Caselink FAQ- General

What is Caselink?

Caselink is the MIS system used by employability projects delivering services for the Local Authorities in Edinburgh, Midlothian and East Lothian. It can be accessed anywhere you can access the internet and have a Caselink User Profile. It was developed for Capital City Partnership by ICONI software based in Belfast.

What is Stored on Caselink?

Organisations record the support they provide to clients and this can include notes and duration of meetings; telephone calls, emails, text messages etc.; referrals onto other organisations; outcomes; and assessment of barriers.

What is it Used For?

The projects themselves use the system for recording services, monitoring workloads and providing reports to funders. The Local Authorities use the system to ensure that public money which supports the organisations is spent effectively. The data is also used to provide an anonymised picture of clients receiving support – for example how many clients in Edinburgh who had been out of work for 6 months or more had achieved a job outcome.

## *How Does an Organisation Start to Use Caselink?*

If your organisation is working in the area of employability and delivering a service in Edinburgh, East or Midlothian you could use Caselink. In the first instance talk to Capital City Partnership. Currently there is no cost to use the system.

Caselink FAQ- Specific

*How can I tell if a client is active with other organisations?*

If you are working with a client and you wish to see if they are active and receiving support from other organisations – useful if you are thinking of referring them on somewhere to know if they are working with them already – you can find out by;

- Putting their IND number in the search box-
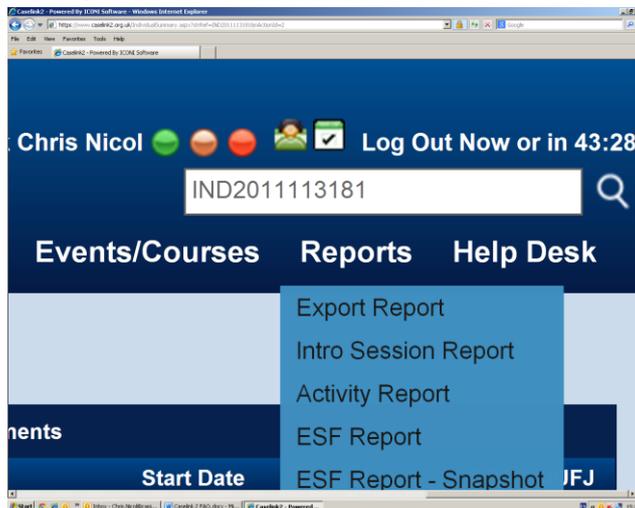
  This will then lead to the client summary where you can then see who else the client is working with.
- Alternatively look at their engagement record and in this there is a tab called **Other Activity**. If you look at this other Caselink using organisations supporting the client will be listed.
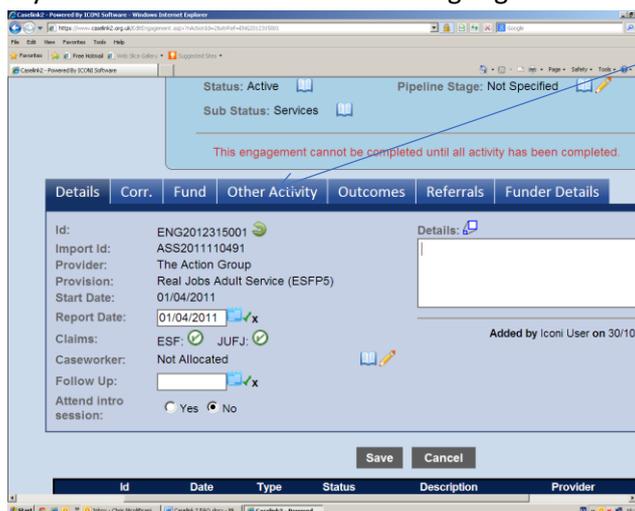
How are Outcomes allocated?

Outcomes are allocated to the organisation that has inputted the outcome. Any other organisation that has also worked with the client but wasn't the first to put the outcome in will be awarded a Contribution. Looking at the outcome reports you can see that you have three choices: **Allocated**, **Contribution**, **Both** and this gives you the option to see the outcomes allocated to you as well as ones from clients who may have gone on and been supported by other organisations.

## What does the ticks and crosses mean in the client summary?

These are historical throwbacks to the earlier iterations of Caselink. It is no longer indicative of anything currently being delivered and would be removed if funding was available.

