



# **FuSioN**

## **Family Support Network**

### **Lead Agency**

### **Assessment & Co-ordination**

### **Learner Guide**



## **COPYRIGHT**

Copyright ©The Department of Communities

All rights reserved. Except under the conditions described in the Copyright Act 1968 of Australia and subsequent amendments, no part of this publication may be reproduced, stored in a retrieval system or transmitted in any form or by any means, electronic, mechanical, photocopying, recording or otherwise without prior permission of the Department of Communities.

Western Australian Government materials, including Internet pages, documents and on-line graphics, audio and video, are protected by copyright law.

Copyright of Western Australian Government materials resides with the State of Western Australia. Apart from any fair dealing for the purposes of private study, research, criticism or review, as permitted under the provisions of the Copyright Act 1968, no part may be reproduced or re-used for any commercial purposes whatsoever without prior written permission of the State of Western Australia.

# CONTENTS

Introduction .....	5
Accessing the Fusion Database .....	5
<b>Activity 1. Navigating Around the Fusion Home Page .....</b>	<b>6</b>
Lead Agency - Assessment & Coordination Home Page View .....	6
Partner Agency Home Page View .....	7
Main Menu .....	8
Active Holding Manager Cases.....	8
My Fusion A&C Cases.....	9
My Fusion Services.....	9
<b>Activity 2. Person Search and Search Cases .....</b>	<b>10</b>
Person Search Overview .....	10
Activity: Person Search.....	11
Search Cases Overview .....	12
Activity: Search Cases .....	13
<b>Activity 3. Create a New Case.....</b>	<b>14</b>
Copy Primary Address to All Family Members .....	22
<b>Activity 4. Attachments and Notes.....</b>	<b>23</b>
Attachments: Fusion Naming Conventions.....	23
Notes: Fusion Naming Conventions .....	23
Adding Attachments.....	24
Add a Note .....	25
<b>Activity 5. Case Management Allocation .....</b>	<b>27</b>
Initial Screening Hours.....	27
Assessment Stage .....	27
<b>Activity 6. Case Plan Development .....</b>	<b>28</b>
Case Plan Goals - Up to 1 Month .....	28
Complete Entry Questions .....	28
Attach Case Plan .....	29
<b>Activity 7. Case Management Allocation: Partner Agency .....</b>	<b>30</b>

Assessment Hours .....	30
Case Manager Allocation .....	30
<b>Activity 8. Create and Allocate Services</b> .....	31
Add Service to Partner Agency .....	31
Allocate Clients .....	31
Allocate Worker .....	32
Add Service to Non-Partner Agency .....	32
<b>Activity 9. Service Provision</b> .....	34
Remove Active Hold .....	35
Service Assessment Details .....	35
Attach Letter From Property Owner .....	36
Close Service .....	37
<b>Activity 10. Case Closure Review</b> .....	38
<b>Activity 11. Living Arrangements</b> .....	39
<b>Activity 12. Case Plan Goals and Exit Questions</b> .....	40
Case Plan Goals - Up to 1 Month .....	40
Case Manager Exit Questions .....	40
Client Exit Interview .....	41
<b>Activity 13. Re-Allocate Case Management to the Lead Agency</b> .....	43
<b>Activity 14. Close the Case</b> .....	44
<b>Appendix I. Create and Relate a New Case</b> .....	46
<b>II. Brief Intervention</b> .....	52
<b>III. Create an Alert</b> .....	56
<b>IV. Query Viewer</b> .....	58
<b>V. Fusion Quiz</b> .....	59
<b>VI. Fusion Recording Workflow</b> .....	60
<b>VII. Family Support Network: Client Workflow</b> .....	61
<b>VIII. Glossary: Fusion Icons</b> .....	62
<b>IX. Help After Training</b> .....	63

# Introduction

Welcome to Fusion Training. Fusion is the main client information system for the Family Support Network (FSN). This course is designed for Lead and Partner Agencies of the Western Australian Family Support Networks and will provide you with an understanding of how to:

- Navigate Fusion and understand the Home Page
- Search for Clients and Cases
- Create new Cases and add people to Fusion
- Add Attachments and Notes to Cases
- Allocate Cases
- Create and Allocate Services
- Place Services on Active Hold
- Update Service Details
- Close Services
- Record Case Reviews
- Close a Case
- Create and Relate a new Case
- Add a Brief Intervention
- Create an Alert
- Run and View Reports

## Accessing the Fusion Database

To access FuSioN go to the <http://wafsn.org.au/> website and log in using your nominated Username and Password. **For FuSioN to operate correctly you must use Internet Explorer 8.**

For further security in the Production Environment, a passcode is generated and will be sent to your nominated email address. You will be able to reset your password after your initial login. Inactive Fusion accounts expire after 90 days.

## Activity 1. Navigating Around the Fusion Home Page

What you see on your Home page is relevant to whether you are a Lead Agency or Partner Agency.

The Lead Agency will have prime responsibility for allocating cases and services for their FSN and will therefore have a full overview of all Assessment & Coordination cases and services on Fusion.

### Lead Agency - Assessment & Coordination Home Page View

Lead Agency Assessment & Coordination Officers are able to view all:

- Allocated Assessment & Coordination Cases to the Lead and Partner Agencies across all Family Support Networks
- Allocated Services to the Lead and Partner Agencies across all Family Support Networks
- Assessment & Coordination Cases & Services on Active Hold across all Family Support Networks

**Active Holding Manager Cases**

\*Team ID ALL  
No Open Cases

**My FuSioN A&C Cases**

\*Team ID ALL

Find | View All First 1-5 of 28 Last

My Cases Additional Data

Case ID	Start Date	Client Name	Primary Issue	Team	Assigned To
<a href="#">100001317</a>	04/01/2014	JAMIESON, Anita	Parenting Issue	MercyCare (MFSN)	59, Trainee
<a href="#">100001325</a>	05/08/2014	REID, Roberto	Housing	MercyCare (MFSN)	58, Trainee
<a href="#">100001343</a>	05/08/2014	YOUNG, Mime	Family Support	MercyCare (MFSN)	58, Trainee
<a href="#">100001414</a>	06/23/2014	ORANGE, Jason	Domestic Violence	MercyCare (MFSN)	59, Trainee
<a href="#">100001437</a>	07/03/2014	FUENTES, Pascal Alejandro	Financial Assistance	MercyCare (MFSN)	59, Trainee

**My FuSioN Services**

\*Team ID ALL

Find | View All First 1-3 of 3 Last

My Services Additional Data

Service ID	Case ID	Start Date	Family Name	Service Type	Team	Assigned To	Case Type
<a href="#">100001523</a>	<a href="#">100001343</a>	08/21/2015	YOUNG	Youth Programs	DUNGEON YOUTH CENTRE (MFSN)		A&C
<a href="#">100001524</a>	<a href="#">100001467</a>	08/21/2015	NALLURA	Parenting	MercyCare (MFSN)	59, Trainee	A&C
<a href="#">100001525</a>	<a href="#">100001468</a>	08/21/2015	REYNOLD	Financial Counselling	CENTACARE FAMILY SERVICES (MFSN)		A&C

**My FuSioN ICM Cases**

\*Team ID  
No Open Cases

## Partner Agency Home Page View

Partner Agencies are only able to view their own

- Allocated Assessment & Coordination Cases
- Allocated Assessment & Coordination Service (including those on Active Hold)
- Allocated Intensive Case Management Services
- Allocated Assessment & Coordination Cases on Active Hold

The screenshot displays the FuSioN Partner Agency Home Page View. It features three main sections:

- Active Holding Manager Cases:** A dropdown menu for \*Team ID is set to ALL, and it displays "No Open Cases".
- My FuSioN A&C Cases:** A dropdown menu for \*Team ID is set to MercyCare (MFSN). It shows a table of cases with columns: Case ID, Start Date, Client Name, Primary Issue, Team, and Assigned To. The table contains 5 rows of data.
- My FuSioN Services:** A dropdown menu for \*Team ID is set to MercyCare (MFSN). It shows a table of services with columns: Service ID, Case ID, Start Date, Family Name, Service Type, Team, Assigned To, and Case Type. The table contains 1 row of data.

Case ID	Start Date	Client Name	Primary Issue	Team	Assigned To
<a href="#">100001317</a>	04/01/2014	JAMIESON, Anita	Parenting Issue	MercyCare (MFSN)	59, Trainee
<a href="#">100001325</a>	05/08/2014	REID, Roberto	Housing	MercyCare (MFSN)	58, Trainee
<a href="#">100001343</a>	05/08/2014	YOUNG, Mime	Family Support	MercyCare (MFSN)	58, Trainee
<a href="#">100001414</a>	06/23/2014	ORANGE, Jason	Domestic Violence	MercyCare (MFSN)	59, Trainee
<a href="#">100001437</a>	07/03/2014	FUENTES, Pascal Alejandro	Financial Assistance	MercyCare (MFSN)	59, Trainee

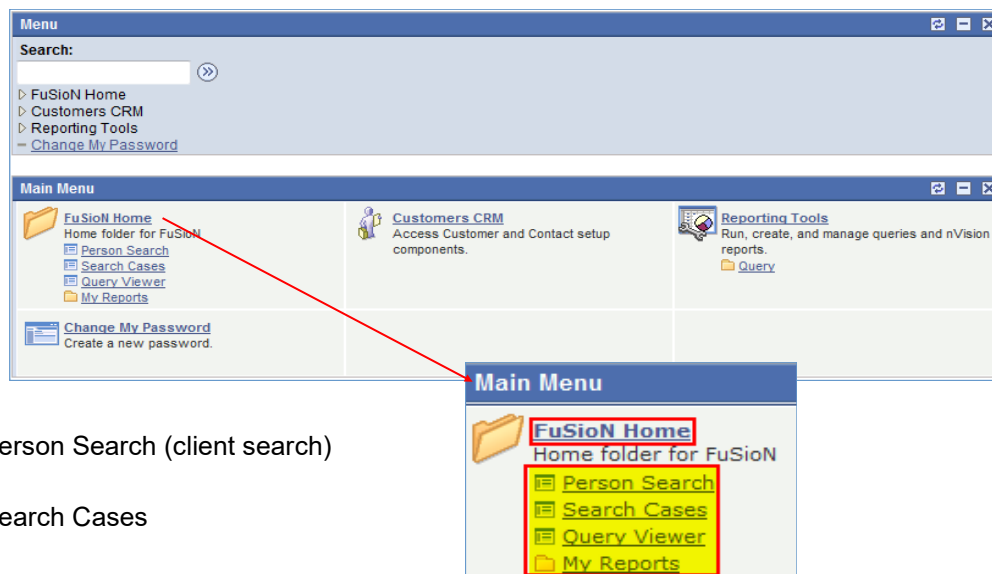
Service ID	Case ID	Start Date	Family Name	Service Type	Team	Assigned To	Case Type
<a href="#">100001524</a>	<a href="#">100001467</a>	08/21/2015	NALLURA	Parenting	MercyCare (MFSN)	59, Trainee	A&C

When back in your FSN, your job role will determine what Cases and Case information you will be able to search for;

- **Assessment & Coordination Officers** will be able to view all A&C cases across all Metro FSNs
- **Assessment & Coordination Officers** will not be able view any ICM cases
- **Intensive Case Managers** will be able to view all A&C cases across all Metro FSNs
- **Intensive Case Managers** will be able to only view ICM cases for their FSN
- **Child Protection Leads** will be able to view A&C and ICM cases across all Metro FSNs

## Main Menu

The **Fusion Home** link on the **Main Menu** is the portal to the available searches and reports:



- Person Search (client search)
- Search Cases
- Query Viewer (reports)
- My Report

Navigation back to the **Home page** is always accessible by clicking the **Home** link at the top of the screen; to exit FuSioN, click on the **Sign Out** link

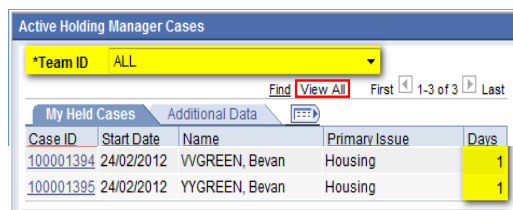


## Active Holding Manager Cases

- The Lead Agency can view all Assessment & Coordination cases on Active Hold across all Family Support Networks

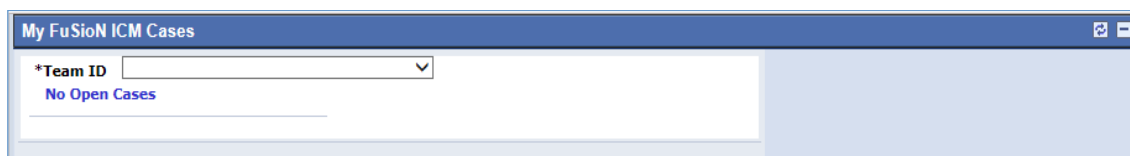
Partner Agencies are only able to view their **allocated cases on Active Hold**

- **Team ID** - allows selection of a specific agency or ALL
- **View All** - click to see all cases on Active Hold
- **Show All Columns** icon - click to reveal all columns
- **Case ID** - click to go directly to the case
- **Days** - view how long the case has been on Active Hold



Case ID	Start Date	Name	Primary Issue	Days
100001394	24/02/2012	VVGREEN, Bevan	Housing	1
100001395	24/02/2012	YYGREEN, Bevan	Housing	1

You will also see a '**My FuSioN ICM Cases**' pagelet on your Home Page. As a Partner Agency Worker this pagelet will always display with the message; No Open cases.





## My FuSioN A&C Cases

- Lead Agency Assessment & Coordination Officers can view **all cases** across all Family Support Networks

Partner Agencies can only view their **allocated Assessment & Coordination cases**

- Team ID** - allows selection of a specific agency or ALL
- View All** - click to see all listed cases
- Case ID** - click to go directly to the case
- Additional Data tab** - click to see referrer information, active hold status and number of days
- Show All Columns** icon - reveals all columns, and **View All** reveals more rows.

Case ID	Start Date	Client Name	Primary Issue	Team	Assigned To	Referrer Type	Referrer Name	Hold Status	Days Holding
100003352	11/06/2014	PUM, Thang	Domestic Violence	MercyCare (Mirrabooka)	KITTLER, Sherilyn	Agency	DCP	N	
100003419	30/06/2014	BEGUE, Stephanie	Family Support	ANGLICARE WA (MIRRABOOKA)	HARPER, Joanna	Agency	DCP	N	
100003460	15/07/2014	JONES, Anthony	Parent/Teen Conflict	MercyCare (Mirrabooka)	KITTLER, Sherilyn	Agency	DCP	N	
100003486	21/07/2014	MOORE, Kamah	Parenting Issue	MercyCare (Mirrabooka)	KITTLER, Sherilyn	Agency	DCP	N	
100003512	25/07/2014	OLIVER, Christine	Financial Assistance	MercyCare (Mirrabooka)	KITTLER, Sherilyn	Agency	Other State (wa) Govt Dept	N	

## My FuSioN Services

- Lead Agency Assessment & Coordination Officer can view **all services** across all Family Support Networks

Partner Agencies can view only their **allocated services**

- Team ID** - allows selection of a specific agency or ALL
- View All** - click to see all listed services
- Service ID** - click to go directly to the service screen
- Additional Data tab** - click to see active hold status and number of days
- Show All Columns** icon - reveals all columns, and **View All** reveals more rows
- Case Type Columns** - shows if the Service is being provided to an Assessment & Co-ordination Case or an Intensive Case Management Case.

