Government of Western Australia
Department of Housing

OPENING DOORS
To Affordable Housing

STEPIMS USER GUIDE

for

Department of Housing Employees

Table of Contents

INTRODUCTION 3
What is STEPIMS? 3
Purpose 3
Access Levels 3
CONFIDENTIALITY OF INFORMATION 3
LOGGING ON TO STEPIMS 4
PRODUCTION TRAINING AND TEST DATABASES 4
Log On Screen 5
Notifications Screen 5
LANDING PAGE 6
Display Information – Agency, Database and User Details 6
General Navigation 7
CASE SEARCH 8
General Navigation 8
Search Results 8
CASE SCREEN 9
Top Bar 9
Grey Bar 9
Referral Details 9
Matrix Template 10
LOG – COMMENTS 11
REFERRAL OUTCOME 13
PROGRAM - ASSESSMENT: 14
Program Length 17
PROGRAM –REVIEW: 18
PROGRAM – EXIT: 20

INTRODUCTION

What is STEPIMS?

The *Support and Tenant Education Program Information Management System* (STEPIMS) is an electronic case management system for STEP Providers to record the details of STEP cases.

By recording cases in STEPIMS a significant proportion of reporting requirements will be automatically met, reducing the need for regular manual collection of data such as wait list numbers and numbers of cases per region etc.

STEPIMS is a web based system and can be accessed using your web browser.

STEPIMS is optimised for Windows PCs using Internet Explorer 9 but will operate on other browsers, Apple Mac systems, tablets and smartphones. Whilst tablets and smart phones can also be used to operate STEPIMS, the system has not been optimised for small screens.

Purpose

The purpose of this *User Guide* and supporting learning exercises are to provide Department of Housing staff with the knowledge and skills to do the following in STEPIMS:

- Search for and find cases

Access Levels

The two different levels of access to STEPIMS available for most Housing staff are:

- **Housing Officer** – read access only with no ability to update records
- **Housing Manager** – same as Housing Officer but with the ability to access reports and an upcoming ability to manage user accounts.

CONFIDENTIALITY OF INFORMATION

There is no legislative right to privacy in Western Australia and the *Housing Act 1980* does not create a duty of confidentiality between the Department of Housing and a customer. The Department, however, believes that it has a corporate responsibility to maintain the privacy and confidentiality of the tenants; hence the department follows the *National Privacy Principles* administered by the Office of The Australian Information Commissioner.

On this basis, STEP clients are required to provide written consent to have their information shared. This is to assure STEP clients that their personal information is used only for the purposes of providing relevant assistance in STEPIMS.

LOGGING ON TO STEPIMS

Access to the STEPIMS is provided by the Department of Housing. New users will need to have their manager complete the Computer Access Form which is available on iNhouse under "All Forms".

If you already have STEPIMS access but you require changes to your current user profile i.e. you have changed your position or require access to other regions then please contact the STEPIMS administrator at step@housing.wa.gov.au.

PRODUCTION TRAINING AND TEST DATABASES

STEPIMS has three main databases which can be accessed by STEPIMS users.

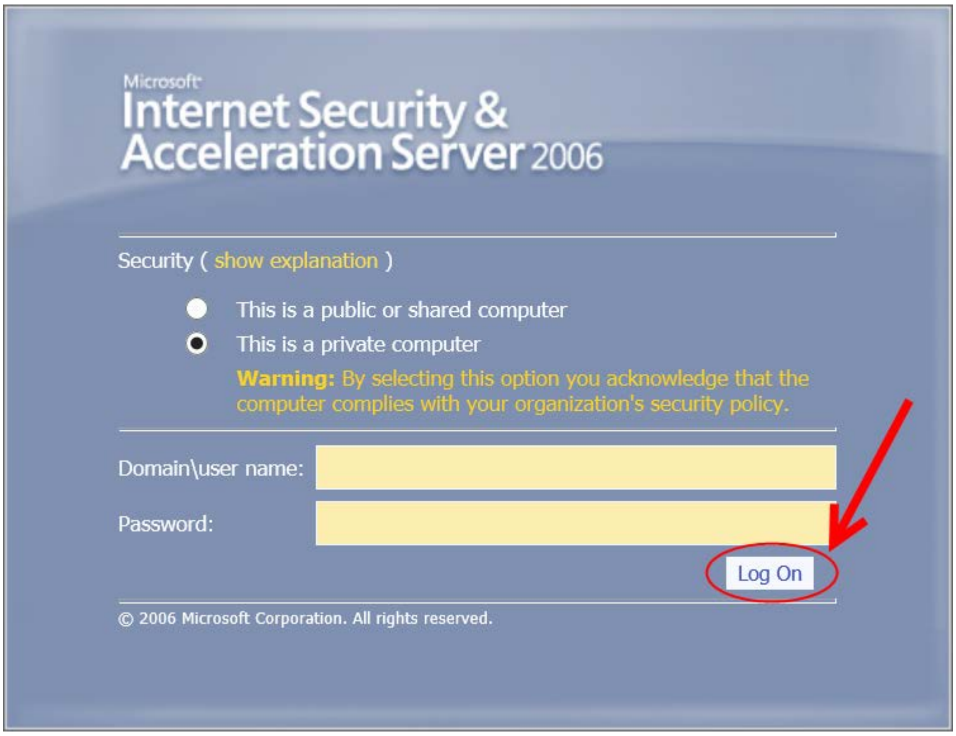
1. **STEPIMS PRODUCTION** is the live system used for real cases. Do not use this database for training and demonstration. STEPIMS PRODUCTION is accessed by typing 'stepims' into the web browser when using the Department of Housing network (including Citrix). It is also accessible externally (e.g. from iPads) by using the following link: https://stepims.housing.wa.gov.au/default.aspx

