



FuSioN

Family Support Network

Partner Agency

Learner Guide



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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
- Allocate Cases
- Take Services off Active Hold
- Update Service Details
- Add Notes and attach Documents to Cases
- Close Services
- Record Case Reviews
- Look up Alerts
- Run Query 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

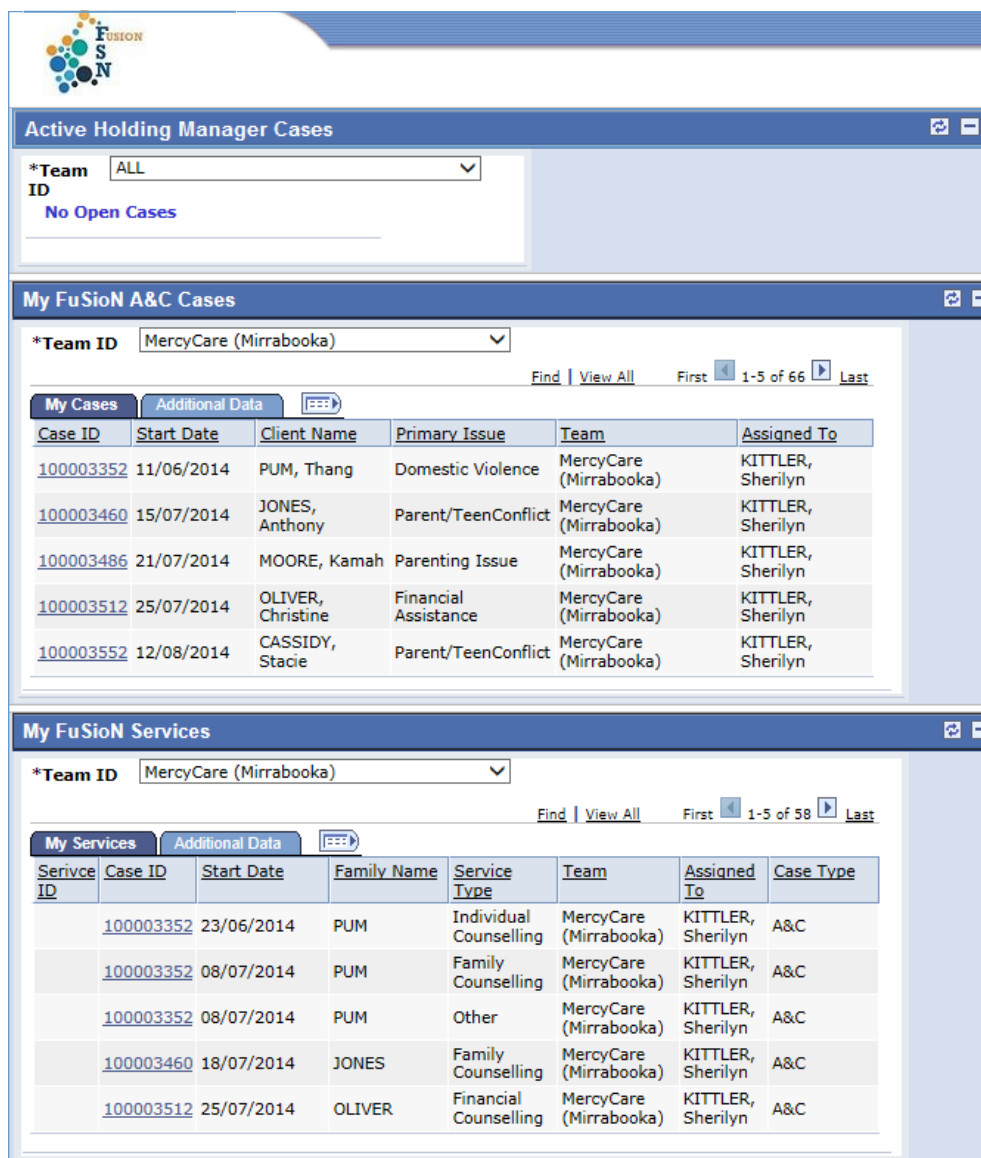
What you see on your Home page is relevant to whether you are a Lead Agency or Partner Agency.

The Lead Agency is able to view all allocated cases and services to the Network including those on active hold. Partner Agencies can view all Assessment and Co-ordination cases and services across the metro area, however with Intensive Case Management cases, can only view services that have been allocated to their agency.

Partner Agency Home Page View

Partner agencies are able to view their own:

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



Active Holding Manager Cases

*Team ID: ALL

No Open Cases

My FuSioN A&C Cases

*Team ID: MercyCare (Mirrabooka)

Find | View All | First 1-5 of 66 Last

Case ID	Start Date	Client Name	Primary Issue	Team	Assigned To
100003352	11/06/2014	PUM, Thang	Domestic Violence	MercyCare (Mirrabooka)	KITTLER, Sherilyn
100003460	15/07/2014	JONES, Anthony	Parent/TeenConflict	MercyCare (Mirrabooka)	KITTLER, Sherilyn
100003486	21/07/2014	MOORE, Kamah	Parenting Issue	MercyCare (Mirrabooka)	KITTLER, Sherilyn
100003512	25/07/2014	OLIVER, Christine	Financial Assistance	MercyCare (Mirrabooka)	KITTLER, Sherilyn
100003552	12/08/2014	CASSIDY, Stacie	Parent/TeenConflict	MercyCare (Mirrabooka)	KITTLER, Sherilyn

My FuSioN Services

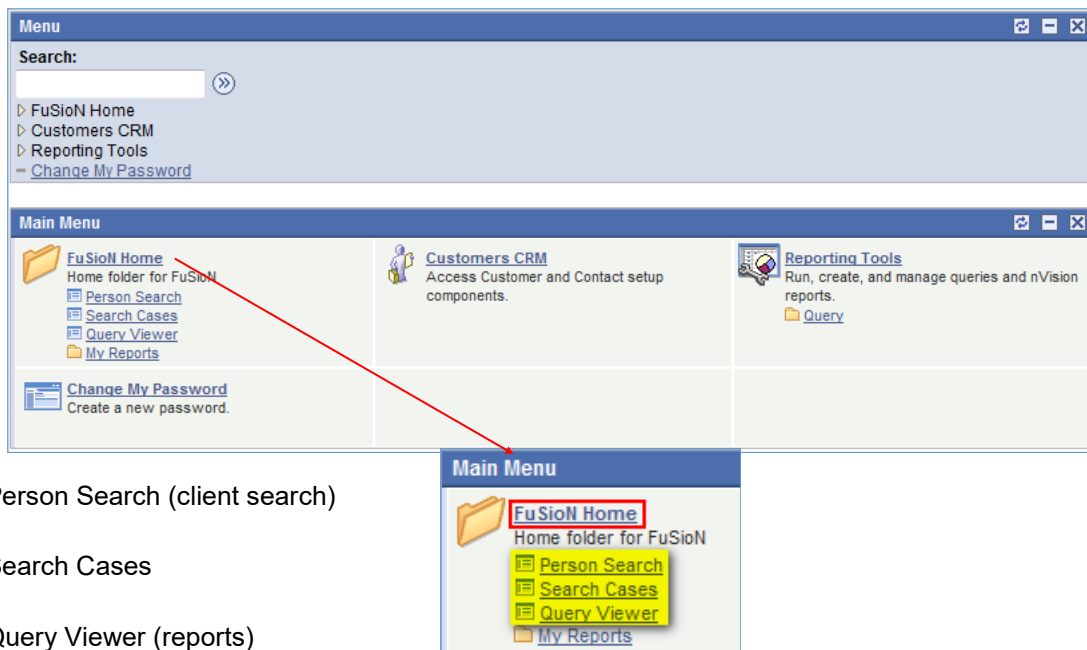
*Team ID: MercyCare (Mirrabooka)

