



Australian Government

**Australian Institute of
Health and Welfare**



SHIP

Specialist Homelessness
Information Platform

Powered by Infoexchange SRS

Specialist Homelessness Information Platform

Administration User Guide

July 2011

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Section 1

Introduction

1.0 Introduction

Service Record System (SRS) is an online client management system designed specifically for the human services sector. SRS enables organisations to record information regarding individuals and families receiving support. It also generates reports to assist with managing service delivery and to provide information to the Australian Institute of Health and Welfare (AIHW) and funding bodies.

From July 2011, SRS is being used as the Client Management Solution (CMS) to serve Specialist Homelessness Services (SHS) and SHS data collection reporting to the AIHW. This solution is referred to as the Specialist Homelessness Information Platform (SHIP).

Depending on your level of access and the configuration for your organisation, the screens in this Administration User Guide may look a little different. Users will have different pages and tabs available to them depending on what is required to undertake their role. See section 3.0 Access Levels for further information on levels of access.

SRS/SHIP is shared across workgroups within an organisation and can be accessed from any computer with an internet connection.

1.1 Specialist Homelessness Information Platform Pages

The Specialist Homelessness Information Platform (SHIP) application has five distinct areas or pages:

- » The **Home** page has two parts. Firstly, the **Reception** Tab can be used to record unassisted person information. Secondly, the **Home** page can be used to manage internal organisational processes such as individual and workgroup based actions.
- » The **Persons** page is used to record information regarding individuals, clients and families receiving ongoing support or assistance from an organisation.
- » The **Days** page provides an alternative view of the **Notes, Payments, Tasks** and **Accommodation** records. The information can be viewed according to the day the event occurred or is due to occur. The **Days** page can be customised to meet the requirements of your Workgroup or organisation.
- » The **Reports** page provides access to a wide range of reports, lists and data export options.
- » The **Admin** page is used to change user preferences, such as email address and password. This area also provides access to various administration functions for authorised users, such as merging duplicate records and viewing audit logs.

Section 2

Application Administration

2.0 Application Administration

Please refer to the general User Guide for a full description of the Normal User access level functionality throughout the pages and tabs within Specialist Homelessness Information Platform (SHIP).

This Administration User Guide details the functions within the application that are only available to the Coordinator and/or Administrator access levels. The Administrator access level does not include any function that displays identifiable client data. (See Section 3.0 Access Levels for further information on access levels.)

2.1 SHS Collection Period Reporting

The **SHS** tab within the Reports page is only available to users with the Coordinator access level.

The SHS tab is used to validate, report and extract SHS data for the workgroup as part of the SHS data collection processing.




Figure 1: SHS tab displaying the default collection period

When the SHS form is opened, the **Collection Period** will default to the last calendar month.

The **Workgroup** will default to the current Workgroup. If the Coordinator has access to multiple Workgroups, the required Workgroup will need to be selected prior to selecting the SHS tab.

The tabs on the right hand side list the person records that have current SHS Support Periods for the selected SHS Collection Period. Please note:

- » The **Missing Records** tab displays the person records that do not have a SHS Status Update record for the selected **Collection Period**.
- » The **Included Records** tab displays the person records that have a SHS Status Update record for the selected **Collection Period**.
- » Person records are grouped together into their presenting units with the head of the presenting unit listed first and members of the presenting unit denoted by the  icon. (see Figure 2)

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- » The **Unassisted** tab displays the Unassisted Person records that will be included in the SHS data validation and extraction for the selected **Collection Period**.
- » The **Submission Log** tab lists the previous SHS data extraction history.
- » Clicking on the blue person name will open a new browser page and display the **Person Details** tab for the selected person record. This allows you to correct the missing details for the person and then click back to the initial browser page so you can continue with the SHS validation work.
- » Clicking **Refresh** will refresh the display of all of the tabs. It is recommended that you click **Refresh** after updating person details.

2.1.1 Validating the SHS Collection Period Data

Before the SHS data can be extracted, it must first pass validation which consists of two areas:

- » Missing SHS Status Update records.
- » Data and business rule validation across the entire collection period.

To correct the missing SHS Status Update records, click on the blue person name in the **Missing Records** list. This will open the Person Details in another browser tab. Create the missing records and navigate back to the SHS tab. Clicking **Refresh** will update the **Missing Records** list.

Once the **Missing Records** list is empty, click **Validate Data** to validate the entire collection period.

The screenshot shows the SHIP interface with the SHS tab selected. The left sidebar has 'Reports' highlighted. The main content area shows 'Workgroup: ACME Homelessness Services' and 'SHS Agency Name: ACME Services'. Below this, there are fields for 'SHS Agency ID' (12345A) and 'Collection Period' (May 2011). There are buttons for 'Validate Data', 'Summary Report', and 'Extract Data'. A 'Report Submitted' message states: 'This report may take a few minutes to run. The report will be displayed in the results tab. The report ID number is: 24. Please delete the report when no longer of use.' On the right, there is a table with columns: Client, Episode Start Date, Episode End Date, and Last Status Update. The table lists records for Johan Doe, Jane Doe, Bob Doe, Susan Doe, and Bill Jones. A 'Refresh' button is located above the table.

Client	Episode Start Date	Episode End Date	Last Status Update
Johan Doe	02/05/11		10/06/11
Jane Doe	02/05/11		10/06/11
Bob Doe	02/05/11		10/06/11
Susan Doe	02/05/11		10/06/11
Bill Jones	04/05/11		22/06/11

Figure 2: SHS tab displaying person records included in validation and the validation report submission details

The validation results are generated as a report and will be available via the Results tab. Any errors will need to be corrected prior to performing the SHS data extraction.

The screenshot shows the SHIP interface with the Results tab selected. The left sidebar has 'Reports' highlighted. The main content area shows 'SHS Collection Period Validation Report for May 2011'. Below this, there is a message: 'Some errors were found during the validation process. Please verify and fix the following warnings before running the extraction process.' The errors listed are: 'Client: Layla Peterson - Inconsistent value: Date of Birth occurs after Support Period Assistance Request Date (30/05/2011 > 29/05/2011). Client: Zara Peterson - Inconsistent value: Relationship to Presenting Unit Head clashes with Date of Birth (Client age:10)'. The report was generated by Gerard Palk.

Figure 3: Sample SHS Collection Period Validation Report listing possible errors

A validation report will also be produced if there are no errors.

2.1.2 Summary Report

Clicking **Summary Report** will produce a report that contains both aggregated record totals of what would be included in the SHS data extraction and also a listing of the data that will be sent to AIHW as part of the SHS data collection. The report can be accessed via the Results tab.

Note that the report contains client names. These names will not be sent to AIHW as part of the SHS data extraction. The names have been included in the report only so that, should you identify data that needs to be corrected, you can click the blue person name and be taken straight to the Person Details tab.

2.1.3 SHS Data Extraction

Once the missing SHS Status Update records have been created and the data has been validated, the SHS data extraction process is performed by clicking **Extract Data**. Note that the **Extract Data** button will be protected if there are any person records identified as missing a SHS Status Update record for the collection period.



Worker: Coordinator A (ACME Homelessness Services) Logout

Home Reports Lists Financial SHS Referrals Reception Custom Results Menu

Persons Workgroup ACME Homelessness Services Refresh

Days SHS Agency Name ACME Services

Reports SHS Agency ID 12345A

Admin Collection Period May 2011

Validate Data Summary Report

Extract Data

Extract Submitted


This extract may take a few minutes to run. If the extract has been correctly validated it will be available for download from the results tab.
The extract ID number is: 26
Please save the extract to a location on your hard drive.
You then need to submit it to the Australian Institute of Health and Welfare (AIHW) through the [Specialist Homelessness Online Reporting \(SHOR\) website](#).

Client	Episode Start Date	Episode End Date	Last Status Update
Johan Doe	02/05/11		10/06/11
Jane Doe	02/05/11		10/06/11
Bob Doe	02/05/11		10/06/11
Susan Doe	02/05/11		10/06/11
Bill Jones	04/05/11		22/06/11

1 to 5 of 5

Figure 4: SHS tab with extraction submission details highlighted

As part of the data extraction process, the entire collection period data will be re-validated. If critical errors are found, the extraction file will not be created. The SHS Collection Period Extract report containing the errors can be viewed via the Results tab.



Worker: Coordinator A (ACME Homelessness Services) Logout

Home Reports Lists Financial SHS Referrals Reception Custom Results Menu

Persons Back to Report Results List Delete this Report

Days SHS Collection Period Extract for May 2011

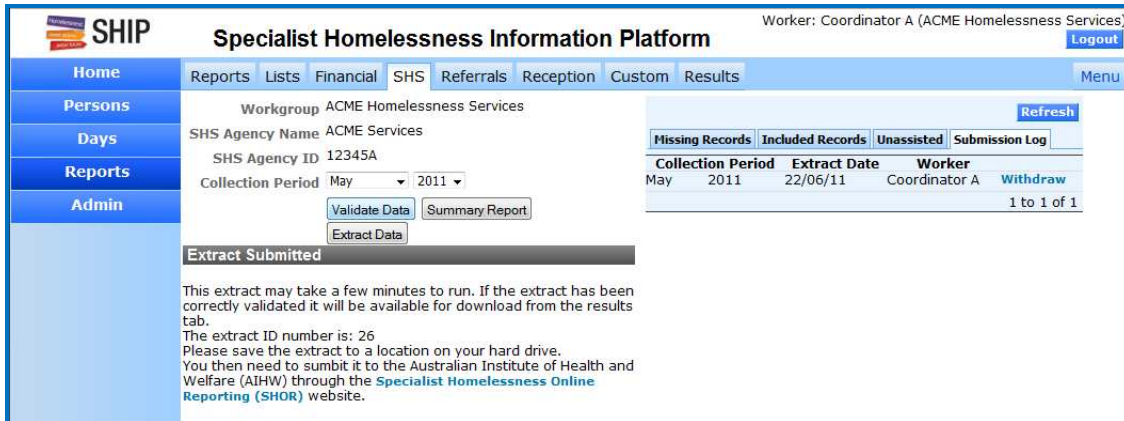
Reports Some errors were found during the extraction process. Please verify and fix the following warnings and run the extraction process again.