How should referrals be dealt with?

If you are the person within your organisation that deals with referrals you will see **Incoming Referrals** listed in the dashboard. Clicking on this will lead into a list of all incoming referrals and you can then look in a bit more detail at the client where you should see the contact details and name of the caseworker who has referred the client to you. From this you should then accept or reject the referral. If in doubt at all contact the organisation referring the client to you and discuss.

How can I find out my active client list?

The easiest way of finding your active client's is to look at the Lists and then choose **List All Engagements.** From this you can then filter by Caseworker and also only for **Active** engagements.
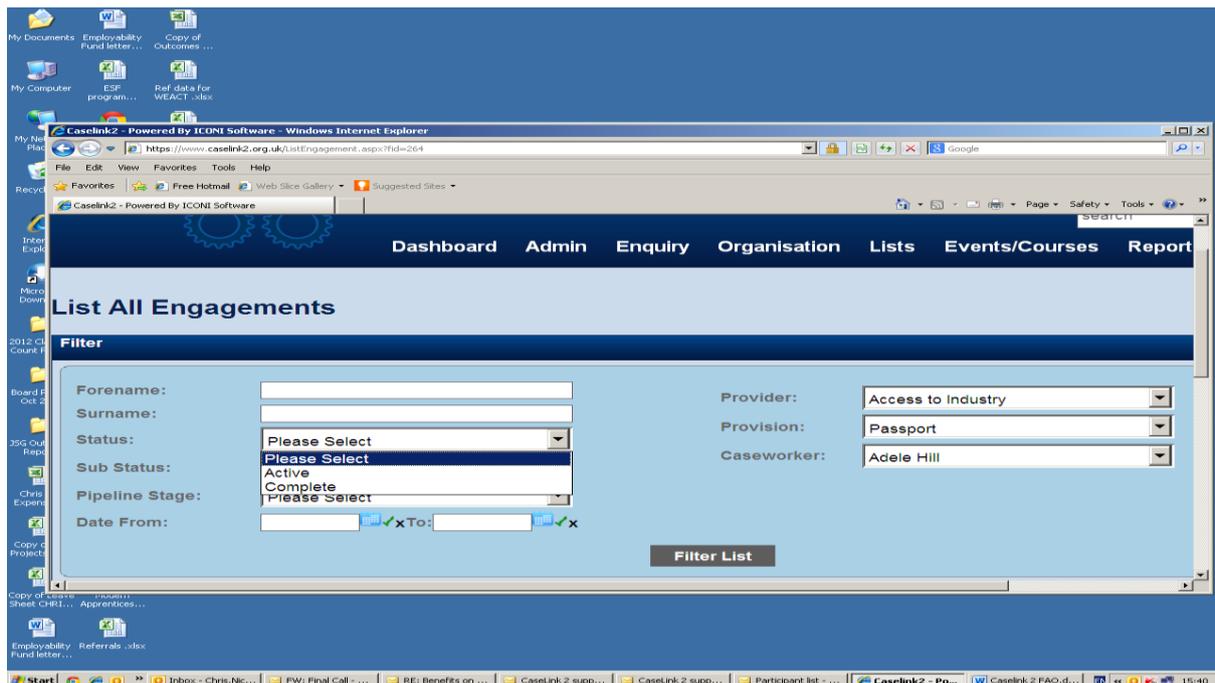
Outcomes aren't showing in the standard report?

First question to ask is has the outcome been verified? If it hasn't it won't appear in standard reports. Verify and see if it's there. If it is, check the reporting date. If you were looking for a report based on outcomes achieved between 01/01/2018 and 31/03/2018 but you only verified it 16/04/2018 it won't feature as the verification date was outside the dates in question. If this is all correct and it's still not showing it may be that the outcome has been recorded and verified by another organisation and it features as an allocated outcome in their report. In the Outcome report you can ask for allocated outcomes, outcomes where you are awarded a contribution and both.

If you get an outcome recorded as a contribution and you think you should have had it allocated get in touch with Chris Nicol at CCP and he will look into it.

I need to record work done over a month ago, but the system won't let me. How can I get around this?