Find | View All | First 1-5 of 58 Last

Service ID	Case ID	Start Date	Family Name	Service Type	Team	Assigned To	Case Type
	100003352	23/06/2014	PUM	Individual Counselling	MercyCare (Mirrabooka)	KITTLER, Sherilyn	A&C
	100003352	08/07/2014	PUM	Family Counselling	MercyCare (Mirrabooka)	KITTLER, Sherilyn	A&C
	100003352	08/07/2014	PUM	Other	MercyCare (Mirrabooka)	KITTLER, Sherilyn	A&C
	100003460	18/07/2014	JONES	Family Counselling	MercyCare (Mirrabooka)	KITTLER, Sherilyn	A&C
	100003512	25/07/2014	OLIVER	Financial Counselling	MercyCare (Mirrabooka)	KITTLER, Sherilyn	A&C

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)

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

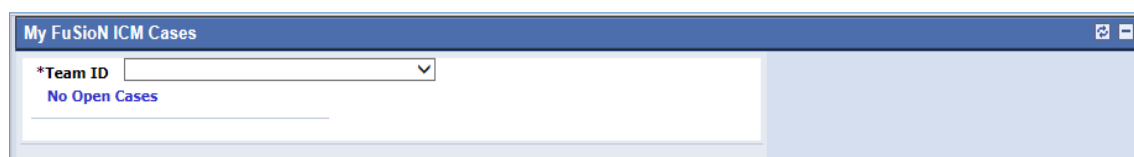
Partner Agencies are able to view their **allocated cases on Active Hold**

- **Team ID** - shows the name of your Agency
- **View All** - click to see all cases
- **Case ID** - click to go directly to the case
- **Days** - view how long the case has been on Active Hold

The screenshot shows the 'Active Holding Manager Cases' page. It has a dropdown menu for 'Team ID' set to 'ALL'. Below it, there is a 'Find' button and a 'View All' link. A table titled 'My Held Cases' displays the following data:

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

Partner Agencies can view only their allocated Assessment & Co-ordination Cases:

- **Team ID** - shows the name of your Agency
- **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.

My FuSioN A&C Cases

*Team ID: MercyCare (Mirrabooka)

Find | **View All** | First 1-5 of 66 Last

My Cases | **Additional Data** | [Show All Columns]

Case ID	Start Date	Client Name	Primary Issue	Team	Assigned To
100003352	11/06/2014	PUM, Thang	Domestic Violence	MercyCare (Mirrabooka)	KITTLER, Sherilyn
100003460	15/07/2014	JONES, Anthony	Parent/TeenConflict	MercyCare (Mirrabooka)	KITTLER, Sherilyn
100003486	21/07/2014	MOORE, Kamah	Parenting Issue	MercyCare (Mirrabooka)	KITTLER, Sherilyn
100003512	25/07/2014	OLIVER, Christine	Financial Assistance	MercyCare (Mirrabooka)	KITTLER, Sherilyn
100003552	12/08/2014	CASSIDY, Stacie	Parent/TeenConflict	MercyCare (Mirrabooka)	KITTLER, Sherilyn

My FuSioN Services

Partner Agencies can view only their allocated services:

- **Service ID** - click to go directly to the service screen
- **Case Type Column** - shows if the service is being provided to an Assessment & Coordination Case or an Intensive Case Management Case

My FuSioN Services

*Team ID: ALL

Find | View 5 | First 1-23 of 23 Last

[Show All Columns]

Service ID	Case ID	Start Date	Family Name	Service Type	Team	Assigned To	Case Type	Hold Status	Days
100001533	100001531	25/08/2015	XXBROWN	Housing Support	UNITING CARE WEST (FFSN)	63, Trainee	A&C	Y	1541
100001530	100001267	23/08/2015	THOMSON	Youth Programs	ARMADALE-PARTNER 2	SERVINA, Michel	A&C	N	
100001523	100001343	21/08/2015	YOUNG	Youth Programs	DUNGEON YOUTH CENTRE (MFSN)		A&C	N	
100001525	100001468	21/08/2015	REYNOLD	Financial Counselling	CENTACARE FAMILY SERVICES (MFSN)		A&C	N	
100001524	100001467	21/08/2015	NALLURA	Parenting	MercyCare (MFSN)	59, Trainee	A&C	Y	1545

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



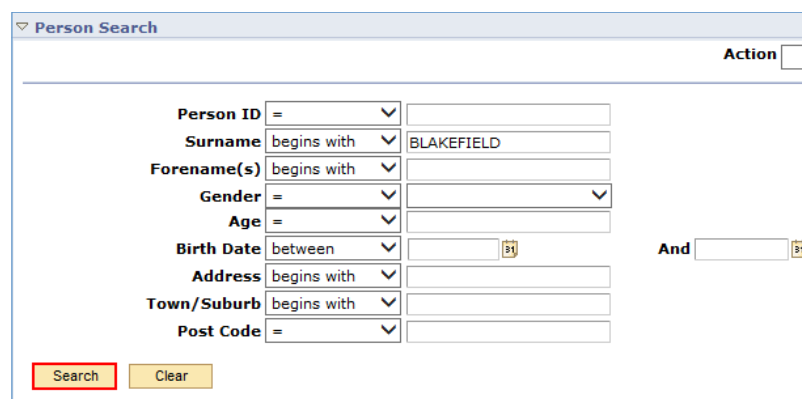
Searching for a person attached to an ICM case will return a search result to show they are in the system, however no case information will be visible.

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





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 for cases that belong to your Family Support Network.