Admin Client: Bill Jones - Inconsistent value: There are no support services (Hint: Notes tab) recorded for this client in this collection period.
Report generated by Coordinator A

Figure 5: Results tab displaying SHS Collection Period Extract errors

If no errors are found in the validation process, the SHS data collection extract file is created and will be available to download from the Results tab. The extract should be saved to a location on your hard drive and then submitted to the AIHW Specialist Homelessness Online Reporting (SHOR) website. A link to SHOR is provided on the SHS tab upon successful SHS data extraction. (See Figure 4)

After a successful data validation and extraction, the **Submission Log** tab is updated with the date of the SHS data extraction.



The screenshot shows the SHIP interface for the SHS tab. The header includes the SHIP logo and the text 'Specialist Homelessness Information Platform'. The user is identified as 'Coordinator A (ACME Homelessness Services)'. The main content area has a navigation menu on the left with options like Home, Persons, Days, Reports, and Admin. The main area has tabs for Reports, Lists, Financial, SHS, Referrals, Reception, Custom, and Results. The SHS tab is active, showing a form with fields for Workgroup (ACME Homelessness Services), SHS Agency Name (ACME Services), SHS Agency ID (12345A), and Collection Period (May 2011). There are buttons for 'Validate Data', 'Summary Report', and 'Extract Data'. A table shows the 'Submission Log' with columns for Collection Period, Extract Date, and Worker. The table contains one record: May 2011, 22/06/11, Coordinator A. A 'Withdraw' button is visible next to the record. Below the table, there is a section titled 'Extract Submitted' with a message: 'This extract may take a few minutes to run. If the extract has been correctly validated it will be available for download from the results tab. The extract ID number is: 26. Please save the extract to a location on your hard drive. You then need to submit it to the Australian Institute of Health and Welfare (AIHW) through the Specialist Homelessness Online Reporting (SHOR) website.'

Figure 6: SHS tab displaying successful extraction details

2.1.4 Withdrawing a Submission

Should you need to make a resubmission of SHS data, clicking **Withdraw** on the **Submission Log** tab will withdraw the current submission status and allow you to edit and re-extract the SHS data for the selected SHS Collection Period.

Note that this withdrawal process will only update the SHS data extraction status within the SHIP application, it will not remove any data that has previously been uploaded to the AIHW SHOR portal.

2.1.5 Locking Down Records

Once the SHS data extraction has been successfully completed for the collection period, the following records/fields will be locked down and cannot be edited:

- » **Date support period commenced** field within the SHS Support Period record
- » **SHS Status Update** record

However, withdrawing the SHS data submission by clicking **Withdraw** on the **Submission Log** tab for the collection period will remove the locks on the records/fields.

2.1.6 Locating Person Records via the Alpha Code

Should the SHOR processing require you to locate records within SHIP, you will not be given client name information from SHOR to locate the records within SHIP. However, you should be given the client's Alpha Code information.

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To search for a client via their Alpha Code:

1. Navigate to the Full Search facility within the Persons page.
2. Enter the **Alpha Code** and click **GO**.

SHIP John Doe Male, DOB: 27/05/1970 (Age 41 yrs) Worker: Coordinator A (ACME Homelessness Services) Logout

Home Search Details Notes Payments Accommodation Status Alerts Referrals Plans Tasks Documents Menu

Persons Search for: Given name: Family name: Male Female Fuzzy OHOE2 GO Clear

Days Search Results

Given Name	Family Name	Sex	DOB	Alias?	Match
John	Doe	male	27/05/1970	0	0
Johan	Doe	male	01/01/1970	Alias	0

Reports

Admin Add new Client

Recent List: Family name search: GO

Figure 7: Search tab displaying Alpha Code search and search results with Alpha Code field highlighted

2.2 Financial Reconciliation

The **Finance** tab within the Admin page is only available to users with the Coordinator access level.

To assist with financial reconciliation activities, the Finance tab provides access to the payment information that has been entered within the application.

SHIP Specialist Homelessness Information Platform Worker: Coordinator A (ACME Homelessness Services) Logout

Home Change Password Preferences Documents Finance Bulk Actions Merge Audit Templates Reference Data Menu

Persons Workgroup: ACME Homelessness Services Date Range: This Month Finalize Transactions

Date	First Name	Last Name	Account	Payment Type	Worker	Amount	Action
From: 01/06/2011						Total: \$325.00	Apply Filter
To: 22/06/2011							Clear Filter
06/06/2011	John	Doe	2		Worker A	100.00	Update
06/06/2011	John	Doe	2		Worker A	75.00	
06/06/2011	Nickie	Smith	4		Worker A	150.00	Update
TOTAL:						\$325.00	

Figure 8: Finance tab displaying payment information

To generate a list of financial transactions:

1. Select a **Date Range** by either using the blue drop down menu at the top of the screen or by using the calendar icon.
2. You can filter by **Date**, **First Name**, **Last Name**, **Account**, **Payment Type** or **Worker**. Once one of the options has been selected, click **Apply Filter**.

Please note that:

- » Clicking on the transaction **Date** will take you to the detailed payment transaction record. (I.e. the payment record in the Persons page.)
- » You can update the payment transaction amount by entering the updated figure in the **Amount** field and clicking **Update**.

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Organisations often finalise payment transactions following reconciliation of their records and internal financial systems. These payment transactions are locked down and cannot be edited.

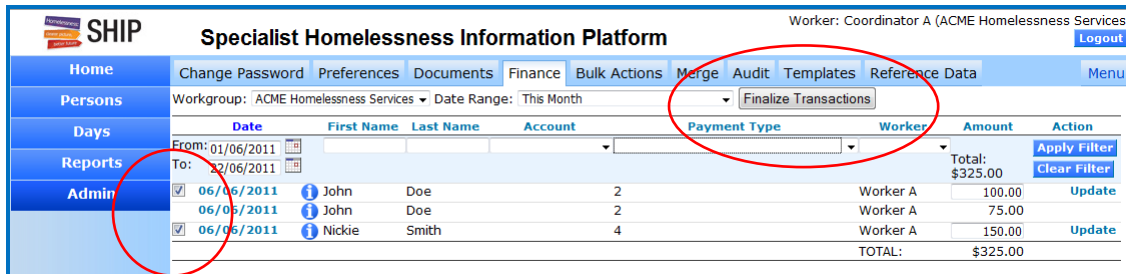


Figure 9: Finance tab displaying payment transactions with Finalise Transactions buttons and check boxes highlighted

To finalise transactions:

1. Select the payment transactions to be included in the finalisation process by ticking the check box on the left hand side.
2. To lock down the payment transactions, click **Finalise Transactions** and confirm you wish to lock down the transactions. These payment transactions will no longer be able to be edited.

2.3 User Management

The **Users** tab within the Admin button is available to users with either the Coordinator¹ or Administrator access level.

The **Users** tab provides access to the User Maintenance functions.



Figure 10: Users tab displaying list of current users

¹ Some application configurations do not include the Users tab within the Coordinator access level.

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2.3.1 Creating a New User

The process of creating a new user involves three steps.

1. Creating the new **User Name**.
2. Allocating the new **User Name** to a workgroup. Failure to allocate the **User Name** to a workgroup will result in the user not being able to access the required functions and records within the application.
3. Allocating the correct access level.

To create a new User:

1. Click **Add new user** button and the **Add new user** form will open to the right of screen.

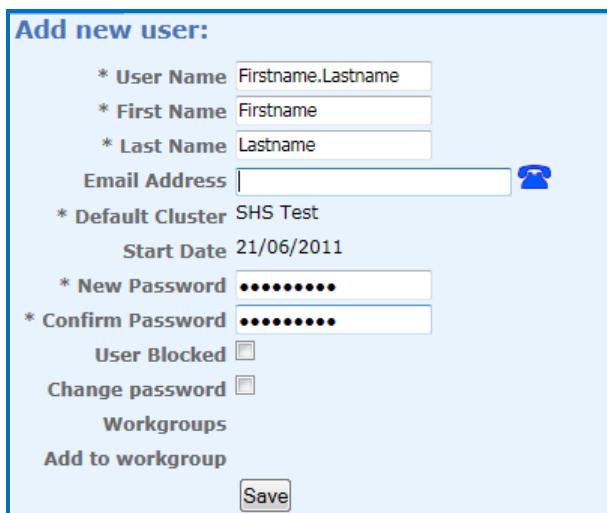
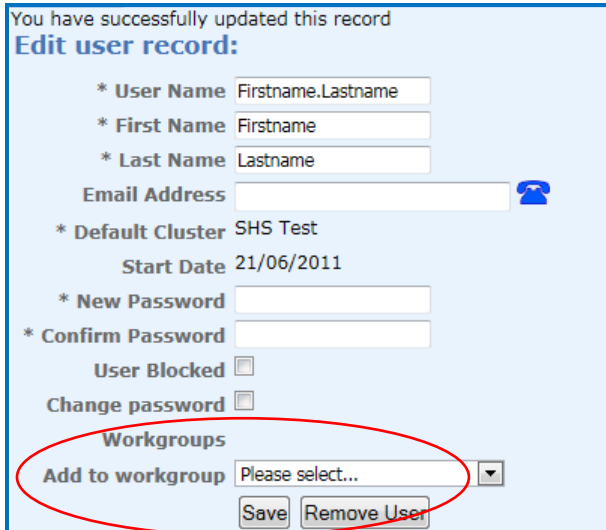


