



**Strengthening
Families**

Te Huarahi ki te
Whakapiripiri I Ngā Whānau

Reporter Guide



Strengthening Families

What is SF about?

Early Intervention.

SF is a model for interagency service coordination that is based on developing family/ whānau strengths. It is distinguished from other integrated service models by its reliance on family/ whānau direction for the development and implementation of the interagency service plans.

It can work for all levels of intensity provided the family/ whānau have other services available to them appropriate to their needs.

Who is the client group for SF?

The client group for SF is vulnerable children, young people (0 to 17 years) and families / whānau who require an intervention from more than one agency.

Target group definition

Vulnerable children or young people and their family/ whānau who have multiple and complex needs and require a coordinated intervention from more than one agency.

- vulnerable children are children who are at significant risk of harm to their wellbeing now and into the future, because of the environment in which they are raised, and in some cases, due to their own complex needs.
- environmental factors that influence child vulnerability include not having their basic emotional, physical, social, developmental and/or cultural needs met at home or in the wider community.

What we do

We co-ordinate support for children and whānau showing early signs of need.

What do we mean by early intervention?

- Essentially here we are talking about providing support over and above what might be provided by universal services (like health and education) or services that provide a 'safety net' such as work and income and housing. But we are not talking about services for children who have been identified as at risk of harm or serious harm – that's where the rest of the operating model is focused.
- So 'early intervention' is where we respond to early needs or early risks that, if not addressed, might lead to bigger problems later, including potentially care and protection or youth justice interventions.

**“Ehara taku toa i te toa
takitahi engari kē, he toa
takitini”**

Our success is not of our individual
efforts alone, but rather,
by the combined



Strengthening Families Reporter Guide

V 1.4 June 2022

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Introduction

The SF Reporter (SFRT) is a tool for the Strengthening Families Coordinator. It will record your work, contacts, the resolution and closing of referrals. It allows you to collate a report for your Employer, Manager, Local Management Group.

SF Reporter supports our key focus: making life better for families. It provides data to answer the key Results Based Accountability questions –

- How much did we do?
- How well did we do it?
- Is anyone better off?

Other development priorities included ease of use, stability, and robust security. Only authorised people in your organisation can view the client's personal information.

The reports produced by the tool only show numbers and summarise data.


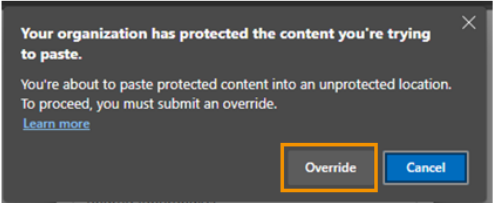
These instructions are designed as a pointer to help you complete your regular reporting requirements. To use the tool you will need:


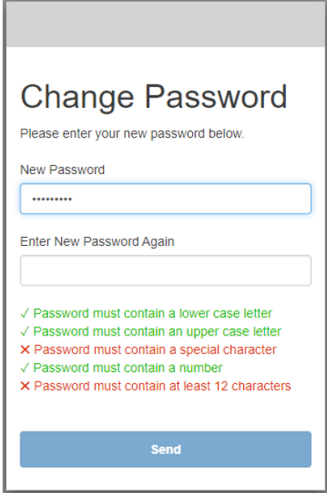
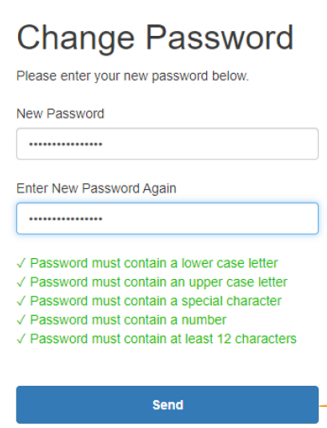
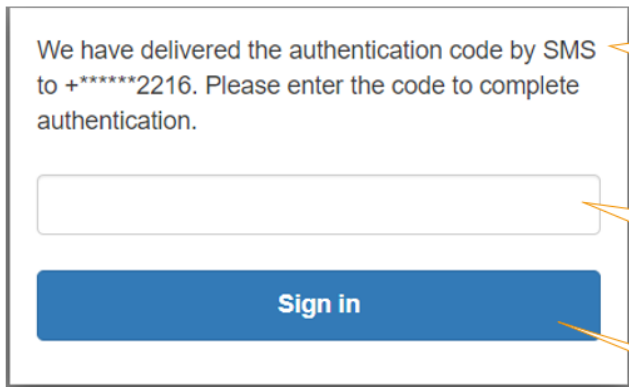
- A computer.
- Internet access.
- To be registered as an approved user.
- And this manual of course!
- SF Reporter Tool database reports accurately entered and completed by the 5th working day of each month.