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

- **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

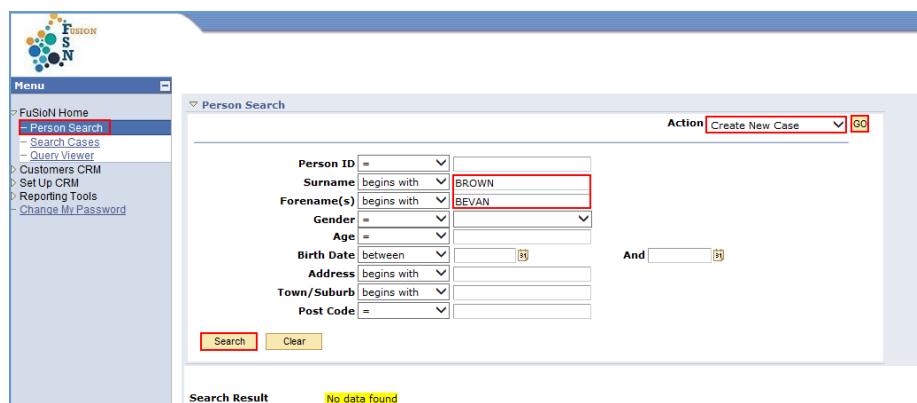
- 1) Search for the following Case ID 100001316 and find the Person and Primary Issue:
 Person:
 Primary Issue:
- 2) Search for Pascal Fuentes, Primary Issue; Financial Assistance, and find the following:
 Assigned To:
 Case ID:
 Date Created:
- 3) Search for Surname; Thomas, and Referrer Type; Individual,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

Activity 3. Create a New Case

Scenario: Your agency is a Partner Agency to the Family Support Network (FSN) and has been working with Bevan, the sole carer of two children regarding his housing issues. Whilst working with Bevan it has been identified that he has some other issues that he would like help with. These issues include; concerns around the custody of his children requiring legal advice, and worries for his children's mental health due to parental separation requiring child counselling. Unfortunately your Agency does not provide either of these services. You ask Bevan if he would like to be linked into the FSN to get help with these other issues and he consents. As a Partner Agency you will link this family into the FSN through the "no wrong door policy."

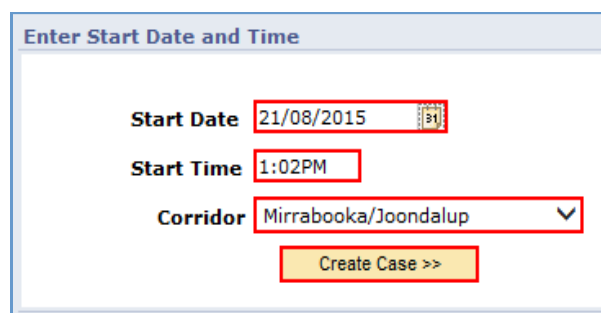
Use Your **Family Name** to create a new case:

- 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 **Mirraboooka/Joondalup**
- Press **Create Case >>**



Referral Information

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



Search for your Trainee Login

- Surname: enter **your trainee login number**
- Press **Look Up**
- Click on the **Person ID** in the Search Results

Member Selection

Surname begins with

Forename begins with

Assigned To begins with

Search Results Find First 1 of 1

Person ID	Surname	Forename	Assigned To
450354	62	TRAINEE	62, TRAINEE

- Role: Click on the **magnifying glass** and select **Social Welfare Professional**
- Referral Date & Time: leave the **current date and time**

Referral Information

*Type Network

Role

*Referral Date 21/08/2015 *Time

- Contact Method: select **04-Office**
- Primary Issue: select **Family Support**
- Status: defaults to **Open**

Contact Method

Primary Issue

*Status

Complete Summary

- Summary: enter **Linking Bevan and his family into the FSN for counselling and legal advice**
- Assessment: enter **Bevan's children, Michael and Paul, require counselling to address the trauma they have experienced due to parental separation. Bevan requires Legal advice from the family law court to address his custody concerns. The family are currently linked in with our agency and are working through their housing issue.**
- Are there any children identified in this case?: select **Yes**
- Number of Children: enter **2**
- Are there other agencies involved?: select **Yes**

***Summary**

Linking Bevan and his family into the FSN for counselling and legal advice

Assessment

Bevan's children, Michael and Paul, require counselling to address the trauma they have experienced due to parental separation. Bevan requires Legal advice from the family law court to address his custody concerns. The family are currently linked in with our agency and are working through their housing issue.

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
- Click on **Person ID** 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 **Mirraboooka**
- State: enter **WA**
- Press **Search Existing Address**

Address Information

*Country Australia

Address 1 20 Ravenswood

Address 2

Town / Suburb Mirraboooka

*State WA Western Australia

Post Code

Search Existing Address

Address Search Result List

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

Search Results

Find View All First 1 of 1 Last

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**

- 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

The **Person Information** page displays

- Press **Save**
- Client Consent: select **Yes**
- Living Arrangement at Referral Commencement: select **Not applicable - Adult**

- Issue: select **Family Support**
- Detail: select **Immediate Family**
- Press **+ sign** to add a new row
- Issue: select **Other Issue**
- Detail: select **Legal/Justice**
- Press **+ sign** to add a new row
- Issue: select **Housing**

- Detail: select **Threat of Eviction**

- Press **Save**

*Person ID 451011 Surname XXBROWN Referral Age 34 Aboriginal Aboriginal
 Gender Male Forename Bevan Current Age 34 CaLD No
 Client Consent Yes Primary Address 20 Ravenswood Drive, Fremantle, WA, 6160, AUS Phone 0413 153 668 Alert Exists

Living Arrangement at Referral Commencement : Not applicable - Adult
 Living Arrangement at Case Closure :

Issue Details

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

Note: this is the minimum amount of information that is required to be able to save and generate a Case ID number.

Case : (100001526) History Select One...

Save

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

Referral Information *Summary



Add New Person (Child 1)

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

*Person ID 451011 Surname XXBROWN Referral Age 34 Aboriginal Aboriginal
 Gender Male Forename Bevan Current Age 34 CaLD No
 Client Consent Yes Primary Address 20 Ravenswood Drive, Fremantle, WA, 6160, AUS Phone 0413 153 668 Alert Exists

Living Arrangement at Referral Commencement : Not applicable - Adult
 Living Arrangement at Case Closure :

Issue Details

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

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

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

Search For Person

Search

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

Search Clear Cancel Add Person

No search results were found.