Figure 11: Edit user record form

2. Enter the new **User Name** (User id). Please note that:
 - The **User Name** is case sensitive.
 - It is recommended that the naming convention of 'Firstname.Lastname' be followed. For example, if the user's name is John Smith, the new **User Name** should be 'John.Smith'.
 - The **User Name** can consist of letters, numbers, and the '-' (dash) and the '.' (dot) characters. No other characters or symbols are permitted.
3. Enter the **First Name** and **Last Name**.
4. Enter the **New Password** and re-enter the password in **Confirm Password**. The password must be at least six characters in length and contain both letters and numbers.
5. Ensure that the **User Blocked** checkbox is not ticked.
6. Tick the **Change Password** checkbox which will force the user to change their password when they log into the application.
7. Click **Save**. The User account has been saved.

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8. To allocate access to a Workgroup, make a selection from **Add to workgroup** list and click **Save**.



You have successfully updated this record
Edit user record:



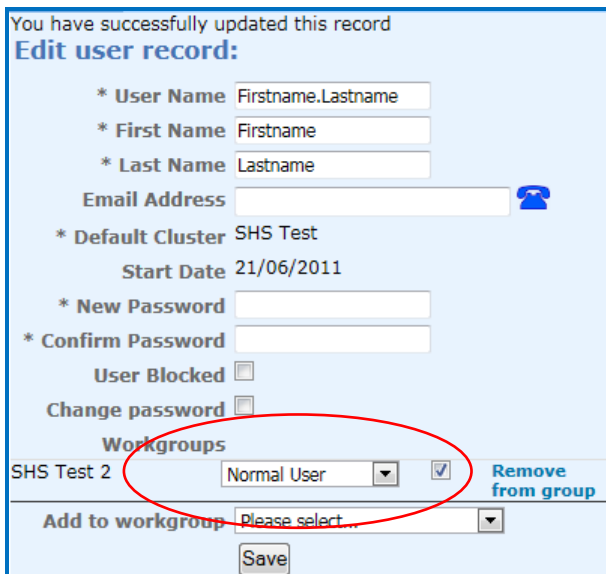
* User Name
* First Name
* Last Name
Email Address 
* Default Cluster SHS Test
Start Date 21/06/2011
* New Password
* Confirm Password
User Blocked
Change password
Workgroups
Add to workgroup 

Figure 12: Edit user record form with Add to workgroup highlighted

9. The access level for the Workgroup will default to 'Normal User'. If a different access level is required, select the correct access level from the list.

Most users should be given 'Normal User' access level. Managers and team leaders may be given 'Coordinator' access level. Administration workers who are responsible for adding users and running reports may be given 'Administrator' access level. (Identifiable client data cannot be viewed with the 'Administrator' access level.)

See section 3.0 Access Levels for a listing of the pages and tabs available within the application to the different access levels.



You have successfully updated this record
Edit user record:




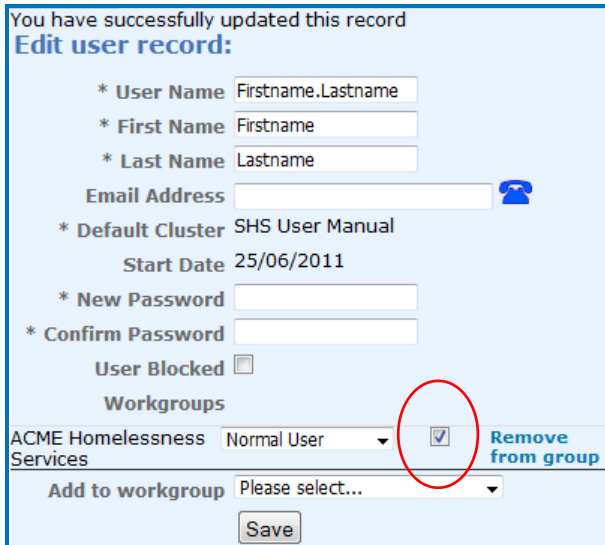
* User Name
* First Name
* Last Name
Email Address 
* Default Cluster SHS Test
Start Date 21/06/2011
* New Password
* Confirm Password
User Blocked
Change password
Workgroups
SHS Test 2 
Add to workgroup 

Figure 13: Edit user record form with Normal User access level highlighted

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10. If the user needs access to another workgroup, make another selection from the **Add to workgroup** list at the bottom of the form and assign the required access level.
11. If the user is a manager who is not an 'operational' member of the workgroup, uncheck the operational check box so that their **User Name** does not appear in the 'worker' drop down lists throughout the application. For the majority of users, the operational check box should remain checked.



You have successfully updated this record
Edit user record:


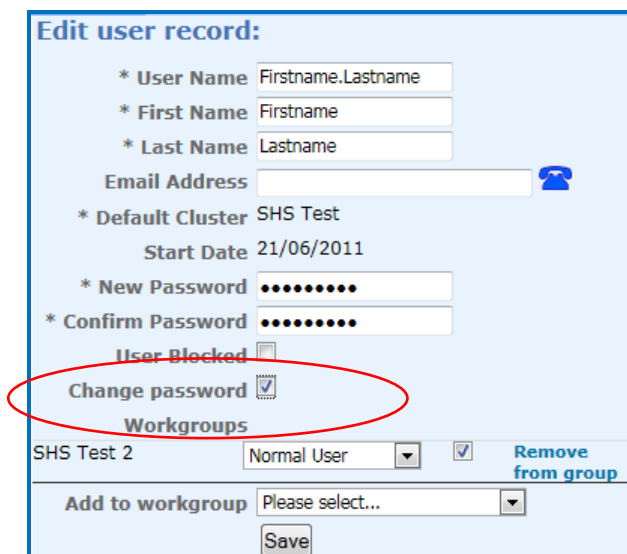
* User Name
* First Name
* Last Name
Email Address 
* Default Cluster SHS User Manual
Start Date 25/06/2011
* New Password
* Confirm Password
User Blocked
Workgroups
ACME Homelessness Services [Remove from group](#)
Add to workgroup

Figure 14: Edit user record form with Operational check box highlighted

2.3.2 Resetting a Password

To reset a user's password:

1. Open the **Edit user record** form by selecting the **User Name** from the list on the left of screen.



Edit user record:


* User Name
* First Name
* Last Name
Email Address 
* Default Cluster SHS Test
Start Date 21/06/2011
* New Password
* Confirm Password
User Blocked
 [Change password](#)
Workgroups
SHS Test 2 [Remove from group](#)
Add to workgroup

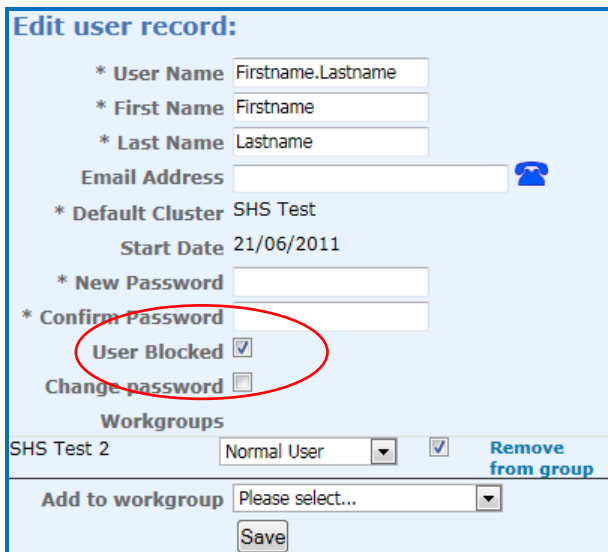
Figure 15: Edit user record with Change Password highlighted

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2. Enter the **New Password** and re-enter the password in **Confirm Password**.
3. Tick the **Change Password** checkbox which will force the user to change their password the next time they log into the application.
4. Click **Save**.

2.3.3 Unblocking a User Account

A user account may become blocked due to five consecutive incorrect password attempts or by lengthy account inactivity.




Edit user record:

* User Name

* First Name

* Last Name

Email Address 

* Default Cluster SHS Test

Start Date 21/06/2011

* New Password

* Confirm Password

User Blocked

Change password

Workgroups

SHS Test 2 [Remove from group](#)

Add to workgroup

Figure 16: Edit user record with User Blocked highlighted

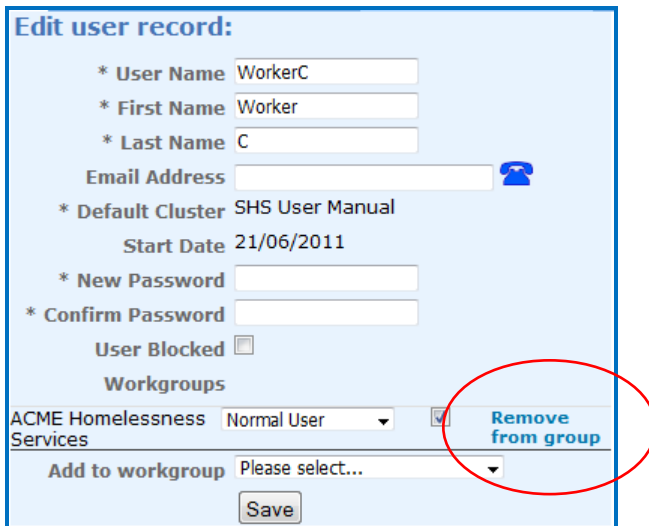
The user account can be unblocked by unchecking the **User Blocked** check box and clicking **Save**.

