Introducing the...

For Community Support Management

(Standard) Database

OST T/A

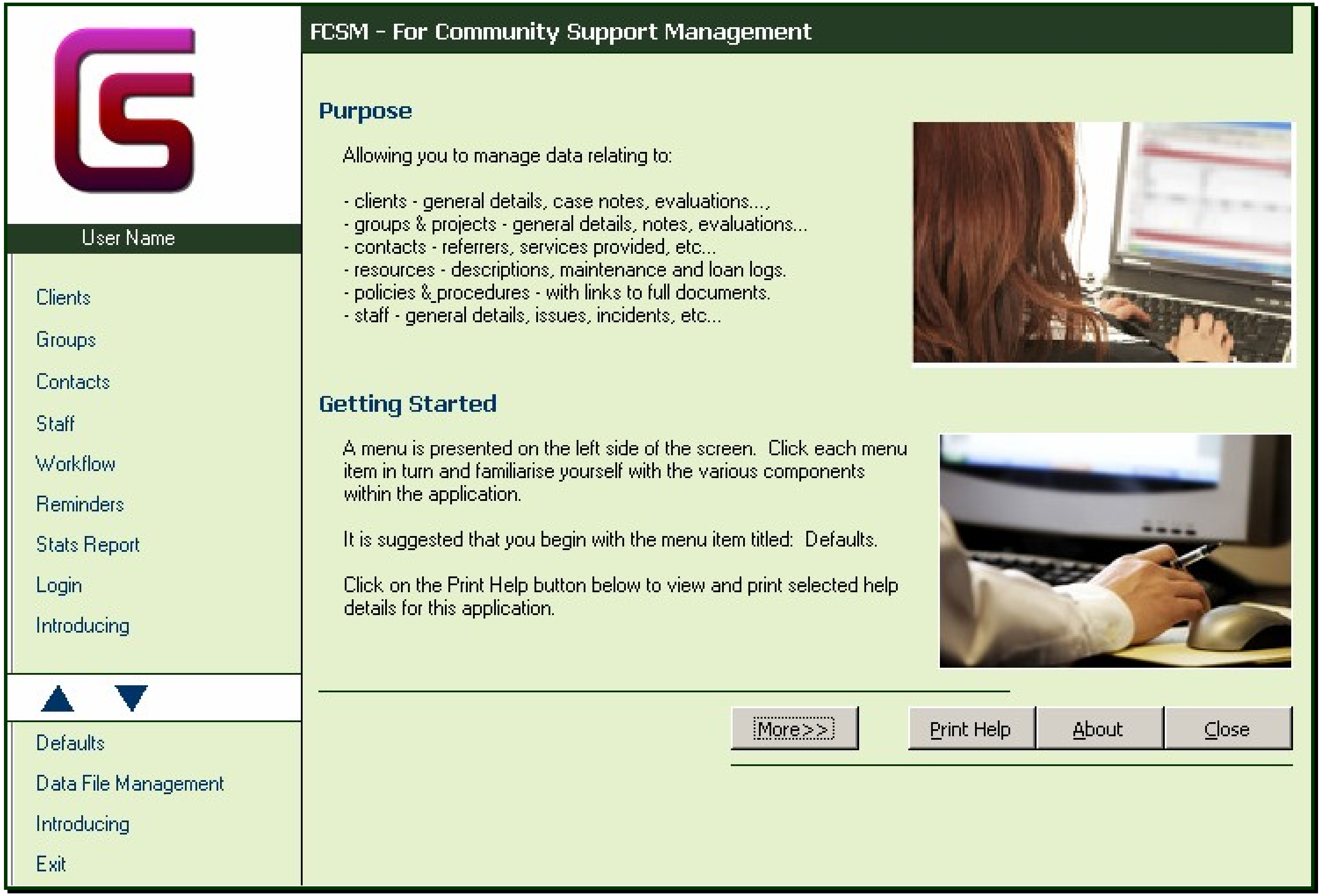
OST Database Group

Specialists in Database Design, Development & Renovation

Overview

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

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

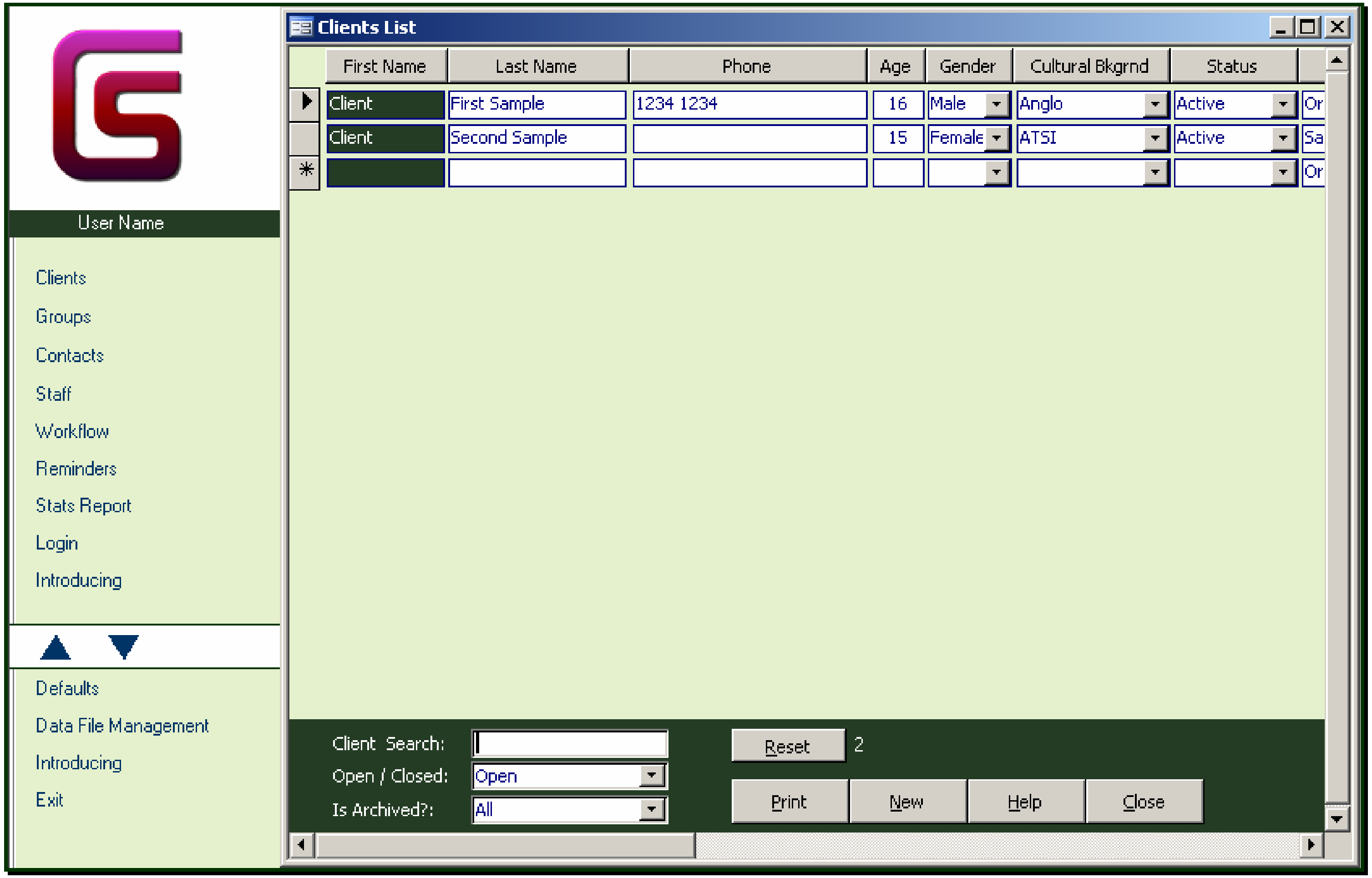


Clients - List

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