Service ID	Case ID	Start Date	Family Name	Service Type	Team	Assigned To	Case Type	Hold Status	Days
	100003891	20/11/2014	RILEY	Housing Support	MercyCare (Mirrabooka)	DUNN, Sharon	A&C	N	
	100003896	10/12/2014	JAMA	Other	MercyCare (Mirrabooka)	KITTLER, Sherilyn	A&C	N	
	100003896	12/12/2014	JAMA	Intensive Family Support	MercyCare (Mirrabooka)	KITTLER, Sherilyn	A&C	N	
	100003896	03/12/2014	JAMA	Housing Support	MercyCare (Mirrabooka)	KITTLER, Sherilyn	A&C	Y	1325

## Activity 2. Person Search and Search Cases

There are two types of searches accessible from the **Home Page Main Menu** or side **Menu** on all other screens:

- Person Search
- Search Cases



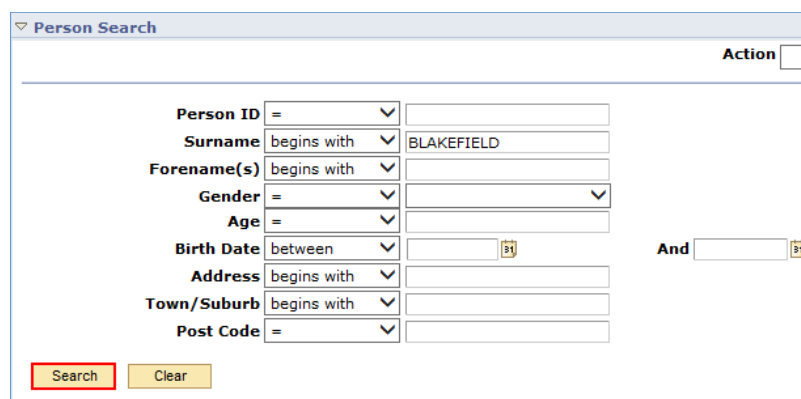
Searching for a person attached to an ICM case will return a search result to show they are in the system, however no case information will be visible.

### Person Search Overview

Criteria for finding a person:

- **Person ID** - a unique ID number is created for each client in Fusion
- **Surname / Forename** - select 'begins with', 'contains' or '=' when searching for a client's name
- **Gender** - refine search results by selecting M (male), F (female) or U (undetermined)
- **Age** - select '=' or 'between' using a client's age range
- **Birth Date** - select '=' or 'between' using a client's birth date range
- **Address** - enter all or part of a client's address if known. When searching using an address, leave off the street type i.e. street, drive, road.

**EXAMPLE** Search for BLAKEFIELD



Person Search

Action

Person ID =

Surname begins with BLAKEFIELD

Forename(s) begins with

Gender =

Age =

Birth Date between

Address begins with

Town/Suburb begins with

Post Code =

And

Search Clear



**Search Results** provides a snapshot of client information including:

- Person ID
- Surname & Forename
- Aliases
- Gender
- Alerts

- Birth Date
- Age
- Current Address
- Deceased

If more than 5 results are returned you will need to click on the view all link

Search Result 2 record(s) found

Person View	Person ID	Surname	Forename(s)	Alias Surname	Alias Forename(s)	Gender	Alert Exists ?	Birth Date	Age	Current Address
	450892	AAWHITE	SALLY	AAWHITE	SARA	F	No		20 Yrs	30 PIMMEY COURT, , SYE 6000
	450893	AAWHITE	SUE	-	-	F	No		3 Yrs	30 PIMMEY COURT, , SYE 6000

Clicking the **Person View** icon displays the Person View screen



**Wildcard Search** uses ‘%’ sign when the spelling is uncertain. The wildcard ‘%’ sign replaces 1 or more unknown letters.

For example, Thompson is often spelt in a variety of ways. The wildcard can be used: T%M%S%N and the search results display all recorded variations of that surname.

## Activity: Person Search

### Open the Person Search screen

- **Click** on the **Person Search** hyperlink from the Home Page and search for the following people using a variety of different search criteria.

- 1) Search for Person ID 450699 and find:

Surname and Forename:  
Birth Date:  
Do any alerts exist?

- 2) Search for the following people and find their person IDs:

Paula Gray:  
Sam White:

- 3) Search for the following names and addresses and find the person IDs and suburbs:

*Tip: When searching addresses, leave off the street type as it may have been entered into Fusion as St instead of Street and this will not bring back results.*

Emma Black, 82 Ellesmere Street:  
Craig Green, 110 Withers Street:

- 4) Search for the following forename and estimated ages and find the surname and person ID:

Sophie, aged between 8 & 13 years:

- 5) Search for the following person with an estimated date of birth and find their actual Date of Birth and Person ID:

Louise Green, born between 01/01/2009 and 31/12/2009:

- 6) Search for Sally Thompson using 'contains' and a wildcard search T%M%S%N, and list all of the different spellings returned in the search results:

- 7) Search for Brent GRAY who lives at 12 Smith Street, Perth and find the following information:

Person ID:

Is this an open or completed case? (Hint: click on the Person View icon)

Is the client Aboriginal or Torres Strait Islander (ATSI) or Culturally and Linguistically Diverse (CaLD)?

## Search Cases Overview

You can only search got cases that belong to your Family Support Network.

The screenshot shows a search interface with various filters on the left and a menu on the right. The filters include Case ID, Person ID, Surname, Forename, Start Date, Primary Issue, Assigned To, Team, Referrer Type, Summary, Status, Reason for Case Closure, and Date Created. The menu on the right includes options like FuSion Home, My Reports, Person Search, Search Cases (highlighted), Query Viewer, Customers CRM, Reporting Tools, and Change My Password.

Criteria for finding open or closed cases:

- **Case ID** - a unique ID number is created for each case in Fusion
- **Person ID** - a unique ID number is created for each client in Fusion
- **Surname / Forename** - select 'begins with', 'contains' or '=' when searching for a client's name
- **Start Date** - select '<', '=', '>' or 'between' using a case's start date
- **Primary Issue** - select an option from dropdown list

The screenshot shows the Primary Issue dropdown menu with the following options: Child Development, Child Protection, Community Conflict, Domestic Violence, Family Support, Financial Assistance, Grief and Loss, Housing, Legal Issue, Mental Health, Migration Issue, Other Issue, Parent/Teen Conflict, Parenting Issue, Post Trauma Support, Relationship Issue, School Absentee, Social Isolation, and Substance Use.

- **Assigned To** - search by who the case is assigned to
- **Team** - search by the Team or Agency the case is assigned to
- **Referrer Type** - search by the type of referrer for the case e.g. Agency or Individual
- **Summary** - search using the case summary (a brief description of the case)
- **Status** - search for open, closed or re-opened cases
- **Reason for Closure** - search case closure e.g. Client Disengaged or Case Completed
- **Date Created** - search for case creation date (*different to case Start Date*)

**Example:** Search for Case ID 100001399

**Search Results** provides a snapshot of case information:

Search Case									
Search Results									
Case Id	Start Date	Person	Summary	Primary Issue	Status	Reason for Closure	Assigned To	Team	Date Created
100001399	10/06/2014	AABROWN	Person needs mental health support	Mental Health	Open		09, Trainee	Communicare	10/06/2014

- **Case ID** - links directly to the case information screen

## Activity: Search Cases

Open the **Search Cases** screen

- **Click** on the **Search Cases** hyperlink from the Home Page

**Search** for the following cases

- 1) Search for the following Case ID 100001316 and find the Person and Primary Issue:  
 Person:  
 Primary Issue:
- 2) Search for Pascal Fuentes, Primary Issue; Financial Assistance, and find the following:  
 Assigned To:  
 Case ID:  
 Date Created:
- 3) Search for Surname; Thomas, and Referrer Type; Individual, and find the following:  
 Case ID:  
 Primary Issue(s):

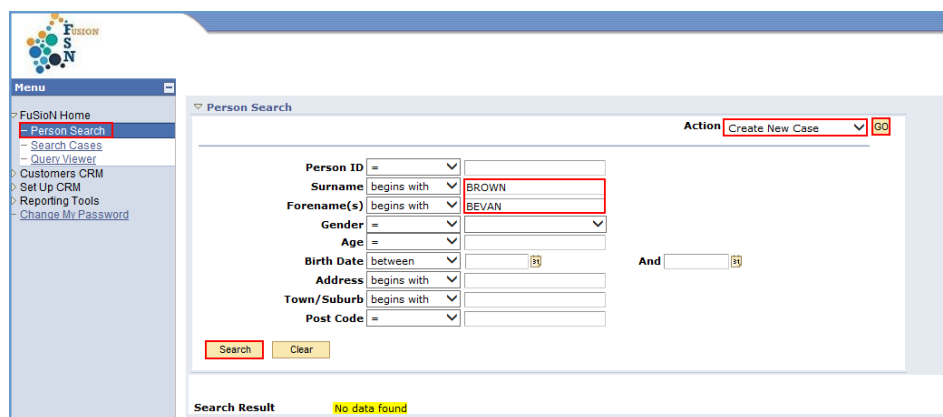
## Activity 3. Create a New Case

Scenario: Bevan, the sole carer of two children, Paul and Michael, has contacted your Family Support Network. He has recently lost his job, is behind in his rent payments, and is now being threatened with eviction from the family home. He also has concerns around the custody of his children and would like some legal advice.

*In training you will now create the case in Fusion.*

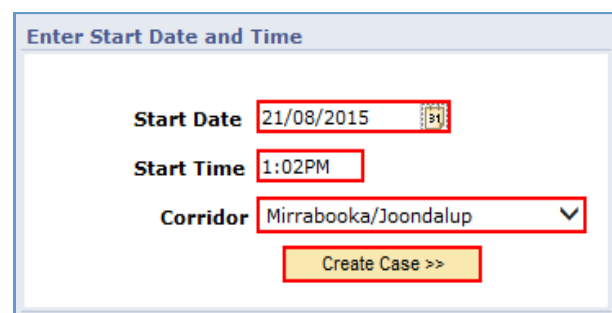
Use Your **Family Name** to create a new case:

- Click on the **Person Search** screen using the **side menu**
- Surname: enter **Your Family Name**
- Forename: enter **Bevan**
- Press **Search**. **No Data Found** should display
- Action: select **Create New Case**
- Press **Go**



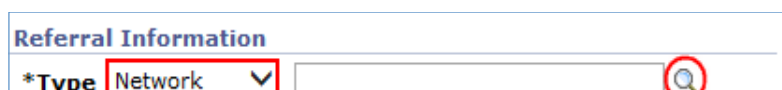
**Enter Start Date, Time and Corridor**

- Start Date: use the **calendar icon** to select **current date**
- Start Time: auto-populates with **current time**
- Corridor: select **Mirrabooka/Joondalup**
- Press **Create Case >>**



**Referral Information**

- Type: select **Network**
- Click on the **magnifying glass**



- Search for **Bevan Your Family Name**
- Press **Search**
- **No Search Results** should return
- Press **Add Person**

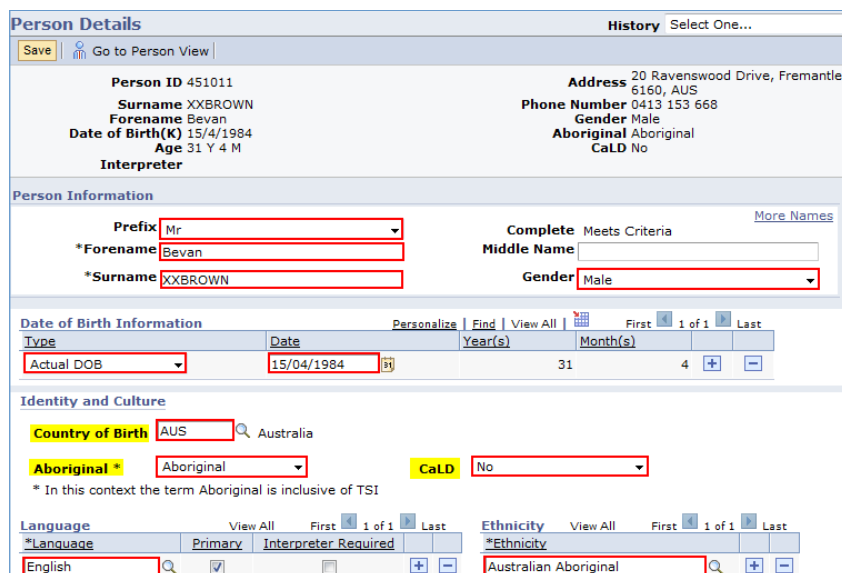


## Person Details Information

- Prefix: select **Mr**
- Forename: enter **Bevan**
- Surname: enter **Your Family Name**
- Gender: select **Male**
- Date of Birth Information: select **Actual DOB**
- Date: enter **15/04/84**

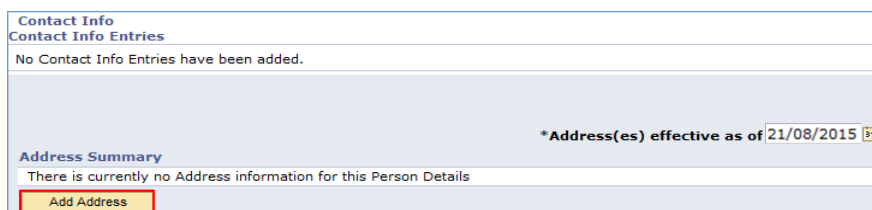
## Identity & Culture

- Country of Birth: start typing **Aus** and select **Australia** (or search using the magnifying glass)
- Aboriginal: select **Aboriginal**
- CaLD: select **No**
- Language: start typing **Eng** and select **English**
- Ethnicity: delete text & start typing **Aus** and select **Australian**



## Contact Info

- Press **Add Address**



Contact Info  
Contact Info Entries

No Contact Info Entries have been added.

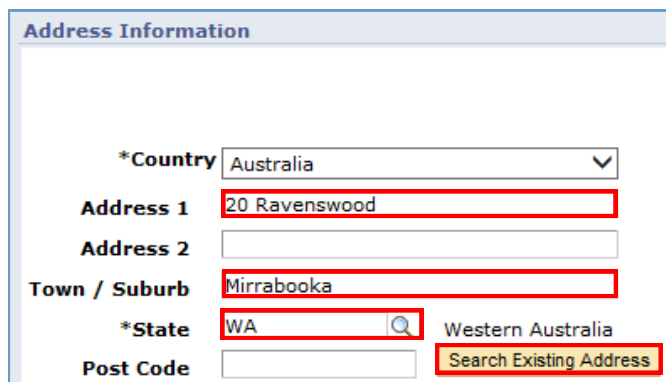
\*Address(es) effective as of 21/08/2015

Address Summary

There is currently no Address information for this Person Details

Add Address

- Address 1: enter **20 Ravenswood**
- Address 2: leave blank
- Town/Suburb: enter **Mirrabooka**
- State: enter **WA**
- Press **Search Existing Address**



Address Information

\*Country Australia

Address 1 20 Ravenswood

Address 2

Town / Suburb Mirrabooka

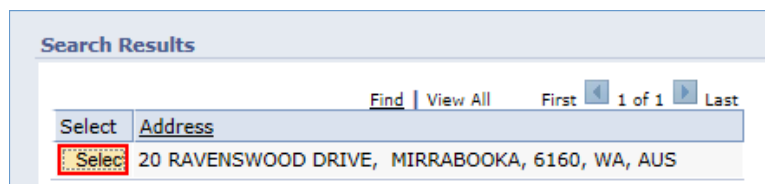
\*State WA Western Australia

Post Code

Search Existing Address

## Address Search Result List

- Press **Select**
- Press **Save**



Search Results

Select	Address
Select	20 RAVENSWOOD DRIVE, MIRRABOOKA, 6160, WA, AUS



\*Country Australia

Address 1 20 RAVENSWOOD

Address 2

Town / Suburb MIRRABOOKA

\*State WA Western Australia

Post Code 6160

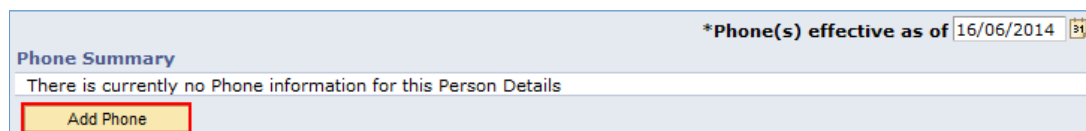
Start Date 13/08/2018

Save

[Return to Address Summary Page](#)

If no address displays you can create it by clicking Return, add in full street type & press Save

- The **Person Information** page displays.
- Press **Add Phone**



\*Phone(s) effective as of 16/06/2014

Phone Summary

There is currently no Phone information for this Person Details

Add Phone

- Purpose: select **Mobile**
- Country Code: leave as **61**
- Number: enter **0413 153 668** (use correct spacing)
- Start Date: leave as **current date**