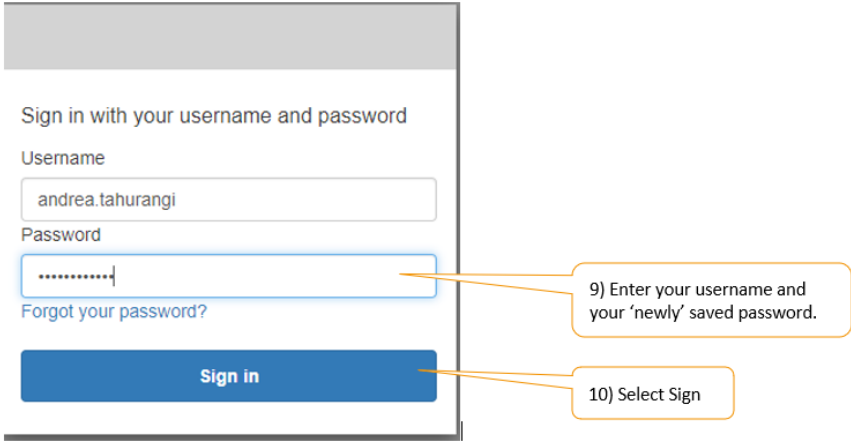
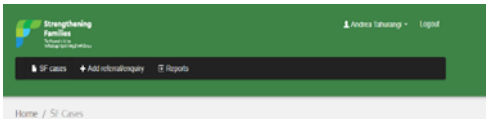

We wish you a long and productive working relationship with the SF Reporter tool.

1. Login to SFRT for the first time

<p>Invitation to SFRT email</p> <p>NOTE: If this email does not appear in your inbox, please check in your junk mail.</p>	<p>You will receive an invitation email entitled 'SFRT – Your account'. This email contains the details you will require to log into SFRT for the 1st time.</p> <p>The email is formatted so that you can copy and paste your Username and temporary password into the login screen of SFRT.</p> <div data-bbox="411 526 1487 1187" style="border: 1px solid orange; padding: 10px;"> <p>From: noreply@ot.govt.nz Sent: Thursday, 26 May 2022 3:07 pm To: Tahurangi@hotmail.com Subject: SFRT - Your account</p> <p style="text-align: right;">SUBJECT: SFRT – Your account</p> <p>Kia ora,</p> <p>An account has been created for you in the Strengthening Families Reporter tool (SFRT). If you think this is a mistake, please ignore this email.</p> <p>You can login with: <u>Username – <u>Firstname.Lastname</u>. You will need this to log in.</u> <u>jane.doe</u></p> <p>Your temporary password is: <u>Temporary password – Used the 1st time you log in.</u> <u>J1*/M3Ow8chS</u></p> <p>You will be prompted to enter a new password.</p> <p>To access your account click here. <u>Link to SFRT – You have 3 days to access SFRT using this link. Should the link expire please contact SFRTsupport@OT.govt.nz to action an invitation reset.</u></p> <p><u>Ngā mihi nui</u> <u>Noel Doney</u> Senior Advisor <u>Maori Partnerships and Communities</u> T: 64 4918 9281 M:64 29 650 0390 E: noel.doney@ot.govt.nz</p> <p style="text-align: right;">National Administrator contact details</p> </div> <p>➤ Click on the link to SFRT.</p> <div data-bbox="542 1288 1289 1444" style="border: 1px solid orange; padding: 10px; margin-top: 10px;"> <p>Your username is <u>firstname.lastname</u> and temporary password is <u>XXXXXXXXXXXX</u>.</p> <p>You will also receive a text message to your mobile phone, advising you of your username and 12-character temporary password.</p> </div>
<p>1. Login screen – Enter details</p>	<div data-bbox="422 1489 1388 1960" style="border: 1px solid gray; padding: 10px;"> <p>Sign in with your username and password</p> <p>Username <input type="text" value="Username"/></p> <p>Password <input type="password" value="Password"/></p> <p>Forgot your password?</p> <p style="text-align: center;">Sign in</p> </div> <div data-bbox="1029 1585 1388 1697" style="border: 1px solid orange; padding: 5px; margin-top: 10px;"> <p>1) Enter the username and temporary password from the SFRT invitation email.</p> </div>