2. **STEPIMS TRAINING** is used for training and demonstration purposes. Do not use this database for entering real client names and details. STEPIMS Training is accessed by typing '*trainingstepims'* into the web browser when using the Department of Housing network (including Citrix). It is also accessible externally (e.g. from iPads) by using the following link: http://trainingstepims.housing.wa.gov.au

3. **STEPIMS TEST** is used for testing purposes such as testing new features that are under development. Housing staff do not need to access this database unless asked to test a new feature. Do not use this database for entering real client names and details. STEPIMS Test is accessed by typing 'teststep' into the web browser when using the Department of Housing network (including Citrix). It is also accessible externally (e.g. from iPads) by using the following link: http://teststepims.housing.wa.gov.au

Log On Screen

When you access any of the above databases externally (i.e. from your iPad), the following screen will display:

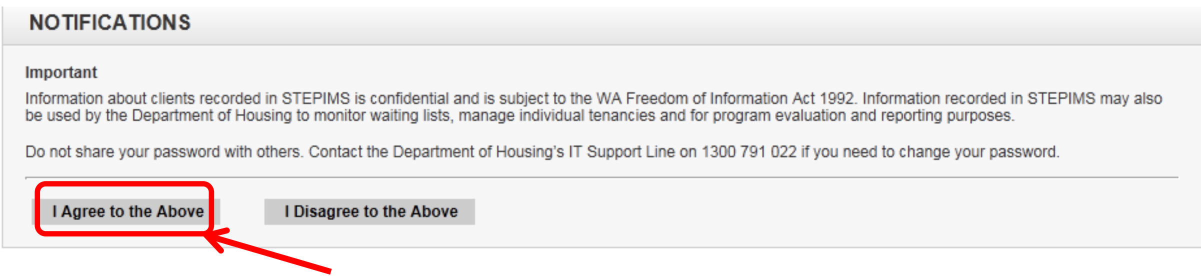


Select 'this is a private computer' and then enter your Department of Housing User ID and Password and click on the Log On button.

Notifications Screen

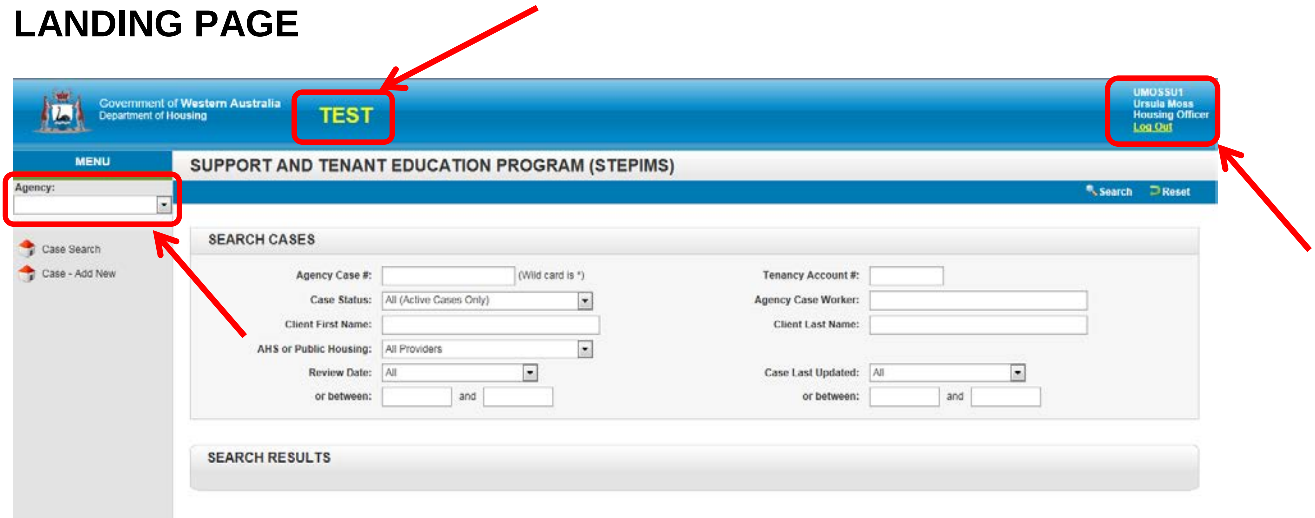
The Notifications screen will then be displayed.

If you are logging on whilst using the Dept. of Housing network you will be taken straight to the Notifications screen. This screen contains information about upcoming system maintenance and an acknowledgement and reminder screen about client confidentiality and password security.



Click on the 'I Agree to the Above' button to proceed into the landing page:

LANDING PAGE



Display Information – Agency, Database and User Details

In the top left area of the screen under the Menu label there is a drop down icon  that allows you to choose the STEP Provider name. You will be able to view all the STEP providers but you will only be able to view cases from offices mapped against your user profile. You will need to contact the STEPIMS administrator if you need other offices mapped to your profile.