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

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

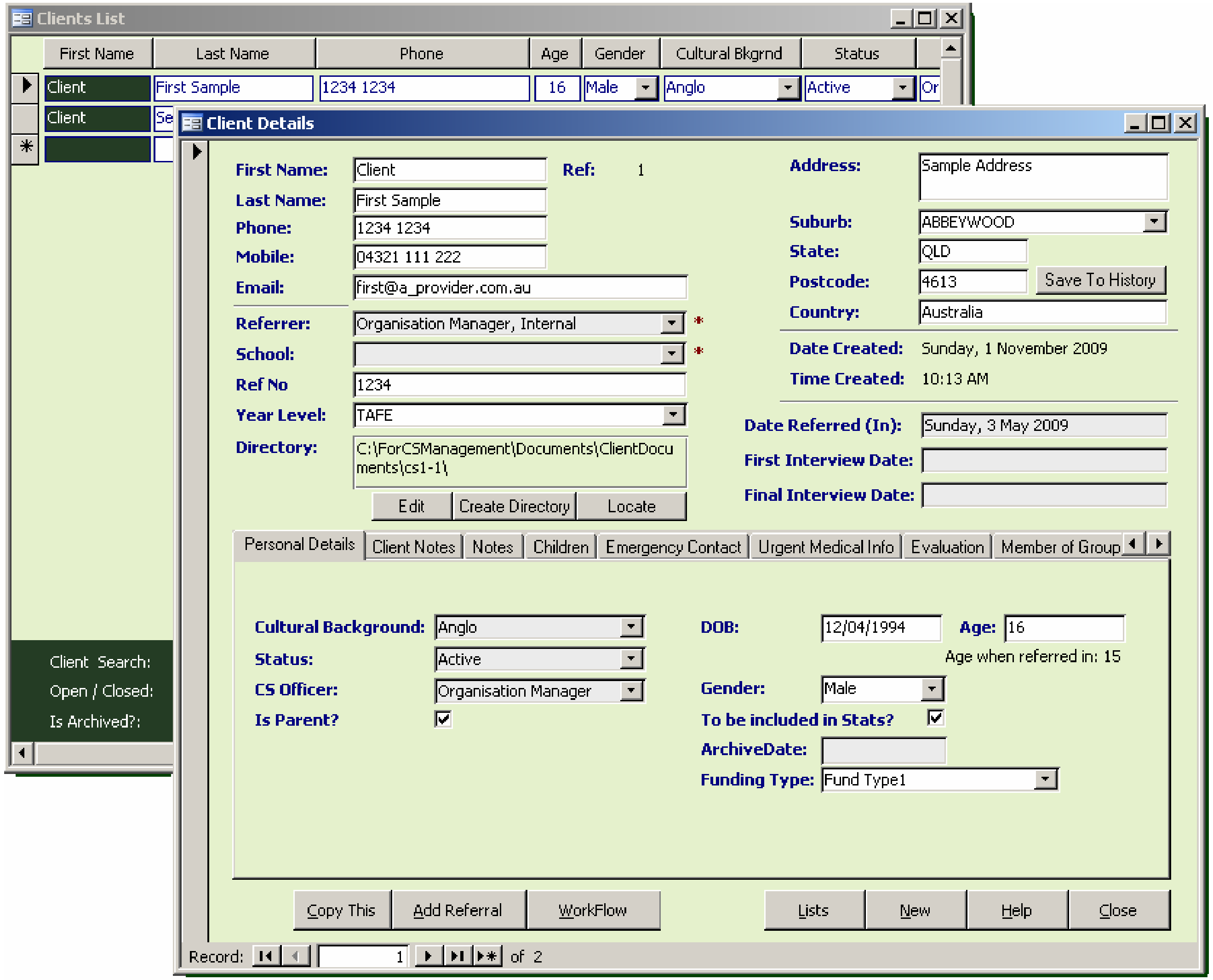


Clients - Detail

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

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

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

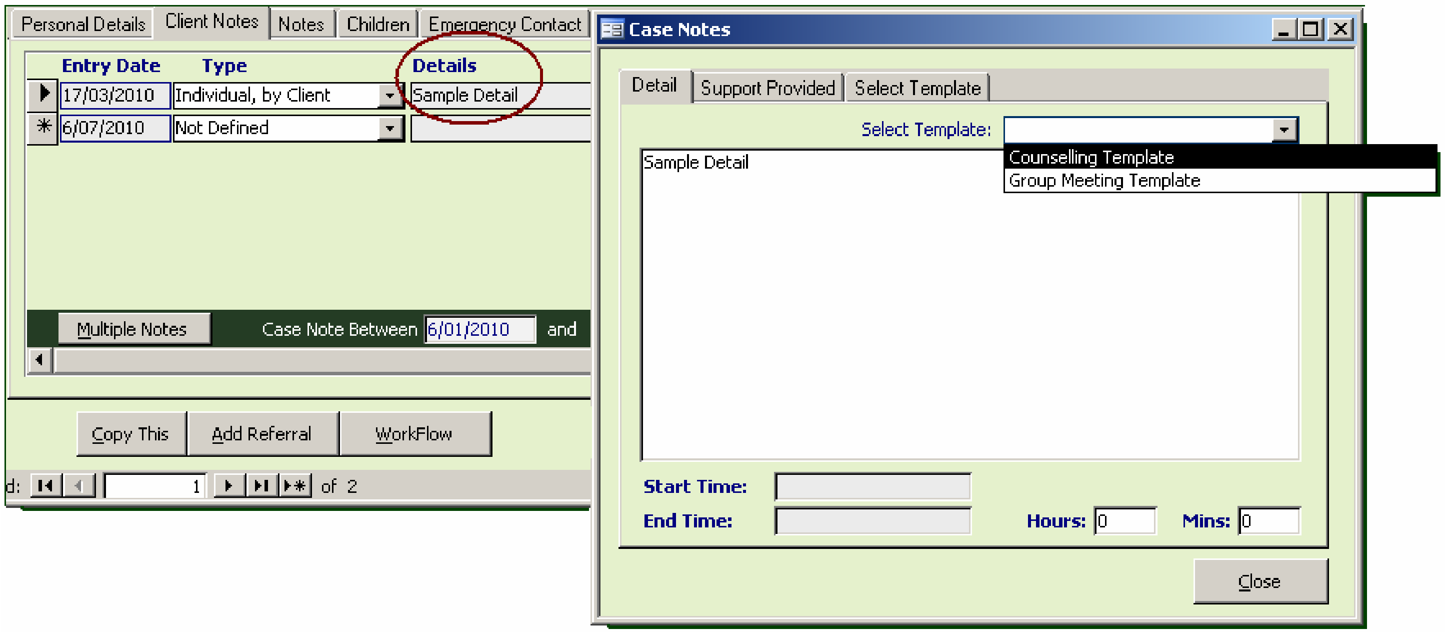


Clients – Case Notes