 <p>Paste protection error message</p>	 <p>If this error message pops up, select override and continue to sign in.</p>
<p>2. Sign in screen message prompts</p>	<p>Sign in with your username and password</p> <p>The username or password you entered is invalid</p> <p>Username andrea.tahurangi</p> <p>Password Password</p> <p>Forgot your password?</p> <p>Please fill out this field.</p> <p>Sign in</p> <p>2) Ensure you use EXACTLY the details that have been provided to you. Username and password fields must be entered before you sign in.</p>
<p>3. Sign in</p>	<p>Sign in with your username and password</p> <p>Username andrea.tahurangi</p> <p>Password</p> <p>Forgot your password?</p> <p>Sign in</p> <p>3) Select Sign in</p>
<p>4. Change password confirmation</p>	<p>Change Password</p> <p>Please enter your new password below.</p> <p>New Password</p> <p>Enter New Password Again</p> <p>Send</p> <p>4) Enter a new password. Password musts: <ul style="list-style-type: none"> ✓ Password must contain a lower case letter ✓ Password must contain an upper case letter ✓ Password must contain a special character ✓ Password must contain a number ✓ Password must contain at least 12 characters </p> <p>5) Enter your new password again.</p>

<p></p> <p>Password rules</p>	 <p>You will see as you enter your password, the password musts will turn green in the display, so you know what you need to add.</p> <p>In this example a special character is required, and the length must be increased to 12 characters. As soon as these conditions are met, the password is accepted.</p> <ul style="list-style-type: none"> ✓ Password must contain a lower case letter ✓ Password must contain an upper case letter ✓ Password must contain a special character ✓ Password must contain a number ✓ Password must contain at least 12 characters
<p>5. Change password confirmation</p>	 <p>6) Select send.</p>
<p>6. Text message to mobile</p>	<p>Your authentication code is <u>123456</u></p> <p>A 6-digit authentication code will be texted to the mobile phone you provided as a part of your application to access SFRT.</p> <p>NOTE: if you change your mobile number, please notify the SFRT National administrator immediately in to retain your access to SFRT.</p>
<p>7. Enter authentication code</p>	 <p>Authentication code message will display to confirm the mobile number used for the SMS text message.</p> <p>7) Enter the 6-digit authentication code received in the SMS Text message here.</p> <p>8) Select Sign in.</p>

<p>8. Sign in with your username and 'new' password</p>	
<p>9. SFRT</p>	 <p>You will be directed to SFRT. You will see the options available to you according to the role you have been assigned in SFRT. Any issues please seek assistance. See the Support section.</p>
<p> SFRT access</p>	<p>NOTE: You can log in to SFRT by entering your username or your email address into the UserName field but your password must be correct.</p> <p>If you cannot remember your password use the 'Forgot your password' function to reset your password.</p> <p>Passwords need to be reset every 90 days.</p>

2. Login to SFRT through the SF website

Using your web browser (e.g. Google Chrome, Edge etc.) go to the Strengthening Families website.

www.strengtheningfamilies.govt.nz

1. Click on For Agencies
2. Then click on the **Co-ordinator login** button
3. **OT staff** should also log in using this button.



(Don't save this page as a bookmark / favourite)

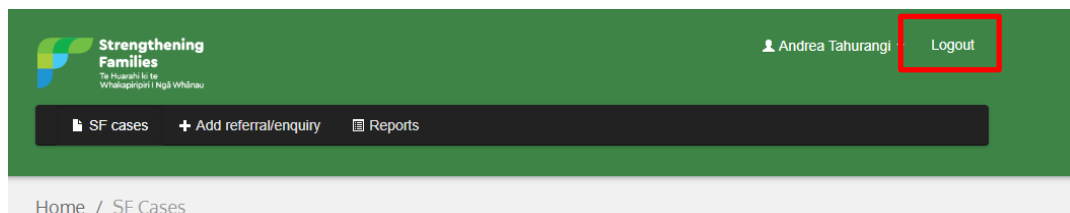
This will take you to the login screen

1. Enter your email **or** your username (firstname.lastname)
2. Enter your password
3. Click the Login box.
4. You will then receive a text message to your mobile (as in Step 6 – Logging in for the first time Section 1) which you enter to bring up SFRT. This is multi-factor authentication (MFA).