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 **Family Support**
- Detail: select **Immediate Family**
- Press **+ sign** to add a new row
- Issue: select **Housing**
- Detail: select **Threat of Eviction**
- 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**
- Press **Search**
- **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: 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 **Family Support**

- Detail: select **Immediate Family**
- Press **+ sign** to add a new row
- Issue: select **Housing**
- Detail: select **Threat of Eviction**
- Press **Save**

*Person ID 451013 Surname XXBROWN Referral Age 7 Aboriginal Aboriginal
 Gender Male Forename Paul Current Age 10 CaLD No
 Client Consent Yes Primary Address 20 Ravenswood Drive, Fremantle, Phone WA, 6160, AUS

Living Arrangement at Referral Commencement : Family care – child living with parents
 Living Arrangement at Case Closure :

Issue Details

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



Copy Primary Address to All Family Members

Ensure you have pressed save first

- Press **Copy Primary Address**

Person Find First 1-3 of 3 Last

*Person ID 451011 Surname XXBROWN Referral Age 31 Aboriginal Aboriginal
 Gender Male Forename Bevan Current Age 34 CaLD No
 Client Consent Yes Primary Address 20 Ravenswood Drive, Fremantle, Phone 0413 153 668 WA, 6160, AUS

Living Arrangement at Referral Commencement : Not applicable - Adult
 Living Arrangement at Case Closure :

Issue Details

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

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

Copy Primary Address - Person Details Find First 1-3 of 3 Last

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"/>	451011	XXBROWN	Bevan	21/08/2015	Male	15/04/1984	31	20 Ravenswood Drive, Fremantle, WA, 6160, AUS	0413 153 668
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	451012	XXBROWN	Michael	21/08/2015	Male	10/02/2004	11		
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	451013	XXBROWN	Paul	21/08/2015	Male	15/06/2008	7		

OK Cancel

Activity 4. Attachments and Notes

Scenario During the Initial Screening and Assessment process Bevan has signed a Consent Form. An email has also been sent to the Lead Agency advising that a new family has been created on Fusion.

In training you will now attach the Consent Form to the case. Using the Notes function you will also record that an email to the Lead Agency has been sent .

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 a date of '23/04/15 10:07AM AWST'. Below this is the 'Add a Note' form. The 'Added' field is set to '24/08/2015 12:00PM 80, Trainee'. The '*Subject' field contains 'Bevan XXBrown, Consent Form, 19.08.15'. The 'Details' field contains 'Please see Attached'. At the bottom of the form are two buttons: 'Apply Note' and 'Add an Attachment'.

- 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 has a text field containing 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 Last
Subject	Attachment(s)	Added By	Date Added
Bevan XXBrown, Consent Form, 21.08.15	1	62, Trainee	08/05/17 1:02PM AWST

Add a Note

- Press **Add Note**

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

- Subject: enter **Bevan Your Family Name, Email to Lead Agency New Case, current date**
- Details: enter **An email was sent to the Lead Agency Alliance Manager on the current date. Email details: New Case created in Fusion, Case ID 100001567, to be discussed at the next allocations meeting.**
- Press **Apply Note**
- Press **Save**

Add a Note

Added 12/05/2017 1:22PM 72, Trainee

***Subject** Bevan XXBrown, Email to Lead Agency New Case, 21.08.15

Details An email was sent to the Lead Agency Alliance Manager on the 21.08.15. Email details: New Case created in FuSioN, Case ID 100001567, to be discussed at the next allocations meeting.

Two items now display in the Notes Summary:

Case : (100006480)

History

Select One...

Save

Case

Services

Brief Interventions

Case Management

Review

Notes (2)

Related Activities

Notes Summary

Find

View All

First

1-2 of 2

Last

Subject

Attachment(s)

Added By

Date Added

Bevan XXBrown, Email to Agency New Case, 21.08.15

1

VINCENT, Julie

20/07/18 1:32PM AWST

Bevan XXBrown, Consent Form, 21.08.15

1

VINCENT, Julie

20/07/18 1:30PM AWST

To view an attachment:

- Click on the **Consent Form** in the **Notes Summary** and the **Note Details** box opens
- Click on **File Name**

Activity 5. Case Management Allocation

Scenario: The case will now be allocated to the Lead Agency. An allocations meeting will be scheduled with the FSN Partner Agencies to discuss what services are available and appropriate for the family. Your Partner Agency will continue to work with Bevan to help resolve the family's housing issue.

In training you will now allocate the case to the Lead Agency and add yourself to the case as the Case Co-Worker.

- 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 2
- Press **Save**

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

Case Manager Allocation

- Press **Add Case Manager** (Note: Do not use the Update Case Manager button as this will override the current case management details)

Network Agency	Stage	Assigned To	Role	Start Date	End Date	Hours
MIRRABOOKA PARTNER AGENCY 1	Initial Screening	62, Trainee	Case Manager	21/08/2015		2.00

- Network Agency: select relevant **Mercycare MFSN**
- Assigned To: click on magnifying glass and select your **Alliance Manager** (to be advised by your facilitator)
- Role: select **Case Manager**
- Stage: select **Assessment**
- Start Date: auto-populates to current date
- Press **Apply**
- Press **Save**

Case Manager Allocation

Network Agency: MercyCare (Mirrabooka) Stage: Assessment

Assigned To: LEWIS, Josh

*Role: Case Manager Start Date: 21/08/2015

Apply Cancel

Adding a Co-Worker

Co-Worker Details:

- Network Agency: select relevant **Mirrabooka Partner Agency 1**
- Stage: select **Assessment**
- Assigned To: click on the magnifying glass and select **your trainee login**
- Start Date: auto-populates to current date
- Press **Save**

The screenshot shows the 'Co-Worker Details' form with the 'Responsibility' tab selected. The form contains the following fields and values:

*Network Agency	*Stage	*Assigned To	Role	*Start Date	End Date	Hours
MIRRABOOKA PARTNER AGENCY 1	Assessment	40, Trainee	Co-Worker	12/09/2018		

Below the table, there is an 'Audit History' section and a 'Save' button. The 'Save' button is highlighted with a red box.

Activity 6. Case Management Entry Questions

Scenario: As part of the Assessment stage the Partner Agency will also answer the Case Manager Entry Questions.

In training you will now go to the Outcomes tab and record the responses to the Case Manager Entry

- Click on the **Outcomes** tab

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**

Case : (100001621) History Select One... ▼

Save

Case \ Services \ Brief Interventions \ Case Management \ Review \ **Outcomes** \ Notes (0) \ ▶

Case Plan Goals [Add]

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	<input type="text"/>				
2 How many case plan goals are progressing?	<input type="text"/>				
3 How many case plan goals have been completed?	<input type="text"/>				

Case Manager Questions \ Client Exit Interview

Entry Questions \ Audit Details [Add]

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 ▼



FACILITATOR TO ALLOCATE CASE MANAGEMENT AND SERVICES TO PARTNER AGENCIES

Activity 7. Home Page: View Case and Service

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 the referring agency you have talked through the service options with the family and they agree to engage with the services being offered. The Lead Agency has allocated these services to the relevant Partner and Non Partner Agencies. The family has been referred to your agency with their issue of housing.