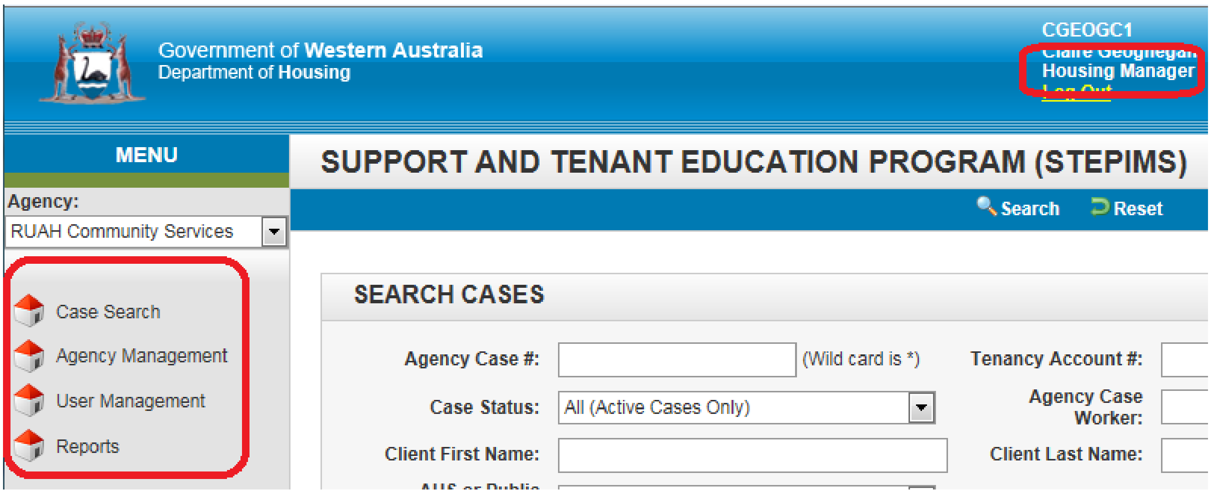
The middle area of the blue banner at the top of the screen will indicate which database you have logged into. If you are in the PRODUCTION database nothing is displayed in the banner. If you are in the TRAINING database the word TRAINING will be displayed, and if you are in the TEST database the word TEST will be displayed in the blue banner.

The top right area of the blue banner shows:

- Your Log On ID
- Your name
- Your access level
- A Log Out button

General Navigation

In the top left hand corner of your screen, you will see the *Menu* displayed.



The above screen shot shows the menu if you have Housing Manager Access.

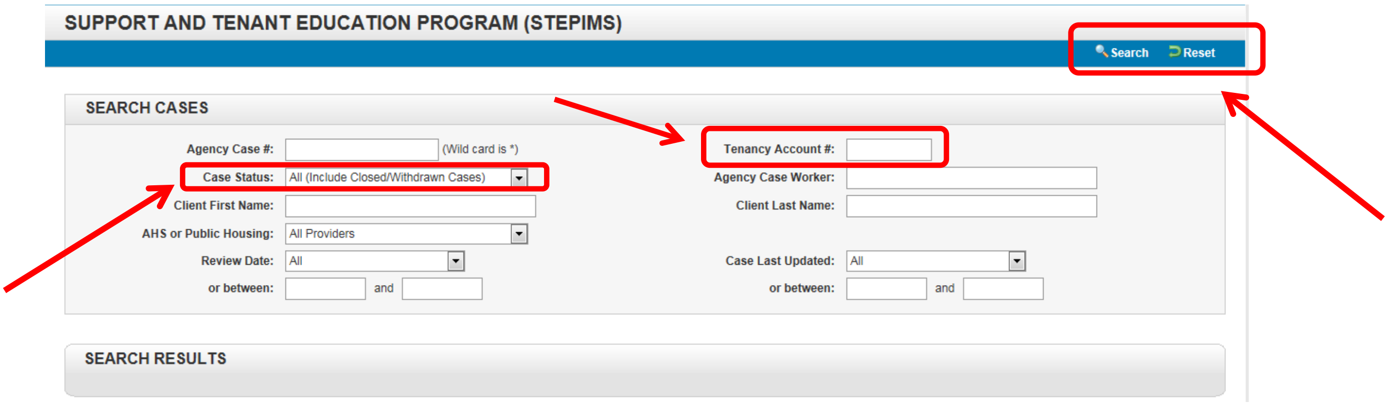
If your access level is Housing Officer you will only be able to see Case Search.

The options are:

Menu Option	Details
Case Search	Allows the user to search for cases that meet inputted search criteria such as case status, cases managed by a specific worker etc. From the search results, users can go to the details of a case and update the record (e.g. record home visits, review meetings etc.) Users will only see cases for their allocated office.
Agency Management	Visible to Housing Managers but only Administrators can edit details
User Management	Visible to Housing Managers. Currently only Administrators should edit details of users and disable user accounts. Housing Managers will be given procedures for updating user accounts for their team members in a future update.
Reports	Housing Managers will see this menu option. There are a number of reports under development which will be released at a future date.

CASE SEARCH

General Navigation



The *Case Search* menu option allows you to search for cases, and from there you can then go directly from the search results area into the client details screen.

To search, you can enter details such as the client name, case worker name or tenancy account number and then click on the *Search* button in the top right hand corner of the screen.

Hint: The *Reset* button removes any existing search criteria so you can start again.