✓ Please make sure you **log out** at the close of every session for privacy and security.

✓ The SF Reporter will log out after 30 minutes if there is no activity.

5. Press **SAVE** and **Logout** whenever you leave the SF Reporter.



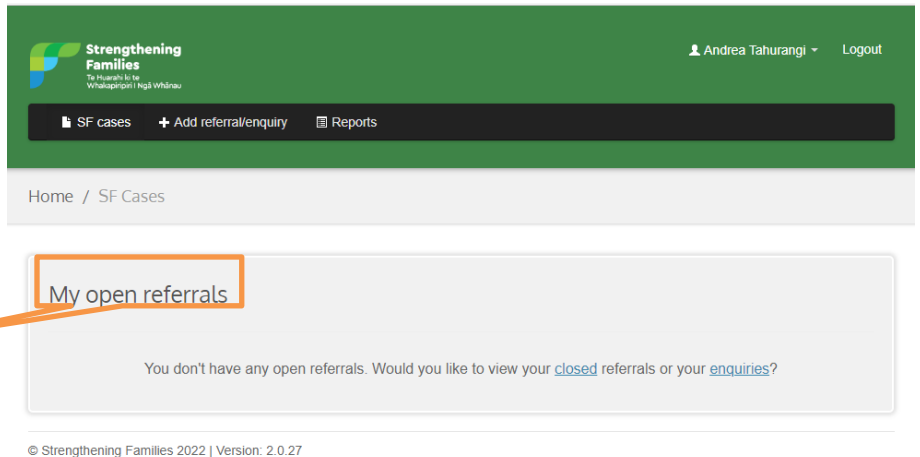
NOTE: MFA is now required for login.

1. Getting started

Once you're logged in, you'll see the Home/SF Cases screen.

There are three record types:

- Enquiries
- Open Referrals
- Closed Referrals.

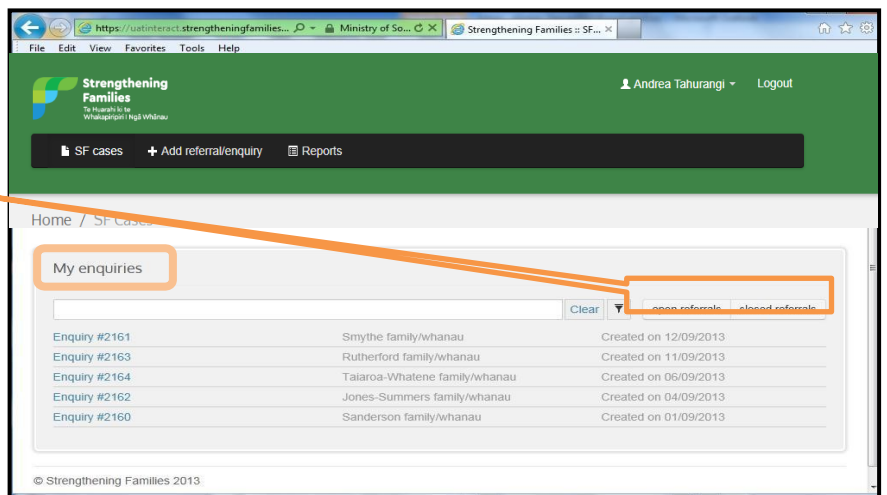


They are listed on this screen.

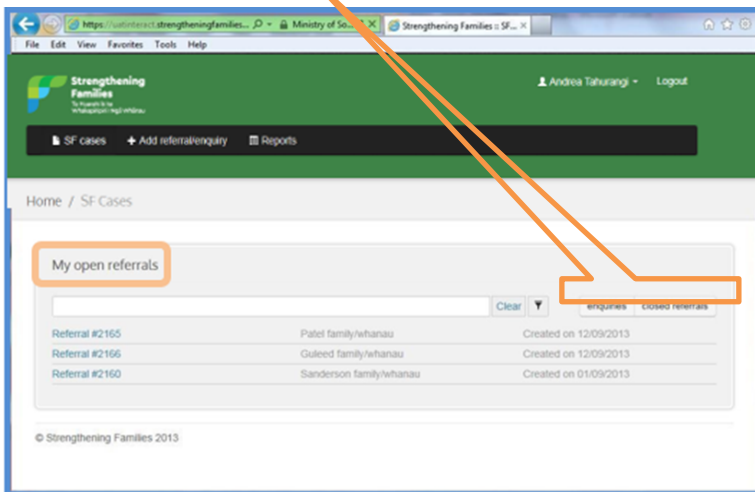
At first, these lists will not be populated, as shown here.

