



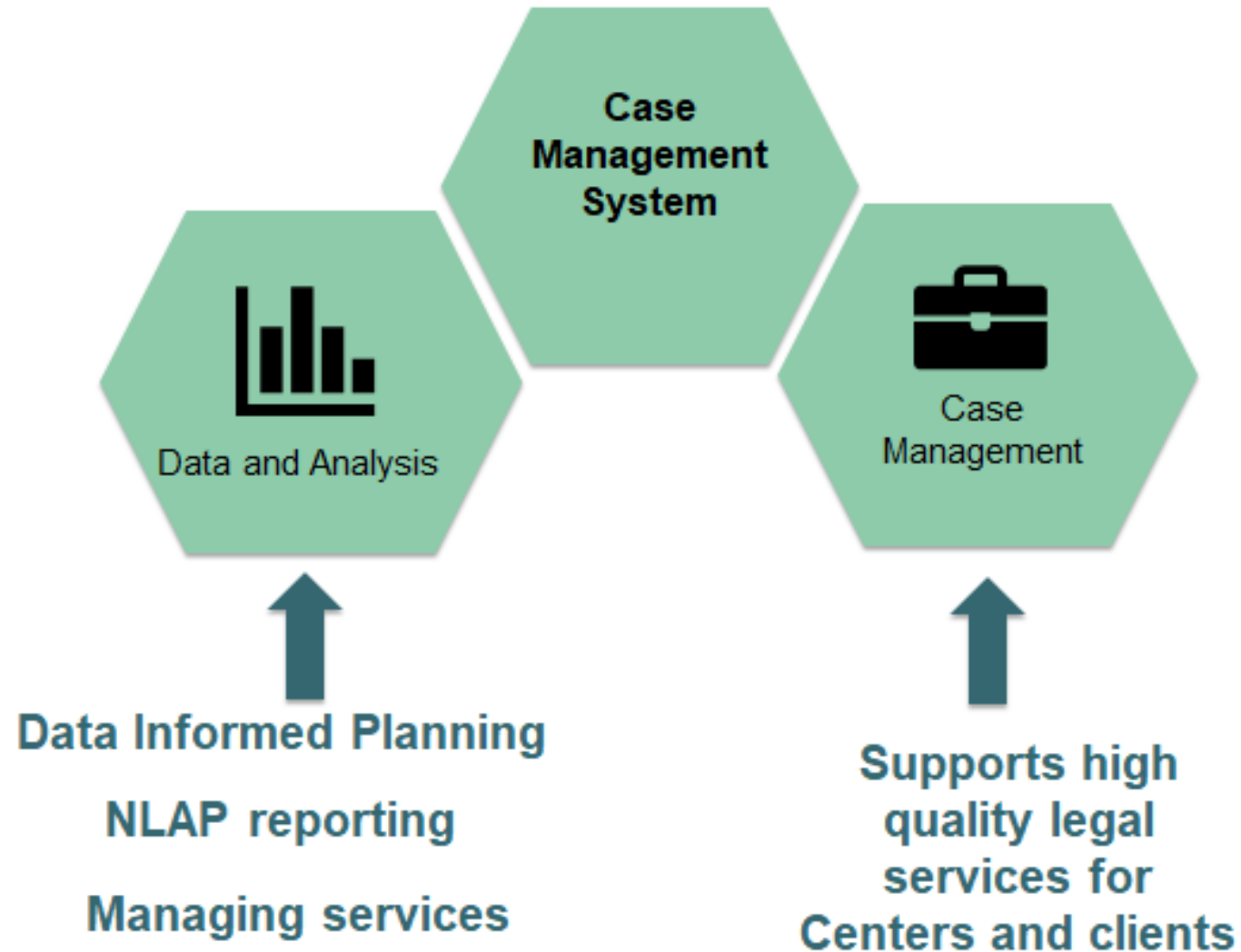
Case Management Systems

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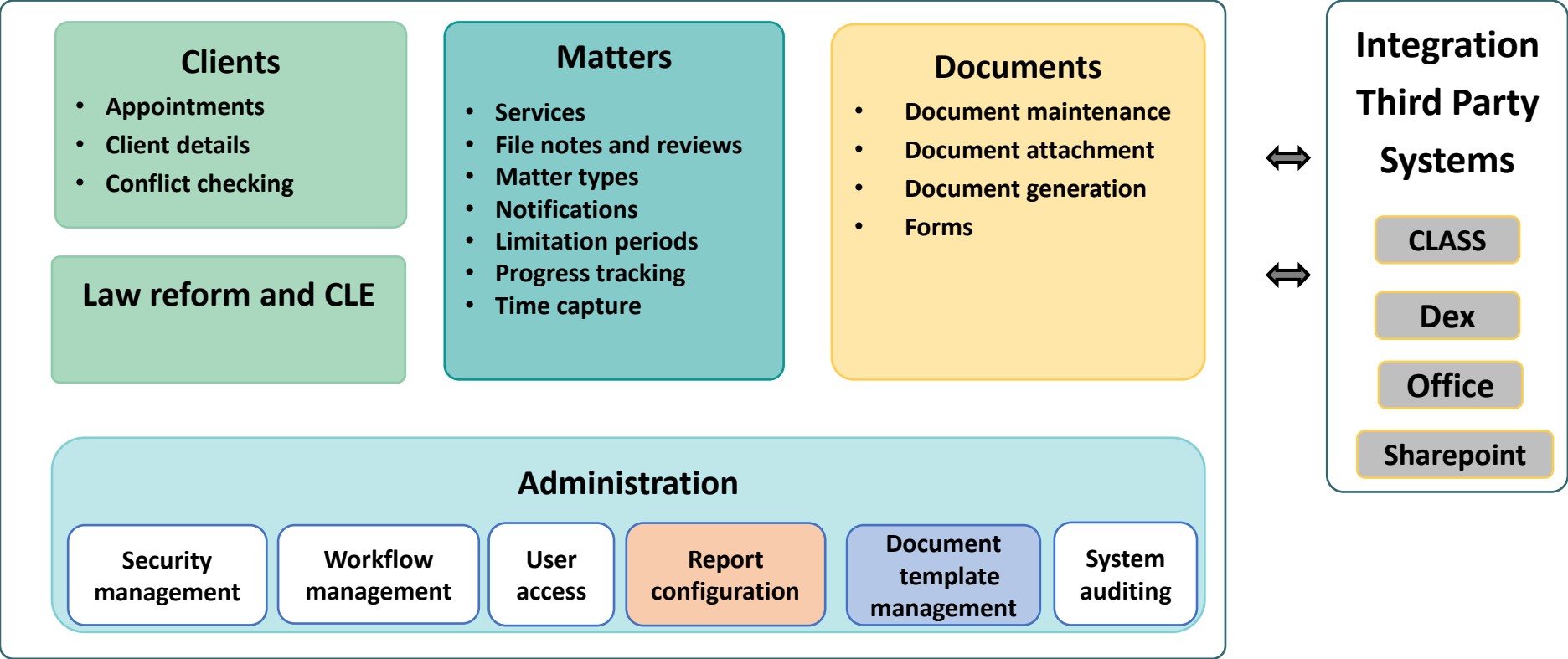
Overview

- **Snapshot of Case Management Systems used by CLCs**
- **National Data Standards**
- **Data Import Tool**

What is a case management system?



Case Management Functions



Case management system – example of requirements

Area	Requirement
Client	Ability to create a new Client
Client	Provide a dashboard for the management of Client Details
Client	Record Client Personal Details – Country of Birth
Client	Record Client Personal Details – Year Arrival in Australia
Client	Record Client Personal Details – Language spoken at home
Client	Record Client Personal Details – Interpreter Required
Client	Record Client Contact Details – Address
Client	Record Client Contact Details – Email
Client	Record Client Contact Details – Phone
Client	Ability to view a list of Active Clients
Client	Record Client Children Details – Number of Children Dependent
Client	Record Client Children Details (multiple children)
Client	Record Client Children Details – First Name
Client	Record Client Children Details – Last Name
Client	Record Client Children Details – DOB
Manage Work	Provide a dashboard for the management of Cases
Manage Work	View a list of Open and Closed Work
Manage Work	View a list of Work assigned to a staff member
Manage Work	Record Legal Advice – Service Provided
Manage Work	Record Legal Advice – Service Location
Manage Work	Record Legal Advice – Solicitor
Manage Work	Record Legal Advice – Office
Manage Work	Record Legal Advice – Client Referral
Manage Work	Record Legal Advice – File Notes
Manage Work	Record Legal Advice - Attachment of Documents

What should you look for in a case management system?