- Press **OK**

**Person Details**

**Add Phone**

**Phone Information**

\*Purpose Mobile

Country Code 61

\*Number 0413 153 668

Start Date 21/08/2015 End Date

OK [Return to Phone Summary Page](#)

\* Required Field

- The **Person Information** page displays
- Press **Add Email**
- Purpose: leave as **Home**
- Email Address: enter **bevan.surname@hotmail.com**
- Start Date: leave as **current date**
- Press **OK** button

**Person Details**

**Update Email**

**Email Information**

\*Purpose Home

\*Email Address bevan.xxbrown@hotmail.com

Start Date 21/08/2015 End Date

OK [Return to Email Summary Page](#)

\* Required Field

The **Person Information** page displays

- Press **Save**

**Person Details** **History** Select One...

**Save** [Go to Person View](#)

**Person ID** 451011 **Address** 20 Ravenswood Drive, Fremantle, WA, 6160, AUS

**Surname** XXBROWN **Phone Number** 0413 153 668

**Forename** Bevan **Gender** Male

**Date of Birth(K)** 15/4/1984 **Aboriginal** Aboriginal

**Age** 31 Y 4 M **CaLD** No

**Interpreter**

## Complete Referral Information

- Role: start typing **Parent** and select **Parent/Guardian** from the list
- Referral Date & Time: leave the **current time and date** (these fields can be amended to reflect when the referral was received)
- Contact Method: select **03-In Person**
- Primary Issue: select **Housing**
- Status: defaults to **Open**
- Corridor: auto-populates with **Mirrabooka/Joondalup**

**Referral Information**

\*Type Individual XXBROWN, Bevan

Role Parent/Guardian

\*Referral Date 25/07/2018 \*Time 3:33PM

Contact Method 03-In Person

Primary Issue Housing

\*Status Open

Corridor Mirrabooka/Joondalup

Closure Date

Reason for Case Closure

## Complete Summary

- Summary: enter **Threat of eviction from rental home & concerns about custody of his children**
- Assessment: enter **Bevan, the sole carer of two children, Paul and Michael, has contacted the Mirrabooka/Joondalup Family Support Network. He has recently lost his job, is behind in his rent payments and is now being threatened with eviction from the family home. He also has concerns around the custody of his children and would like some legal advice.**
- Are there any children identified in this case?: select **Yes**
- Number of Children: enter **2**
- Are there other agencies involved?: select **No**

**\*Summary**  
Threat of eviction from rental home & concerns about

**Assessment**  
Bevan, the sole carer of two children, Paul and Michael, has contacted the Mirrabooka/Joondalup Family Support Network. He has recently lost his job, is behind in his rent payments and is now being threatened with eviction from the family home. He also has concerns around the custody of his children and would like some legal advice.

Are there any children identified in this case? ☒ Yes ☐ No

Number of children

Are there other agencies involved? ☐ Yes ☒ No

## Add Person Information & Issue Details

- Scroll down to **Person** section (*bottom of the screen*)
- Click on **Person ID** magnifying glass

**Person** Find First 1 of 1 Last

\*Person ID  Surname  Referral Age  Aboriginal   
 Gender  Forename  Current Age  CaLD   
 Client Consent  Primary Address  Phone

▼ Issue Details

\*Issue  \*Detail

Copy Primary Address

- Search for **Bevan Your Family Name**
- Search Results: click on **Person ID**

PersonID =   
 Surname begins with   
 Forename(s) begins with   
 Gender =   
 Birth Date =   
 Address begins with   
 Town/Suburb begins with   
 Post Code =   
 Age =

**Search Results** View All First 1 of 1 Last

PersonID	Surname	Forename(s)	Middle Name	Alias Surname	Alias Forename	Gender	Birth Date	Age	Address
451013	XXBROWN	Bevan				M	1984-04-15	34	20 Ravenswood Drive, Fremantle, WA, 6160, AUS

- Client Consent: select **Yes**
- Living Arrangement at Referral Commencement: select **Not Applicable - Adult**
- Issue: select **Housing**
- Detail: select **Threat of Eviction**
- Press **+ sign** to add a new row
- Issue: select **Other Issue**
- Detail: select **Legal/Justice**
- Press **Save**

This is the minimum amount of information that is required to be able to save and **generate a Case ID** (at the top of the screen)

### Add New Person (Child 1)

- Press **+ sign** to add a new row in the **Person** section
- Click on **Person ID** magnifying glass

- Search for Child 1 **Michael Your Family Name**
- Press **Search**
- **No Search Results** should display
- Press **Add Person**

### Add Person Information & Issue Details

- Forename: enter **Michael**
- Surname: enter **Your Family Name**
- Gender: select **Male**
- Date of Birth Information: select **Actual DOB**
- Date: enter **10/02/06**

### Identity & Culture

- Country of Birth: start typing **Aus** and select **Australia**
- Aboriginal: select **Aboriginal**
- CaLD: select **No**
- Language: start typing **Eng** and select **English** (or search using the magnifying glass)
- Ethnicity: delete text & start typing **Aus** and select **Australian**
- Press **Save**

- Client Consent: select **Yes**
- Living Arrangement at Referral Commencement: select **Family Care - child living with parents**
- Issue: select **Housing**
- Detail: select **Threat of Eviction**

- Press **+ sign** to add a new row
- Issue: select **Other Issue**
- Detail: select **Legal/Justice**
- Press **Save**

### Add New Person (Child 2)

- Press **+ sign** to add a new row
- Click on **Person ID** magnifying glass
- Search for Child 2 **Paul Your Family Name**
- **No Search Results** should display
- Press **Add Person** button

### Add Person Information & Issue Details

- Forename: enter **Paul**
- Surname: enter **Your Family Name**
- Gender: select **Male**
- Date of Birth Information: select **Actual DOB**
- Date: enter **15/06/2008**

### Identity & Culture

- Country of Birth: start typing **Aus** and select **Australia**
- Aboriginal: select **Aboriginal**
- CaLD: select **No**
- Language: start typing **Eng** and select **English**
- Ethnicity: start typing **Aus** and select **Australian Aboriginal**
- Press **Save**

**Person Information**

Prefix  Complete Meets Criteria [More Nam](#)

\*Forename  Middle Name

\*Surname  Gender

**Date of Birth Information** Personalize Find View All First 1 of 1 Last

Type	Date	Year(s)	Month(s)
Actual DOB	15/06/2008	7	2

**Identity and Culture**

Country of Birth  Australia

Aboriginal \*  CaLD

\* In this context the term Aboriginal is inclusive of TSI

**Language** View All First 1 of 1 Last

*Language	Primary	Interpreter Required
English	<input checked="" type="checkbox"/>	<input type="checkbox"/>

**Ethnicity** View All First 1 of 1 Last

*Ethnicity
Australian Aboriginal

- Client Consent: select **Yes**
- Living Arrangement at Referral Commencement: select **Family Care - child living with parents**
- Issue: select **Housing**
- Detail: select **Threat of Eviction**
- Press **+ sign** to add a new row
- Issue: select **Other Issue**
- Detail: select **Legal/Justice**
- Press **Save**

## Copy Primary Address to All Family Members

**Ensure you have pressed Save first**

- Press **Copy Primary Address**

**Person**

\*Person ID 450895 Surname XXBLUE

Gender Male Forename Bevan

Client Consent Yes Primary Address 30 Sixth Ro  
AUS

**Issue Details**

\*Issue

**Copy Primary Address**

- Tick the **Copy From** box for Bevan and tick the **Copy To** boxes for Michael and Paul
- Untick the **Include Primary Phone** for Michael and Paul

Copy From	Copy To	Include Primary Phone	Person ID	Surname	Forename	Effective Date	Gender	Birth Date	Age	Primary Address	Primary Phone
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	450895	XXBLUE	Bevan	17/06/2014	Male	15/04/1984	30	20 Ravenswood Drive, Mirrabooka, WA, 6061, AUS	
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	450898	XXBLUE	Michael	17/06/2014	Male	10/02/2004	10		
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	450899	XXBLUE	Paul	17/06/2014	Male	15/06/2006	8		

OK Cancel

## Activity 4. Attachments and Notes

Scenario During the Initial Screening and Assessment process Bevan has signed a Consent Form and the Assessment and Co-ordination Officer has completed an Initial Screening Form.

*In training you will now attach the Consent Form and Initial Screening Form to the case. You will also add a note to the Case detailing Bevan's visit to your FSN office.*

Fusion allows users to record notes and add attachments. To ensure consistency across the FSN, the **following naming conventions for case notes and attachments is required**. By using naming conventions, it is easier to search and analyse important information recorded against a client record.

### Attachments: Fusion Naming Conventions

The following file names are to be used for all attached documents e.g. Word, pdf, Excel:

**Client Name, Document Name, Date of the Document**

For example: **Lucy Davies, Initial Screening, 01.08.15**

Documents can include:

- Referral Form
- Consent Form
- Initial Screening
- Assessment
- Allocations Meeting
- Consultation with Leader Child Protection
- Referral Assessment and Planning Form
- Child Matrix
- Parent Matrix
- Case Closure
- Case Review
- Closure Summary
- External Referral
- Letter

### Notes: Fusion Naming Conventions

The subject of the note is to be recorded as follows:

**Client Name, Purpose of Note/Event, Date of the Event**

For example: **Lucy Davies, Home Visit, 01.08.15**

Notes can include:

- Telephone Call
- Telephone Message
- Email
- Consultation
- File Note
- Home Visit
- Office Visit

## Adding Attachments

When adding attachments, the name of the document must be saved **with no more than 160 characters**. If document names are longer than 160 characters, they **will not attach** in Fusion.

### Add the Consent Form:

- Click on the **Notes** tab (*in the Case view*)
- Subject: enter **Bevan Your Family Name, Consent Form, Current Date**
- Details: enter **Please see attached Consent Form**
- Click **Add an Attachment**

The screenshot shows the 'Notes' tab in the Fusion software. The 'Notes Summary' table lists a note with the subject 'Bevan XXBrown, Consent Form, 19.08.15' and details 'Please see Attached'. Below this, the 'Add a Note' form is displayed, showing the 'Added' date and time, the '\*Subject' field, and the 'Details' field. The 'Add an Attachment' button is highlighted in yellow.

- Press **Browse** to select a document (*as advised by your facilitator*)
- Double click on the **document** you want to upload
- Press **Upload**

The screenshot shows the 'File Attachment' dialog box. It contains a text field with the path 'T:\Assist Production\Training\Course Materials\Training M' and a 'Browse...' button. Below the text field are 'Upload' and 'Cancel' buttons.



- The document displays in **Attachments**

Attachments	
File Name	Description
Bevan_XXBrown, Consent Form, 21.08.15.docx	

- Click **Apply Note**
- Press **Save**
- The document displays in **Notes Summary** (*top of screen*)

Notes Summary			
Find	View All	First	1 of 1
Subject	Attachment(s)	Added By	Date Added
Bevan_XXBrown, Consent Form, 21.08.15	1	62, Trainee	08/05/17 1:02PM AWST

## Add the completed Initial Screening Document

- Click on **Add Note**
- Repeat the above steps

## Add a Note

- Press **Add Note**

Notes Summary			
Find	View All	First	1 of 1
Subject	Attachment(s)	Added By	Date Added
Bevan_XXBrown, Consent Form, 21.08.15	1	62, Trainee	08/05/17 1:02PM AWST
L <b>Add Note</b>			

- Subject: enter **Bevan *Your Surname*, Office Visit, Date**
- Details: enter **Bevan came into the office seeking support for housing and custody issues. He is the sole carer of two children and has recently lost his job. He is behind in his rent payments and is now being threatened with eviction from the family home. Bevan consented to work with the FSN.**
- Press **Apply Note**
- Press **Save**

Add a Note

Added 24/08/2015 12:24PM 80, Trainee

\*Subject Bevan\_XXBrown, Office Visit, 19.08.15

Details Bevan came into the office seeking support for housing and custody issues. He is the sole carer of two children and has recently lost his job. He is behind in his rent payments and is now being threatened with eviction from the family home. Bevan consented to work with the FSN and completed the Parent Matrix.

Apply Note Add an Attachment

**Three items now display in the Notes Summary:**

Notes Summary				Find	View All	First	1-3 of 3	Last
Subject	Attachment(s)	Added By	Date Added					
<a href="#">Bevan XXBrown, Office Visit, Date</a>		55, Trainee	25/07/18 1:32PM AWST					
<a href="#">Bevan XXBrown, Initial Screening, 19.08.15</a>	1	55, Trainee	25/07/18 1:31PM AWST					
<a href="#">Bevan XXBrown Assessment, Consent Form, 19.08.15</a>	1	55, Trainee	25/07/18 1:29PM AWST					

Note: Be careful not to delete any notes or attachments of other colleagues/Partner Agencies

**To View the Attachment:**

- Click on the **Consent Form** in the **Notes Summary** and the **Note Details** box opens
- Click on **File Name** (Press CTRL and the attachment will open in another window)

**Note Details**

**Added** 25/07/2018 1:29PM 55, Trainee

**\*Subject**

**Details**

**Attachments**

File Name	Description	Added By	Date Added
<a href="#">Consent to Share Information form.docx</a>		55, Trainee	25/07/2018 1:20PM

## Activity 5. Case Management Allocation

Scenario: The Initial Screening Stage is now complete and the Assessment Stage will commence. An Allocations Meeting will be scheduled with the FSN Partner Agencies to discuss what services are available and appropriate for the family.

*In training you will now enter the Initial Screening Hours and add the Assessment Stage.*

- Click on the **Case Management** tab

### Initial Screening Hours

Hours fields are entered in the **Case Management** tab and displayed on the **Case** tab. It is mandatory to enter a value but '0' can be recorded. All hours/activities remain editable until the case is closed.

- Hours: enter 1
- Press **Save**

**1 = 60 mins / 0.25 = 15 mins / 0.50 = 30 mins / 0.75 = 45 mins**

The screenshot shows the 'Case : (100001568)' interface. The 'Case Management' tab is selected. Below the tabs, there is a table with the following data:

Responsibility	Stage	Assigned To	Role	Start Date	End Date	Hours
MercyCare (MFSN)	Initial Screening	55, Trainee	Case Manager	21/08/2015		1.00

### Assessment Stage

- Press **Add Case Manager** (Note: Do not use the Update Case Manager button as this will override the current case management details)
- Network Agency: select relevant **Mercycare MFSN**
- Assigned To: click on magnifying glass and select **your Trainee ID**
- Role: select **Case Manager**
- Stage: select **Assessment**
- Start Date: auto-populates to current date
- Press **Apply**
- Press **Save**

The screenshot shows the 'Case Manager Allocation' form. The fields are as follows:

- Network Agency:** MercyCare (MFSN)
- Assigned To:** 56, Trainee
- \*Role:** Case Manager
- Stage:** Assessment
- Start Date:** 24/08/15

Buttons: Add Case Manager, Update Case Manager, Apply, Cancel.

## Activity 6. Case Plan Development

Scenario: As part of the Assessment stage a Case Plan has been developed with Bevan and his family where clear Case Plan Goals have been established.

*In training you will now record the responses to the Case Manager Entry Questions, record the number of Case Plan Goals and attach the Case Plan*

### From the Case Management Tab

- Click on the **Outcomes** tab

### Case Plan Goals - Up to 1 Month

- Total number of Case Plan goals: enter 3
- How many case plan goals are progressing?: enter 0
- How many case plan goals have been completed?: enter 0
- Press **Save**

The screenshot shows the 'Outcomes' tab with a table titled 'Case Plan Goals'. The table has columns for 'Case Plan Goal', 'Up to 1 month', 'Up to 4 months', 'Up to 8 months', 'Up to 12 months', and 'more than 12 months'. The first three rows are highlighted with red borders around the input fields.