As you add Enquiries/Referrals, they will be listed, as will Closed Referrals as you complete them. (Sections 3 and 5, overleaf, will tell you how to add Enquiries and/or Referrals.)

At the left of the screen, there is a link button for My Enquiries. On the Right of the screen Open Referrals / Closed Referrals. Clicking on these will show lists of items.



Note: these buttons toggle; that is, as you click them, they will cycle between the three record types.



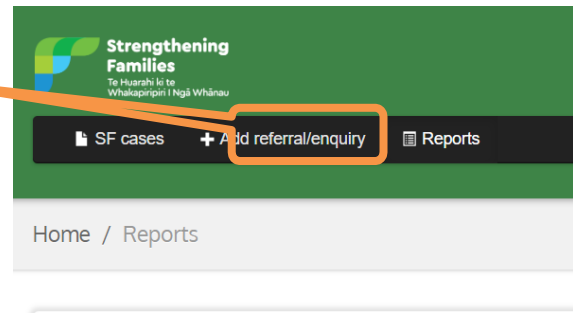
The client's [redacted] need to retype it.

2. To record an Enquiry

An enquiry records pre-referral activity. You can record any sort of Enquiry information from or about a family.

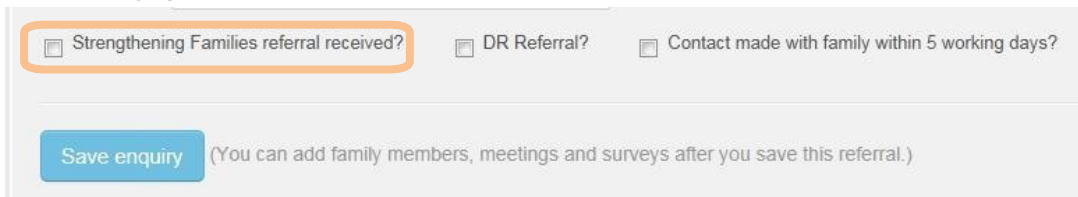
- Click on the + Add Referral/Enquiry box

There are 3 check boxes at the foot of the screen

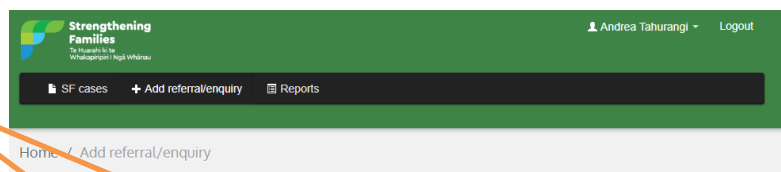


- Strengthening Families referral received?
 - DR referral
 - Contact made with family within 5 working days?
- Click within any applicable box to confirm it

! Note: Only the first box - *Strengthening Families referral received?* - can begin the Referral process. Unless the first box is ticked, your work will remain an Enquiry only (and expires after 7 days).



- Fill in information about the Referrer (all boxes need to be filled in)
- Choose the **Agency** they represent (there's also an option for Self-Referral)



Referrer's contact details

Referral date: <small>Required</small> 07/04/2022	Address: <input type="text"/>
Agency: <input type="text"/>	Phone: <input type="text"/>
Region: [Select region]	Email: <input type="text"/>
Name: <input type="text"/>	

Family / whanau details

Surname(s):

Strengthening Families referral received? DR Referral? Contact made with family within 5 working days?

Save enquiry (You can add family members, meetings and surveys after you save this referral.)

Family /Whanau details



IMPORTANT NOTE: Family name must be entered into the Surname field.

3. Choosing Agencies

- Agency drop-down-box options will appear as you start typing. You will only be given FOUR options at a time.
- Move your mouse or use the up/down arrow keys on your keyboard to the Agency you want (it will be highlighted in blue).
- The on-screen cursor will turn into a pointing finger.
- Press ENTER or left-click with your mouse to select an Agency.

Pre-loaded Agencies

The agencies we work with, and the Sector they operate in, have all been pre-loaded but there are more of them than can be shown on screen at one time.