- **Cost**
 - **Of licences**
 - **Of moving from one system to another**
 - **Of managing**
- **Functionality – client management, case management, reporting**
- **Easy to use**
- **Easy to manage**
- **Easy to customise**
- **Level of support**
- **Secure**
- **Sustainable**

Case management systems used by CLCs

CMS	CLCs using
CLASS	180 CLCs and FVPLs across Australia
Actionstep	Inner City Melbourne, Consumer Action Law Centre, Mental Health Law Centre (WA), Seniors Rights Victoria, Southport, Bayside Community Legal Service, Hub Community Legal and others
<u>Salesforce</u>	Seniors Rights Service, Arts Law, Knowmore, LawRight
CSNet	Tenants Union Qld, Suncoast CLS, Mackay Regional Legal Service, TASC
Leap	The Humanitarian Group (WA), YFS Legal, EDO
Jira	Youth Law (NSW)
Sharepoint	Basic Rights Qld
MS Dynamics	Marrickville Legal Service

National Legal Assistance Data Standards

What

- A set of common definitions used across CLCs, Legal Aids, FVPLS and ALS

Why

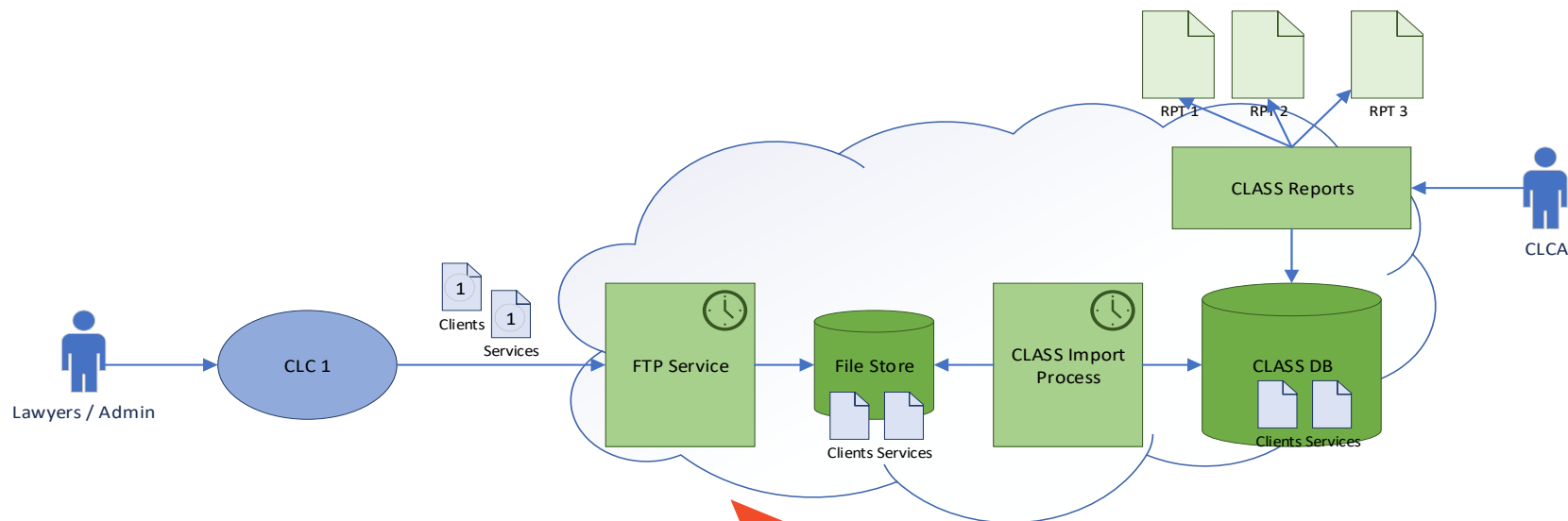
- Consistency of data allows meaningful comparisons between CLCs and other services
- Required if you receive Commonwealth funding