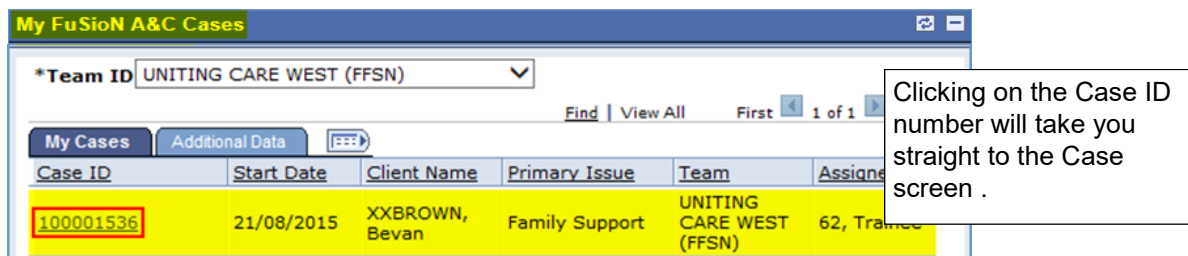
In training you will now access Bevan's Case and the Housing Service via the Home Page

- Click on **Home**



My Fusion A&C Cases

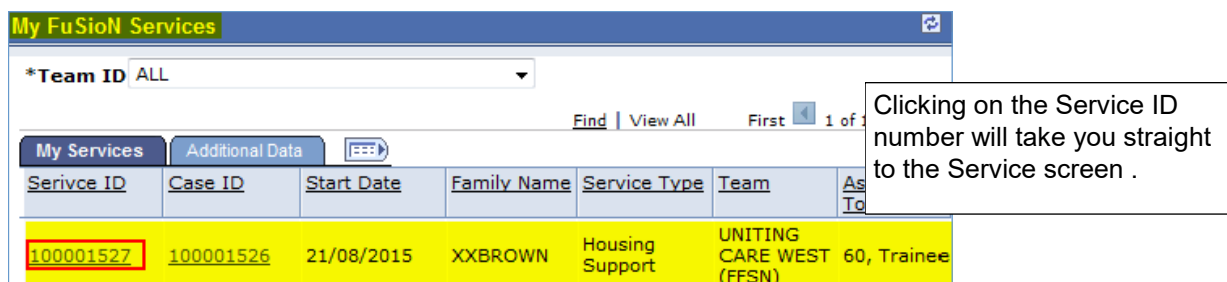
Your allocated case now displays under **My Fusion A&C Cases** (clicking on the **Case ID** link will take you to the **Case**)



Case ID	Start Date	Client Name	Primary Issue	Team	Assigned To
100001536	21/08/2015	XXBROWN, Bevan	Family Support	UNITING CARE WEST (FFSN)	62, Trainee

My Fusion Services

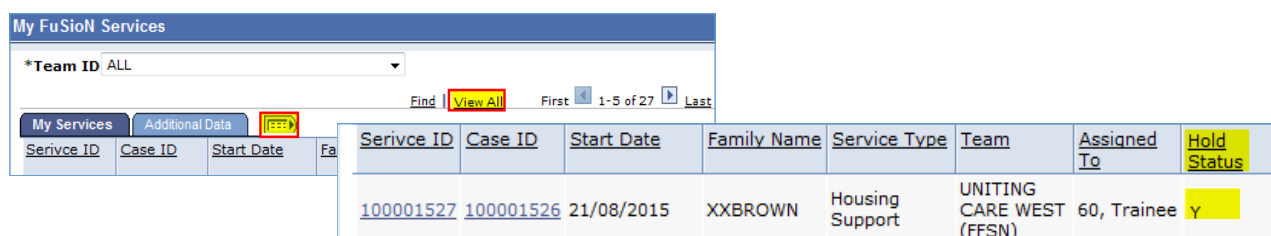
Your allocated service now display under **My Fusion Services** (Clicking on the **Service ID** link will take you to the **Service Activity**)



Service ID	Case ID	Start Date	Family Name	Service Type	Team	Assigned To
100001527	100001526	21/08/2015	XXBROWN	Housing Support	UNITING CARE WEST (FFSN)	60, Trainee

Remember to click on the **Show All Columns** icon & **View All** if more than 5 Services.

Active Hold: If there is a waitlist for a Partner Agency Service then the Hold Status will display as yes 'Y'. This means the family is being actively supported by the Lead Agency whilst they wait for the service to commence.



Service ID	Case ID	Start Date	Family Name	Service Type	Team	Assigned To	Hold Status
100001527	100001526	21/08/2015	XXBROWN	Housing Support	UNITING CARE WEST (FFSN)	60, Trainee	Y

Activity 8. 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 number of Case Plan Goals and attach the Case Plan

From the Home Page

- Click on the your **Case ID** number
- 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 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 '0' entered. The third row, '3 How many case plan goals have been completed?', also has '0' entered. All input fields are highlighted with red rectangles.

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				

Attach Case Plan

- Click on the **Notes** tab
- Press **Add Note**
- Subject: enter **Bevan Your Family Name, Case Plan, current date**
- Details: enter **Please see attached**

The screenshot shows the 'Notes' tab in a software interface. At the top, there is a 'Notes Summary' section with a table listing existing notes. Below this, there is an 'Add Note' button. At the bottom, there is a 'Note Details' section with fields for 'Added', '*Subject', and 'Details'. The 'Subject' field contains 'Bevan XXBrown, Case Plan, 04.12.18' and the 'Details' field contains 'Please see attached'. Both fields are highlighted with red rectangles.

Subject	Attachment(s)	Added By	Date Added
Bevan XXBrown, Case Plan, 04.12.18		40, Trainee	04/12/18 12:57PM AWST
Bevan XXBrown, Email to Lead Agency New Case, 04.12.18		40, Trainee	04/12/18 12:56PM AWST
Bevan XXBrown, Consent Form, 04.12.18		40, Trainee	04/12/18 10:07AM AWST

L. **Add Note**

Note Details

Added 04/12/2018 12:57PM 40, Trainee

***Subject** Bevan XXBrown, Case Plan, 04.12.18

Details Please see attached

- Click **Add an Attachment**
- Press **Browse** to select a document
- Press **Upload**

The screenshot shows a 'Note Details' form. At the top, it says 'Added 04/12/2018 12:57PM 40, Trainee'. Below this is a text field for '*Subject' containing 'Bevan XXBrown, Case Plan, 04.12.18'. Underneath is a larger text area for 'Details' containing 'Please see attached'. At the bottom left, there are two buttons: 'Apply Note' and 'Add an Attachment'. The 'Add an Attachment' button is highlighted with a red rectangular box.