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2.3.4 Removing User Access

To remove the active user account from the system:

1. Open the **Edit user record** form for the user account.



Edit user record:


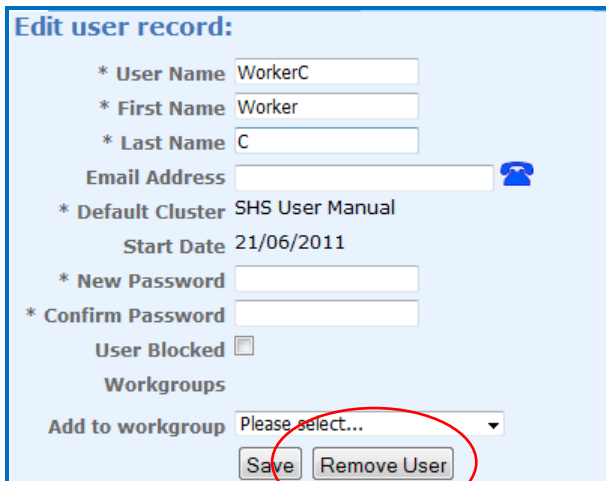
* User Name WorkerC
* First Name Worker
* Last Name C
Email Address 
* Default Cluster SHS User Manual
Start Date 21/06/2011
* New Password
* Confirm Password
User Blocked
Workgroups
ACME Homelessness Services Normal User **Remove from group**
Add to workgroup Please select...
Save

Figure 17: Edit user record with Remove from group highlighted

2. Click **Remove from group** for all listed Workgroups.
3. Once all workgroups have been removed, the **Remove User** button will be displayed.



Edit user record:


* User Name WorkerC
* First Name Worker
* Last Name C
Email Address 
* Default Cluster SHS User Manual
Start Date 21/06/2011
* New Password
* Confirm Password
User Blocked
Workgroups
Add to workgroup Please select...
Save Remove User

Figure 18: Edit user record form with Remove User button highlighted

4. Click **Remove User**.
5. The user account will be removed as an active user but all database references to the user will be retained. For example, association with case notes.

If you don't want to remove the active user account from the system but do want to remove access for a period of time, tick the **User Blocked** check box. The user will not be able to log in to the application.

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2.4 Merging Person Records

The **Merge** tab within the Admin page is only available to users with the Coordinator access level.

The Merge tab allows you to merge duplicate person records for the same client. For example, two workers may have individually entered client details and one record is incorrect.

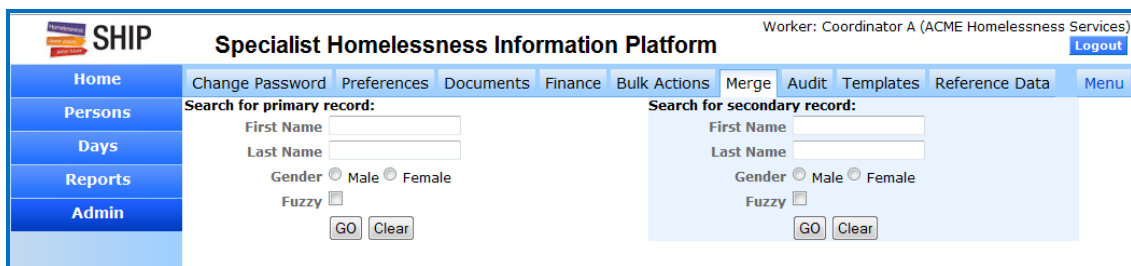
Prior to commencing the merge process, you should identify the 'primary' person record you want to keep and the 'secondary' person record you want to merge into the primary person record.

When you merge the two person records, the demographic information will be retained for the primary person record but the demographic information contained in the secondary person record will essentially be deleted.

Note that you will be unable to merge two records that contain SHS Support Periods or Profiles with overlapping dates. In this instance, you can either delete one SHS Support Period (or Profile) prior to the merge or alter the dates of the SHS Support Period (or Profile).

To merge two person records:

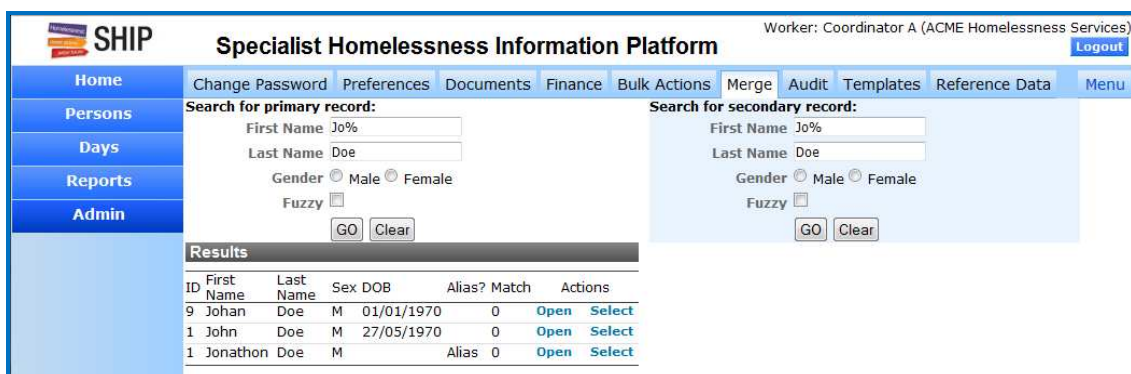
1. Click the Merge tab. The **Search for primary record** form will appear in the top left of the screen and the **Search for secondary record** form will appear in the top right of the screen.



The screenshot shows the SHIP interface with the 'Merge' tab selected. It features two search forms side-by-side. The 'Search for primary record' form on the left has fields for 'First Name', 'Last Name', 'Gender' (radio buttons for Male and Female), and a 'Fuzzy' checkbox. The 'Search for secondary record' form on the right has identical fields. Both forms have 'GO' and 'Clear' buttons at the bottom.

Figure 19: Merge tab displaying search criteria for primary and secondary person records

2. In the **Search for primary record** form, enter the **First Name** and/or **Last Name** of the primary person record. It is also recommended to click the **Fuzzy** search check box to display partial matches and to allow for incorrect spelling.
3. Click **GO** and a list of possible primary person records will be displayed.



The screenshot shows the SHIP interface with the 'Merge' tab selected. The 'Search for primary record' form now has 'Jo%' in the 'First Name' field and 'Doe' in the 'Last Name' field. The 'Fuzzy' checkbox is checked. Below the form, a 'Results' table is displayed with the following data:

ID	First Name	Last Name	Sex	DOB	Alias?	Match	Actions
9	Johan	Doe	M	01/01/1970	0		Open Select
1	John	Doe	M	27/05/1970	0		Open Select
1	Jonathon	Doe	M		Alias	0	Open Select

Figure 20: Merge tab displaying primary record possible matches

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- If the records have the exact same client name, you can verify the primary and secondary record according to the Person ID, the unique system number for each person record. (Note that the Person ID is not the person's Alpha Code.) You can obtain the Person ID by holding the mouse over the client's name in the Person Details tab. The first number is the Person ID, the second number (if different) is the alias record ID. In the example below, the Person ID is '1' and the Alias ID is '2'.

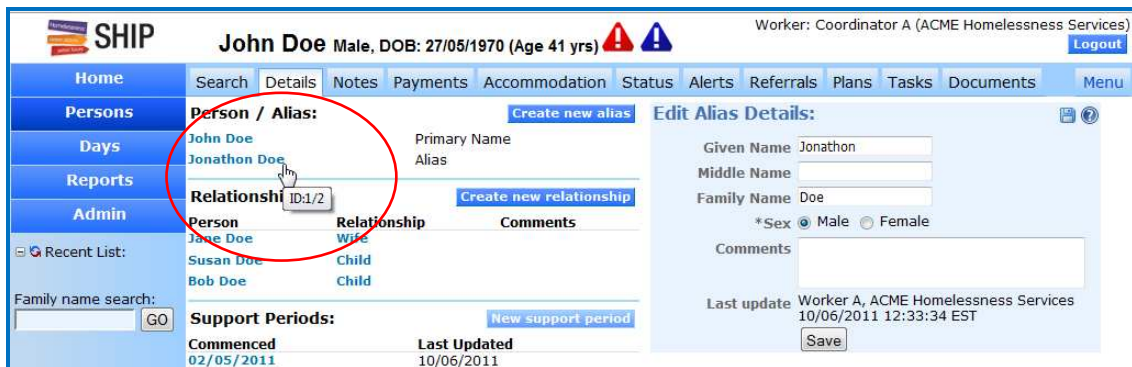


Figure 21: Person Details tab with Person Id highlighted

- When viewing the Primary person record search results on the Merge tab, you can view the Person Details tab for the selected person record by clicking **Open** (see Figure 20). Note that you will then need to navigate back to the Merge tab and start the merge process again.
- Click **Select** to confirm the primary person record for the merge process. This is the record that will be kept.