Note: Type in the first letters of the agency name and you'll be given four options. If the agency you want is not in the first four, keep adding letters into the input box. Notice in the examples below, adding an 'r' to 'Te' results in a different set of suggestions.

SF Reporter will look for any letters *within* an Agency name (and highlights them in **bold**).

If nothing appears in a drop-down box you should try other letter and space combinations as all the Agencies we work with have been pre-loaded.

See below for the checks to make before asking for a new Agency to be added.

Important Note: You must add a space between words. Agencies will not be recognised if their names are run together. For example, Agency [space] M might present you with these options: Agency Manukau; Agency Masterton; and Agency Morrinsville. If you type AgencyM it will not be recognised.

Requests to add Agencies

If you have tried all possible letter and space combinations and the Agency you want still doesn't appear, see [Add Agency](#) contact details. (A template is available from OT national office to add new agencies or get corrections sorted)

It's best if we keep the list of Agencies as small as possible, to make it easy to use and to make the statistics more meaningful.

Before requesting an additional Agency, please ask yourself-

- Is there is a reasonable prospect of using it (e.g. do we need all schools?)
- Is it already on the list? Agency initials/acronyms are used rather than full names For example, look for OT rather than Oranga Tamariki. The latter will not be recognised. As we mentioned above, OT Location will also not be recognised: you must use OT [space] Location.
- Do I really need local site names?

An agency site name should only be needed if the organisation you deal with has multiple sites in your region and you need to distinguish between them, e.g. if XYZ Manukau is better at attending meetings than XYZ Onehunga.

Family/Whānau details

Finally, fill in basic Family/Whānau information and press Save enquiry.



Important Note: You can add full Family/Whānau contact details only when you progress to a [Strengthening Families Referral](#) (see [Checking your enquiries](#)).

He Whakatauki

Hutia te rito o te harakeke

Kei whea te Komako e kō
Kī mai koe ki ahau
He aha te mea nui o tēnei ao
Māku e Kī atu
He Tangata
He Tangata
He Tangata

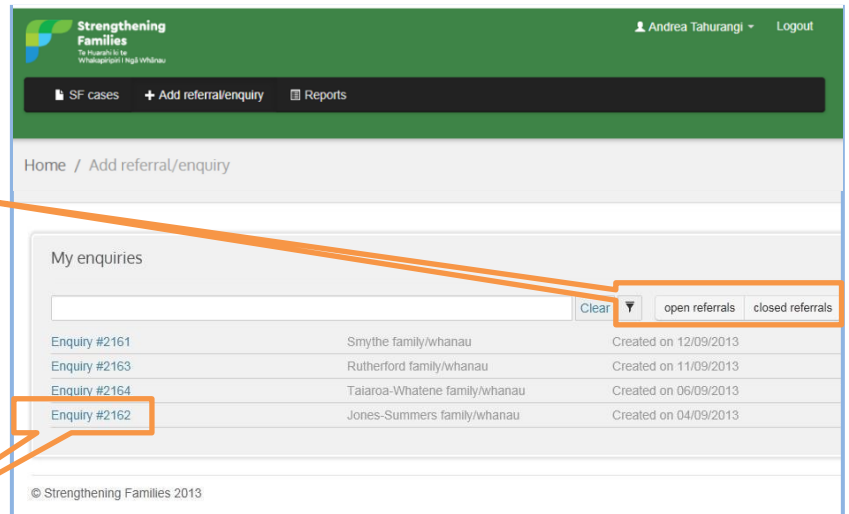


4. Checking your Enquiries

- Return to the Home/SF Cases screen.

- Check you've selected the Enquiries box. (Remember it toggles between Enquiries, Open Referrals and Closed Referrals.)

- Your Enquiry will be listed by number, family/whānau name and date.



- Click the Enquiry # to open it.

The Enquiry can now be edited (the tab at the top says Referral. Don't worry – it's still just an Enquiry).

You can re-open and change the information in an Enquiry as many times as you want.

- When you have finished editing an Enquiry, click **Save enquiry**– this will save your changes *OR*
- Click **Cancel** to exit without saving anything. This will lose all changes.

5. Progressing an Enquiry to a Referral

Once a Strengthening Families Referral has been received, you can change the Enquiry into a Referral. All the information you need is captured in your standard referral and consent forms.

You will need to keep all original hard copies of these forms for your record keeping / contract monitoring requirements.