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

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

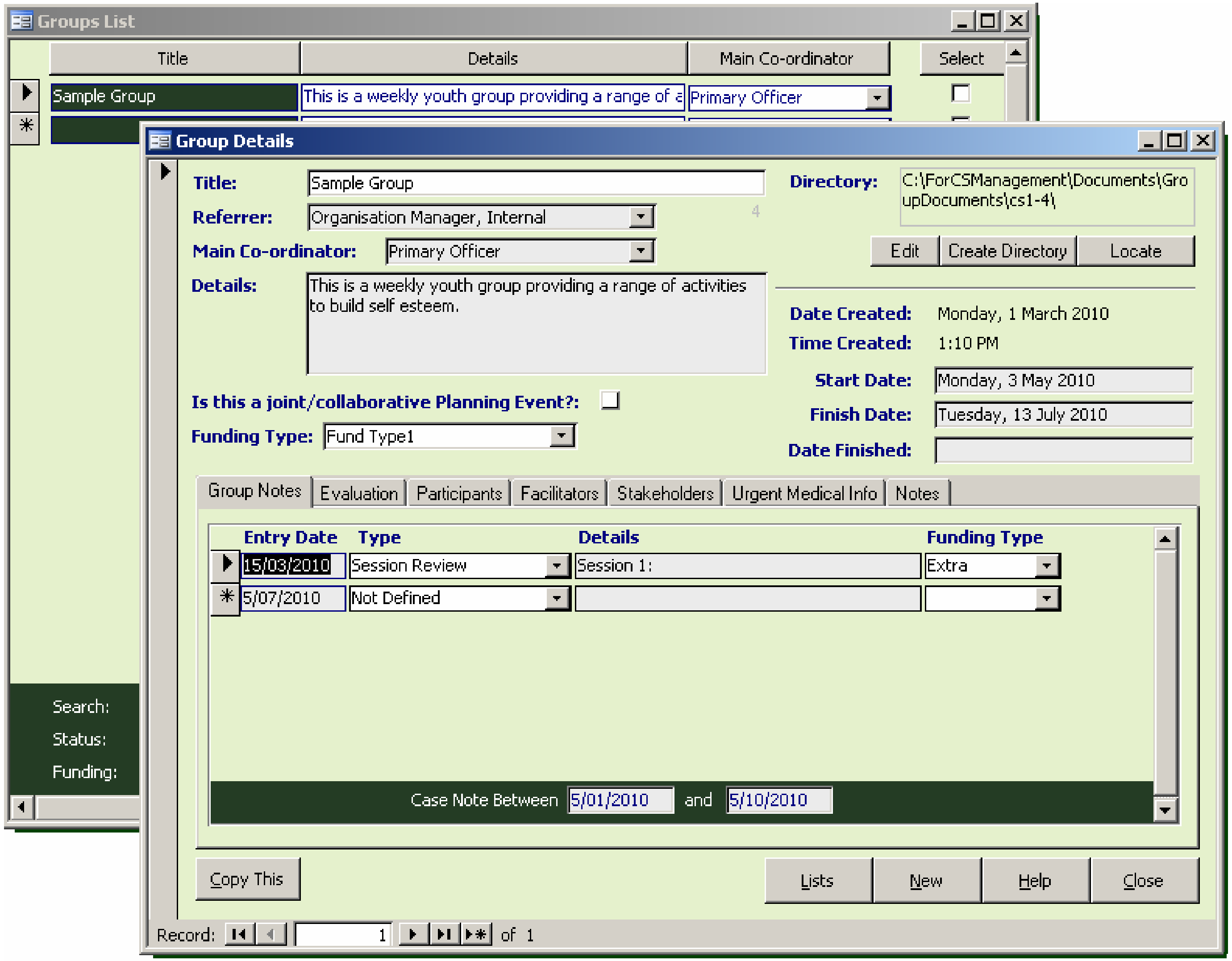
- Add/select an entry date and select a client note type and funding type (*where applicable*).
- Double click on the **Details** field to add the Case Note detail, a start and end date, and time spent *(where applicable).*
- Add, edit or select a Case Note Template – if and as required.