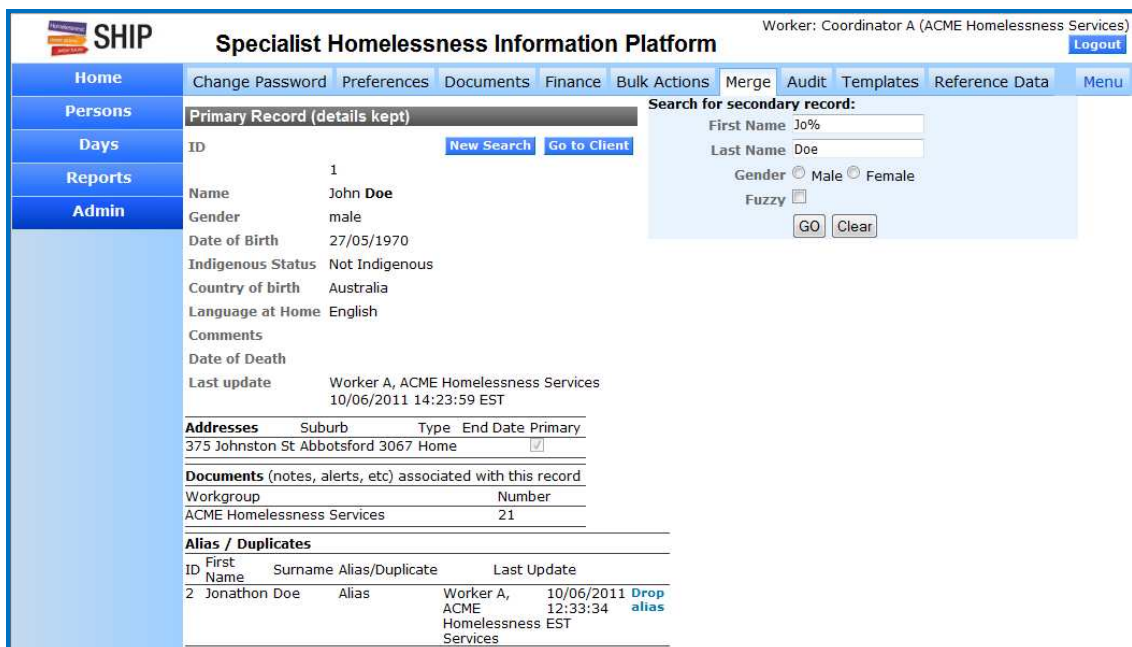


Figure 22: Merge tab displaying selected primary person record

Administration User Guide



- In the **Search for secondary record** form, enter the **First Name** and/or **Last Name** of the secondary person record. These fields will have been defaulted from the search criteria entered in the primary search criteria. It is also recommended to click the **Fuzzy** search check box to display partial matches and to allow for incorrect spelling.
- Click **GO** and a list of possible secondary person records will be displayed.
- If you want to view the Person Details tab for the selected secondary person record, click **Open**. Note that you will then need to navigate back to the Merge tab and start the merge process again.
- Click **Select** to confirm the secondary person record for the merge process. This is the record that will be merged into the primary person record.

The screenshot shows the SHIP interface with the 'Merge' tab selected. It displays two side-by-side record forms for comparison. The primary record (ID 1) for John Doe has a date of birth of 27/05/1970 and is associated with ACME Homelessness Services. The secondary record (ID 9) for Johan Doe has a date of birth of dd/mm/1970 and is also associated with ACME Homelessness Services. At the bottom right, the 'Make Alias' and 'Merge' buttons are highlighted with a red circle.

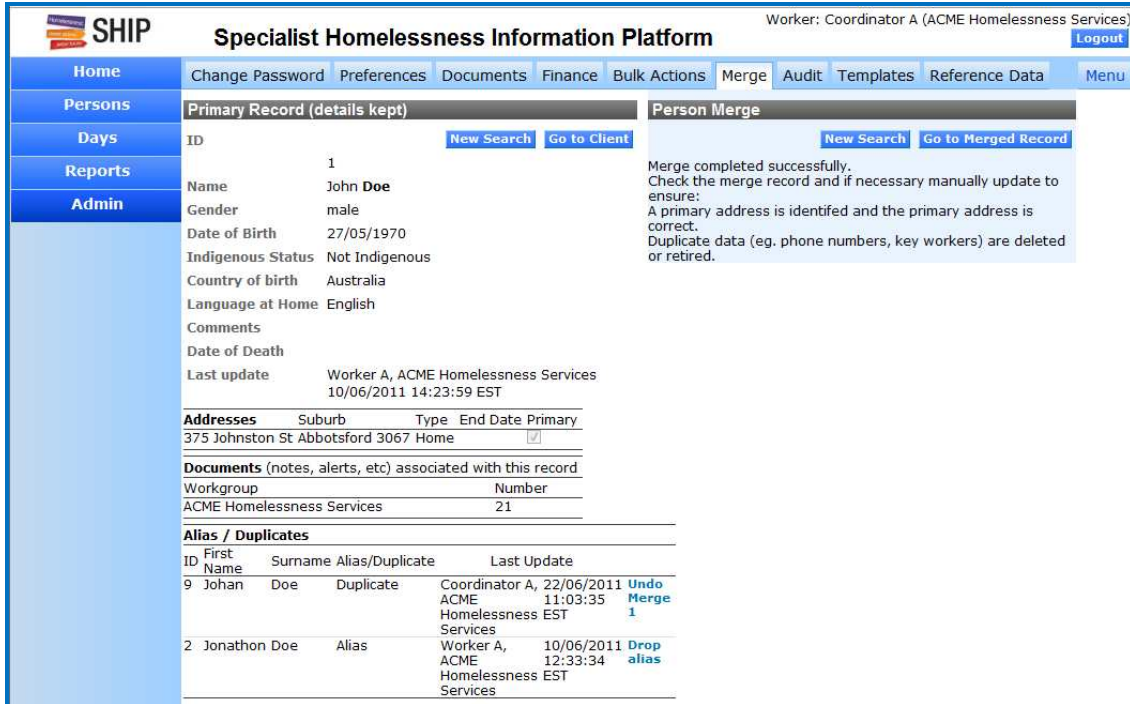
Figure 23: Merge tab displaying selected primary and secondary person records with ~~Make Alias~~ and Merge buttons highlighted

- Carefully consider both records to ensure they relate to the same client before clicking **Merge**. Note that, in addition to merging the records, clicking **Make Alias** will also create an Alias record from the name and gender details of the secondary person record. For example, the **Make Alias** function would be used if you were merging two records where the person is known under different names (hence the accidental creation of a duplicate record for the person).
- Click **Merge** to merge the secondary person record into the primary person record.
- If you are sure you want to merge the records, click **OK** to confirm the merge.

Please note that the **Merge** button will not be available if the two selected person records have overlapping SHS Support Periods or Profiles. The conflicting SHS Support Periods will be displayed in the 'Support Periods' section of the Secondary (Merge) Record form.

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Once the merge process has been completed, a confirmation message will be displayed in the top right corner of the screen.



Worker: Coordinator A (ACME Homelessness Services) [Logout](#)

Home | Change Password | Preferences | Documents | Finance | Bulk Actions | **Merge** | Audit | Templates | Reference Data | Menu

Persons | **Primary Record (details kept)** | **Person Merge**

Days | ID: 1 | [New Search](#) | [Go to Client](#) | [New Search](#) | [Go to Merged Record](#)

Reports | Name: John Doe

Admin | Gender: male

Date of Birth: 27/05/1970

Indigenous Status: Not Indigenous

Country of birth: Australia

Language at Home: English

Comments

Date of Death

Last update: Worker A, ACME Homelessness Services
10/06/2011 14:23:59 EST

Addresses

Suburb	Type	End Date	Primary
375 Johnston St Abbotsford 3067	Home		<input checked="" type="checkbox"/>

Documents (notes, alerts, etc) associated with this record

Workgroup	Number
ACME Homelessness Services	21

Alias / Duplicates

ID	First Name	Surname	Alias/Duplicate	Last Update	
9	Johan	Doe	Duplicate	Coordinator A, ACME Homelessness Services 22/06/2011 11:03:35 EST	Undo Merge 1
2	Jonathon	Doe	Alias	Worker A, ACME Homelessness Services 10/06/2011 12:33:34 EST	Drop alias

Merge completed successfully.
Check the merge record and if necessary manually update to ensure:
A primary address is identified and the primary address is correct.
Duplicate data (eg. phone numbers, key workers) are deleted or retired.

Figure 24: Merge tab showing results of successful merge process

Within the Merge function you also have the option to:

- » **Undo Merge** – the system will remember what records have been merged and will allow you to unmerge the two person records at a later date.
- » **Drop Alias** – will allow you to delete an alias that has been incorrectly entered or is no longer valid.

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2.5 Audit Log

The **Audit** tab within the Admin page is only available to users with the Coordinator access level.

The Audit tab enables you to review the activities of individual Workers or review access to specific client records over a period of time.