Case Plan Goal	Up to 1 month	Up to 4 months	Up to 8 months	Up to 12 months	more than 12 months
1 Total number of Case Plan goals	3				
2 How many case plan goals are progressing?	0				
3 How many case plan goals have been completed?	0				

### Complete Entry Questions

- What is the family's ability to provide a parenting role children in the family group?: select **Has required level of capability**
- What is the family's ability to establish and maintain a safe and stable family environment and household routines?: select **Limited capability**
- What is the family's ability to access community support services?: select **Has required level of capability**
- Press **Save**

The screenshot shows the 'Case Manager Questions' section in the 'Outcomes' tab. It includes a 'Save' button, a 'History' dropdown, and a table of questions with responses.

Case : (100006808) History Select One...

Case Services Brief Interventions Case Management Review Outcomes Notes (0)

Total number of Case Plan goals ☐  
How many case plan goals are progressing? ☐  
How many case plan goals have been completed? ☐

Case Manager Questions Client Exit Interview

Questions	Response
1 What is the family's ability to provide a parenting role to children in the family group?	Has required level of capability
2 What is the family's ability to establish and maintain a safe and stable family environment and household routines?	Limited capability
3 What is the family's ability to access community support services?	Has required level of capability

## Attach Case Plan

- Click on the **Notes** tab
- Press **Add Note**

Case : (100006808) History Select One...

Save

Case Services Brief Interventions Case Management Review Outcomes **Notes (3)**

Notes Summary

Subject	Attachment(s)	Added By	Date Added
Bevan Woods, Initial Screening, 19.11.18	1	ROWE-MARTIN, Carly	19/11/18 11:02AM AWST
Bevan Woods, Office Visit, 19.11.18	1	ROWE-MARTIN, Carly	19/11/18 10:52AM AWST
Bevan Woods, Consent Form, 19.11.18	1	ROWE-MARTIN, Carly	19/11/18 10:50AM AWST

Add Note

- Subject: enter **Bevan Your Family Name, Case Plan, Date**
- Details: enter **Please see attached**
- Click **Add an Attachment**

Add a Note

Added 19/11/2018 11:02AM ROWE-MARTIN, Carly

\*Subject Bevan Woods, Case Plan, 19.11.18

Details Please see attached

Apply Note Add an Attachment

- Press **Browse** to select a document (*as advised by your trainer*)
- Press **Upload**

File Attachment

C:\Users\carlywo\Desktop\FuSioN Training Dates.docx Browse...

Upload Cancel

- Attachments / Description: leave blank (*can be added if necessary*)
- Press **Apply Note**
- Press **Save**

Add a Note

Added 19/11/2018 11:12AM ROWE-MARTIN, Carly

\*Subject Bevan Woods, Case Plan, 19.11.18

Details Please see attached

Attachments

File Name	Description	Added By	Date Added
FuSioN_Training_Dates.docx	FuSioN Training Dates.docx	ROWE-MARTIN, Carly	19/11/2018 11:02AM

Apply Note Add an Attachment

Audit History

Save Top of Page

## Activity 7. Case Management Allocation: Partner Agency

Scenario: An allocations meeting has now taken place between the FSN Lead Agency and Partner Agencies. Appropriate services for this family have been discussed. As a Lead Agency Assessment and Coordination Officer you have talked through the service options with the family and they agree to engage. The Housing service will be allocated to a Mirrabooka/Joondalup Partner Agency and the Legal service will be allocated to a non-Partner Agency.

*In training you will now allocate Case Management to the Partner Agency providing the Housing service*

### From the Case Management Tab

### Assessment Hours

- Hours: enter **1.5**
- Press **Save**

Case Management							
Responsibility	Audit	Stage	Assigned To	Role	Start Date	End Date	Hours
Network Agency							
MercyCare (MFSN)		Assessment	56, Trainee	Case Manager	24/08/2015		1.50
MercyCare (MFSN)		Initial Screening	55, Trainee	Case Manager	21/08/2015	24/08/2015	1.00

### Case Manager Allocation

- Press **Add Case Manager**
- Network Agency: select **Mirrabooka Partner Agency 1**
- Assigned To: click on magnifying glass and select the **Partner Agency Worker (select any Trainee ID)**
- Role: select **Case Manager**
- Stage: select **Case Management**
- Start Date: leave as **current date**
- Press **Apply**
- Press **Save**

Add Case Manager

Update Case Manager

**Case Manager Allocation**

**Network Agency** MIRRABOOKA PARTNER AGENCY 1

**Assigned To** 41, TRAINEE

**\*Role** Case Manager

**Stage** Case Management

**Start Date** 25/08/15

Apply

Cancel

### Assessment end dates and Partner Agency Case Management starts:

Responsibility	Audit	Stage	Assigned To	Role	Start Date	End Date	Hours
Network Agency							
MIRRABOOKA PARTNER AGENCY 1		Case Management	41, TRAINEE	Case Manager	25/08/2015		
MercyCare (MFSN)		Assessment	56, Trainee	Case Manager	24/08/2015	25/08/2015	1.50
MercyCare (MFSN)		Initial Screening	55, Trainee	Case Manager	21/08/2015	24/08/2015	1.00

## Activity 8. Create and Allocate Services

**Scenario:** As a Lead Agency Assessment and Coordination Officer you are responsible for creating and allocating the services agreed at the Allocations meeting. It has been decided that the Housing service will be allocated to a Mirrabooka/Joondalup Partner Agency and the Legal service will be allocated to a non-Partner Agency.

*In training you will now create and allocate these services to the relevant Partner and Non-Partner Agencies.*

### Add Service to Partner Agency

- Click on the **Services** tab
- Start Date: use the calendar icon to select **current date**
- Status: select **Allocated**
- Service Type: select **Housing Support**
- Service Provider: select **Mirrabooka Partner Agency 1**
- Program: leave blank
- Comments: enter **Referral to housing support service for Bevan and his family as they are behind in rental payments and have been threatened with eviction.**
- Press **Next**

### Allocate Clients

- Select **Housing issue** for each **family member** by ticking the appropriate **boxes**
- Press **Create Service**
- Press **Save**

Allocate People - Service: (HOSU) Provider: (St Patrick's Community Support Centre)

Person View	Person ID	Issue	Issue Detail	Surname	Forename	Select
1	451011	Housing	Threat of Eviction	XXBROWN	Bevan	<input checked="" type="checkbox"/>
2	451011	Other Issue	Legal/Justice	XXBROWN	Bevan	<input type="checkbox"/>
3	451012	Housing	Threat of Eviction	XXBROWN	Michael	<input checked="" type="checkbox"/>
4	451012	Other Issue	Legal/Justice	XXBROWN	Michael	<input type="checkbox"/>
5	451013	Housing	Threat of Eviction	XXBROWN	Paul	<input checked="" type="checkbox"/>
6	451013	Other Issue	Legal/Justice	XXBROWN	Paul	<input type="checkbox"/>

**Create Service** **Cancel**

## Allocate Worker

- Press **Update Service**

**Service Provision**

Service Type	Status	External	Start Date	End Date	Find	First	1 of 1	Last
Housing Support	Allocated	<input type="checkbox"/>	25/08/2015					Delete

**Add Service**

**Allocation Detail**

\*Start Date: 25/08/2015  
 \*Status: Allocated  
 External Service: ☐ Agency ID:   
 Agency Name:   
 End Date:   
 Outcome:   
 Service Duration:   
 \*Service Type: Housing Support  
 Unmet Demand Reason:   
 Service Provider: MIRRABOOKA PARTNER AGENCY 1  
 Program:   
 Comments: Referral to housing support service for Bevan and his family as they are behind in rental payments and have been threatened with eviction.

**Update Service**

- Assigned To: click on magnifying glass and select the **Partner Agency Worker** (select any Trainee ID)
- Press **Save**
- Active Holding? Start Date: use the calendar icon to select **current date** to put Service on **Active Hold**
- Press **Save**

**Active Holding ?**

Start Date: 25/08/2015 End Date:

\*Start Date: 25/07/2018

Service Type: Housing Support

\*Assigned To: 41, TRAINEE

\*Provider: MIRRABOOKA PARTNER AGENCY 1

Status: Open

Review Date:

**Search Results**

Person ID	Provider Group	Surname	Forename	Assigned To	Alternate Character
3004705	MIRRABOOKA PARTNER AGENCY 1	FRASER	Matthew	FRASER, Matthew	(blank)
450331	MIRRABOOKA PARTNER AGENCY 1	41	TRAINEE	41, TRAINEE	(blank)
450343	MIRRABOOKA PARTNER AGENCY 1	51	Trainee	51, Trainee	(blank)
450344	MIRRABOOKA PARTNER AGENCY 1	52	Trainee	52, Trainee	(blank)
450345	MIRRABOOKA PARTNER AGENCY 1	53	Trainee	53, Trainee	(blank)
450346	MIRRABOOKA PARTNER AGENCY 1	54	Trainee	54, Trainee	(blank)
450793	MIRRABOOKA PARTNER AGENCY 1	40	Trainee	40, Trainee	(blank)
450794	MIRRABOOKA PARTNER AGENCY 1	41	Trainee	41, Trainee	(blank)

The Service is now assigned to a specific worker within the Partner Agency and is on Active Hold Status until they are ready to work the Service. The Service will be displayed on their Home Page.

## Add Service to Non-Partner Agency

- Click **Transfer to "Parent Case"** link
- Click on the **Services** tab

**Main Information** Brief Interventions Notes (0) Related Activities

**Details**

**Assessment**

Threat of eviction from rental home & concerns about custody of his children

**Comments**

Transfer to "Parent Case"

**Active Holding ?**

Start Date: 25/08/2015 End Date:

\*Start Date: 25/08/2015

Service Type: Housing Support

\*Assigned To: 41, TRAINEE

\*Provider: MIRRABOOKA PARTNER AGENCY 1

Status: Open

Review Date:

**Outcome**

Outcome:

Decision Date:

Intensity (hours):



- Press **Add Service**

Case	Services	Brief Interventions	Case Management	Review	Outcome
<b>Service Provision</b>					
Service Type	Status	External	Start Date		
Housing Support	Allocated	<input type="checkbox"/>	21/08/2015		
<b>Add Service</b>					

- Start Date: enter **current date**
- Status: select **Allocated**
- External Service: **tick box**
- Agency ID: click on **magnifying glass**
- Agency Name: enter **Legal**
- Press **Look Up**
- Search Results: select **Legal Service Agency**
- End Date: enter **current date**
- Service Type: select **Other**
- Comment: enter **Bevan has been linked in with the relevant contact at the Family Law Court to provide custody issue support.**
- Press **Save**

**Look Up Agency ID**

Agency ID: begins with

Agency Name: begins with

**Look Up** **Clear** **Cancel** [Basic Lookup](#)

**Search Results**

View 100 First 1 of 1 Last

Agency ID	Agency Name
10527	Legal Service Agency

**Allocation Detail**

\*Start Date: 25/08/2015

\*Status: Allocated

External Service: ☒ Agency ID: 10527

Agency Name: Legal Service Agency

End Date: 25/08/2015

Outcome:

Service Duration: 0.00

\*Service Type: Other

Unmet Demand Reason:

Service Provider:

Program:

Comments: Bevan has been linked in with the relevant contact at the Family Law Court to provide custody issue support.

**Next**

**Audit History**

**Save** [Top of Page](#)

Two Services now display under Service Provision:

Case	Services	Brief Interventions	Case Management	Review	Notes (3)	Related Activities
<b>Service Provision</b>						
Service Type	Status	External	Start Date	End Date	Find	First 1-2 of 2 Last
Housing Support	Allocated	<input type="checkbox"/>	25/08/2015			<b>Delete</b>
Other	Allocated	<input checked="" type="checkbox"/>	25/08/2015	25/08/2015		<b>Delete</b>

## Activity 9. Service Provision

Scenario: The Case and Services have now been allocated to the relevant agencies.

*In training you will now work as the Partner Agency Worker who has been allocated the Family's housing issue to complete service provision details*

- Click on **Home** (at the top of the screen)
- My FuSioN A&C Cases: click on the **Case ID** for your Bevan family

My FuSioN A&C Cases

\*Team ID: ALL

Find | View All First 1-5 of 15 Last

Case ID	Start Date	Client Name	Primary Issue	Team	Assigned To
<a href="#">100001505</a>	18/08/2015	YYBROWN, Bevan	Domestic Violence	MercyCare (MFSN)	56, Trainee
<a href="#">100001343</a>	08/05/2014	YOUNG, Mime	Family Support	MercyCare (MFSN)	58, Trainee
<b><a href="#">100001568</a></b>	21/08/2015	XXBROWN, Bevan	Housing	MIRRABOOKA PARTNER AGENCY 1	41, TRAINEE
<a href="#">100001476</a>	29/04/2015	XXBLUE, Bevan	Domestic Violence	MercyCare (MFSN)	55, Trainee
<a href="#">100001465</a>	23/04/2015	WILSON, Jackson	Domestic Violence	MercyCare (MFSN)	55, Trainee

- Are there other agencies involved: select **Yes**
- Press **Save**

**Referral Information**

\*Type: Individual | XXBROWN, Bevan | Role: Parent/Guardian | Referral Date: 21/08/2015 | \*Time: 1:20PM

Contact Method: 04-Office | Primary Issue: Housing | \*Status: Open | Corridor: Mirrabooka/Joondalup | Closure Date: [ ] | Reason for Case Closure: [ ]

**Hours**

Initial Screening	1.00	Service Delivery	0.00
Assessment	1.50	Brief Intervention	0.00

**\*Summary**

Threat of eviction from rental home & concerns about

**Assessment**

Bevan, the sole carer of two children, Paul and Michael, has contacted the Mirrabooka/Joondalup Family Support Network. He has recently lost his job, is behind in his rent payments and is now being threatened with eviction from the family home. He also has concerns around the custody of his children and would like some legal advice.

Are there any children identified in this case? ☒ Yes ☐ No

Number of children: 2

Are there other agencies involved? ☒ Yes ☐ No

- Click on the **Services** tab
- Click on the **+ folder** icon next to **Housing Support**

Case | **Services** | Brief Interventions | Case Management | Review | Notes (3) | Related Activities | D

**Service Provision**

Find First 1-2 of 2 Last

Service Type	Status	External	Start Date	End Date	
Other	Allocated	<input checked="" type="checkbox"/>	25/08/2015	25/08/2015	Delete
<b>Housing Support</b>	Allocated	<input type="checkbox"/>	25/08/2015		Delete

- Press **Update Service**

**Allocation Detail**

\*Start Date: 25/08/2015  
 \*Status: Allocated  
 External Service: ☐ Agency ID:   
 Agency Name:   
 End Date:   
 Outcome:   
 Service Duration:   
 \*Service Type: Housing Support  
 Unmet Demand Reason:   
 Service Provider: MIRRABOOKA PARTNER AGENCY 1  
 Program:   
 Comments: Referral to housing support service for Bevan and his family as they are behind in rental payments and have been threatened with eviction.  
 Update Service

## Remove Active Hold

- End Date: use calendar icon to select **current date** (The Active Holding End Date is the date the service delivery begins).
- Press **Save**

**Active Holding ?**

Start Date: 25/08/2015  
 End Date: 25/08/2015  
 \*Start Date: 25/08/2015  
 Service Type: Housing Support  
 \*Assigned To: 41, TRAINEE  
 \*Provider: MIRRABOOKA PARTNER AGENCY  
 Status: Open  
 Review Date:

## Service Assessment Details

- Assessment: delete text & enter **Case Manager [your Name] contacted the owner of the rental property and was able to negotiate for the family to stay in the house on the condition that Bevan Your Surname catches up on his rental arrears within the next three months. The owner has agreed to set up a payment plan for Bevan of \$50 extra per week. Bevan has an interview for a job next week and has also applied for a second job.**
- Press **Save**

**Details**

**Assessment**  
 Case Manager [your Name] contacted the owner of the rental property and was able to negotiate for the family to stay in the house on the condition that Bevan \_ \_Surname catches up on his rental arrears within the next three months. The owner has agreed to set up a payment plan  
**Comments**  
 Transfer to "Parent Case"

## Attach Letter From Property Owner

- Click on the **Notes** tab
- Subject: enter Bevan ***Your Family Name***, Letter Property Owner, ***current date***
- Details: enter **Please see attached Letter**
- Click **Add an Attachment**

Service ID : ( 100001576 ) History Select One...