Groups

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

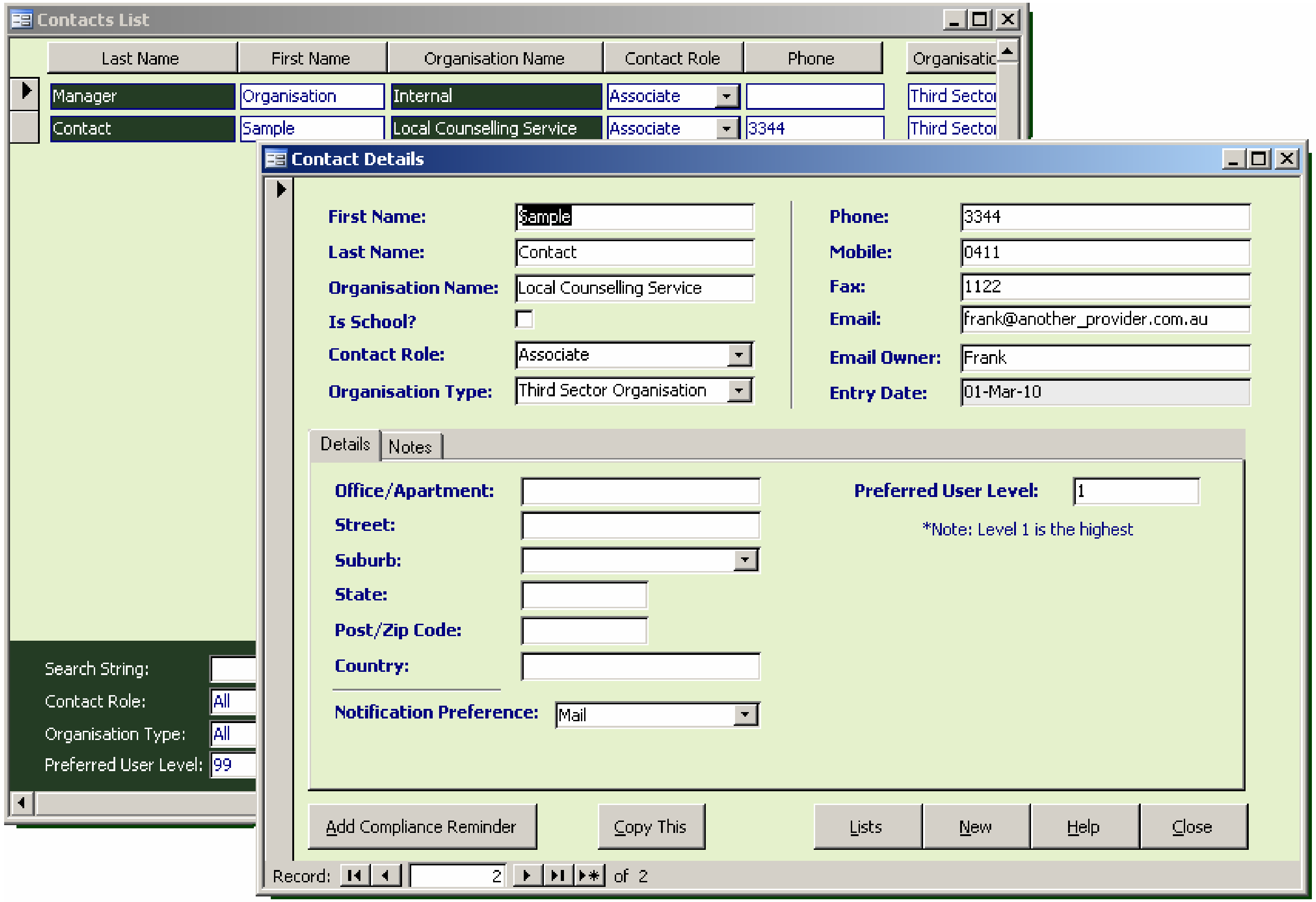
- ***General details*** - name, dates, description, etc.
- ***Stakeholder details*** including: participants, facilitators, stakeholders and urgent medical details.
- ***Ongoing Management*** – group (file) notes and evaluations.



Contacts and Staff

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

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



Workflow – Adhoc Contacts

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

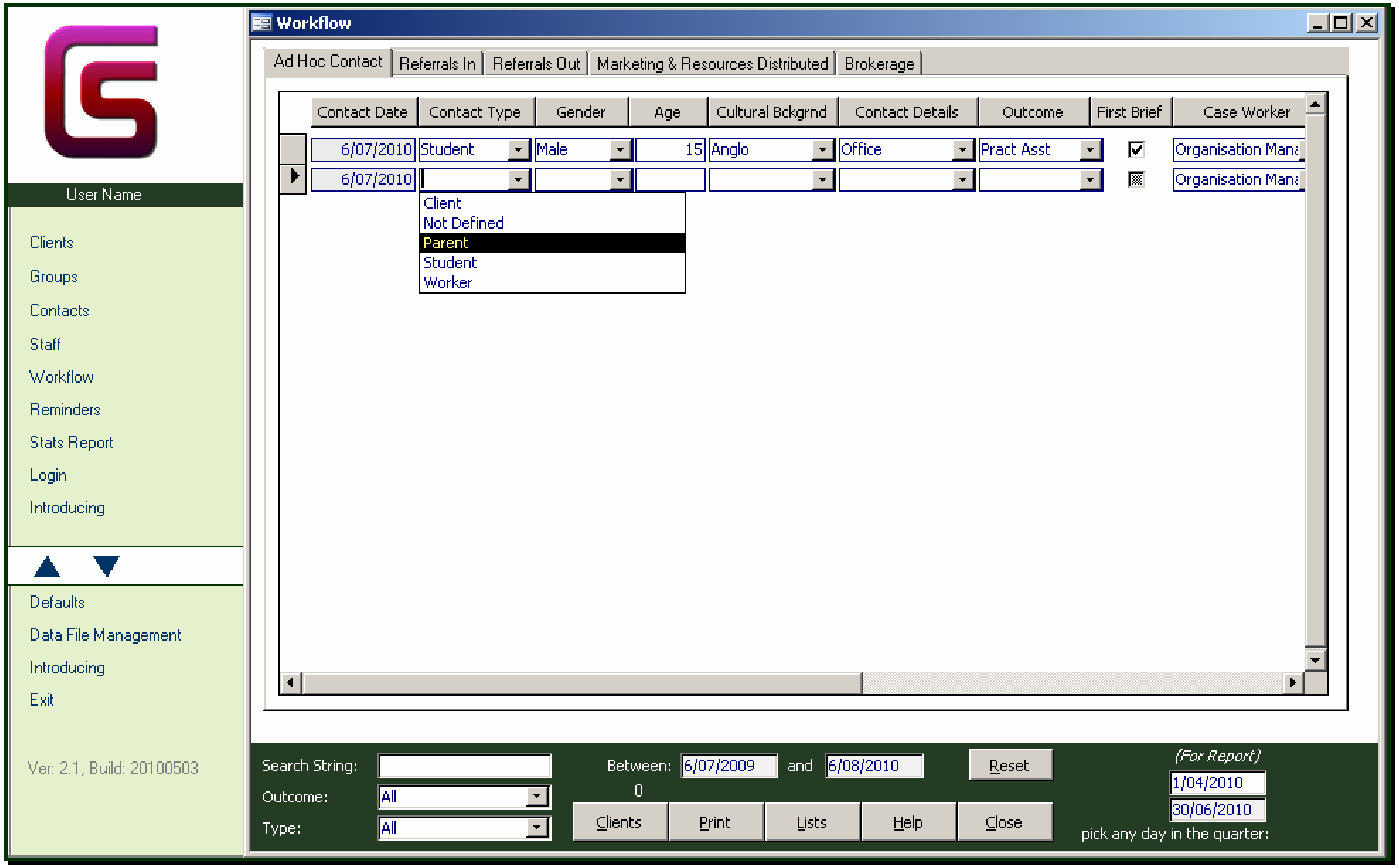
Adhoc contact details include:

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

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

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

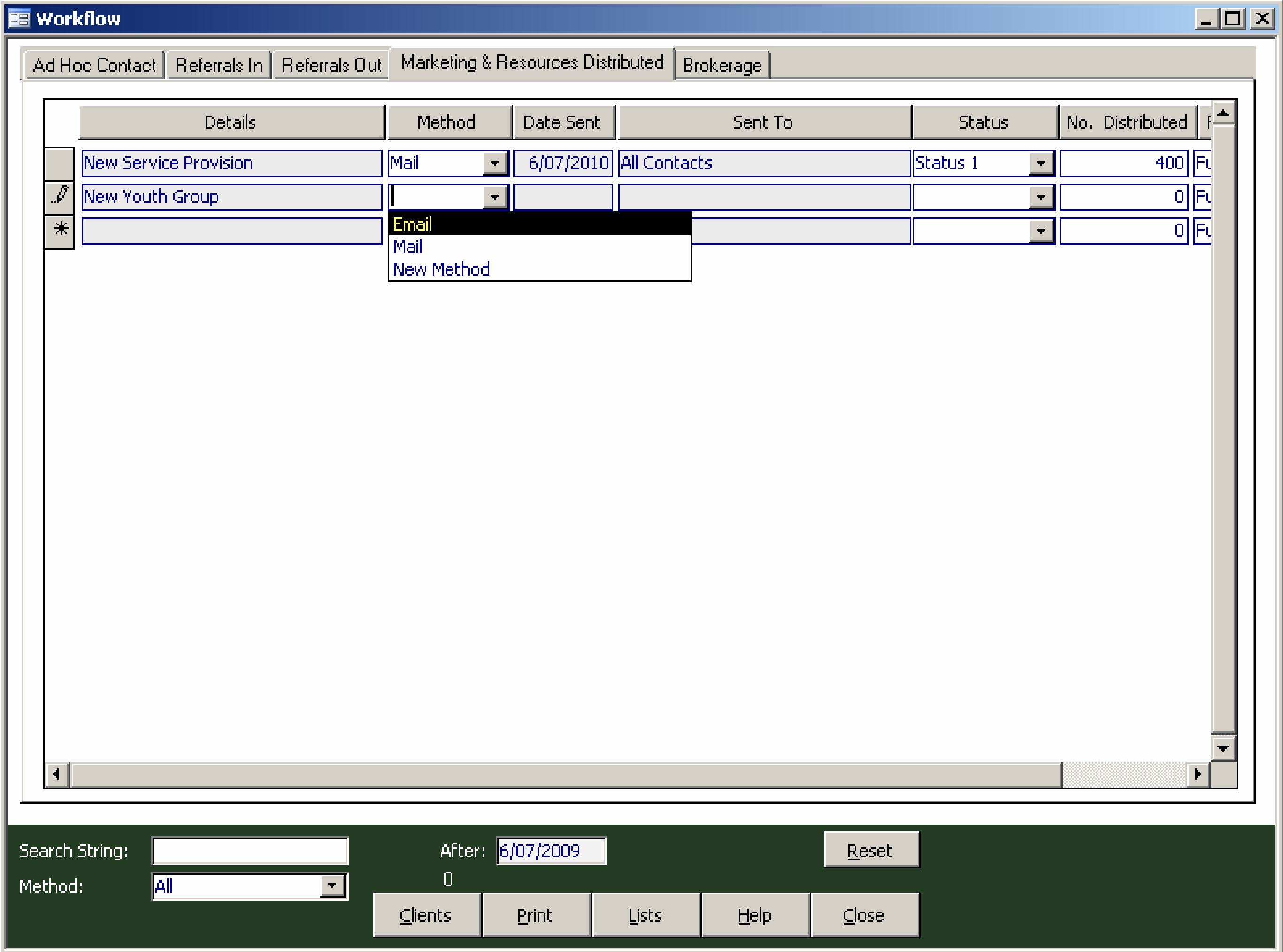
at the bottom of the screen.