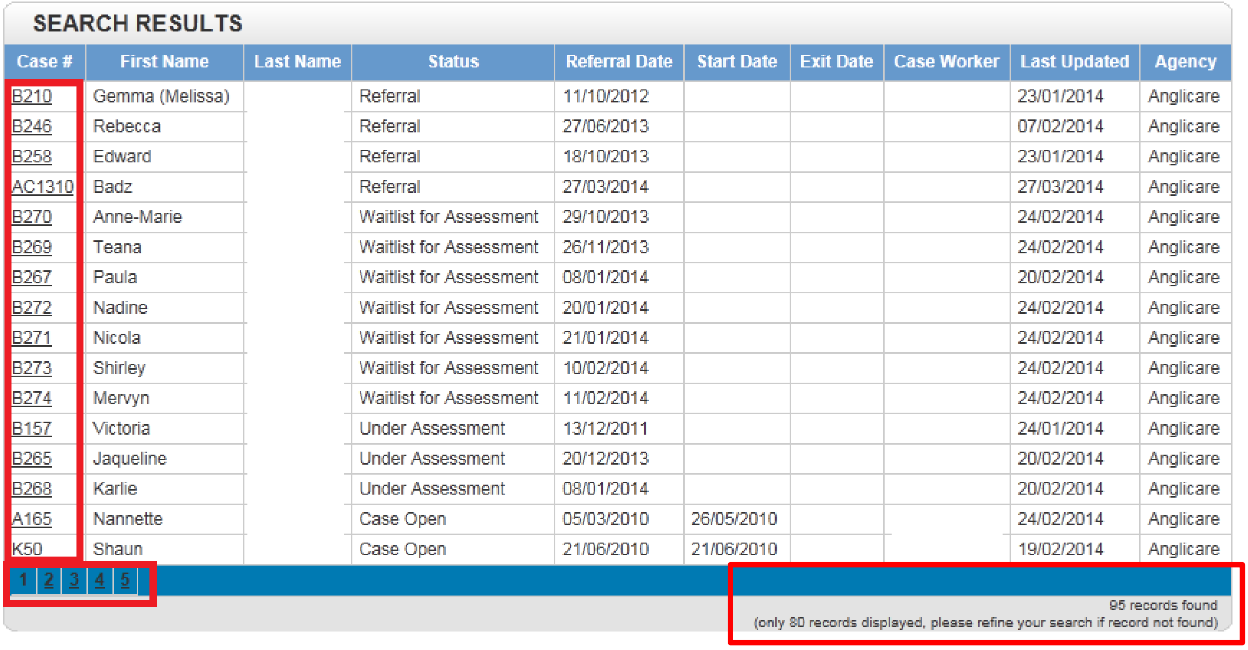
Search Results

The search results are displayed in the *Search Results* section and are listed in Case Status order (from Referrals to Waitlisted Cases to Open Cases to Closed Cases). To view a particular case, click on the ‘Case #’ to go to the details screen for that case.

Information on the case details screen is covered in a later section of this manual.

On the bottom blue banner, the number on the left corner of the screen indicates the page number (clickable links) if there are more than 16 records. The number on the right corner of the screen indicates the total number of cases that met the search criteria.

Note: Only the first 80 records will be returned, if the case you are looking for is not displayed you will need to refine your search criteria.



SEARCH RESULTS

Case #	First Name	Last Name	Status	Referral Date	Start Date	Exit Date	Case Worker	Last Updated	Agency
B210	Gemma (Melissa)		Referral	11/10/2012				23/01/2014	Anglicare
B246	Rebecca		Referral	27/06/2013				07/02/2014	Anglicare
B258	Edward		Referral	18/10/2013				23/01/2014	Anglicare
AC1310	Badz		Referral	27/03/2014				27/03/2014	Anglicare
B270	Anne-Marie		Waitlist for Assessment	29/10/2013				24/02/2014	Anglicare
B269	Teana		Waitlist for Assessment	26/11/2013				24/02/2014	Anglicare
B267	Paula		Waitlist for Assessment	08/01/2014				20/02/2014	Anglicare
B272	Nadine		Waitlist for Assessment	20/01/2014				24/02/2014	Anglicare
B271	Nicola		Waitlist for Assessment	21/01/2014				24/02/2014	Anglicare
B273	Shirley		Waitlist for Assessment	10/02/2014				24/02/2014	Anglicare
B274	Mervyn		Waitlist for Assessment	11/02/2014				24/02/2014	Anglicare
B157	Victoria		Under Assessment	13/12/2011				24/01/2014	Anglicare
B265	Jaqueline		Under Assessment	20/12/2013				20/02/2014	Anglicare
B268	Karlie		Under Assessment	08/01/2014				20/02/2014	Anglicare
A165	Nannette		Case Open	05/03/2010	26/05/2010			24/02/2014	Anglicare
K50	Shaun		Case Open	21/06/2010	21/06/2010			19/02/2014	Anglicare

1 2 3 4 5

95 records found
(only 80 records displayed, please refine your search if record not found)

CASE SCREEN

Top Bar

The area under the top blue banner will look like this:

Grey Bar

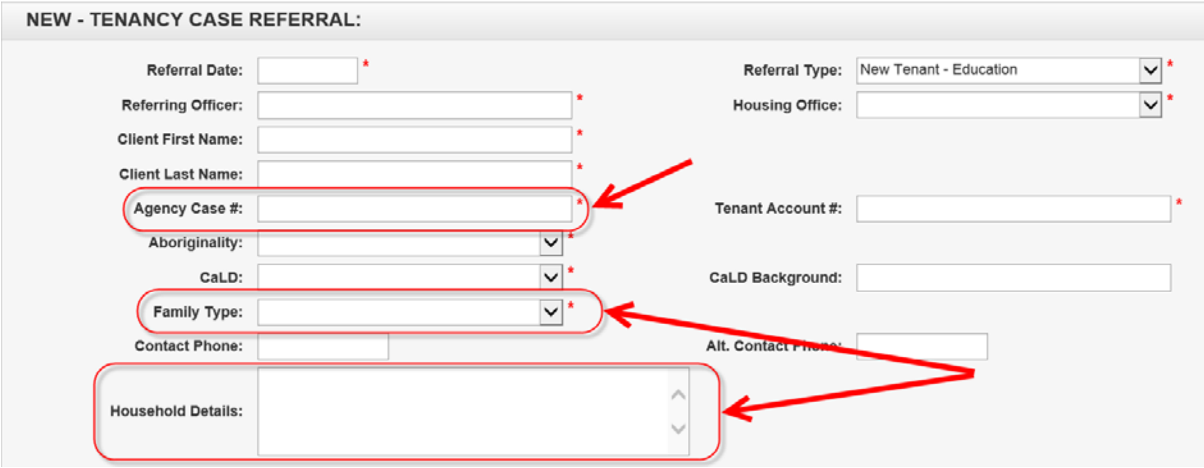
The grey bar also contains four fields:

Field	Details
Case Status	This field shows the status of the case.
Case ID	This is a unique number allocated to each case.
Last Updated By	This displays the name of the user who last updated the record.
Last Updated	This displays the date and time the record was last saved.

Referral Details

The STEPIMS referral page closely follows the paper based referral form used by the Department of Housing.