The system has an automatic 28 day rolling lock down. Practically this means that if I wish to record any sort of work (meetings, outcomes, course attendance etc.) I need to do it within 28 days. For example, assume that today (29th August 2018) I want to record a session that took place on the 1st July. When I try to put this date in the system won't allow me to go further back than 1st August 2018 – 28 days back from today.

If this happens you have two options, the right one and the wrong one. The wrong one would involve putting into the system the last date you could go back to and writing in the notes that you met with the client before then. This is easy to do but causes all sorts of problems as it doesn't accurately reflect the date you started with them and anything that happened before their Caselink start date will not be accepted by the system, which means more made up dates. **Please do not do this! If you have this date issue the right way to deal with it is to get in touch with CCP who will remove the date constraint to allow you to get the records in correctly.**

To remove all of these problems simply record interactions etc. within 28 days. If you do this, then the issue won't arise.

## How do you find out if a client is already on the system?

You have two options depending on whether or not the client is working with your organisation, or whether or not they are working with another organisation.

If you know or think that the client is working with your organisation, then the first place to examine is the search box. You can put in the full name, first name or as little as three letters of a name (useful if the name could have been mis-spelt).
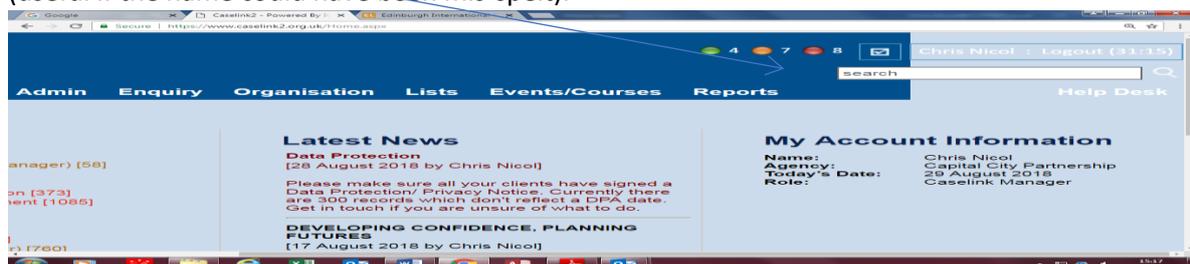
This will return a list of clients working with your organisation that have the same or, if you just put in the three letters, similar names. **This doesn't search the whole system**- i.e. it won't return a list of clients with the same name working with other organisations.

To find out if the client that you are working with is already on the system you have to start with the first step of a new registration.
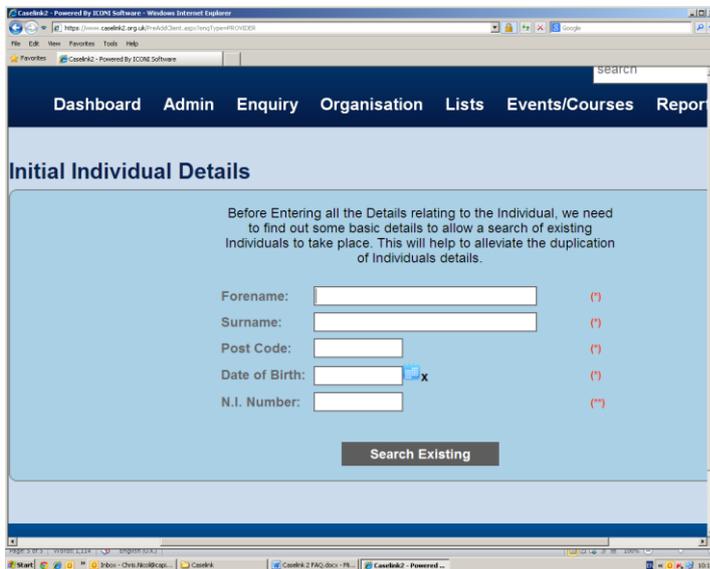
As you can see in the screenshot above you need to add First name, Surname, Postcode and Date of Birth. National Insurance number is recommended but not required.

Once you have put these in the system will search and return a list of possible matches'. This won't simply match on name, it will also match on date of birth and also on postcode. Look carefully at this list and see if your client is already on the system. Please be aware that addresses (postcodes) can change and so can names- so the best identifier should be the date of birth. Although it isn't unknown for these to have been entered incorrectly!