SHIP Specialist Homelessness Information Platform								Logout	
Home	Change Password	Preferences	Documents	Finance	Bulk Actions	Merge	Audit	Templates	Menu
Persons	From: 10/06/2011 To: 10/06/2011		Person ID:	Worker: Worker A		GO			
Days	Audit Log								
Reports	Date	Person ID	First Name	Last Name	Alias/Duplicate	Worker	Workgroup		
Admin	10/06/2011 09:13:36 EST	1	John	Doe		Worker A	ACME Homelessness Services		
	10/06/2011 12:07:04 EST	1	John	Doe		Worker A	ACME Homelessness Services		
	10/06/2011 12:47:40 EST	4	Susan	Doe		Worker A	ACME Homelessness Services		
	10/06/2011 12:47:47 EST	1	John	Doe		Worker A	ACME Homelessness Services		
	10/06/2011 13:41:06 EST	4	Susan	Doe		Worker A	ACME Homelessness Services		
	10/06/2011 13:41:09 EST	1	John	Doe		Worker A	ACME Homelessness Services		

Figure 25: Audit log list displayed for selected worker

You can either search via the **Worker** or search via the client record. To search via the client, you will first need to identify the **Person ID** for the client record. To do this hover the mouse over the client name in the Person Details tab. (See Figure 21.)

To generate an Audit Log:

1. Select your search date range by using the calendar icons.
2. Select the **Worker** from the list or enter the **Person ID**.
3. Click **GO** and the **Audit Log** will be displayed.

SHIP Specialist Homelessness Information Platform								Logout	
Home	Change Password	Preferences	Documents	Finance	Bulk Actions	Merge	Audit	Templates	Menu
Persons	From: 10/06/2011 To: 10/06/2011		Person ID: 4	Worker: Please select...		GO			
Days	Audit Log								
Reports	Date	Person ID	First Name	Last Name	Alias/Duplicate	Worker	Workgroup		
Admin	10/06/2011 12:47:40 EST	4	Susan	Doe		Worker A	ACME Homelessness Services		
	10/06/2011 13:41:06 EST	4	Susan	Doe		Worker A	ACME Homelessness Services		

Figure 26: Audit log list displayed for person

Please note:

- » Clicking on either the **First Name** or **Last Name** of the person record will take you to the Person Details tab.
- » You can sort the Audit Log by clicking on the blue **Date**, **First Name**, **Last Name**, **Worker** or **Workgroup** headings.

Administration User Guide

2.6 Templates

The **Templates** tab within the Admin button is available to users with either the Coordinator or Administrator access level.

The application supports two types of document templates:

- » Merge templates – these are templates used in the person data merge facility within the Documents tab in the Person page. This is similar to a mail merge where the client details are merged into a Rich Text Format (RTF) document template that can be saved against the client's person record and printed. For example, referral letter, letter of introduction.
- » Static documents – useful documents and files that do not need to have specific client details incorporated into the document. These documents may be general documents that can be printed off as needed and are not stored against the client's file. For example, the agency's confidentiality and privacy policy.

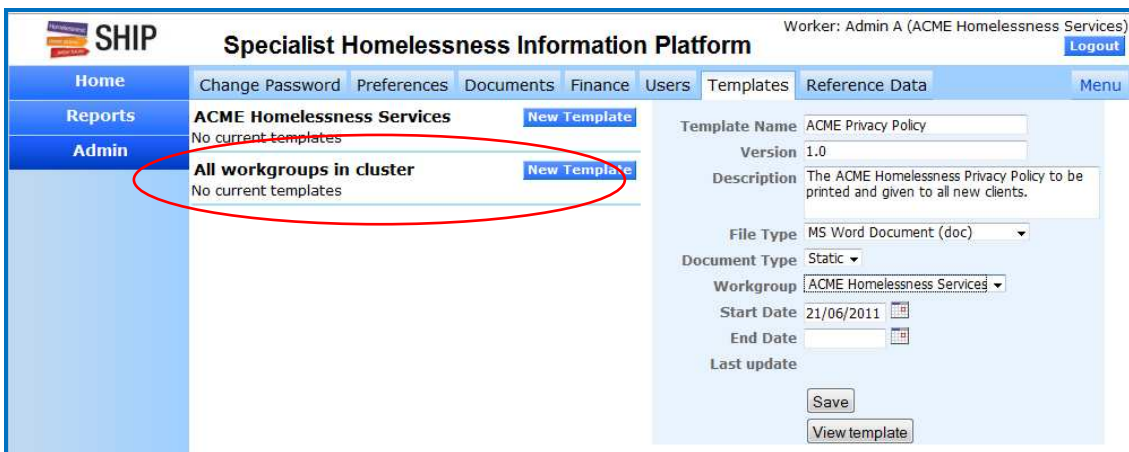
Templates first need to be created in Microsoft Word (or other applications) and then the template or document is uploaded to the application via the Templates tab. (See section 4.0 Allowable Tags for Rich Text Format Documents for a full listing of the allowable merge tags for RTF documents.)

The selected Document type of 'Merge' or 'Static' dictates where the template/document will be available within the application and the purpose of the template/document:

- » Template Document type: Merge – available via the document merge facility within the Documents tab in the Person page.
- » Template Document type: Static – available via the Documents tab within the Admin tab.

To add a new document template:

1. Click **New Template** and the new template form will appear to the right of screen.



The screenshot shows the SHIP interface with the 'Templates' tab selected. The left sidebar has 'Admin' selected, and the 'All workgroups in cluster' group is highlighted with a red circle. The main content area shows the 'New Template' form with the following fields:

Template Name	ACME Privacy Policy
Version	1.0
Description	The ACME Homelessness Privacy Policy to be printed and given to all new clients.
File Type	MS Word Document (.doc)
Document Type	Static
Workgroup	ACME Homelessness Services
Start Date	21/06/2011
End Date	
Last update	

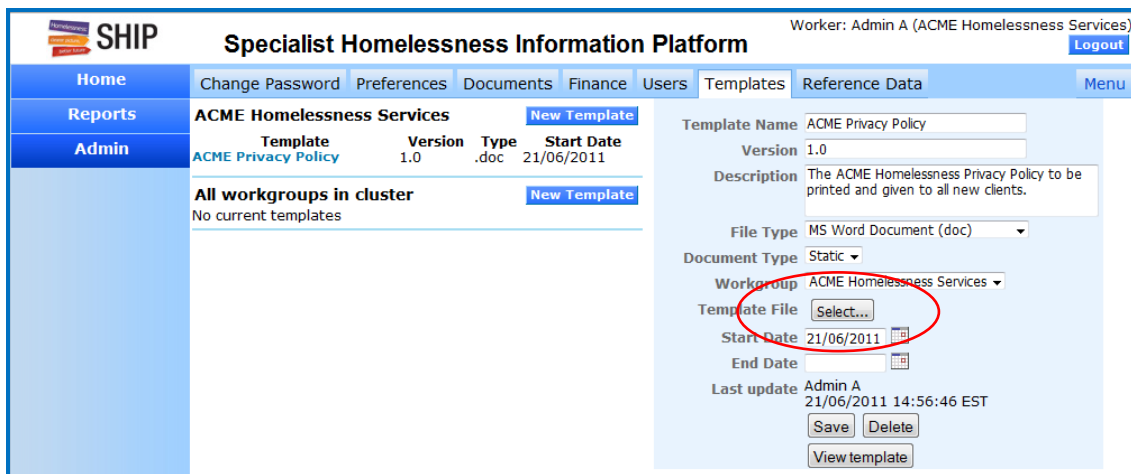
Buttons: Save, View template

Figure 27: Templates tab with new template form with All workgroups in cluster group highlighted

2. Enter the **Template Name** (document name).
3. Enter the **Version** and the **Description** which will appear in the Documents tab lists.
4. Select the **File Type**. For the mail merge documents, this must be 'Rich Text Format'.

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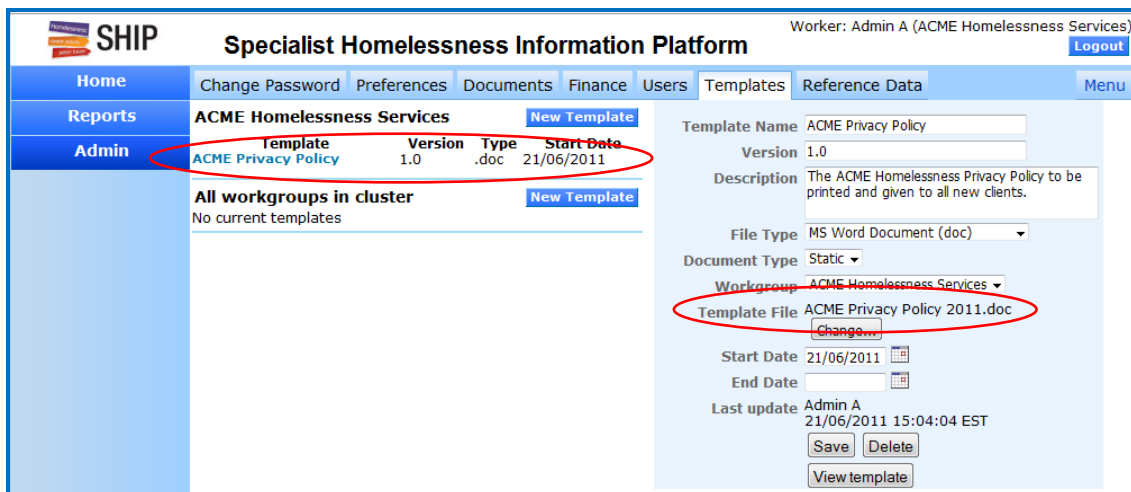
5. Select the **Document Type**: 'Merge' for mail merge documents and 'Static' for general documents that will appear within the Documents tab in the Admin page.
6. Select the **Workgroup** indicating whether the template/document is available for all workgroups within the cluster or a specific cluster.
7. Enter the **Start Date** of when the template/document is to be available.
8. Click **Save**. The **Select...** button will now be available to upload the file.