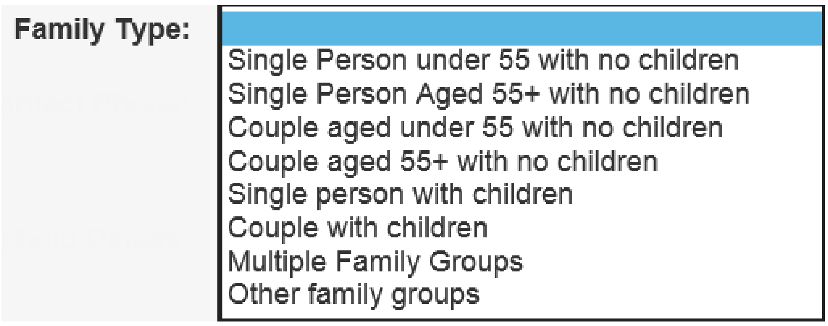
There are two key differences near the top half of the screen.



The first difference is the recording of the Agency Case # against the referral. This is the case/client ID used by your STEP Provider.

The second major difference is STEPIMS uses two fields to capture household details, whereas the paper form has a 'grid' for each household member after the main tenant, with fields for gender, date of birth, Indigenous Status and CALD (cultural and linguistically diverse) status.

In STEPIMS, users record the 'Family Type' by selecting a value from the provided list:



The 'Household Details' field allows users to record additional details e.g., "Jenny is a single parent with 3 children aged 16 (Pete), 12 (Chloe), and 9 (Darryn)."

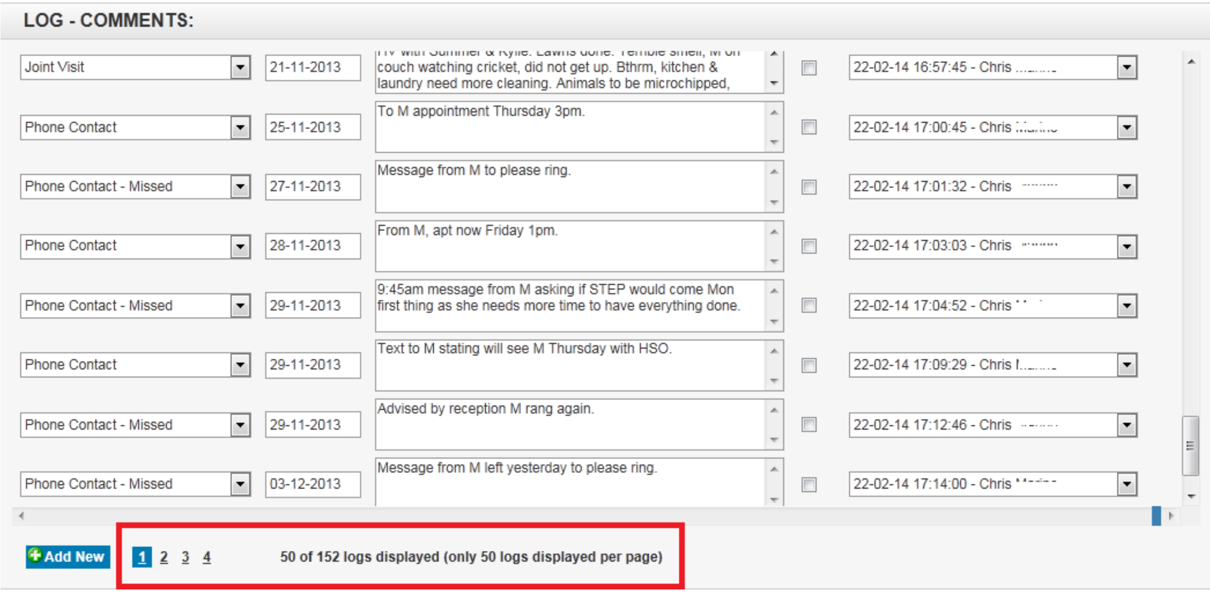
Matrix Template

The Matrix Template displays if the 'Referral Type' is 'Existing Tenant'. For Public Housing, the Matrix is not implemented as yet.

At this stage, there is not a corresponding measurement framework for referrals for housing waitlist applicants or for new tenants (prevention/education cases). These will be developed over time and implemented in STEPIMS.

LOG – COMMENTS

At any time after the referral is saved, it is possible for the STEP Provider to log actions and record a comment against the action in the 'Log – Comments' section below the Referral Outcome Area.



Note: a limited number of Logs can be seen at a time – to view other logs use the scroll bar on the right or click on the page numbers on the bottom left as highlighted in the screenshot.

The types of actions that can be logged are:

Option	Details
Referral	Actions in the Referral phase that do not involve direct contact with the client. E.g. phone calls to the Department of Housing to clarify information in the referral.
Referral - Not Accepted	Actions related to the decision not to accept a referral, such as phone calls or meetings with the Department of Housing.
Phone Contact	Phone contact with the client. Phone calls to other parties should be captured either under other Action types (such as Referral or General).
Phone Contact - Missed	An unsuccessful attempt to contact the client by phone.
Home Visit	A visit to the client's home where the client was present.
Home Visit - Missed	A visit to the client's home where they were not present. Record in the free text field if it was a planned or unplanned visit.
Office Appointment	Where the client has come to see the worker for an office session.
Office Appointment - Missed	Where the client missed a scheduled office appointment. Record in the free text field if the client made contact advising they were unable to make the appointment.
Joint Visit	This option is used when taking the client to another agency e.g. Centrelink; Financial Counsellor or when another officer is accompanying the case worker
Joint Visit - Missed	This option is used to record when the client did not attend the joint visit
Assessment	Actions in the Referral phase that do not involve direct contact with the client. E.g. phone calls to the Department of Housing to clarify information in the referral, or to ascertain alternative contact numbers.
Matrix Review	DO NOT USE – a comments field is available in the Review area.
Closure	For actions leading up to the closure of the case that do not involve direct contact with the client, e.g. phone calls/case discussions with the Department of Housing.
General	All other actions.