- Open an Enquiry and, if needed, edit it as covered in [Checking your enquiry](#).



Note: If an Enquiry is not progressed within 7 days, it will be closed. If you receive a Referral after that time, you must start the Enquiry > Referral process from scratch.

Strengthening Families referral received?
 DR Referral?
 Contact made with family within 5 working days?

Lead agency
 Lead agency:
 Date referred to lead agency:

Referral status
 Final case management report received from Lead Agency?
 Referral threshold / entry criteria met?
 Closure date:

- Click the check-box
 - Strengthening Families referral received?
- If this is a DR (Differential Response) click on the check box
 - DR



Note: You cannot revert to this being an Enquiry once ‘Strengthening Families referral received’ has been ticked. Once SF Referral has been ticked it disappears)

These boxes will open a new portion of the input screen. You can input information on:

Lead Agency

Lead agency
 Lead agency:
 Date referred to lead agency:

Referral status
 Final case management report received from Lead Agency?
 Referral threshold / entry criteria met?
 Closure date:
 Closure reason:

Please ensure that all agency meeting attendance is correct and up to date before closing the referral.

Referral Status

Includes Closure Date and a drop-down box for Closure Reason – See [Recording a Meeting](#) for information on closing cases.

Date referred to lead agency

- Click on a date field to open a drop-down calendar.
- Select the date you require, or you can input it manually using the format 00/00/0000 with forward-slashes / as the date separator.

Lead agency: Youth Justice

Date referred to lead agency: 02/09/2013

Family / whānau Surname(s):

Phone: none

Family / Whānau Contact Details

- Family/whānau contact details.

Because the information is to aid you in your Co-ordination role, there are few format requirements, but as many fields as possible should be filled in.

Family / whānau contact details

Surname(s): Matt Sanderson and Suo'o Wa'ome

Address: 134 Mockingbird Lane, Ionian Heights, Elliston, GORE

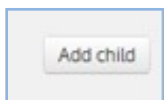
Phone: cell phone 027 321 6565

Children/tamariki and young people/rangatahi in the family/whānau: Add child

Parents/caregivers and whānau members: Add parent

Buttons: Save referral, Cancel

Children/tamariki and young people/rangatahi in the family/whānau



Click on **Add Child** for each family/whānau member you want to input information on.

DOB is required to fill-in this section.

An input box will appear.

- Add the child's name and other information.

There are 3 required fields:

- Full Name
- Gender
- Date of Birth.

Add child

Full Name: Jane Planfir-Xanthe

Address: 56 Mondial Street, South Wexter, Glosstor 6909

Gender: Male, Female

School: St Jude's Primary

D.O.B.: 01/01/2000 (13 years old)

Ethnicities: NZ European / Pakeha, Maori, Samoan, Cook Island Maori, Tongan, Niuean, Indian, Chinese

Buttons: Close, Save

You cannot proceed without adding a birthdate and gender.

If you do not have this information, you can add an approximate date but the correct date must be obtained and entered as soon as possible.



Note: The system will transfer the address information first entered in the family/whānau details. If the address is different just delete and add the new address.

Parents/caregivers and whānau members

- Click on **Add Parent** for each family/whānau member you want to input information on. An input box will appear.

The screenshot shows a web form titled 'Add parent'. At the top, there is a red error message: 'Validation error(s) occurred.' Below this, the form contains several fields: 'Full Name: Required' with the value 'Whetu Waipori-Brown'; 'Address:' with the value '135 Ionian Drive, Pleasant Heights, Sheffield 9014'; 'Gender: Required' with radio buttons for 'Male' and 'Female', and a message 'Please select a gender' below it; 'Iwi:'; 'Relationship to children: Required' with the value 'Step-Mother'; and 'Ethnicities:' with checkboxes for 'NZ European / Pakeha' and 'Maori'. At the bottom right, there are 'Close' and 'Save' buttons. A red box highlights the 'Gender' section, and a red arrow points from the error message to it.

The system will transfer the address information first entered in the family/whānau details.

If the family/whānau member's address is different just delete and add the new address.

There are 3 required fields:

- Full Name
- Gender
- Relationship to children.

This example shows an error ("Validation") message; the family member's Gender was not ticked but this information is compulsory. The action you should take is shown in red below.

Finishing the editing

- Click **SAVE**– this will save your changes
- Click **CLOSE** to exit without doing anything. **This will lose all changes.**

Finishing the Enquiry > Referral editing

You will now have a list of family/whānau members (children and extended family).