The screenshot shows the SHIP interface with the 'Templates' tab selected. The left sidebar has 'Home', 'Reports', and 'Admin' sections. The 'Admin' section shows a table with columns for Template, Version, Type, and Start Date. The main content area shows a form for creating a new template. The 'Template File' field has a 'Select...' button highlighted with a red circle. Other fields include Template Name, Version, Description, File Type, Document Type, Workgroup, Start Date, End Date, and Last update.

Figure 28: Templates tab with template form highlighting Select... button

9. Click **Select...** to select and upload the required file to the application. Once the file has been uploaded, click **Save**.



The screenshot shows the SHIP interface with the 'Templates' tab selected. The left sidebar has 'Home', 'Reports', and 'Admin' sections. The 'Admin' section shows a table with columns for Template, Version, Type, and Start Date. The main content area shows the form for creating a new template. The 'Template File' field now shows 'ACME Privacy Policy 2011.doc' and the 'Change...' button is highlighted with a red circle. Other fields include Template Name, Version, Description, File Type, Document Type, Workgroup, Start Date, End Date, and Last update.

Figure 29: Templates tab with template form and uploaded file highlighted

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If the Document Type is 'Static' the document will now be available for all users to view via the Documents tab in the Admin page. The document can be viewed and printed by clicking on the blue **Document Name**.

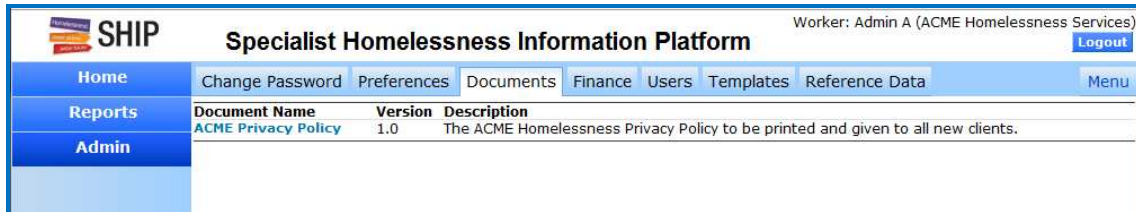


Figure 30: Document tab displaying new static document

2.7 Reference Data

The **Reference Data** tab within the Admin page is available to users with either the Coordinator or Administrator access level.

Organisations now have the capacity to enter additional client information via the customisable Memo within the Person page. The **Memo Type** classification will first need to be populated via the **Reference Data** tab.

To add new **Memo Type** information:

1. Click the blue **Memo Type** and the **Reference Data** form will open to the right of screen.

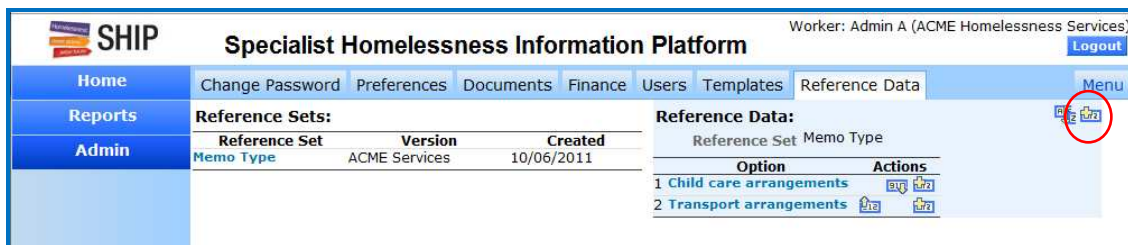


Figure 31: Reference Data tab displaying Reference Data form with Add new reference data item highlighted

2. Click the Add new reference data  icon and the **Reference Data** form will extend.

Administration User Guide



3. Enter the new Memo Type information and click **Save**.

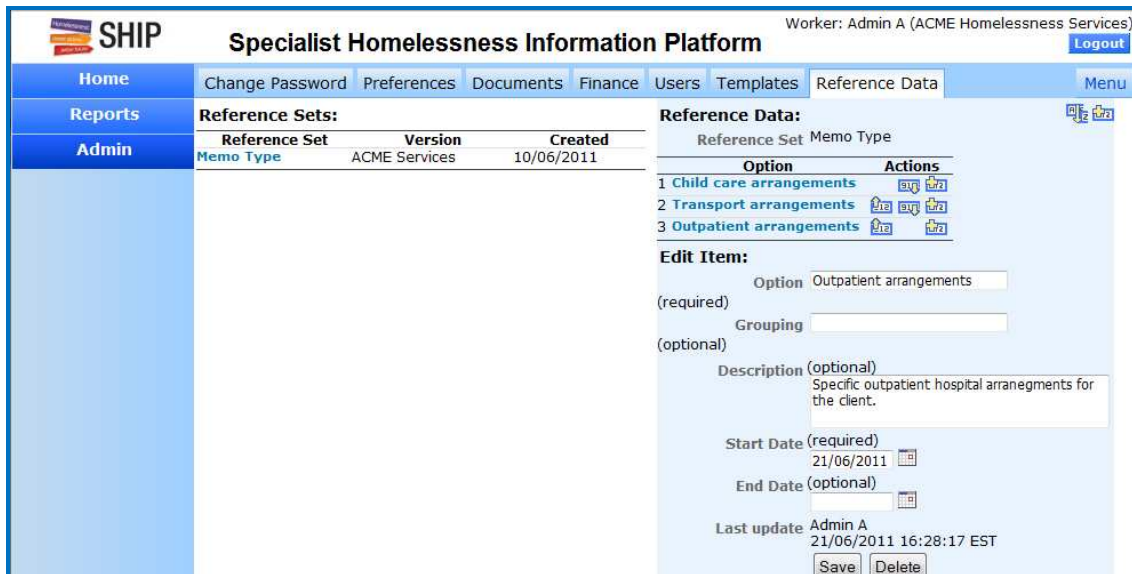




Figure 32: Reference Data tab displaying new Memo Type information

The new **Memo Type** will now appear in the **Memo** tab of the Persons page.

To order the sequence of how the **Memo Type** data will appear in the Memo form, click the move up  and move down  icons to move the **Memo Type** up or down the list.

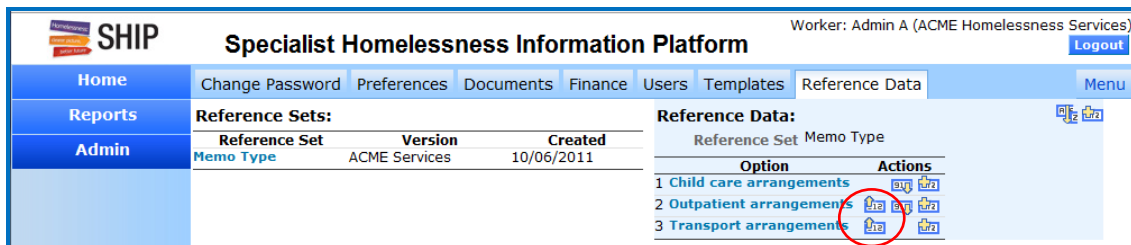


Figure 33: Reference Data tab displaying re-ordered Memo Type with move up icon highlighted

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2.8 Deletion of Records

The Persons page is used to record information about individuals and families receiving planned support and ongoing casual or crisis assistance. There are a number of tabs and function options under the Persons page which are detailed in the general User Guide.

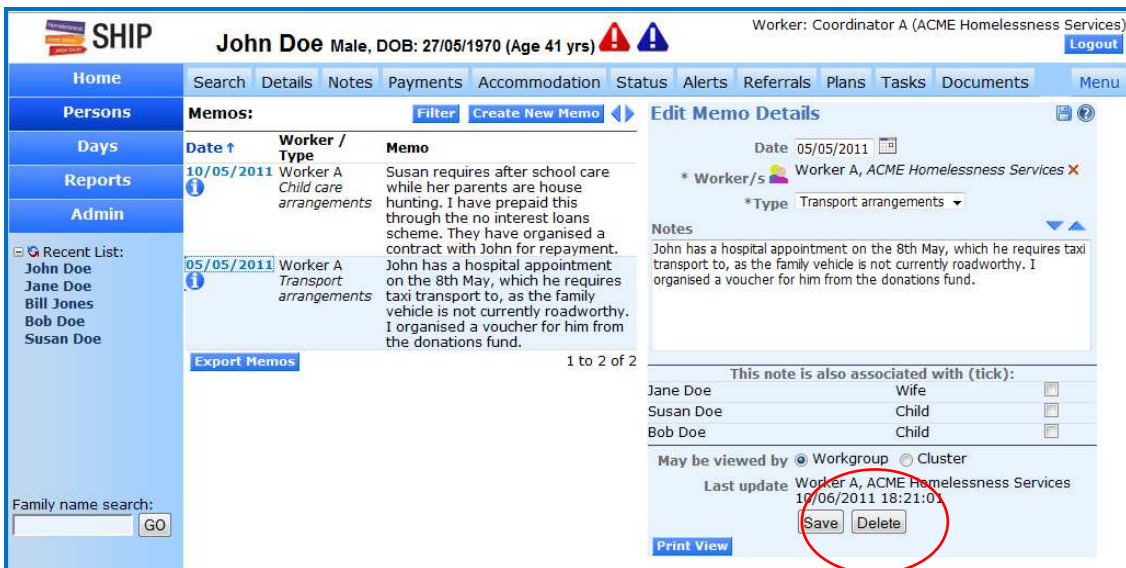
The Persons page is not available to users with the Administrator access level.