Workflow – Referrals, Marketing & Brokerage

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

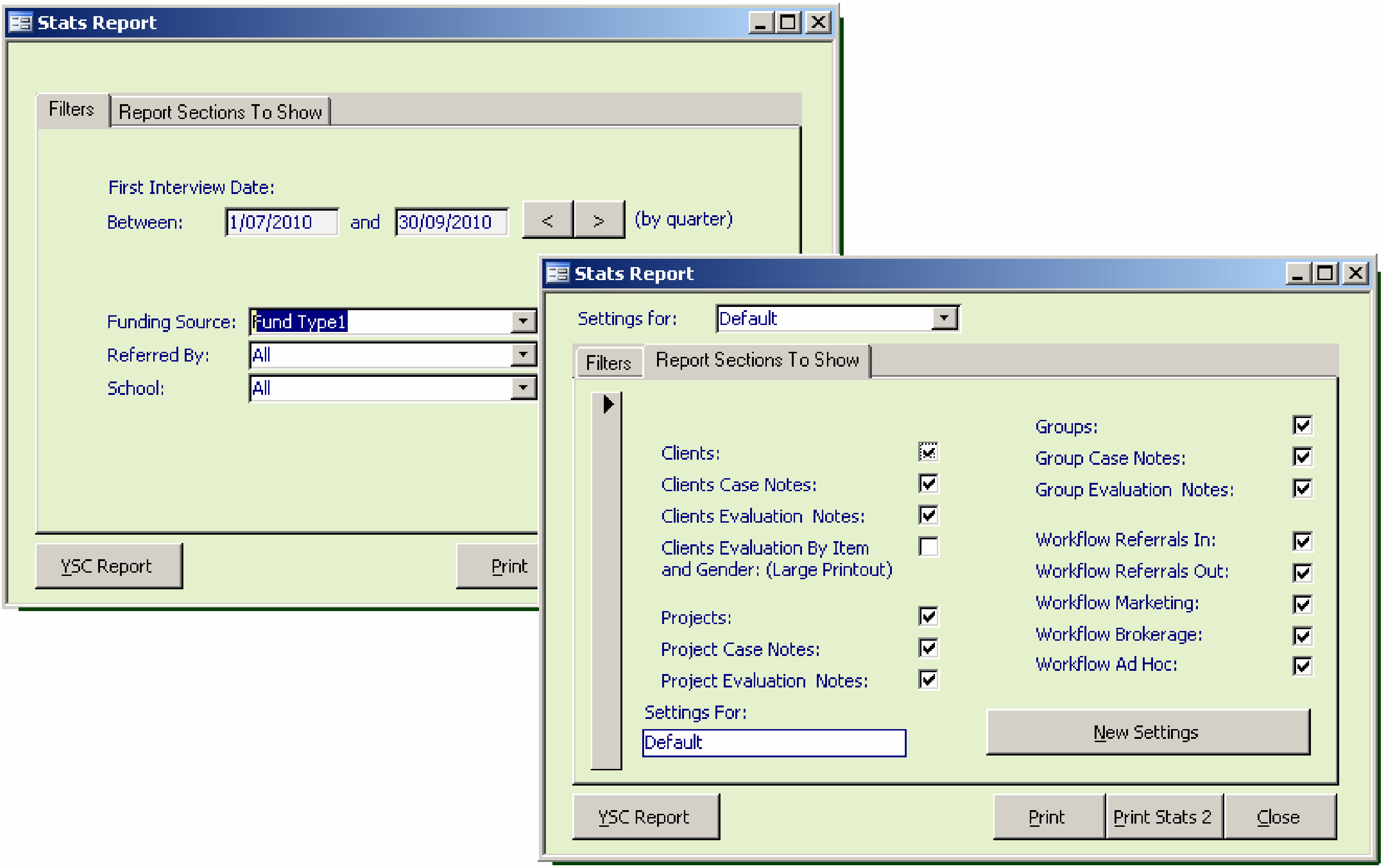
- ***Referrals In and Out*** – listing of those who referred clients in, and to whom clients have been referred.
- ***Marketing Materials Distributed*** – name, detail, date sent, etc
- ***Brokerage*** – for tracking moneys or equivalent provided to clients.



Stats Reporting

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

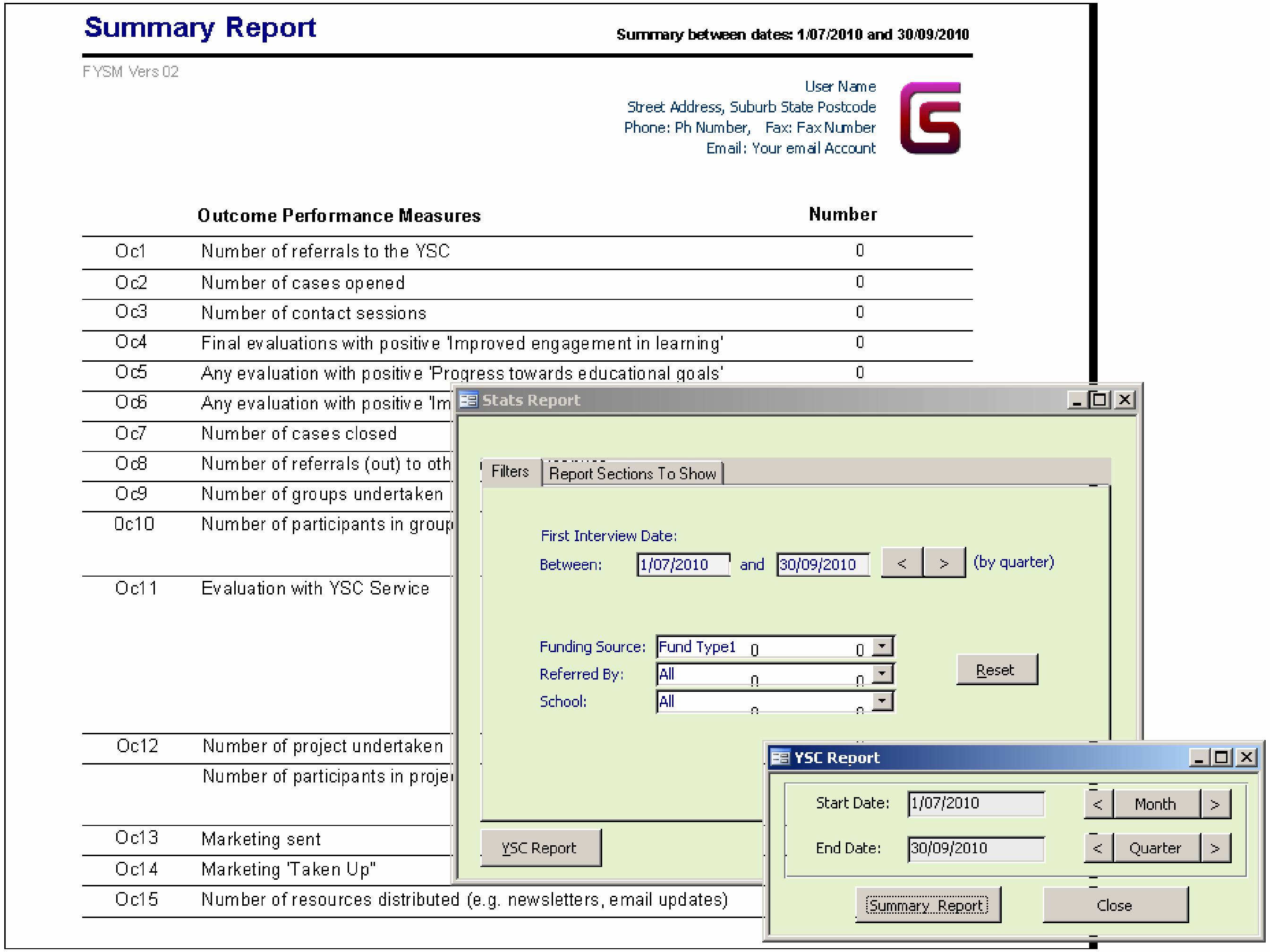
- ***Funding/Program specific report*** – a number of specific funding types or programs have had reports developed in line with applicable funding obligations.
- ***General Stats Report*** – a general statistics report is also available for more general information and internal use.