Save

Main Information Brief Interventions **Notes (0)** Related Activities

Notes Summary

Subject	Attachment(s)	Added By	Date Added
		55, Trainee	25/07/18 3:22PM AWST

Add a Note

Added 25/07/2018 3:22PM 55, Trainee

\*Subject Bevan XXBrown, Letter Property Owner, 28/05/15

Details Please see attached letter

Apply Note Add an Attachment

- Press **Browse** to select a document (as advised by your trainer)
- Double click on the **Document Name**
- Press **Upload**

File Attachment

T:\Assist Production\Training\Course Materials\Training M Browse...

Upload Cancel

- Press **Apply Note**
- Press **Save**

Add a Note

Added 23/07/2018 10:12AM VINCENT, Julie

\*Subject Bevan XXBrown, Letter Property Owner, 21.08.15

Details Please see attached Letter

Attachments

File Name	Description	Added By	Date Added
Letter_Property_Owner.docx		VINCENT, Julie	23/07/2018 10:13AM

Apply Note Add an Attachment

Audit History

Save Top of Page

## Close Service

- Click on the **Main Information** tab
- Comments: enter **The threat of eviction has now been resolved, service provision can be closed.**
- Status: select **Closed**
- Review Date: enter **current date**
- Outcome: select **Achieved**
- Decision Date: enter **current date**
- Intensity (hours): enter **5**
- Press **Save**

Service ID : ( 100001576 ) History Select One...

Save

Main Information Brief Interventions Notes (1) Related Activities

Details

Assessment

Case Manager [your Name] contacted the owner of the rental property and was able to negotiate for the family to stay in the house on the condition that Bevan \_ \_ Surname catches up on his rental arrears within the next three months. The owner has agreed to set up a payment plan.

Comments

The threat of eviction has now been resolved, service provision can be closed.

Transfer to "Parent Case"

Active Holding ?

Start Date 25/08/2015 End Date 25/08/2015

\*Start Date 25/08/2015

Service Type Housing Support

\*Assigned To 41, TRAINEE

\*Provider MIRRABOOKA PARTNER AGENCY

Status Closed

Review Date 29/08/2015

Outcome

Outcome Achieved

Decision Date 29/08/2015

Intensity (hours) 5

The Service Provision is now closed:

Main Information Brief Interventions Notes (1) Related Activities

Details

Assessment

Case Manager [your Name] contacted the owner of the rental property and was able to negotiate for the family to stay in the house on the condition that Bevan \_ \_ Surname catches up on his rental arrears within the next three months. The owner has agreed to set up a payment plan.

Comments

The threat of eviction has now been resolved, service provision can be closed.

Transfer to "Parent Case"

Active Holding ?

Start Date 25/08/2015 End Date 25/08/2015

Start Date 25/08/2015

Service Type Housing Support

\*Assigned To 41, TRAINEE

Provider MIRRABOOKA PARTNER AGENCY 1

Status Closed

Review Date 29/08/2015

Outcome

Outcome Achieved

Decision Date 29/08/2015

Intensity (hours) 5.00

- Click on **Transfer to "Parent Case"** link

## Activity 10. Case Closure Review

**Scenario:** The Housing Service has been closed on Fusion. A Case Review now needs to be carried out.

**Note:** when closing a service provision and completing a Case Review it is important to check the Service tab for any open services. If no other services are displayed this indicates that you're the only service provider. If no open services are displayed this indicates that you are the last service provider. In both cases a Case Closure Review would need to be completed and an email sent to the Lead Agency requesting for the case be closed.

In training you will now check the Services tab for any other open services before completing a Case Closure Review

- Click on the **Services** tab
- Check for any other **open services**. If all services have an end date proceed to Case Closure Review

Case	<b>Services</b>	Brief Interventions	Case Management	Review	Notes (3)	Related Activities	▶
Service Provision							
	Service Type	Status	External	Start Date	End Date	Find	First 1-2 of 2 Last
📁	Other	Allocated	<input checked="" type="checkbox"/>	25/08/2015	25/08/2015		Delete
+	Housing Support	Allocated	<input type="checkbox"/>	25/08/2015	29/08/2015		Delete

- Click on the **Review** tab
- Review Type: select **Case Closure**
- Review Date: use calendar icon to select **current date**
- Review Outcome: select **Close Case**
- Click on the **speech bubble**

Case : (100001568) History Select One... ▼

Save

Case Services Brief Interventions Case Management **Review** Notes (3) Related Activities ▶

Find First 1 of 1 Last

Main Audit ⓘ

*Review Type	*Review Date	*Review Outcome	Details	
Case Closure ▼	29/08/2015 ⓘ	Close Case ▼	🗨️	+ -

- Details: enter **Property Owner has agreed for the family to stay in the property on the condition that Bevan catches up on his rental arrears through a payment plan. Threat of eviction issue has been resolved and case can be closed.**

- Press **OK**
- Press **Save**

Main Audit ⓘ

*Review Type	*Review Date	*Review Outcome	Details	
Case Closure ▼	08/12/2017 ⓘ	Close Case ▼	🗨️	+ -

▶ Audit History

Save Top of Page

### Details

Property Owner has agreed for the family to stay in the property on the condition that Bevan catches up on his rental arrears through a payment plan. Threat of eviction issue has been resolved and the service has been closed.

## Activity 11. Living Arrangements

Scenario: A Case Closure Review has been completed. Living Arrangements at Case Closure for each of the family members now need to be recorded.

*In training you will now go to the Case screen and select the Living Arrangements at Case Closure for; Bevan, Michael and Paul*

- Click on the **Case** tab
- Scroll down to the **Person** section

### Record Bevan's Living Arrangement

- Living Arrangement at Case Closure: select **Not applicable - Adult**

Person screen for Bevan (Person ID 451011). The 'Living Arrangement at Case Closure' dropdown is highlighted with a red box and set to 'Not applicable - Adult'.

*Issue	*Detail
Family Support	Immediate Family
Other Issue	Legal/Justice
Housing	Threat of Eviction

### Record Michael's Living Arrangement

- Living Arrangement at Case Closure: select **Family Care - child living with parents**

Person screen for Michael (Person ID 451012). The 'Living Arrangement at Case Closure' dropdown is highlighted with a red box and set to 'Family care - child living with parents'.

*Issue	*Detail
Family Support	Immediate Family
Other Issue	Legal/Justice
Housing	Threat of Eviction

### Record Paul's Living Arrangement

- Living Arrangement at Case Closure: select **Family Care - child living with parents**

Person screen for Paul (Person ID 451013). The 'Living Arrangement at Case Closure' dropdown is highlighted with a red box and set to 'Family care - child living with parents'.

*Issue	*Detail
Family Support	Immediate Family
Other Issue	Legal/Justice
Housing	Threat of Eviction

- Press **Save**

## Activity 12. Case Plan Goals and Exit Questions

Scenario: Before returning the Case to the Lead Agency a review of the Case Plan goals will be carried out to see which goals; still remain, are progressing or have been completed. As the last Partner Agency to be working with the family and the Manager of the Case it is also your responsibility to complete the Case Manager Exit Questions and Client Exit Interview.

*In training you will now update the Up to 1 month Case Plan goal details, record Case Manager Exit Questions and Client Exit Interview responses.*

### Case Plan Goals - Up to 1 Month

Case Plan goals need to be reviewed at regular points throughout the life of a case including at; Up to 1 month, Up to 4 months, Up to 8 months, Up to 12 months and more than 12 months.

- Click on the **Outcomes** tab
- Total number of Case Plan goals: enter **3**
- How many Case Plan goals are progressing?: enter **0**
- How many Case Plan goals have been completed?: enter **3**
- Press **Save**

The screenshot shows the 'Outcomes' tab in a software interface. Under the 'Case Plan Goals' section, there is a table with columns for different time periods: 'Up to 1 month', 'Up to 4 months', 'Up to 8 months', 'Up to 12 months', and 'more than 12 months'. The first row, '1 Total number of Case Plan goals', has the value '3' entered in the 'Up to 1 month' column. The second row, '2 How many case plan goals are progressing?', has the value '0' entered in the 'Up to 1 month' column. The third row, '3 How many case plan goals have been completed?', has the value '3' entered in the 'Up to 1 month' column. The 'Up to 1 month' column is highlighted with a red border.

Case Plan Goal	Up to 1 month	Up to 4 months	Up to 8 months	Up to 12 months	more than 12 months
1 Total number of Case Plan goals	3				
2 How many case plan goals are progressing?	0				
3 How many case plan goals have been completed?	3				

### Case Manager Exit Questions

- Click on the **Exit Questions** tab

The screenshot shows the 'Exit Questions' tab in a software interface. It contains two sections: 'Entry Questions' and 'Exit Questions'. Each section has a table with 'Questions' and 'Response' columns. The 'Entry Questions' section has three questions, each with a dropdown menu. The 'Exit Questions' section has one question with a dropdown menu.

Questions	Response
1 What is the family's ability to provide a parenting role to children in the family group?	
2 What is the family's ability to establish and maintain a safe and stable family environment and household routines?	
3 What is the family's ability to access community support services?	

Questions	Response
1 What is the family's ability to provide a parenting role to children in the family group?	

#### Exit Questions:

- What is the family's ability to provide a parenting role to children in the family group?: select **Has required level of capability**
- What is the family's ability to establish and maintain a safe and stable family environment?: select **Has required level of capability**
- What is the family's ability to access community support services?: select **Has required level of capability**



- What is the family's view on whether they received a service from the Lead agency that aligned with their cultural views and expectations?: select **Some**
- What is the family's view on whether they received a service from the Partner agency that aligned with their cultural views and expectations?: select **Some**
- Press **Save**

Case Manager Questions		Client Exit Interview
<div> <a href="#">Entry Questions</a> <a href="#">Audit Details</a> </div>		
Questions	Response	
1 What is the family's ability to provide a parenting role to children in the family group?	Has required level of capability	
2 What is the family's ability to establish and maintain a safe and stable family environment and household routines?	Limited capability	
3 What is the family's ability to access community support services?	Has required level of capability	
<div> <a href="#">Exit Questions</a> <a href="#">Audit Details</a> </div>		
Questions	Response	
1 What is the family's ability to provide a parenting role to children in the family group?	Has required level of capability	
2 What is the family's ability to establish and maintain a safe and stable family environment and household routines?	Has required level of capability	
3 What is the family's ability to access community support services?	Has required level of capability	
4 What is the family's view on whether they received a service from the Lead agency that aligned with their cultural views and expectations?	Some	
5 What is the family's view on whether they received a service from the Partner agency that aligned with their cultural views and expectations?	Some	
<a href="#">Audit History</a>		
<a href="#">Save</a>		<a href="#">Top of Page</a>

## Client Exit Interview

- Click the **Client Exit Interview** hyperlink

Case Manager Questions		Client Exit Interview
<div> <a href="#">Exit Questions</a> <a href="#">Audit Details</a> </div>		
Questions	Response	
1 Were you involved in planning your case?		

- Where you involved in planning your case?: select **Yes**
- As a family, what is your confidence in setting up and keeping routines to support a stable family environment?: select **Very Confident**
- Were these questions answered by the client?: select **Yes**
- How many times did you have to explain your story?: select **2 To 4**
- Did the Service(s) you received AT THE START meet your needs?: select **Yes**
- Were you given a case manager?: select **Yes**
- If yes, do you think your case manager co-ordinated support for all of your needs?: select **Yes**

- Do you think you increased your network of friends, family or community that you are comfortable calling on in times of need?: select **A lot**
- Do you feel safe and secure in your identity and culture?: select **A lot**
- Press **Save**

Case Manager Questions
Client Exit Interview

Exit Questions
Audit Details

Questions	Response
1 Were you involved in planning your case?	Yes
2 As a family, what is your confidence in setting up and keeping routines to support a stable family environment?	Very confident.
3 Were these questions answered by the client?	Yes
4 How many times did you have to explain your story?	2 To 4
5 Did the service(s) you received AT THE START meet your needs?	Yes
6 Were you given a case manager?	Yes
7 If yes, do you think your case manager co-ordinated support for all of your needs?	Yes
8 Do you think you increased your network of friends, family or community that you are comfortable calling on in times of need?	A lot
9 Do you feel safe and secure in your identity and culture?	A lot

Audit History

Save
Top of Page

## Activity 13. Re-Allocate Case Management to the Lead Agency

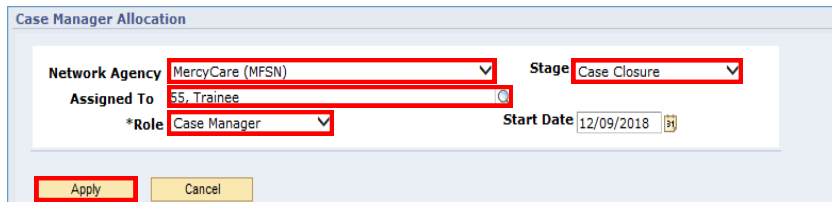
Scenario: The Partner Agency has successfully resolved Bevan and his family's housing issue. The Partner Agency has closed the Service Provision and completed; a Case Closure Review, Case Plan Goal details and Exit Questions. Case Management can now be allocated back to the Lead Agency to close the case. The Partner Agency has emailed the Lead Agency with the Case ID to let them know that the service details and Case Review have been completed and the service has been closed.

*In training you will now re-allocate Case Management back to the Lead Agency.*

- Click on the **Case Management** tab

### Assessment Hours

- Hours: enter **1**
- Press **Add Case Manager**
- Network Agency: select **MercyCare MFSN**
- Assigned To: click on magnifying glass and select an **Alliance Manager**
- Role: select **Case Manager**
- Stage: select **Case Closure**
- Start Date: leave as **current date**
- Press **Apply**
- Press **Save**



The Case Management has now been re-allocated to the Lead Agency:

Find First 1-4 of 4 Last							
Responsibility	Audit	ETA					
Network Agency			Stage	Assigned To	Role	Start Date	End Date
MercyCare (MFSN)			Case Closure	S6, Trainee	Case Manager	29/08/2015	
MIRRABOOKA PARTNER AGENCY 1			Case Management	41, TRAINEE	Case Manager	25/08/2015	29/08/2015
MercyCare (MFSN)			Assessment	S6, Trainee	Case Manager	24/08/2015	25/08/2015
							1.50
MercyCare (MFSN)			Initial Screening	S5, Trainee	Case Manager	21/08/2015	24/08/2015
							1.00

## Activity 14. Close the Case

**Scenario:** Case Management has been allocated back to the Lead Agency so that the case can be closed. As a Lead Agency Assessment & Coordination Officer you will review the case on Fusion ensuring all Services have been closed and a Case Closure Review, Case Plan Goals and Entry/Exit Questions have all been completed before closing the case.

*In training you will now review and close the case.*

**NOTE:** Cases are closed by the **Lead Agency ONLY**.

- Click on the **Services** tab and check that all services have been completed & end dated

Service Type	Status	External	Start Date	End Date	Find	First	1-2 of 2	Last
Other	Allocated	<input checked="" type="checkbox"/>	25/08/2015	25/08/2015				
Housing Support	Allocated	<input type="checkbox"/>	25/08/2015	29/08/2015				

- Click on the **Review** tab and check that a **Case Closure Review** has been entered.

*Review Type	*Review Date	*Review Outcome	Details
Case Closure	29/08/2015	Close Case	

- Click on the **Outcomes** tab and check that **Case Plan Goal details** and **Entry/Exit Questions** have been entered.