I Have an Engagement but I Can't Add a Service or Book them on to a Course?

This is usually down to one of two reasons. Firstly, it could be that the engagement has been marked as complete. If this is the case you won't see as many options in the Action Panel, and you should also see the message *This engagement can be reopened by a manager.*

If you see this message either get in touch with your manager or get in touch with me and it be reopened.

The second reason is when Sub Status: Information Required can be seen. This is basically asking you to indicate what barriers, issues, etc the client had when they started with your service and is almost the same as the registration that you would have been asked to complete for new clients. To sort this out you will have to click on the funder details tab and this will lead to the screen you can see below.
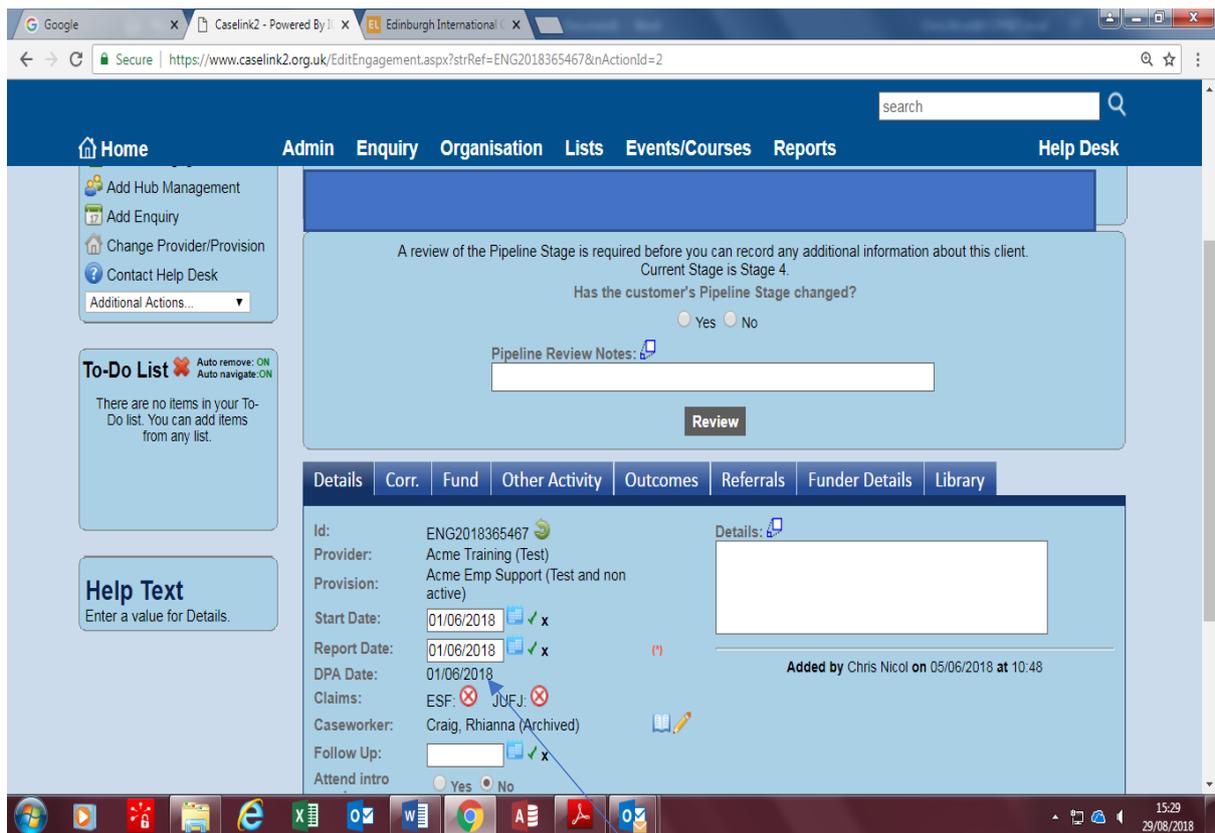
The third reason is that they are missing the Data Protection Agreement/Privacy Notice signature date – this is only an issue if you didn't register the client, as in these cases the system requires subsequent provisions to record the date at which they got the client to sign the form regardless of when it was recorded previously.

The fourth reason you can't record anything is that the engagement requires a pipeline stage review, and this can be seen in the made up client above.