Frequently Asked Questions

Updated 23/11/2021

Contents

Enquiries

Q: How to record a call from a homeless person?

A: In the nature of call choose 'Inappropriate' (not 'Service call') and Reason call is inappropriate 'Homelessness'.

Q: How to record that Client was referred onwards/signposted to other services because of the location of Refuge?

A: In the Refuge request outcome field choose the option 'Offer not accepted by the Client'.

Q: How to record a call from a professional (not related to a specific Client)

A: Contact type: Concerned person (professional), Client details: blank, Non-client Caller: find/record the caller as a General Contact, Enquiry outcome: information provided.

Q: I was asked by a third party to give somebody a call back regarding Refuge Request, but the call has not been answered. How to record this?

Record the Enquiry as coming from a concerned person (professional). Choose option contact back status: requested, save the Enquiry and create Call back task. Update the task details to indicate no answer, and mark the task complete. Create another task if needed.

Q: If I get a call from an existing Client, should this be recorded as an Enquiry or an Intervention?

A: This depends on who dealt with the call. If this was an assigned key worker, this should be recorded as an Intervention. If it was Admin/Helpline, an Enquiry should be recorded and transferred to Client's record. A person taking the call should also create a task for the key worker requesting follow up. Calls from new Clients should be logged as Enquiries.

Q: What should I enter in the "Existing client?" field wen recording a call from a professional?

A: This field is not mandatory; you can leave it blank.

Q: Do I need to record all Client details when I found Clients record on the system?

A: It is enough if you select Client record in the field. Then if you leave first name, last name and address blank, these details will be pulled in automatically to the Enquiry from the selected Client record upon saving.

Client files

Q: Why Client ID has not been generated?

A: Client ID is not generated if a user specifies a different client ID in the Enquiry record.

Q: Where can I see history of all the interactions with the Client?

A: Use 'Client Activity Report' button on the Client page. As well as interventions this includes Enquiries, Internal Referrals (change in status) and External Referrals. You can also use "All Related Lists" tab on the Client page.

Q: Where can I see all files related to the Client?

A: Use "Files" related list added to Client page. When a user adds a file to a Client Engagement, an Internal Referral or a Safety Plan, the file will also get linked to the Client so it is easily visible from

the Client page. Users will also be able to add files here, but these will not be added to any other records, so it's still best to add them from the more specific record. It might be useful to agree a naming convention within a service, so it is easier to find a required file on the Client page.

Q: Why can't I see some of the buttons included in the documentation screenshots?

A: You might be using the system on a smaller screen. To see more buttons, click on the down arrow immediately to the right of the other buttons.

Engagement and Internal Referrals

Q: In the process of creating an Internal Referral I forgot to set a task for a Programme owner. How can I fix this?

A: Go to Tasks tab and create a task manually assigning it to another user. Include Client's name in the task details.

Q: How can I see new Referrals to my Programme?

A: You can either go to the Internal Referrals tab, open New Referrals list view and sort by programme. Alternatively, go to Programmes/Groups tab, find your Programme and sort the Internal Referrals related list by Status.

Q: Do I need to update Internal Referral status manually?

A: Yes, the Referral status does need to be updated manually. The idea is that you start with Referred status to indicate new people coming into a programme. Once the programme owner has seen their record they should set the status to Active or to Waiting List if appropriate. When the client is no longer engaging, the button Record Service Exit should be used to set the status to Completed, Drop-out or Withdrew, as appropriate. For Refuge/Safe House referrals, there is a button to set the status to Room Reserved and the New Refuge Intake button on the Client record will set the status to Active.

Q: How to avoid creating duplicate Referral records?

A: When you are creating new Referral, the system shows what Active Referrals already exists for this Client. Make sure you check this list before creating a new Referral.

Refuge

Q: How do I change the Refuge Referral status?

A: You do it by using the buttons on the Referral record: Reserve Room, Refuge Intake (changes status to Active) and Record exit (changes status to Completed/Drop-out/Withdrawn). You can also directly edit the Referral status field to update it to Withdrawn or Not offered based on risk assessment.

Q: I want to confirm room allocation, but I don't see Client's name in the unconfirmed rooms list.

A: Unconfirmed Rooms list is based on information in Internal referrals. Open the Internal Referral record for your residential Programme and make sure the status, reserved date, start date and end date are correct.

Q: I want to record overnight attendance but I don't see Clients' names on the page.

A: Make sure you confirmed room allocation first. This has to happen before the overnight attendance is recorded.

Q: When I try to record overnight attendance I see 2 clients in the one room. How can I fix this?

A: Adjust Room when confirming room allocation (you can type in correct room name). If you are updating for today or yesterday, internal referral record will be updated with new room, so should work correctly going forward. You can use the same method if Client moves to another room.

Q: Client appears twice in Confirmed or Unconfirmed Room List.

A: This will be due to a duplicate Internal Referral request having been created for the client. In order to fix this problem, delete the duplicate internal referral record. In the Confirm Room Allocation screen, if already confirmed, tick the 'Delete' button checkbox next to both records for the client and click the 'Confirm Room Allocation' button. Only one record should now appear for the client in the Unconfirmed room list. Click on 'Confirm Room Allocation' button again to save the record correctly.