Case Plan Goal	Up to 1 month	Up to 4 months	Up to 8 months	Up to 12 months	more than 12 months
1 Total number of Case Plan goals	3				
2 How many case plan goals are progressing?	0				
3 How many case plan goals have been completed?	3				

Case Manager Questions	Client Exit Interview
Entry Questions	Audit Details
Questions	Response
1 What is the family's ability to provide a parenting role to children in the family group?	Has required level of capability
2 What is the family's ability to establish and maintain a safe and stable family environment and household routines?	Limited capability
3 What is the family's ability to access community support services?	Has required level of capability
Exit Questions	Audit Details
Questions	Response
1 What is the family's ability to provide a parenting role to children in the family group?	Has required level of capability
2 What is the family's ability to establish and maintain a safe and stable family environment and household routines?	Has required level of capability
3 What is the family's ability to access community support services?	Has required level of capability
4 What is the family's view on whether they received a service from the Lead agency that aligned with their cultural views and expectations?	Some
5 What is the family's view on whether they received a service from the Partner agency that aligned with their cultural views and expectations?	Some

- Click on the **Case** tab
- Status: change to **Completed**
- Closure Date: enter **current date**
- Reason for Closure: select **Case Completed**
- Hours: check that all relevant hours have been recorded

**Case** Services Brief Interventions Case Management Review Notes (3) Related Activities

**Referral Information**

\*Type Individual XXXBROWN, Bevan  
 Role Parent/Guardian  
 Referral Date 21/08/2015 \*Time 1:20PM  
 Contact Method 04-Office  
 Primary Issue Housing  
 \*Status Completed  
 Corridor Mirrabooka/Joondalup  
 Closure Date 30/08/2015  
 Reason for Case Closure Case Completed

**Hours**

Initial Screening	1.00	Service Delivery	5.00
Assessment	1.50	Brief Intervention	0.00
<b>Total hours</b>	<b>7.50</b>		

**\*Summary**  
 Threat of eviction from rental home & concerns about  
**Assessment**  
 Bevan, the sole carer of two children, Paul and Michael, has contacted the Mirrabooka/Joondalup Family Support Network. He has recently lost his job, is behind in his rent payments and is now being threatened with eviction from the family home. He also has concerns around the custody of his children and would like some legal advice.

Are there any children identified in this case? ☒ Yes ☐ No  
 Number of children 2  
 Are there other agencies involved? ☒ Yes ☐ No

- Press **Save**
- Press **OK** to acknowledge the message: “This will close the case and make all details read only. Please confirm!”

**Message**

This will close the case and make all details read only. Please confirm! (20002,522)

**OK** **Cancel**

The closed case now displays in a ‘read only’ format

**Case : (100001568)** History Select One...

**Save**

**Case** Services Brief Interventions Case Management Review Notes (3) Related Activities

**Referral Information**

\*Type Individual XXXBROWN, Bevan  
 Role Parent/Guardian  
 Referral Date 21/08/2015 \*Time 1:20PM  
 Contact Method 04-Office  
 Primary Issue Housing  
 \*Status Completed  
 Corridor Mirrabooka/Joondalup  
 Closure Date 30/08/2015  
 Reason for Case Closure Case Completed

**Hours**

Initial Screening	1.00	Service Delivery	5.00
Assessment	1.50	Brief Intervention	0.00
<b>Total hours</b>	<b>7.50</b>		

**Summary**  
 Threat of eviction from rental home & concerns about custody of his children  
**Assessment**  
 Bevan, the sole carer of two children, Paul and Michael, has contacted the Mirrabooka/Joondalup Family Support Network. He has recently lost his job, is behind in his rent payments and is now being threatened with eviction from the family home. He also has concerns around the custody of his children and would like some legal advice.

Are there any children identified in this case? ☒ Yes ☐ No  
 Number of children 2  
 Are there other agencies involved? ☒ Yes ☐ No

- Scroll down to the **Person View** of one of the family members
- Click on the **Person View** icon

The case and service display as Completed in the Activity Tree

**Person**

\*Person ID 450986  
 Gender Male

**Activities**

\*Date Filter 7 - View All

First | Previous | Next | Last | Left | Right

**Overview of - Bevan**

**Activities**

- Cases - (1) Completed - (1) View All
- Services - (1) Completed - (1) View All
- Alerts - (0) View All

## Appendix I. Create and Relate a New Case

**Scenario:** Bevan and his children have been referred to the Network by his son's school. There have been a number of incidents with the family, the latest being Dad getting drunk at home, swearing and yelling at the children and waking them up. The youngest child, Paul, came to school upset and confided in his teacher, Sally Ford. The school has spoken to Dad who has agreed that the family would benefit from some help from the Network.

*In training you will now Create & Relate a New Case*

### From the Home Page of Fusion

- Click on the **Person Search** screen

Main Menu

- FuSioN Home**  
Home folder for FuSioN
  - Person Search** (highlighted)
  - Search Cases
  - Query Viewer
  - My Reports
- Customers CRM**  
Access Customer and Contact setup components.
- Set Up CRM**  
Define standard setup information required to manage CRM processes.
  - Product Related

- Surname: enter **Your Family Name**

- Forename: enter **Bevan**

- Press **Search**

- Click the **Person View** Icon

Person ID =

Surname begins with

Forename(s) begins with

Gender =

Age =

Birth Date between  And

Address begins with

Town/Suburb begins with

Post Code =

**Search** **Clear**

**Search Result** 1 record(s) found

Person View	Person ID	Surname	Forename(s)	Alias Surname	Alias Forename(s)	Gender
	451011	XXBROWN	BEVAN	-	-	M

- Click **Completed Case** in the **Activity Tree** (on the left)

- Click on the **corresponding ID** (on the right)

**Person View** History Select One...

Refresh Return to Search

Actions Add Case Go

**Summary**

Person ID 451011 Gender Male

Surname XXBROWN Date of Birth (K) 15/4/1984

Forename Bevan Date of Birth (E)

Address (P) 20 Ravenswood Drive, Fremantle, WA, 6160, AUS Estimated Age 31

Phone (P) 0413 153 668 CaLD No

Interpreter Aboriginal

Required Alert Exists ? Yes

[View Person Details](#)

**Activities**

\*Date Filter 7 - View All

First Previous Next Last Left Right

Overview of - Bevan

- Cases - (1)
- Completed - (1)** (highlighted)
- Open - (1)

**Case Details (Completed)**

ID	Start Date	Status	Primary Issue	Assigned to
<b>100001526</b> (highlighted)	21/08/2015	Completed	Housing	St Patrick's Community Support Centre

- Click on the **arrow** to move along the tabs

Case Services Brief Interventions Case Management Review Outcome **Notes (2)**

Referral Information Summary

- Click on the **Related Activities** tab
- Press **Create and Relate a New Case**

### Enter Start Date & Time

- Start Date: select **current date**
- Start Time: auto-populates with **current time**
- Corridor: select **Mirrabooka/Joondalup**
- Press **OK**

### Select the information to be copied over to the New Case

- Un-tick Referral Info** (*the referrer is different for this case*)
- Leave Person ticked**
- Press **OK**

### The newly created case now appears in Related Activities

- Click on the **ID hyperlink** of the **Open Case**

## Edit the New Case

### New Referral Information

- Type: select **Agency**
- Click on the **magnifying glass**
- Agency Name: enter **Mirrabooka**
- Press **Look Up**
- Select **Mirrabooka Primary School**

Ownership	Agency Name	Agency Type	Agency SubType
External	Mirrabooka Detectives	Police	Detectives
External	Mirrabooka Police Station	Police	Metro Station
External	Mirrabooka Primary School	School	Primary School
External	Mirrabooka Senior High School	School	Senior High School
External	Mirrabooka Shs Ed Sup Ctre	School	Education Support

- Role: click on the **magnifying glass** and select **Teacher**
- Name: enter **Sally Ford**
- Contact method: select **Telephone**
- Primary Issue: select **Domestic Violence**

- Summary: delete text & enter **Concerns for children due to Dad's drinking and domestic violence incidents**
- Are there any children identified in this case?: select **Yes**
- Number of children?: enter **2**
- Are there other agencies involved?: select **No**

Are there any children identified in this case? ☒ Yes ☐ No

Number of children

Are there other agencies involved? ☐ Yes ☒ No



## Amend Issue Details for Bevan

- Living Arrangement at Referral Commencement: select **Not Applicable - Adult**
- Issue: select **Family Domestic Violence**
- Detail: select **Emotional**
- Issue: select **Substance Use**
- Detail: select **Alcohol**
- Press **Save**

*Person ID	456053	Surname	SMITHS	Referral Age	34	Aboriginal	Aboriginal
Gender	Male	Forename	Bevan	Current Age	34	CaLD	No
Client Consent	Yes	Primary Address	20 Ravenswood Drive, Mirrabooka, WA, 6160, AUS				
Living Arrangement at Referral Commencement :				Not applicable - Adult			
Living Arrangement at Case Closure :							
Issue Details							
Copy Primary Address	*Issue	*Detail					
	Family Domestic Violence	Emotional					
	Substance Use	Alcohol					

## Amend Issue Details for Michael and Paul

- Living Arrangement at Referral Commencement: select **Family Care - child living with parents**
- Issue: select **Family Domestic Violence**
- Detail: select **Emotional**
- Use - **sign** to remove the second row

*Person ID	456054	Surname	SMITHS	Referral Age	12	Aboriginal	Aboriginal
Gender	Male	Forename	Michael	Current Age	12	CaLD	No
Client Consent	Yes	Primary Address	20 Ravenswood Drive, Mirrabooka, WA, 6160, AUS				
Living Arrangement at Referral Commencement :				Family care - child living with parents			
Living Arrangement at Case Closure :							
Issue Details							
	*Issue	*Detail					
	Family Domestic Violence	Emotional					

*Person ID	456055	Surname	SMITHS	Referral Age	10	Aboriginal	Aboriginal
Gender	Male	Forename	Paul	Current Age	10	CaLD	No
Client Consent	Yes	Primary Address	20 Ravenswood Drive, Mirrabooka, WA, 6160, AUS				
Living Arrangement at Referral Commencement :				Family care - child living with parents			
Living Arrangement at Case Closure :							
Issue Details							
	*Issue	*Detail					
	Family Domestic Violence	Emotional					

- Press **Ok to the message**
- Press **Save**

**Delete Confirmation**

Delete current/selected rows from this page? The delete will occur when the transaction is saved.

## Case Management Allocation

- Click on the **Case Management** tab

### Complete Initial Screening Hours

- Hours: enter **0.5**
- Press **Save**

Case   Services   Brief Interventions <b>Case Management</b> Review   Outcome   Notes (0)   ▶							
Find   First 1 of 1 Last							
Responsibility	Audit	EFF					
Network Agency	Stage	Assigned To	Role	Start Date	End Date	Hours	
St Patrick's Community Support Centre	Initial Screening	80, Trainee	Case Manager	25/08/2015		0.5	
<input type="button" value="Add Case Manager"/> <input type="button" value="Update Case Manager"/>							

- Press **Add Case Manager**
- Network Agency: select **MercyCare (MFSN)**
- Assigned To: click **magnifying glass** and select **Your Trainee ID**
- Role: select **Case Manager**
- Stage: select **Assessment**
- Start Date: auto-populates to current date
- Press **Apply**
- Press **Save**

**Case Manager Allocation**

**Network Agency** MercyCare (MFSN) ▼

**Assigned To** 55, Trainee 🔍

**\*Role** Case Manager ▼

**Stage** Assessment ▼

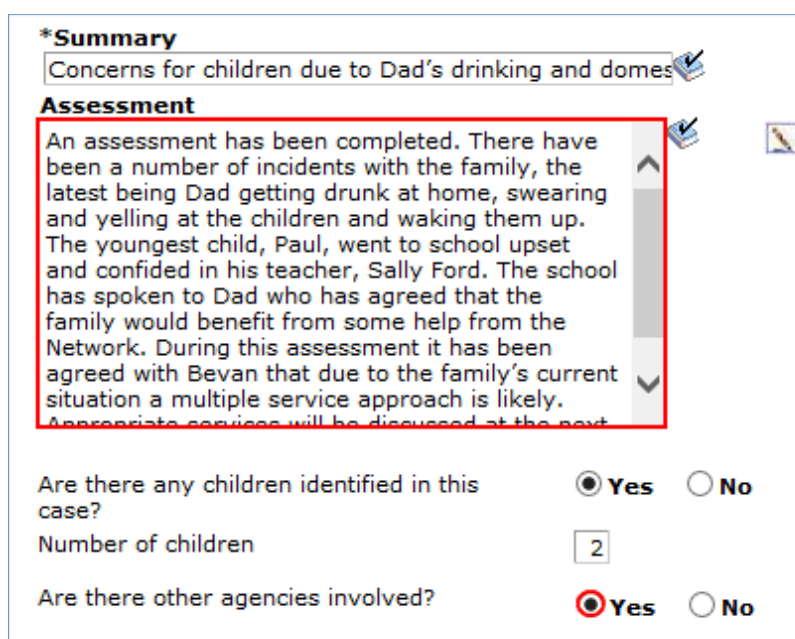
**Start Date** 10/10/2015 📅

### Initial Screening stage is end-dated & Assessment starts

Find   First 1-2 of 2 Last							
Responsibility	Audit	EFF					
Network Agency	Stage	Assigned To	Role	Start Date	End Date	Hours	
MercyCare (MFSN)	Assessment	55, Trainee	Case Manager	10/10/2015			
MercyCare (MFSN)	Initial Screening	55, Trainee	Case Manager	10/10/2015	10/10/2015	0.50	

## Assessment

- Click on the **Case** tab
- Assessment: delete text & enter **An assessment has been completed. There have been a number of incidents with the family, the latest being Dad getting drunk at home, swearing and yelling at the children and waking them up. The youngest child, Paul, went to school upset and confided in his teacher, Sally Ford. The school has spoken to Dad who has agreed that the family would benefit from some help from the Network. During this assessment it has been agreed with Bevan that due to the family's current situation a multiple service approach is likely. Appropriate services will be discussed at the next allocations meeting.**
- Are there other agencies involved?: select **Yes**
- Press **Save**



The screenshot shows a web-based form for case management. At the top, there is a section titled '\*Summary' with a text box containing 'Concerns for children due to Dad's drinking and domes'. Below this is the 'Assessment' section, which has a text box containing the detailed assessment text: 'An assessment has been completed. There have been a number of incidents with the family, the latest being Dad getting drunk at home, swearing and yelling at the children and waking them up. The youngest child, Paul, went to school upset and confided in his teacher, Sally Ford. The school has spoken to Dad who has agreed that the family would benefit from some help from the Network. During this assessment it has been agreed with Bevan that due to the family's current situation a multiple service approach is likely. Appropriate services will be discussed at the next allocations meeting.' This text box is highlighted with a red border. Below the text box, there are three questions: 'Are there any children identified in this case?' with radio buttons for 'Yes' (selected) and 'No'; 'Number of children' with a text box containing '2'; and 'Are there other agencies involved?' with radio buttons for 'Yes' (selected) and 'No'.

An allocations meeting would now have taken place between the FSN Lead Agency and Partner Agencies. The Assessment & Coordination Officer carried out two home visits and discussions were held with the family. A consultation with the CPFS Child Protection Worker was undertaken, where they advised that there were no child protection concerns for this family. A case plan was developed to address domestic violence and substance abuse issues, how to improve on parenting skills, family functioning and the emotional wellbeing of the children. Recommended services included counselling.

The services were created by the Lead Agency who allocated them to the Partner Agencies. Case Management was allocated to the first Partner Agency to commence work with the family.

In training we will not proceed with this case.

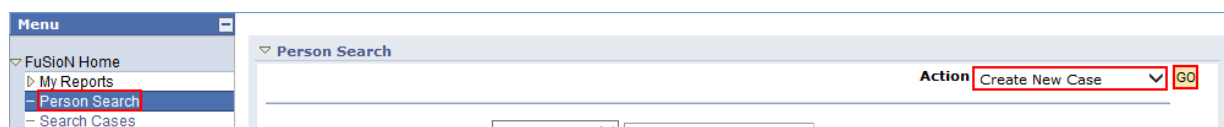
## II. Brief Intervention

Scenario: A woman telephones the Network for the first time seeking advice following a sexual assault by her ex-partner. She gives you her first name but does not want to give you any other personal details. A case is created and a brief intervention is recorded. A brief counselling session and telephone numbers are provided.