The Coordinator access level can access all tabs within the Persons page and has the added functionality of being able to delete the following records:

- » Notes (delete function is only available until the Note is locked down.)
- » Payments (delete function is only available if the Payment has not been locked down via the Financial reconciliation process. See section 2.2 Financial Reconciliation.)
- » Accommodation
- » Alerts
- » Tasks
- » Documents
- » Memos

To delete one of these records the Coordinator will need to:

1. Navigate to the Person record and open the Note record (or similar).



The screenshot shows the SHIP interface for a person named John Doe. The 'Notes' tab is active, displaying a list of memos. The 'Edit Memo Details' window is open, showing the date 05/05/2011 and the memo content. The 'Delete' button is highlighted with a red circle.

Date	Worker / Type	Memo
10/05/2011	Worker A Child care arrangements	Susan requires after school care while her parents are house hunting. I have prepaid this through the no interest loans scheme. They have organised a contract with John for repayment.
05/05/2011	Worker A Transport arrangements	John has a hospital appointment on the 8th May, which he requires taxi transport to, as the family vehicle is not currently roadworthy. I organised a voucher for him from the donations fund.

Figure 34: Notes tab with Coordinator access level Delete button highlighted

2. Click **Delete** and confirm the deletion.

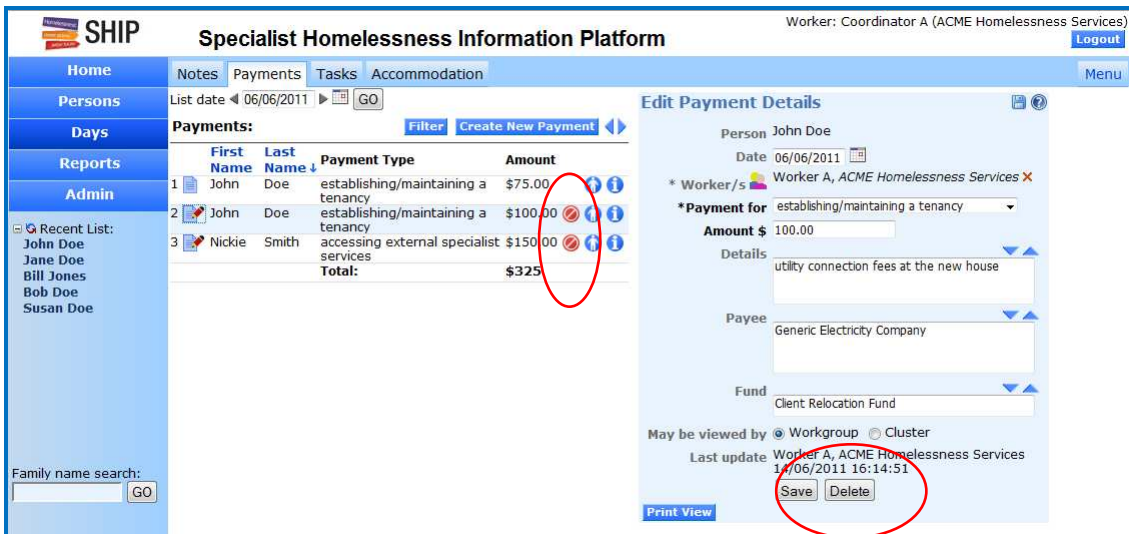
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The Days page allows you to view person related information based on the day an event occurred.

The Coordinator access level can also delete the records via the Days page.

To delete one of these records via the Days page the Coordinator will need to:


1. Navigate to the relevant tab within the Days page and select the correct date to open the Payment record (or similar).



The screenshot shows the SHIP interface with the 'Payments' tab selected. The 'Edit Payment Details' form is open for a payment of \$100.00 to 'Generic Electricity Company'. The 'Delete' button and 'Delete' icon are highlighted with red circles.

	First Name	Last Name	Payment Type	Amount	
1	John	Doe	establishing/maintaining a tenancy	\$75.00	ⓧ ⓘ
2	John	Doe	establishing/maintaining a tenancy	\$100.00	ⓧ ⓘ
3	Nickie	Smith	accessing external specialist services	\$150.00	ⓧ ⓘ
Total:				\$325.00	

Figure 35: Payments tab displaying Edit Payment Details with Delete button and Delete icon highlighted

2. Click either the **Delete** button within the Payment record or the Delete  icon on the Payments list.
3. Confirm the deletion.

Section 3

Access Levels

3.0 Access Levels

Depending on your level of access the screens within this Administration User Guide may look a little different to your version of SHIP. Employees will have more or less menus available to them depending on what is required to undertake their position.

Please refer to the general User Guide for a full description the Normal User access level functionality throughout the pages and tabs within the application.

Usually two people within an organisation will be provided with Coordinator access and will add users and assign roles. This Administration User Guide details the functions within the application that are only available to the Coordinator and/or Administrator access levels. The Administrator access level does not include any function that displays client data.

The following table sets out the default page and tab level access.

Access Level	Page				
	Home	Persons	Days	Reports	Admin
Reception Worker	Reception	No access	No access	No access	Change Password Preferences Documents
Normal User	All tabs	All tabs	All tabs	Reports Lists Financial Referrals Reception Custom Results	Change Password Preferences Documents Bulk Actions
Reports Only	No access	No access	No access	Reports Lists Reception Custom Results	Change Password Preferences

Table 1: Default page and tab access levels within SHIP for Reception Worker, Normal User and Reports Only roles

Administration User Guide



Access Level	Page				
	Home	Persons	Days	Reports	Admin
Coordinator	All tabs	All tabs	All tabs	All tabs	All tabs ²
Administrator	Reception	No access	No access	Reports ³ Lists Financial Referrals Reception Custom Results	Change Password Preferences Documents Users Templates Reference Data

Table 2: Default page and tab access levels within SHIP for Coordinator and Administrator roles

² Some configurations do not include the Users tab within the Coordinator access level.

³ The Administrator access level enables access to the Reports page although report functions containing identifiable client data will not be available.

Section 4

Rich Text Format (RTF) Merge Documents

4.0 Allowable Tags for Rich Text Format Documents

The following tags are compatible with the Rich Text Format (RTF) merge templates described in section 2.6 Templates.

Key Word	Description	Recorded in SRS/SHIP
<<p_title>>	Person title	Persons > Details >Primary Details
<<p_firstname>>	Person firstname	Persons > Details >Primary Details
<<p_middlename>>	Person middlename	Persons > Details >Primary Details
<<p_lastname>>	Person lastname	Persons > Details >Primary Details
<<p_position>>	Person position	Persons > Details >Primary Details
<<p_organisation>>	Person organisation	Persons > Details >Primary Details
<<p_street1>>	Person street1	Persons > Details >Address Details ⁴
<<p_street2>>	Person street2	Persons > Details >Address Details
<<p_suburb>>	Person suburb	Persons > Details >Address Details
<<p_state>>	Person state	Persons > Details >Address Details
<<p_postcode>>	Person postcode	Persons > Details >Address Details
<<p_country>>	Person country	Persons > Details >Address Details
<<p_dob>>	Person dob	Persons > Details >Primary Details
<<p_dobestimate>>	Person dobestimate flag	Persons > Details >Primary Details
<<p_age>>	Person age	Persons > Details >Primary Details
<<p_cob>>	Person county of birth	Persons > Details >Primary Details
<<p_gender>>	Person gender	Persons > Details >Primary Details
<<p_language>>	Person language at home	Persons > Details >Primary Details
<<p_indigenous>>	Person indigenous status	Persons > Details >Primary Details
<<p_addressblock>>	Person addressblock	Includes position, organisation and address details
<<w_firstname>>	Worker firstname	Set by administrator
<<w_lastname>>	Worker lastname	Set by administrator
<<w_email>>	Worker email	Admin > Preferences
<<w_phone>>	Worker phone	Admin > Preferences

⁴ For all address information, if a current Postal Address is present this is the address returned, otherwise the Primary Address is returned.

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Key Word	Description	Recorded in SRS/SHIP
<<w_mobile>>	Worker mobile	Admin > Preferences
<<w_fax>>	Worker fax	Admin > Preferences
<<w_title>>	Worker title	Admin > Preferences
<<w_position>>	Worker position	Admin > Preferences
<<w_organisation>>	Worker organisation	Admin > Preferences
<<docdate>>	Document date	Persons > Documents > Document Details
<<description>>	Description	Persons > Documents > Document Details
<<workgroup>>	Workgroup	Persons > Documents > Document Details
<<reviewdate>>	Review date	Persons > Documents > Document Details
<<today>>	Date of merge	System date
<<time>>	Time of merge	System time

Section 5

Support


5.0 Support

5.1 Client PC Specification

Following are the basic PC specifications required to use the Specialist Homelessness Information Platform (SHIP):

- » Microsoft Internet Explorer 7.0, Microsoft Internet Explorer 8.0, Mozilla Firefox 2 or Mozilla Firefox 3
- » Adobe Acrobat Reader 8.0 or above
- » Screen resolution of 1024 x 768 or above. 1280 x 1024 is recommended.
- » Internet connection. Broadband connection is recommended.

5.2 Support Contact Details

Context sensitive online help is available within the application via the  icon.

The online help facility also includes a Frequently Asked Questions section.

For additional assistance with the application please contact:

- »  1800 627 191
- »  homelessness@aihw.gov.au