REFERRAL OUTCOME

The last part of the referral section of the screen is the Referral Outcome area:

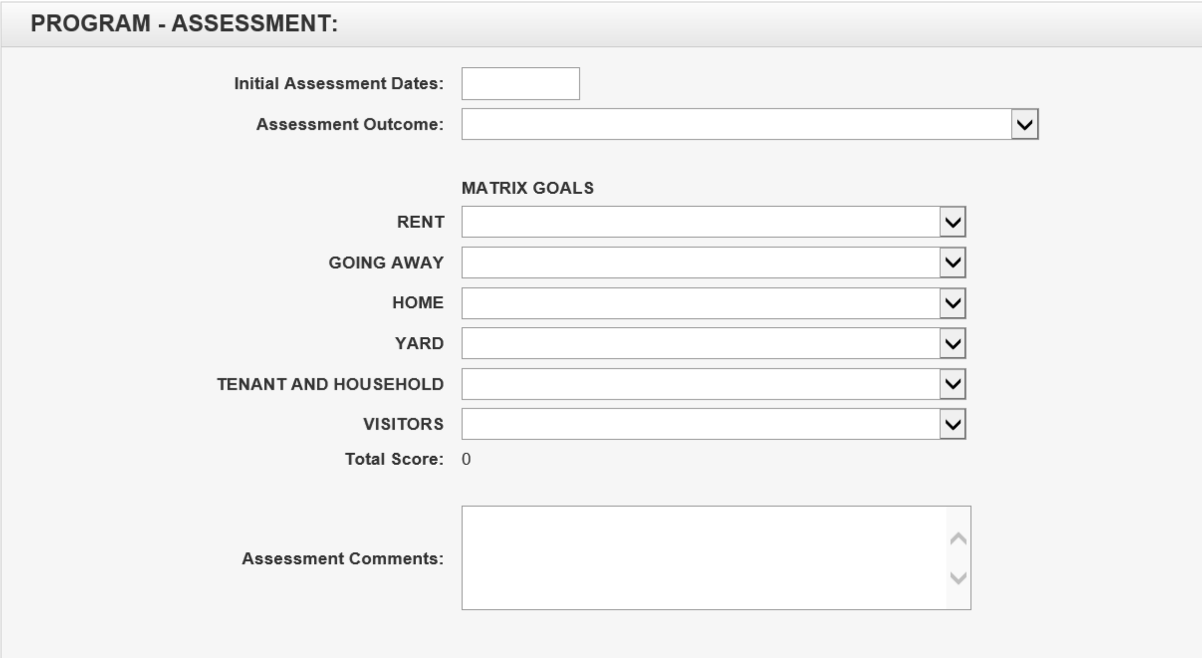
This is where the outcome of the Referral is recorded. The 'Referral Outcome' field has a list of values:

Referral Outcome	Details
Accepted for Assessment	Where the STEP Provider has decided to progress onto meeting with the client to explain STEP further and move towards developing an action plan.
NOT Accepted	Where the STEP Provider has decided in conjunction with the Department of Housing that the referral will not be accepted (e.g. if the client has a familial relationship with the only STEP worker in a remote area).
Waitlist for Assessment	Where the STEP Provider has decided to place the referral on a waiting list for Assessment.
Withdrew by Client	Where client advises the Department of Housing that they no longer want the STEP referral to proceed (before the STEP Provider has reviewed the Referral and made a decision).
Withdrew by Department of Housing	Where the Department of Housing withdraws the referral before the STEP provider has reviewed the referral and made a decision (e.g. if the Department advises the tenant has abandoned the property)

The 'Referral Outcome Comments' field is a long free text field for the Agency to record the reason why a referral was not accepted, or any particular notes of interest relating to the referral, e.g. 'Accepted for Assessment which is expected to commence within seven days.'

PROGRAM - ASSESSMENT:

The purpose of the Program Assessment section is to record whether the case has been accepted or not following contact between the STEP provider and the client. See the screenshot below (note, the MATRIX GOALS are only present if the referral type is for an existing tenant):

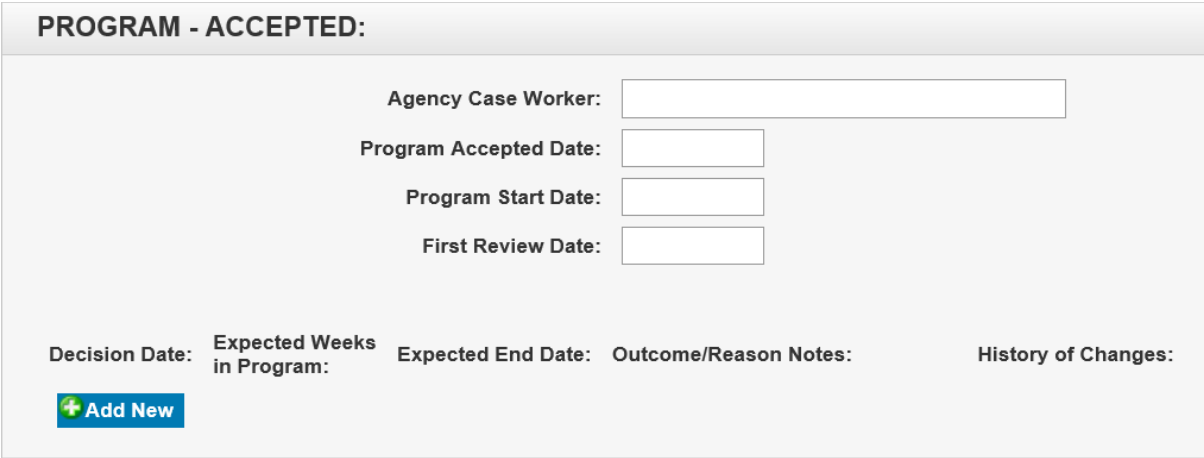


The possible assessment outcomes are:

Code	Definition
Case Accepted - Waitlisted	The STEP provider and client have agreed to work together, but there is a waiting list.
Case Accepted - Open	The STEP provider and client have agreed to work together and will be commencing the program in the near future.
Client Not Amenable – Did not wish to participate in assessment	The STEP provider met with the client, but they did not want to participate in the program.
Client Not Amenable – Declined to meet	The STEP Provider was unable to meet with the client.
Client Not Amenable – Changed mind	The client has changed their mind about participating in STEP.
Case Not Accepted – Agency unable to assist – needs too complex	Where the issues are beyond the scope of STEP. Providers should discuss the case with the Department of Housing prior to discuss alternative options before making this decision.
Case Not Accepted – Negative prior history with STEP Provider	Where the Provider has previously worked with the client and there are reasons why accepting the case would be problematic.
Case Not Accepted – Safety/Violence	The Agency did not accept the case due to safety/violence concerns. Providers should contact the Department of Housing to discuss alternative options, prior to making this decision.
Assessment Not Required – Vacated prior to assessment	The client has vacated the property prior to agreeing to commence STEP with the Provider.
Assessment Not Required – Referred to another agency	The client has been referred to another agency – this could be for a number of reasons such as the client requiring specialised services.

If the outcome is ‘Case Accepted – Open’ and the referral is for an existing tenant, the Matrix Goals should also be recorded (Note: AHS tenants only at this stage).

Upon saving the Assessment Outcome as ‘Case Accepted – Open’, the screen will refresh to show the following:

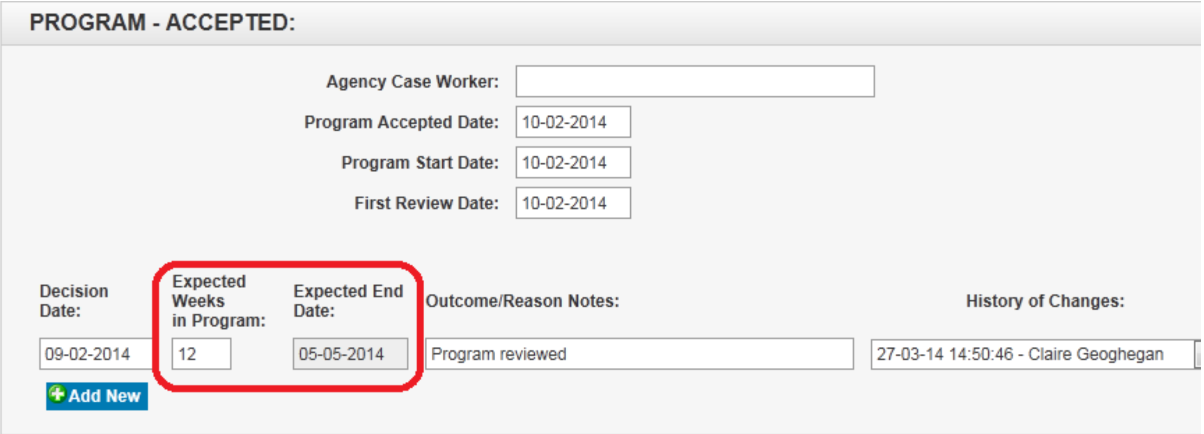


Definitions for the first four fields:

Field	Details
Agency Case Worker	Name of the STEP worker assigned to work with the client.
Program Accepted Date	Date client is accepted onto STEP – (note this field currently duplicates the function of the ‘Initial Assessment Date’ and its usage will be reviewed in a future release).
Program Start Date	Date client commences on STEP. This is usually the same day as the ‘Program Accepted Date’.
First Review Date	Date when the Action Plan (and Matrix) will be formally reviewed with the client. Suggested timeframe is six weeks.

Program Length

The STEP Provider may record the expected length of the program; the screen will show the expected end date.

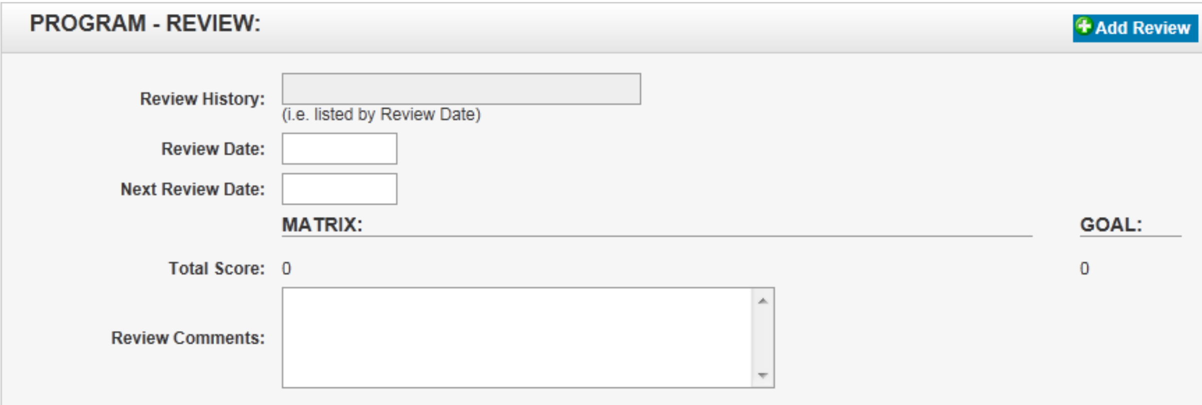


Definitions:

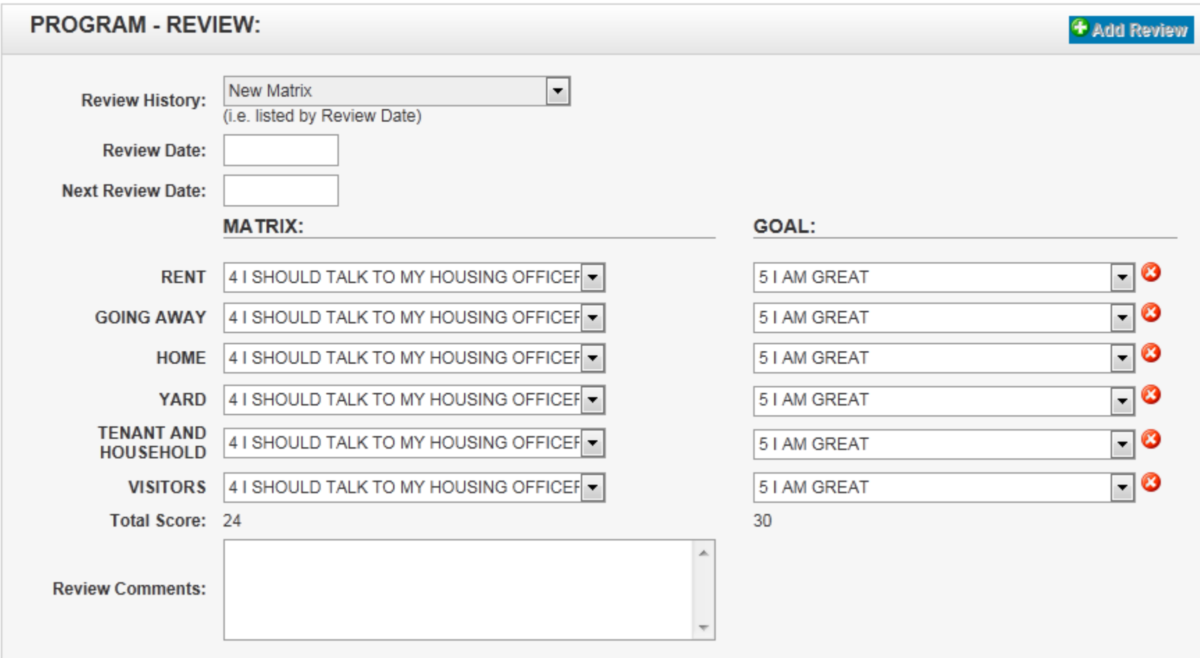
Field	Details
Decision Date	Date the expected program length was determined. The first entry is likely to be the same date as the date you recorded for the ‘Program Accepted Date’ field.
Expected Weeks in Program	Number of weeks the client has agreed to be on STEP.
Expected End Date	This is generated automatically based on the information recorded in the first two fields.
Outcome/Reason Notes	Details about the length of involvement.
History of Changes	Use this drop down to show any changes to the row of information.

PROGRAM – REVIEW:

This section appears for existing tenant referrals only, and is used to capture progress of the tenant at key points of the support program. For a new case, the field will initially be blank:



When the Matrix Review has been completed the STEP Provider will input current Matrix score results and also assign goals.

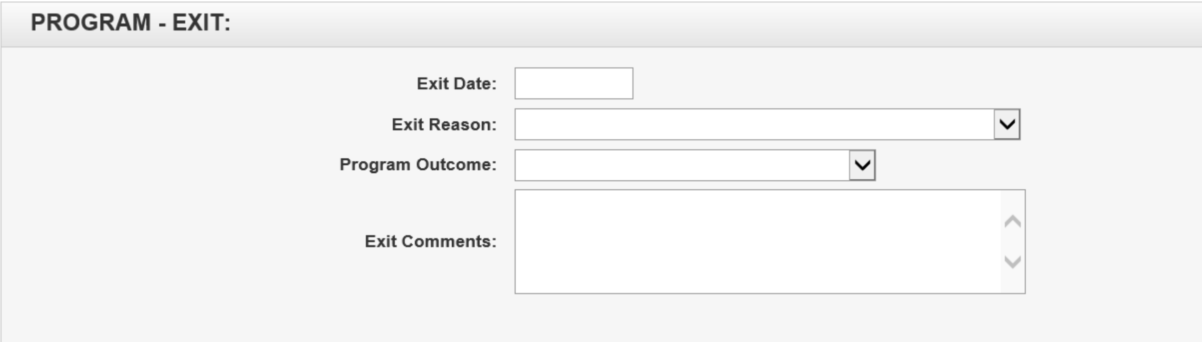


Definitions:

Field	Details
Review History	Used to view previously recorded instances of reviewing the tenant's progress.
Review Date	Date the Review was reapplied. The first time should line up roughly with the 'First Review Date' recorded when the case was commenced.
Next Review Date	Date the Review will be reviewed again with the tenant (e.g. in six weeks).
Matrix	Record of scores for the last Review will display.
Goals	The previously set goals are displayed. Goals that have been met will have a green tick next to them. Goals that have not been met will have a red tick next to them.
Total Score	The Review score and target Goal scores.
Review Comments	Free text field to record any additional information.

PROGRAM – EXIT:

Clients may exit the program at any time and for various reasons. Not all of them may complete the program.



Definitions

Field	Details
Exit Date	Date case is exited
Exit Reason	Reason STEP is no longer involved. See next table for a list of the codes.
Program Outcome	Four options are available: • Successful • Partially Successful • Not Successful • Early or Unexpected Exit
Exit Comments	Free text field to record any additional information.

Options for Exit Reasons include:

- Completed Program
- Not Engaging
- Non-Compliant
- Tenant Withdrew
- Evicted
- Transferred to Another Reason
- Vacated
- Deceased
- Hospitalised
- Incarcerated
- Medical
- Referred to Alternative Program/Agency
- STEP Provider Withdrew Support
- Safety Concerns by STEP Provider
- Dept. of Housing Withdrew Referral
- No Other Appropriate Support in the Area