- Attachments / Description: leave blank
- Press **Apply Note**
- Press **Save**

This screenshot shows the same 'Note Details' form as before, but with additional elements. Below the 'Details' text area, there are two buttons: 'Apply Note' and 'Add an Attachment'. Both of these buttons are now highlighted with red rectangular boxes. Below the buttons is a section titled 'Audit History' which is currently empty. At the very bottom left, there is a 'Save' button, also highlighted with a red box. At the bottom right, there is a link that says 'Top of Page'.

Activity 9. Service Provision

Scenario: Contact has been made with Bevan's property manager. He has agreed to allow the family to stay in the house on the condition that Bevan 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 also has an interview for a job next week and has applied for a second job.

In training you will now complete the Service Assessment Details and attach the letter from the property manager to Bevan's case.

Access My FuSioN Services via Home Page

- Click on the **Service ID** link

My FuSioN Services							
*Team ID		ALL					
		Find View All First 1-4 of 4 Last					
Service ID	Case ID	Start Date	Family Name	Service Type	Team	Assigned To	Case Type
100001523	100001343	21/08/2015	YOUNG	Youth Programs	DUNGEON YOUTH CENTRE (MFSN)		A&C
100001524	100001467	21/08/2015	NALLURA	Parenting	MercyCare (MFSN)	59, Trainee	A&C
100001525	100001468	21/08/2015	REYNOLD	Financial Counselling	CENTACARE FAMILY SERVICES (MFSN)		A&C
100001576	100001568	25/08/2015	XXBROWN	Housing Support	MIRRABOOKA PARTNER AGENCY 1	41, TRAINEE	A&C

Service Assessment Details

- Active Holding? End Date: Enter **current date**
- Assessment: delete text & enter **Case Manager Your Family 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 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**

Service ID : (100001303)

Save

Main Information Brief Interventions Notes (0) 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

Active Holding ?

Start Date 19/02/2014 End Date 19/04/2014

*Start Date 19/02/2014

Service Type Housing Support

*Assigned To DONALD, Rosemary

*Provider UNITING CARE WEST (AFSN)

Status Open

Review Date

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 facilitator*)
- Double click on the **Document Name**
- Press **Upload**
- 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

Activity 10. Close the Service Provision

Scenario: Negotiations with Bevan's property manager means the family can stay in the house and the threat of eviction has now been resolved. The service has been successful and the Service Provision can now be closed.

In training you will now close the service provision

- 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 **2**
- Press **Save**

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 for Bevan of \$50

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** 15/05/2015

***Start Date** 25/08/2015

Service Type Housing Support

***Assigned To** VINCENT, Julie

***Provider** MercyCare (Mirrabooka)

Status Closed

Review Date 25/08/2015

Outcome

Outcome Achieved

Decision Date 25/08/2015

Intensity (hours) 2.00

Note: As part of a Service Provision Closure you would also attach a completed Service Closure form to the Case.

Activity 11. Case 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 **Transfer to "Parent Case"** hyperlink
- Click on the **Services** tab
- Check for any other **open services**, if all services have an end date proceed to **Case Closure Review**

Service Type	Status	External	Start Date	End Date	
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

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 12. 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, showing '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, showing '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, showing 'Family care - child living with parents'.

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

- Press **Save**

Activity 13. 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.

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 for the response. The 'Exit Questions' section has one question with a dropdown menu for the response.

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>Entry Questions Audit Details [Icon]</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>Exit Questions Audit Details [Icon]</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	▼
<div>Audit History</div>		
<div>Save</div>		Top of Page

Client Exit Interview

- Click the **Client Exit Interview** hyperlink

Case Manager Questions		Client Exit Interview
<div>Exit Questions Audit Details [Icon]</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 14. Re-Allocate Case Management to the Lead Agency

Scenario: Your Partner Agency has successfully resolved Bevan and his family's housing issue. You have 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. Your Partner Agency emails 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.

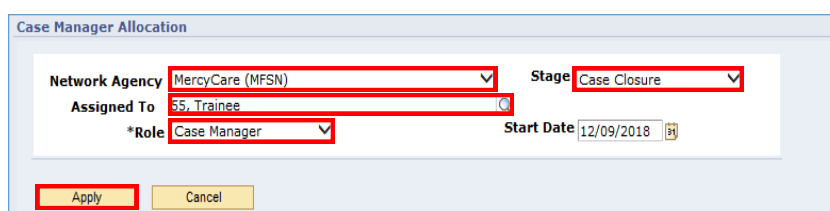
When re-allocating Case Management to the Lead Agency an email would be sent to the Alliance Manager advising that the Service has been closed and Case Management has been re-allocated back to them.

When providing a service to an Intensive Case Management case, you will only have access to the service screens and will not be able to review case specific information. Case Management will remain with the Lead Agency's Intensive Case Manager and the Partner Agency will provide the service. When closing an Intensive Case Management Service you will not complete a case review or re-allocate the case management back to the Lead Agency.

- Click on the **Case Management** tab

Assessment Hours

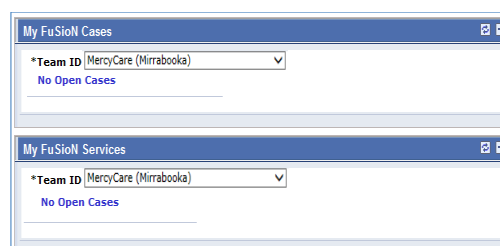
- Hours: enter **1**
- Press **Add Case Manager**
- Network Agency: select **MercyCare MFSN**
- Assigned To: click on magnifying glass and select an **Alliance Manager**
- Role: select **Case Manager**
- Stage: select **Case Closure**
- Start Date: leave as **current date**
- Press **Apply**
- Press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



Home Page: My FuSioN
Cases and My FuSioN Services

A&C

- Click on **Case Home** (at the top of the screen)
- There should be no cases or services displayed