*In training you will now create a Brief Intervention*

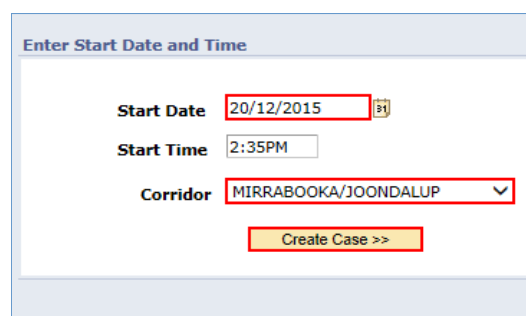
Click on the **Person Search** screen using the side menu:

- Action: select **Create New Case**
- Press **Go**



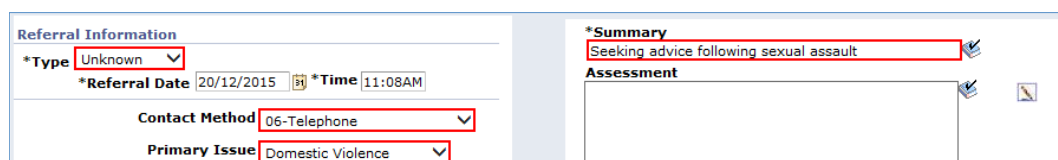
Enter Start Date and Time

- Start Date: use the calendar icon to select **current date**
- Start Time: auto-populates with current time
- Corridor: select **Mirraboopa/Joondalup**
- Press **Create Case >>**



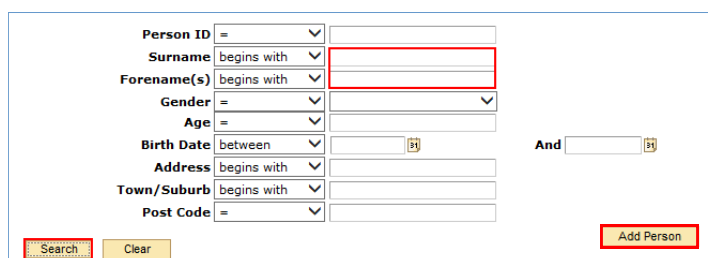
Referral Information

- Type: select **Unknown**
- Contact Method: select **Telephone**
- Primary Issue: select **Domestic Violence**
- Summary: enter **Seeking advice following sexual assault**



Person Details

- Person ID: click on the **magnifying glass**
- Surname: enter **unknown**
- Forename: enter **any female name**
- **No Search Results** should return
- Press **Add Person**

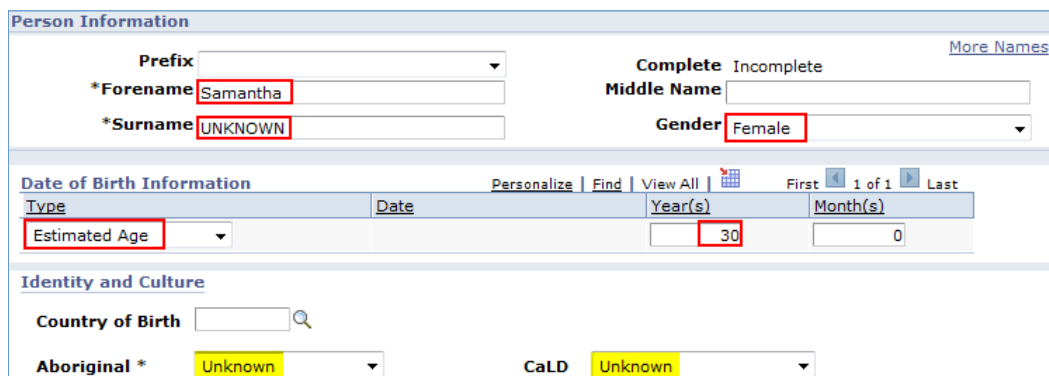


## Person Details Information

- Forename: enter **Samantha**
- Surname: enter **Unknown**
- Gender: select **Female**
- Date of Birth Information: select **Estimated Age**
- Year(s): enter **30**

## Identity & Culture

- Aboriginal: select **Unknown**
- CaLD: select **Unknown**
- Press **Save**



**Person Information**

Prefix:  Complete: ☒ Complete ☐ Incomplete [More Names](#)

\*Forename:  Middle Name:

\*Surname:  Gender:

**Date of Birth Information** [Personalize](#) | [Find](#) | [View All](#) | [First](#) 1 of 1 [Last](#)

Type	Date	Year(s)	Month(s)
<input type="text" value="Estimated Age"/>		<input type="text" value="30"/>	<input type="text" value="0"/>

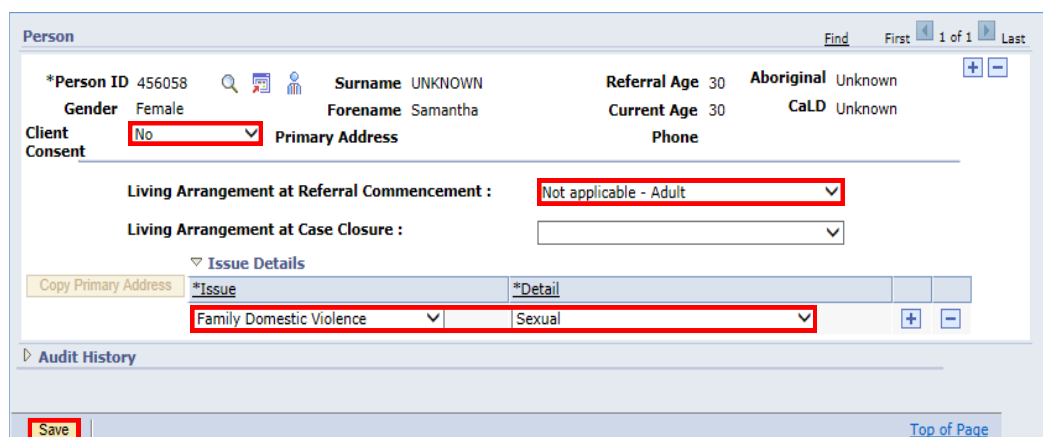
**Identity and Culture**

Country of Birth:

Aboriginal \*:  CaLD:

## Issue Details

- Client Consent: select **No**
- Living Arrangement at Referral Commencement: select **Not applicable - Adult**
- Issue: select **Family Domestic Violence**
- Detail: select **Sexual**
- Press **Save**



**Person** [Find](#) [First](#) 1 of 1 [Last](#)

\*Person ID: 456058 Surname: UNKNOWN Referral Age: 30 Aboriginal: Unknown

Gender: Female Forename: Samantha Current Age: 30 CaLD: Unknown

Client Consent:  Primary Address: Phone:

Living Arrangement at Referral Commencement:

Living Arrangement at Case Closure:

**Issue Details**

Copy Primary Address:  \*Issue:  \*Detail:

[Audit History](#)

[Top of Page](#)

- Click on the **Brief Interventions** tab

- Press **Add Intervention**

- Description: enter **Samantha telephoned seeking advice following a sexual assault by her ex-partner. She does not want to give any personal details. A brief counselling session was provided as well as telephone numbers for her to get further support from appropriate FDV services.**
- Type: select **Brief Counselling Intervention**
- Completed By: click on the **magnifying glass** and select **MercyCare (MFSN)**
- Status: change to **Closed**
- Start Date: use calendar icon to select **current date**
- End Date: use calendar icon to select **current date**
- Intensity (hours): enter **0.5**

#### Person(s) related to intervention:

- Person ID: click on the **magnifying glass** and select **UNKNOWN \_\_Forename**

- Issue: click on the **magnifying glass** and select **Family Domestic Violence**
- Press **Save & Return**

- The Intervention now displays in the **Brief Interventions** tab

Case : (100001580) History Select One...

Save

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

**Brief Interventions**

Type	Completed By	Description	Status	Start Date	End Date
Brief Counselling Intervention	MercyCare (MFSN)	Samantha telephoned seeking ad	Closed	20/12/2015	20/12/2015

### Update Case Management Hours

- Click on the **Case Management** tab
- Hours: Enter **0.25**
- Press **Save**

Case Services Brief Interventions **Case Management** Review Outcome Notes (0)

Find First 1 of 1 Last

Responsibility Audit

Network Agency	Stage	Assigned To	Role	Start Date	End Date	Hours
St Patrick's Community Support Centre	Initial Screening	80, Trainee	Case Manager	25/08/2015		0.25

### Close the Case

- Click on the **Case** tab
- Status: select **Completed**
- Closure Date: select **current date**
- Reason for Case Closure: select **Case Completed**
- Press **Save**

Case : (100001580) History Select One...

Save

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

**Referral Information**

\*Type Unknown

\*Referral Date 20/12/2015 \*Time 11:08AM

Contact Method 06-Telephone

Primary Issue Domestic Violence

\*Status **Completed**

Corridor Mirrabooka/Joondalup

Closure Date 20/12/2015

Reason for Case Closure **Case Completed**

**Hours**

	Initial Screening	Service Delivery	Brief Intervention
Assessment	0.00	0.00	0.30
<b>Total hours</b>	0.30		

**\*Summary**

Seeking advice following sexual assault

**Assessment**

Are there any children identified in this case? ☐ Yes ☒ No

Number of children

Are there other agencies involved? ☐ Yes ☒ No

- Press **OK** to acknowledge the message to close the case

**Message**

This will close the case and make all details read only. Please confirm! (20002,522)




OK Cancel

### III. Create An Alert

Alerts are entered onto Fusion by the **Lead Agency** for a variety of reasons including **medical alerts** (Asthma, Peanut Allergy etc.) **risk to self** (threats of self harm, suicidal ideations etc.) or **risk to others** (Fire arms etc). They display in the **Person View**, **Case Screen** and in the **Person Search** results.

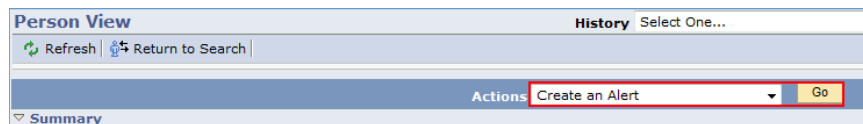
If **Partner Agencies** have information that should be put on FuSioN as an alert, they should email the Lead Agency with the information and quote the Client Name, Person ID and Case ID.

- Click on **Home**
- Click on **Person Search**
- Search for **Bevan \_\_ Surname** and click on their Person View icon

Person View	Person ID	Surname	Forename(s)
	451011	XXBROWN	BEVAN
	451012	XXBROWN	MICHAEL
	451013	XXBROWN	PAUL

- Action: select **Create an Alert**

- Press **Go**



Person View History: Select One...

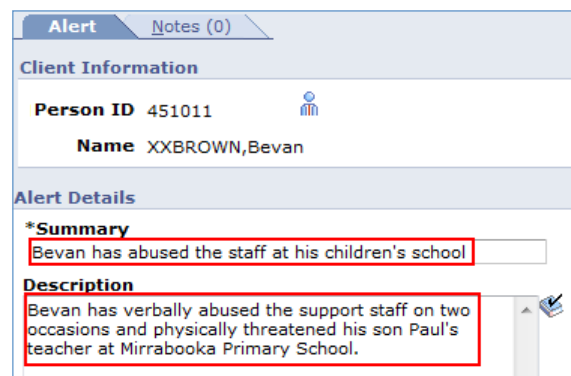
Refresh Return to Search

Actions: Create an Alert Go

Summary

#### Alert Details

- Summary: enter **Bevan has abused the staff at his children's school**
- Description: enter **Bevan has verbally abused the support staff on two occasions and physically threatened his son Paul's teacher.**



Alert Notes (0)

Client Information

Person ID 451011

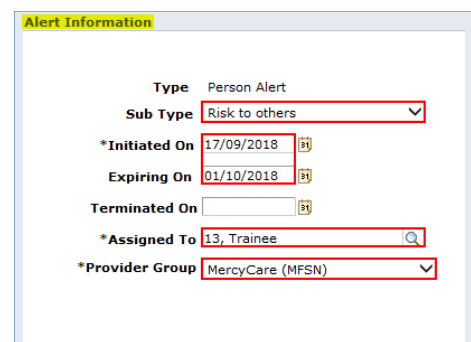
Name XXBROWN, Bevan

Alert Details

\*Summary  
Bevan has abused the staff at his children's school

Description  
Bevan has verbally abused the support staff on two occasions and physically threatened his son Paul's teacher at Mirrabooka Primary School.

- Sub-Type: select **Risk to others**
- Initiated On/Expiring On: start/end dates auto-populate & can be changed as appropriate
- Terminated On: Leave blank
- Provider Group: select **MercyCare (MFSN)**
- Assigned to: click on the magnifying glass and select any **Trainee ID**
- Press **Save**



Alert Information

Type Person Alert

Sub Type Risk to others

\*Initiated On 17/09/2018

Expiring On 01/10/2018


Terminated On

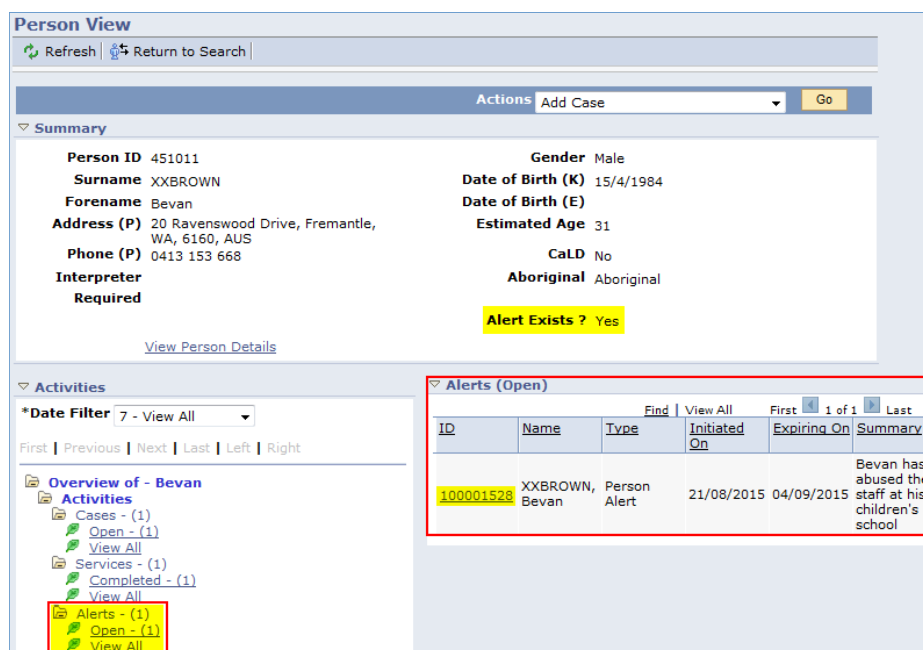
\*Assigned To 13, Trainee

\*Provider Group MercyCare (MFSN)



## To check if an Alert exists:

- Click on **Home**
- Click on **Person Search**
- Search for **Bevan \_ \_ Surname** and click on their **Person View**  icon
- If an **Alert** is open it will display in the **Person Summary**
- Both **Open & Completed Alerts** will display at the bottom of the **Activity Tree**
- Click on **Alerts - Open** (left) and **Alerts ID** (right)



**Person View**

Refresh | Return to Search

Actions: Add Case [Go]

**Summary**

Person ID 451011 Gender Male  
Surname XXBROWN Date of Birth (K) 15/4/1984  
Forename Bevan Date of Birth (E)  
Address (P) 20 Ravenswood Drive, Fremantle, WA, 6160, AUS Estimated Age 31  
Phone (P) 0413 153 668 CaLD No  
Interpreter Required Aboriginal  
**Alert Exists? Yes**

[View Person Details](#)

**Activities**

\*Date Filter 7 - View All

First | Previous | Next | Last | Left | Right

**Overview of - Bevan**

Activities

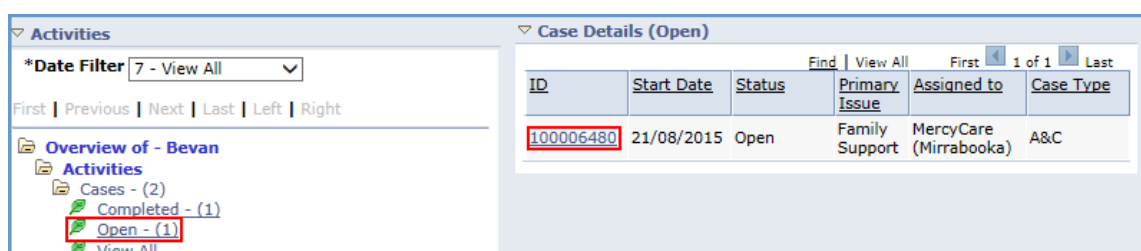
- Cases - (1)
- Open - (1)
- View All
- Services - (1)
- Completed - (1)
- View All
- Alerts - (1)**
- Open - (1)
- View All