Stats Reporting – Program-Specific Reports

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

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

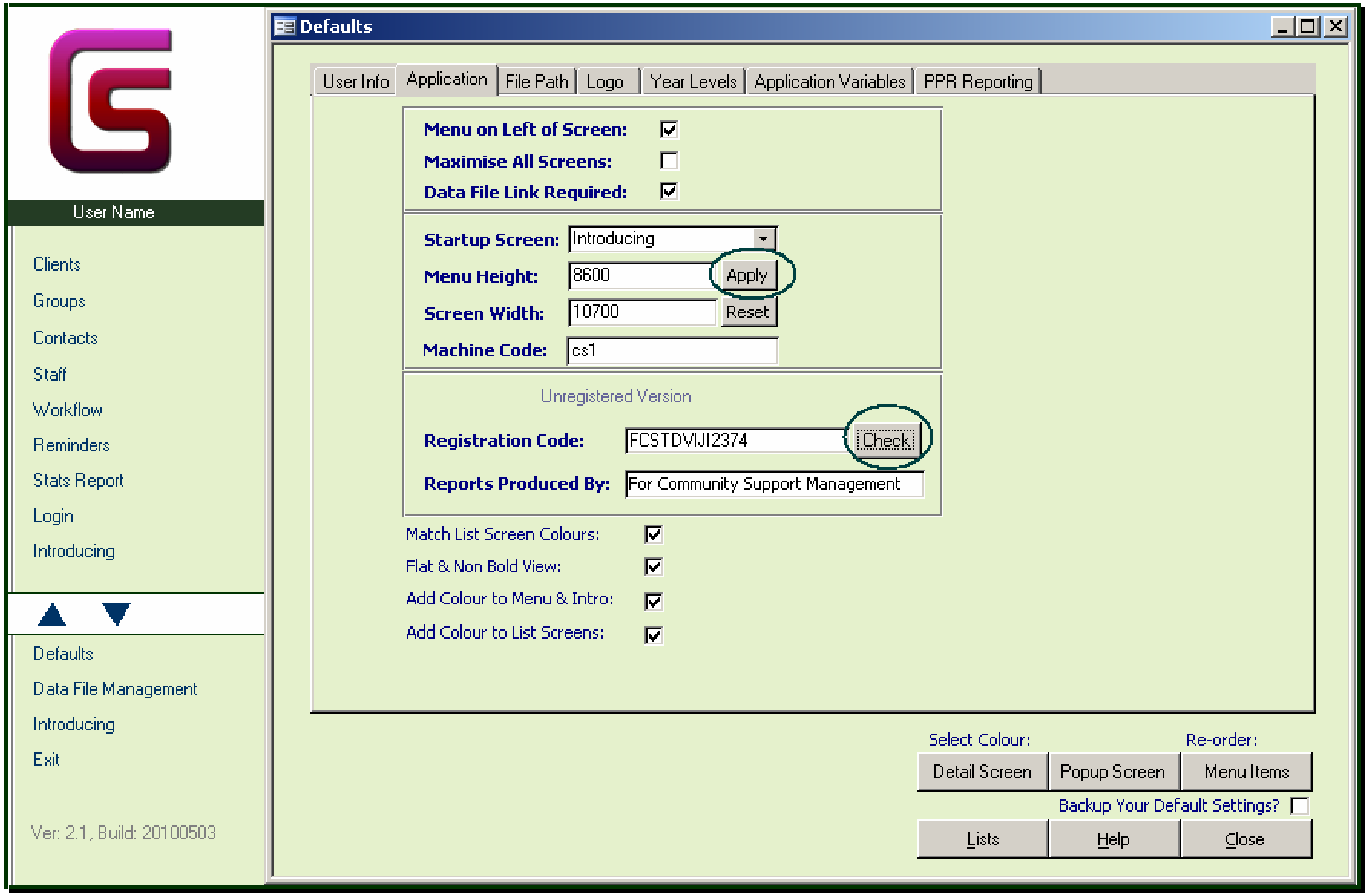


Setting Up: Defaults

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

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

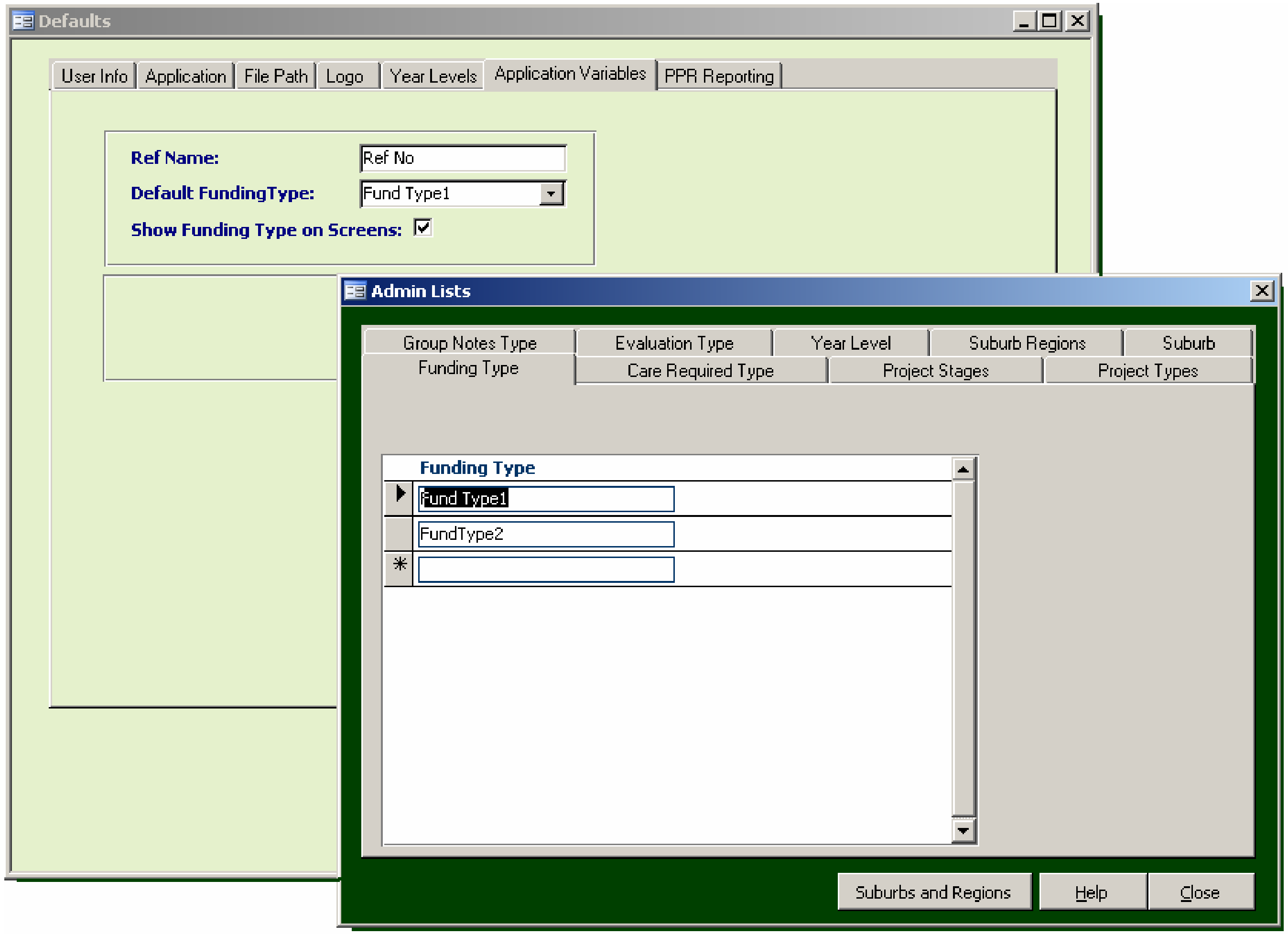
- ***Your organisation's Details*** (*User Info tab*) – name, address, phones, etc (*which appear on multiple reports*).
- ***Application Preferences*** (*Application tab*) – screen sizes, formats, registration code, machine code (*created by you where one or more copies are being run on a laptop*),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