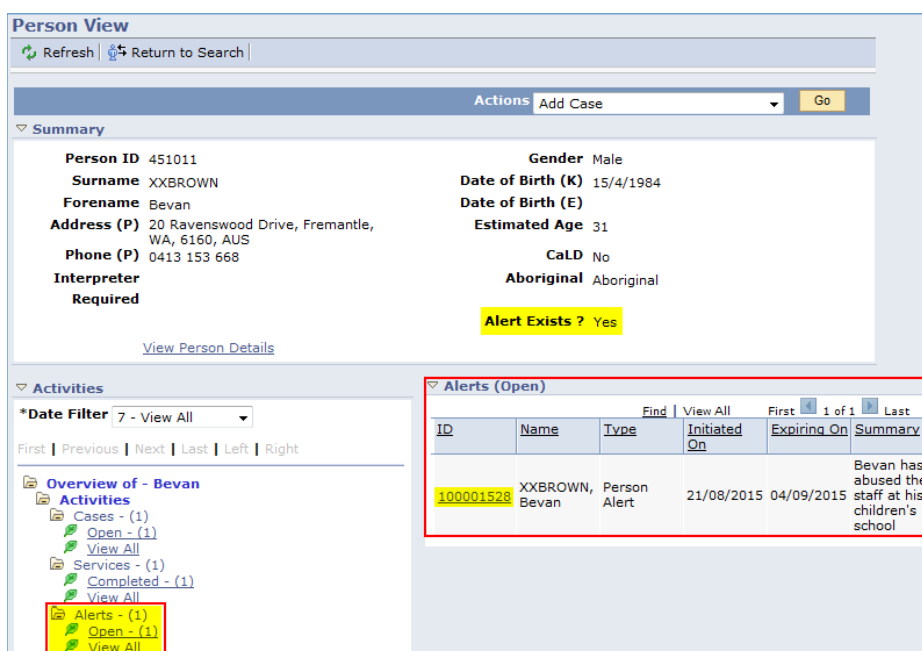
Appendix I. Alerts

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).

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.

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

[View Person Details](#)

Activities

*Date Filter: 7 - View All

First | Previous | Next | Last | Left | Right

Overview of - Bevan

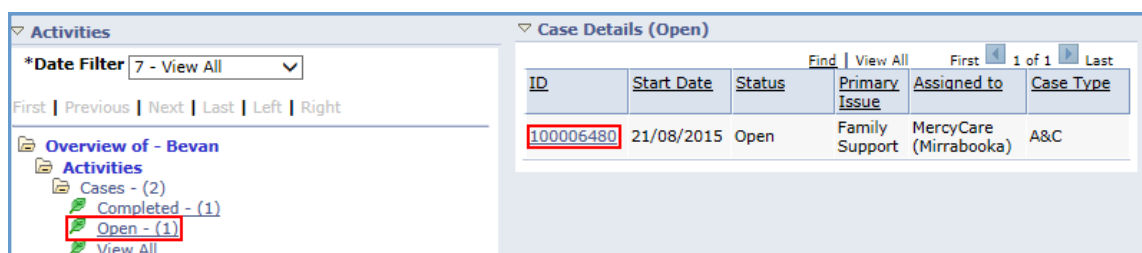
- Cases - (1)
 - Open - (1) [View All]
- Services - (1)
 - Completed - (1) [View All]
- Alerts - (1)**
 - Open - (1) [View All]

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

- Cases - (2)**
 - Completed - (1) [View All]
 - 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 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

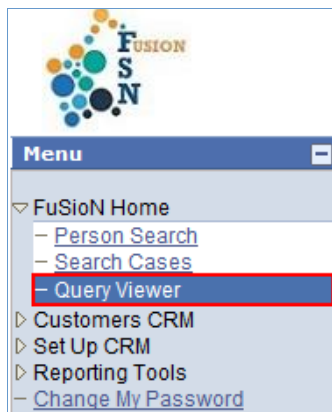
Issue Details

*Issue	*Detail			
Housing	Threat of Eviction	+	-	
Copy Primary Address	Other Issue	Legal/Justice	+	-

II. Query Viewer

All FSN staff can access the **Query Viewer** reporting function. There is a User Guide on the 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 Name	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**

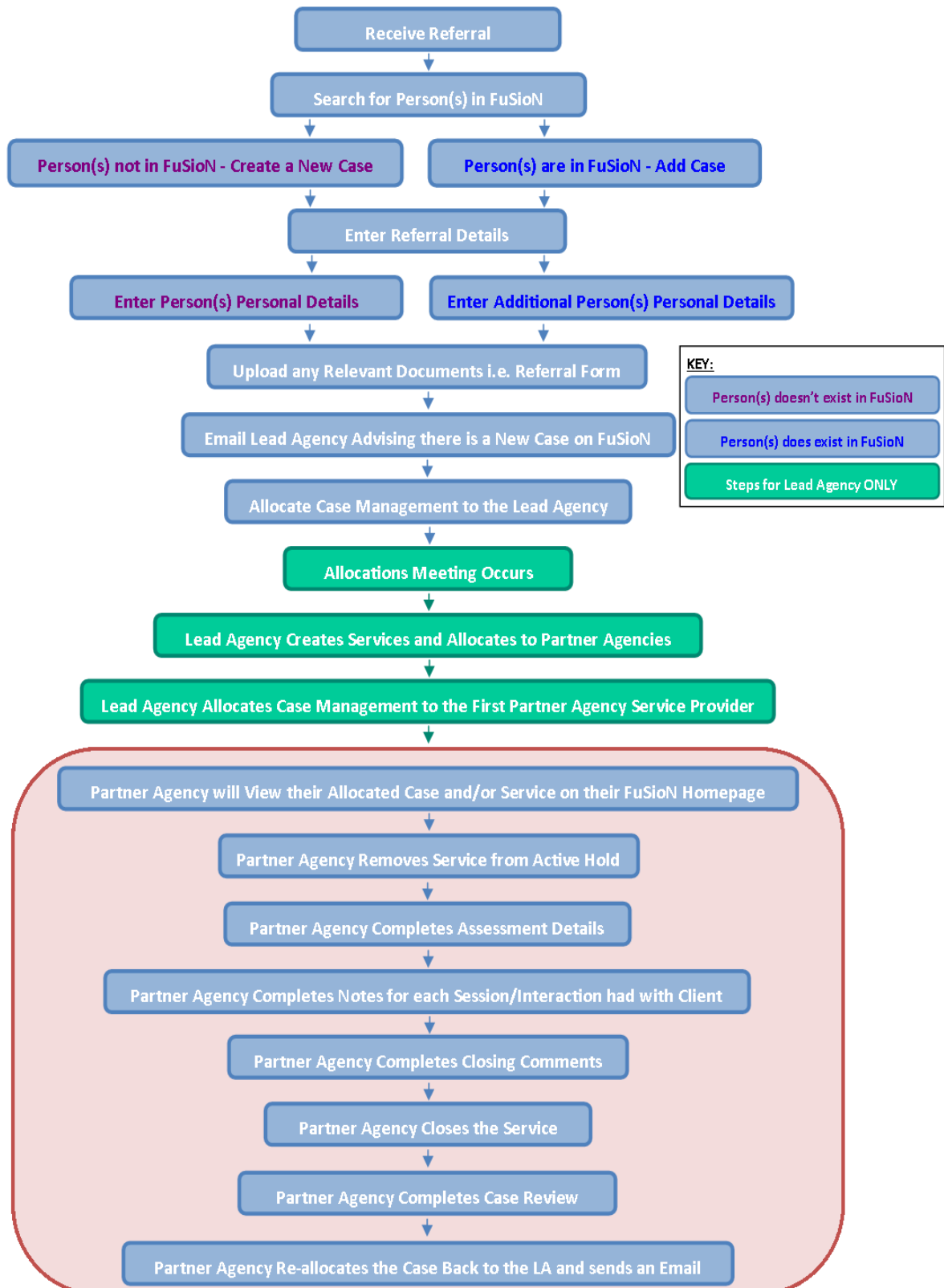
III. Fusion Quiz

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?