**Alerts (Open)**

ID	Name	Type	Initiated On	Expiring On	Summary
100001528	XXBROWN, Bevan	Person Alert	21/08/2015	04/09/2015	Bevan has abused the staff at his children's school

## If an Alert is open it also displays in the Case

- Click on **Cases - Open** (left) and **Cases ID** (right)



**Activities**

\*Date Filter 7 - View All

First | Previous | Next | Last | Left | Right

**Overview of - Bevan**

Activities

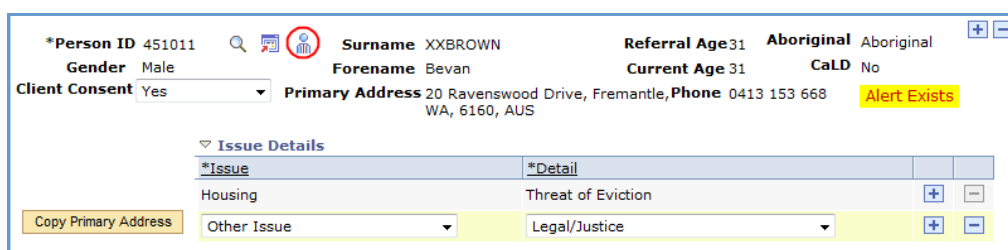
- Cases - (2)
- Completed - (1)
- Open - (1)**
- View All

**Case Details (Open)**

ID	Start Date	Status	Primary Issue	Assigned to	Case Type
100006480	21/08/2015	Open	Family Support	MercyCare (Mirrabooka)	A&C

## 'Alert Exists' displays in the Person section

- Click on **Person View** icon to view the open alert (*steps described above*)



**Person View**

\*Person ID 451011 Surname XXBROWN Referral Age 31 Aboriginal Aboriginal  
Gender Male Forename Bevan Current Age 31 CaLD No  
Client Consent Yes Primary Address 20 Ravenswood Drive, Fremantle, WA, 6160, AUS Phone 0413 153 668 **Alert Exists**

**Issue Details**

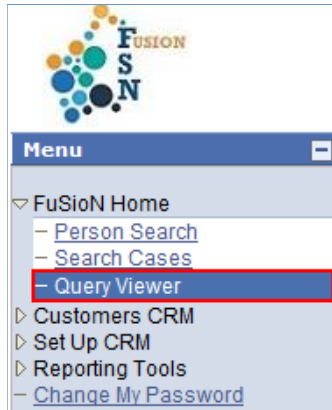
*Issue	*Detail
Housing	Threat of Eviction
Other Issue	Legal/Justice

Copy Primary Address

## IV. Query Viewer

All FSN staff can access the **Query Viewer** reporting function. There is a User Guide on the [www.wafsn.org.au](http://www.wafsn.org.au) website, as well as information below.

### Access Query Viewer from the Fusion side menu



- Search By: select **Query Name**
- Begins with: Leave **Blank**
- Press **Search**
- Click on **Run to HTML** or **Excel** for the **Query Name** required

**Query Viewer**

Enter any information you have and click Search. Leave fields blank for a list of all values.

\***Search By** **Query Name** begins with

**Search**

**Search Results**

\***Folder View** -- All Folders --

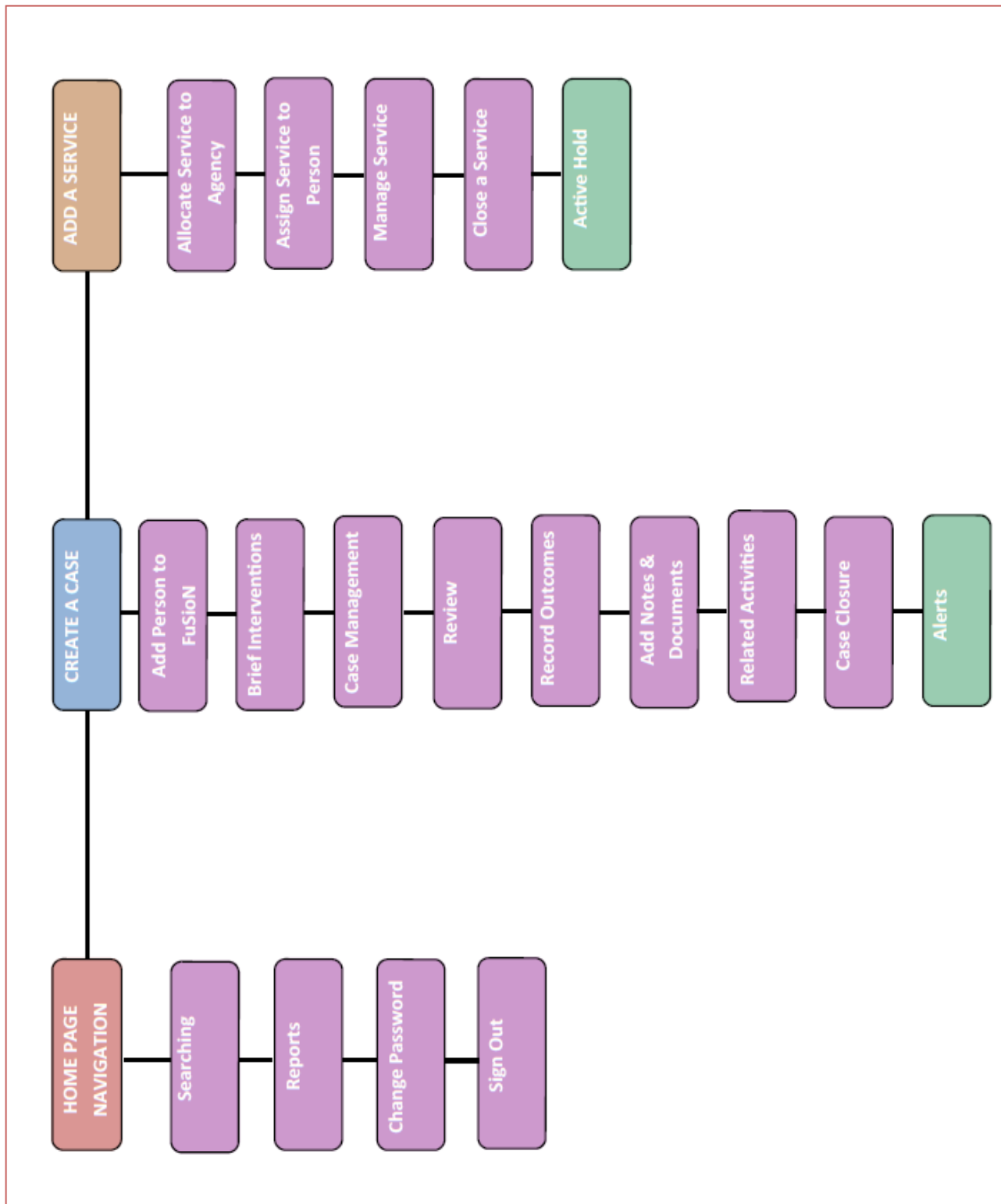
Query	Description	Owner	Folder	Run to HTML	Run to Excel	Schedule	Add to Favorites
AS_ALL_CASES	All Cases	Public		HTML	Excel	Schedule	Favorite
EXTRACT_1	FSN Services	Public		HTML	Excel	Schedule	Favorite
EXTRACT_3	Closed Cases	Public		HTML	Excel	Schedule	Favorite
EXTRACT_4	Clients	Public		HTML	Excel	Schedule	Favorite
EXTRACT_5	Brief Interventions	Public		HTML	Excel	Schedule	Favorite
EXTRACT_6	Client Service Summary	Public		HTML	Excel	Schedule	Favorite
FSN_ACTIVE_HOLDING	Cases on active hold	Public		HTML	Excel	Schedule	Favorite
FSN_CASES	Cases By Decision Date	Public		HTML	Excel	Schedule	Favorite
FSN_OPEN_CASES	Open Cases	Public		HTML	Excel	Schedule	Favorite
RETURNING_CLIENTS		Public		HTML	Excel	Schedule	Favorite

- Put in **From & To Dates** required using the **calendar icon**
- Press **View Results**
- Down Load Results In: click on 'Excel Spread Sheet', 'CSV Text File' or 'XML File'
- Press **Open**

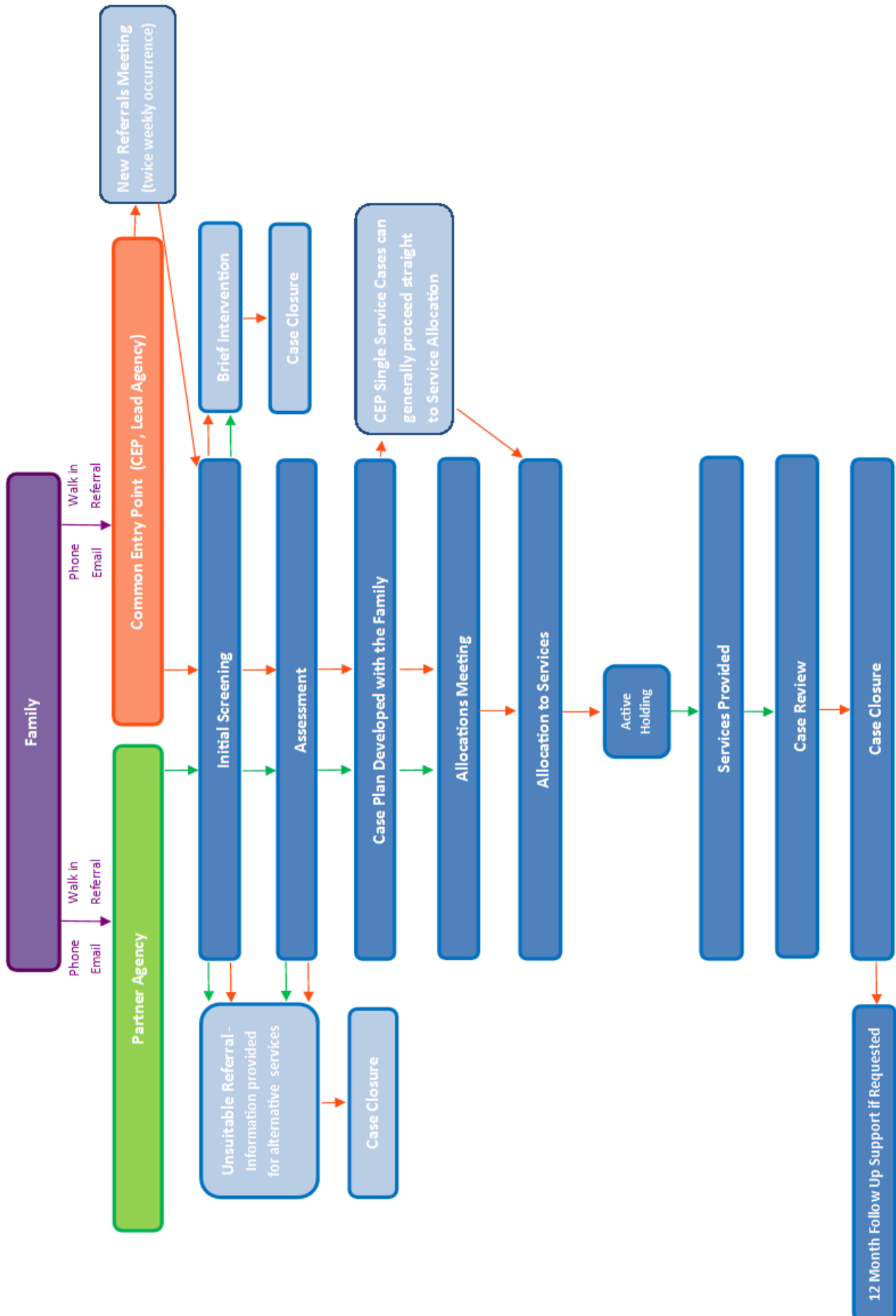
## V. Fusion Quiz

1. Where would you record the Primary Details, including Culture & Identity and Contact information of a person in Fusion?
2. How would you create a new case in Fusion?
3. Where would you add or change Case Manager information for a case?
4. Describe the concept of “Active Hold”
5. Where would you attach documents or notes for a case?


















## VI. Fusion Recording Workflow



## VII. Family Support Network: Client Workflow



## VIII. Glossary: Fusion Icons

ICON	DESCRIPTION
	Show all columns
	Minimise pagelet
	Refresh pagelet
	Show next row
	Expand folder
	Link to Person View
	Link to Calendar
	Open folder
	Link to Look Up
	Link to Person Details
	Expand text box
	Spell checker
	Add/Remove row
	Show more tabs
	Link to text box
	Delete note
	Download report

## IX. Help After Training

Each Family Support Network has access to a CPFS staff member to help with any Fusion related queries.

### ARMADALE/CANNINGTON FAMILY SUPPORT NETWORK

Emma McLoughlin, A/Child Protection Leader

Grace Wastle, A/Alliance Manager

Ph: 1300 038 850

Email: [information@CanningtonArmadaleFSN.org.au](mailto:information@CanningtonArmadaleFSN.org.au) or [referrals@CanningtonArmadaleFSN.org.au](mailto:referrals@CanningtonArmadaleFSN.org.au)

### PERTH/MIDLAND FAMILY SUPPORT NETWORK

Ali Coton, Child Protection Leader

Sharla Abdullah, Alliance Manager

Ph: 1300 038 380

Email: [information@MidlandPerthFSN.org.au](mailto:information@MidlandPerthFSN.org.au) or [referrals@MidlandPerthFSN.org.au](mailto:referrals@MidlandPerthFSN.org.au)

### MIRRABOOKA/JOONDALUP FAMILY SUPPORT NETWORK

Vanna Williams, Child Protection Leader

Joel Richards, Alliance Manager

Ph: 1300 760 691

Email: [mjfsn@mercycare.com.au](mailto:mjfsn@mercycare.com.au)

### FREMANTLE/ROCKINGHAM FAMILY SUPPORT NETWORK

Helen Clothier, Child Protection Leader

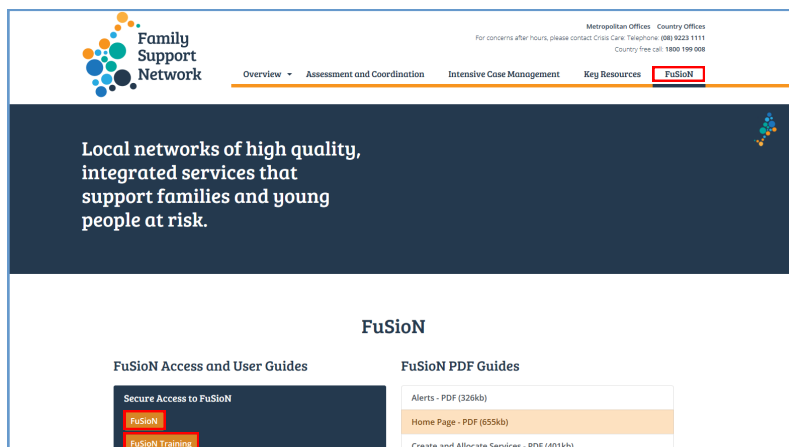
Kerry Wadsworth, Alliance Manager

Ph: 1300 951 190

Email: [fsn@communicare.org.au](mailto:fsn@communicare.org.au)

## FUSION USER AND LEARNER GUIDES

FuSioN Learner & User Guides can be found on the website <http://wafsn.org.au/> under **Fusion**:



## CPFS SUPPORT DESK

The Support Desk can be contacted with recording queries regarding Fusion:

TELEPHONE: 1800 4357 3375 (option 2 - CPFS Applications > option 1 - Fusion)

EMAIL: [ClientApplicationsSupport@cpfs.wa.gov.au](mailto:ClientApplicationsSupport@cpfs.wa.gov.au)