Setting Up: Defaults (Continued)

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

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



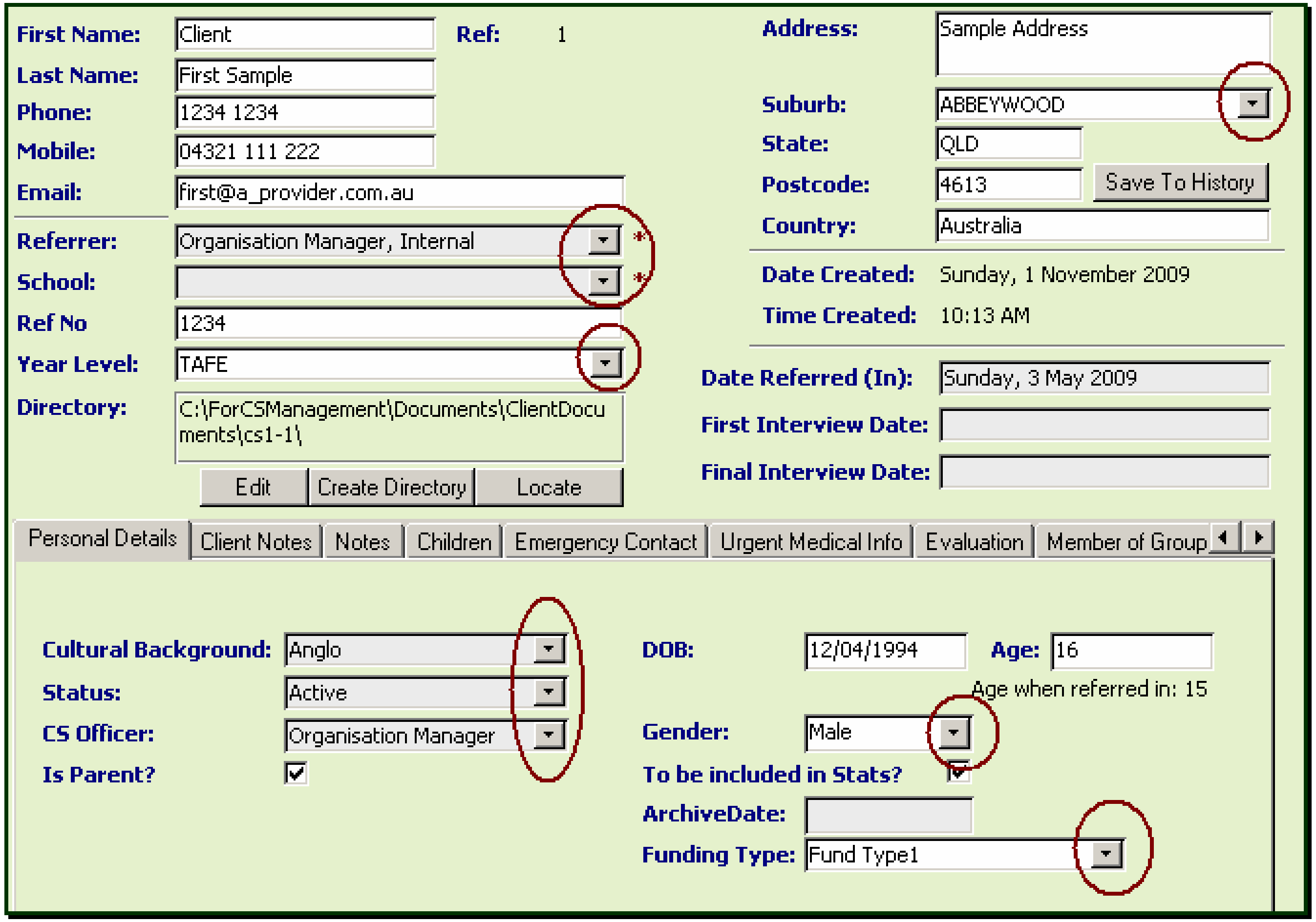
Setting Up: Drop-Down Lists

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

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

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

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



Setting Up: Admin Lists

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

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

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

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