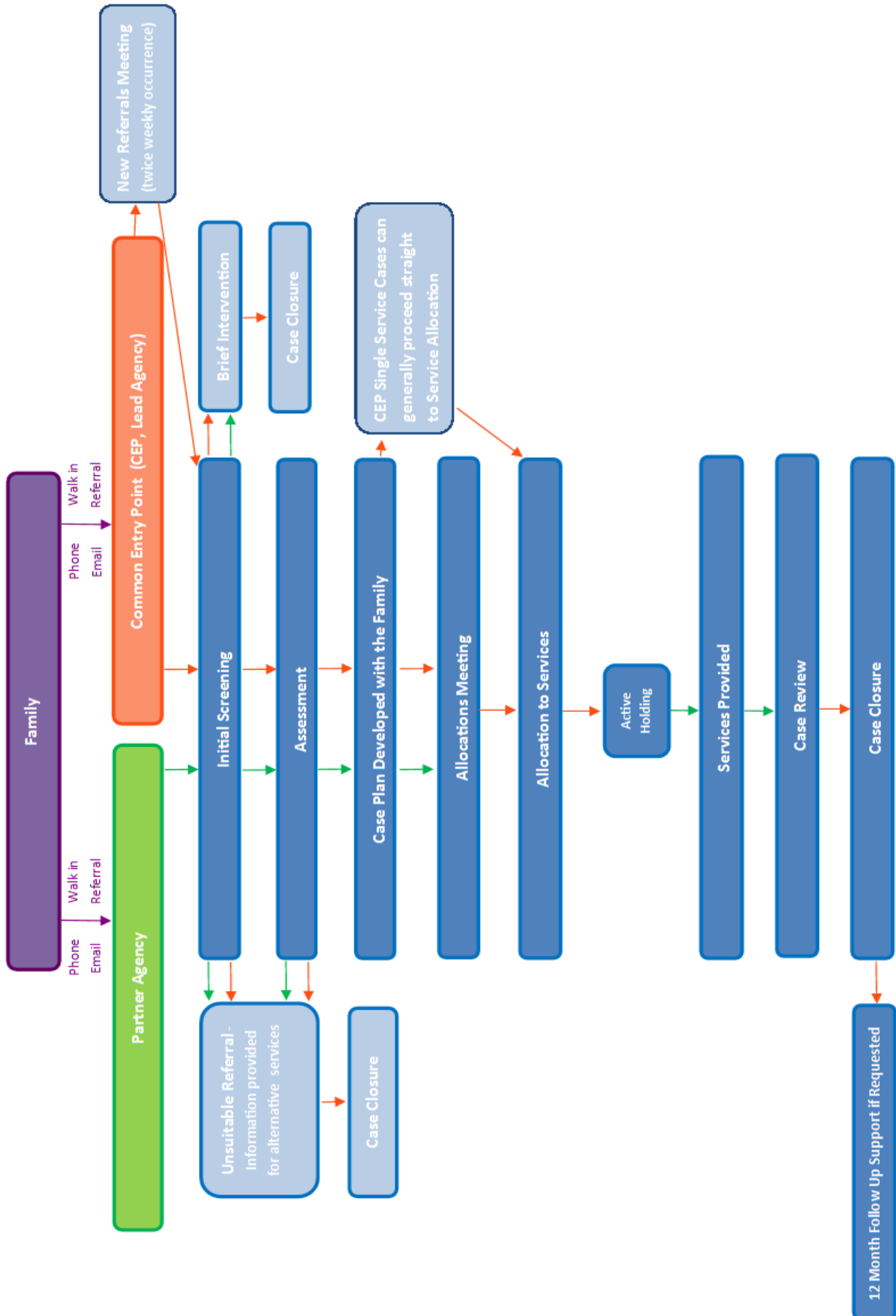
FAMILY SUPPORT NETWORK PARTNER AGENCY FUSION RECORDING FLOW

PLEASE NOTE: Referrals can be received by any Partner Agency (PA). For example if a PA client establishes that they require other services, the PA can link that client with the Family Support Network (FSN) to receive these other services. This type of referral can be entered into Fusion by the PA. *Please refer to the recording steps in blue.*


















Referrals can also be received directly by the Lead Agency (LA) either by a client themselves or by another organisation i.e. a school or hospital. These referrals will be entered onto Fusion by the LA. For these referrals the Partner Agency (PA) would start recording in Fusion only when the case and/or service is allocated to them. *Please refer to only the recording steps in the red box below.*



V. Family Support Network: Client Workflow



VI. 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

VII. 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 or 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 or 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

FREMANTLE/ROCKINGHAM FAMILY SUPPORT NETWORK

Helen Clothier, Child Protection Leader

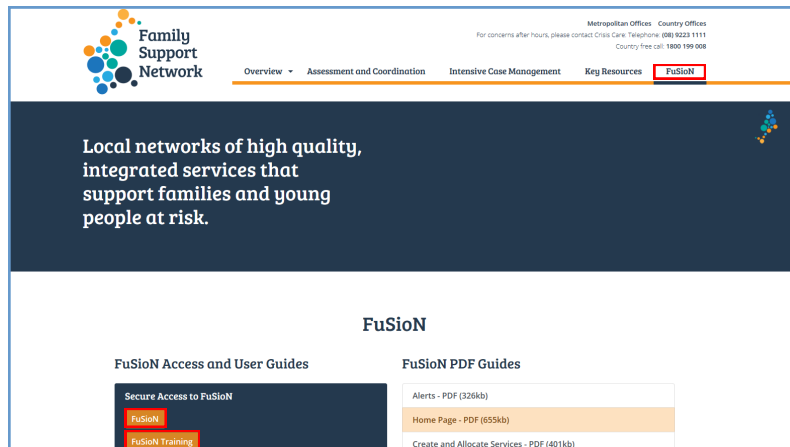
Kerry Wadsworth, Alliance Manager

Ph: 1300 951 190

Email: 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