How

- [National Legal Assistance Data Standards Manual](#)
- [CLCs Australia Data consistency guide](#)
- [Ready reckoner](#)
- [Matrix of services – which service is this](#)

CLASS Data Import Tool

- Importing **reporting data** from other systems into CLASS
- Allows the **automated import** of **csv files** into CLASS via a **secure file transfer protocol**
- Centres need to **map** their data to CLASS data, **extract** the data to csv files, and set up the **ftp process** from their end
- **Developer guidelines** available
- Working with **Actionstep** to include tool in a **CLC template version** of Actionstep
- Currently in final testing



CLCs Australia role

- Continue to support and improve CLASS
- Focus on improving data quality and reporting tools
- Data import tool
- Act as a knowledge broker

Resources and Contacts

- **Actionstep** - <https://try.actionstep.com/overview-clc/>.
Contact Disha Moses, sales@actionstep.com.
[CLCQ webinar on Actionstep](#) -
- **CSNet** - www.csnet.net.au. Contact Mandy Doon, mandy.doon@csnet.net.au, [Presentation on CSNet](#)
- **Salesforce** - www.salesforce.com/au (See slide 7 for Centres using Sharepoint)
- **Leap** - <https://www.leap.com.au/> (See slide 7 for Centres using Leap)
- **Sharepoint** – Basic Rights Qld, Contact Fiona Hunt - fionah@brq.org.au
- **CLC case management sample requirements** – contact Skye Forster, Consumer Action Law Centre - skye@consumeraction.org.au
- **CLASS Import Tool Developer Guidelines** – contact Susan Scott, CLCs Australia, susan.scott@clcs.org.au



Thank you!

Need more information?

Susan Scott –

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Salesforce - Seniors Rights Service

The screenshot displays the Salesforce Seniors Rights Service (SRS) interface. The browser window shows the URL `seniorsrightsservice.my.salesforce.com/5009000001ThKYa?srPos=4&srKp=500`. The page header includes the SRS logo, a search bar, and navigation links like "Switch to Lightning Experience", "Tom Cowen", "Help & Training", and "SRSLogo".

The main navigation bar contains tabs: Home, Organisations, Contacts, **Enquiries**, Promotion / Education, Evaluation Funder Feedback, Documents, Reports, Dashboards, and Files. The "Enquiries" tab is active, showing a list of enquiries with a "Create New..." button and a "Shortcut" section with links to "Calendar" and "Unresolved Items".

The "Recent Items" section lists several enquiries, including "00167634", "ISS-180307", "00194906", "00194490", "Hassan Aleillon", "00194904", "ISS-180312", "ISS-179988", "Call", and "Tom Cowen".

The "Enquiry Detail" section for enquiry 00167634 is shown, with buttons for "Edit", "Delete", "Clone", and "Submit for Approval". The "Contact Risk Status" section shows "contactRisk". The "Internal & Intake File Notes" section includes a table with columns for "Case Note", "Display Purposes", and "SRS Complaints Procedure".

Case Note	Display Purposes	SRS Complaints Procedure
Internal Comments	Jane Doe is EPoA for John Doe, EPoA doc attached to JANE DOE contact record. 15-5-2018 lt JD msg left twc 2-2-2018 lt JD no ans, no msg, twc 23-12-2017 lt JD lt msg twc	Advised Is Follow-up Action Required? 24/7/2019
Critical Date 1		Action BY Whom: Smythe, Jennifer
Critical Date 2		Define Action: Do site search and advise client of result
Critical Date 3		Follow-up Completed
Critical Date Reasons		

The bottom of the page shows a status bar with the text "Waiting for seniorsrightsservice--c.visualforce.com..."