Q: Room allocation is confirmed incorrectly (e.g. Room Reserved instead of Active, incorrect client, room no longer allocated to client).

A: In order to fix this, you need to update the Internal Referral Record, ensuring status, reserved date, start date and end date are correct. Then go to the Confirm Room Allocation screen, tick the 'Delete' checkbox next to the record that is incorrect, and click the 'Confirm Room Allocation' button. The record will be removed from the Confirmed Room list and, if appropriate, a new record will appear in the Unconfirmed Room list. Click the 'Confirm Room Allocation' button again to save the corrected status.

Q: Will the Engagement record automatically close when the Internal Referral status is changed to Completed?

A: No, the status of the Engagement needs to be updated manually. You can use "Client Engagements for closure" report to see Engagements with no active Referral records.

Q: I admitted a Client to the Refuge, but later I find out that the children need to be admitted as well. How to record this on the system?

A: Go to a Client record and click on the New Refuge Intake button on the top. The system should suggest adding Children/Dependents to the Internal Referral.

Interventions

Q: Does Intervention status need to be updated manually?

A: Yes. If created for a past date, the service intervention status is set to Attended. When set for a future date, it is set to Booked. The user should then update the status to Attended or other status as appropriate when they are updating the session notes. The Data Quality dashboard lists past one to one attendances that are still in Booked status.

Assessments and Support Plan

Q: What is the difference between an Initial Assessment and a Full Assessment?

A: The Initial Assessment is used to determine immediate support needs and actions. The Full Assessment is completed if the service user has identified that they would like in-depth support. Continued needs assessment then takes place through support planning once initial needs are established. In terms of system configuration, the information captured in the Initial Assessment is

copied to the Full Assessment record, but can be overwritten. Full Assessment also contains additional questions, not asked in the Initial Assessment.

Child-related work

Q: How to record CPN (Child Protection Notification)?

A: Go to U18 Client (child's) record and click New Referral button. Select External Referral option and type: Child protection social work. Link to TUSLA as an organisation.

Q: How to record that a family has an open case with TUSLA?

A: You can record this information in the Full Assessment, in the "Child prot social work involvement?" field.

Q: Does closing parent's referral automatically closes children's referrals?

A: When you close parent's refuge referral, children's refuge referrals will be automatically marked as completed. In other cases, when closing parent's referrals, children's referrals remain active.

Reporting

Q: Where can I find information necessary for submitting TUSLA weekly reports?

A: Go to Reports > eSAFE TUSLA reports > TUSLA weekly reports. Some information has been also included in the Tusla Weekly Reporting Dashboard. Please note that not information requested by TUSLA is recorded in the eSAFE system, so some data may need to be recorded elsewhere.

Q: In the report "Client Support Plan Objective Summary" there is no data captured but I would have expected to see all the objectives currently open?

A: This report is designed to be called from the Client page (Click for support plan objectives report), and references the Id of one specific client. If you want to use this across all clients save a copy of the report, then remove the filter which says 'Client SF Id = "" '.

System administration

Q: How can a System Administrator monitor users' activity?

Please use report called "Internal Referral Creation Leaderboard" from the Data Quality folder. This report gives total numbers of Internal Referrals created. Then group by the 'Created by' name, hide the details, then in the dropdown to the right of the 'CreatedBy Name' heading, select sort by Record Count, then Sort descending. Another more detailed view is in 'Who created internal referral records'. You could use this same approach for other objects, such as Enquiries. For comparison purposes, you could look at the number of enquiries created with 'Internal referral' as one of the outcomes.

Q: How can we monitor which Enquiries need to be transferred to Client files?

A: Use the "Untransferred Enquiries" report.

Q: How can I prevent users from making changes to the reports?

A: Non-system administrators do not have the permissions the overwrite reports in public folders, so standard users will not be able to overwrite standard eSAFE reports. Permission sets also preven users from updating somebody else's reports.

Q: How to monitor quality of data recorded on the system?

A: There are special reports to support data quality reviews saved in the eSAFE Data Quality Reports folder, which includes:

- Incomplete Enquiries – no outcome
- Named Enquiries without gender,
- Untransferred Enquires
- Unlinked Support Provided Enquiries.

You can also use Data Quality Dashboard. At the beginning try to compare if the data collected in the TUSLA weekly reports matches the actual work done in the service, as this is a good way to identify any issues with data recording.

Other things to watch out for:

- Make sure all individuals are recorded as Contacts, not Organisations. General Contacts should be linked with Organisations.
- Enquiries with Internal Referral as outcome, but not transferred to Client file
- Past attendances that have not been updated with status
- Duplicate Contacts and Referrals

How can I request a change on the eSAFE system?

Send an email to eSAFE Programme Manager (Dorota) or request a change during weekly eSAFE Clinic meeting.

Can I record workshops delivered in schools on eSAFE?

Currently eSAFE does not allow to record these type of events.