You can click on each family member to edit their information if needed.

The screenshot shows a web browser window displaying the 'Family / whānau contact details' page. The page has a menu bar (File, Edit, View, Favorites, Tools, Help) and a browser address bar showing 'https://uatinteract.strengtheningfamilies...'. The main content area is divided into sections: 'Family / whānau contact details' with fields for Surname(s) (Guleed), Address (89 Foster Place, Niceville, Pleasant Valley), and Phone (none); 'Children/tamariki and young people/rangatahi in the family/whānau' with an 'Add child' button and a list of children: Sayeed Guleed (4 months old), Mohammed Guleed (13 years old), and Aziza Guleed (14 years old); and 'Parents/caregivers and whānau members' with an 'Add parent' button and a list of members: Abdi Guleed (Father), Nadifa Guleed (Mother), and Salifa Kaheed (Great Grandmother). At the bottom, there are 'Save referral' and 'Cancel' buttons. Red boxes highlight the 'Aziza Guleed' entry and the 'Save referral' and 'Cancel' buttons. Red arrows point from the text on the left to these elements.

- Click **Save referral**– this will save your changes
- Click **Cancel** to exit without saving anything. **This will lose all changes.**



Note: Your referral will now be listed under 'Referrals' in the Home and SF cases screens and will no longer be listed under Enquiries.

6. Filtering (search tools)

The SF Reporter has powerful filtering tools that help you find cases when your lists of Enquiries, Referrals and Closed Referrals get longer.

The filter will re-display your list; it will only show the names which include the letters or phrase you are searching.

- Just type any part of the name you want to find into the Filter Box.
- Any possible Enquiries/Referrals that match will be shown. For example, the search for 'San' brings up both the Sanford and Sanderson family/whānau.
- Select the one you want by clicking on the blue text.

My open referrals

enquiries

Referral #2165	Patel family/whanau	Created on 12/09/2013
Referral #2166	Guleed family/whanau	Created on 12/09/2013
Referral #2176	Johns family/whanau	Created on 12/09/2013
Referral #2164	Taiaroa-Whatene family/whanau	Created on 06/09/2013
Referral #2160	Sanderson family/whanau	Created on 01/09/2013

My open referrals

enquiries closed referrals

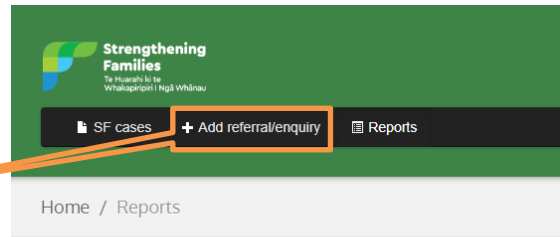
Referral #2181	Sanford family/whanau	Created on 12/09/2013
Referral #2160	Sanderson family/whanau	Created on 01/09/2013

- Press Clear for another filter search. If the filter still offers too many cases, you can refine the search by adding more letters.

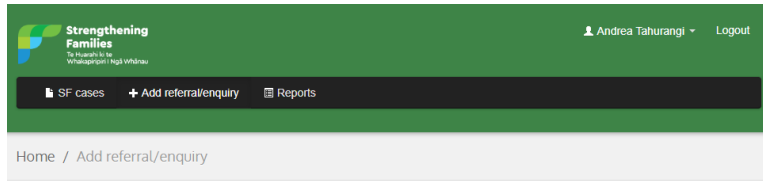
7. Creating a new Referral

Some Strengthening Families Referrals will be received directly, without being transferred from an Enquiry. You can easily create a Referral from scratch.

- Click on + Add Enquiry/Referral



A fresh screen will appear, with the current date. You can edit this if needed.



Referrer's contact details

Referral date: Required Address:

Agency:

Region: Phone:

Name: Email:

Strengthening Families referral received? DR Referral? Contact made with family within 5 working days?

Lead agency Referral status

Lead agency: Final case management report received from Lead Agency?
 Referral threshold / entry criteria met?

Date referred to lead agency: Closure date:

Closure reason:

You can then fill in all Referral information, as in [Checking your enquiries](#).

Once you have ticked 'Strengthening Families referral received' and any other relevant boxes, three new grey tabs will appear at the top of the Referral screen.

- Referral
- Meetings
- Surveys.

This activity all happens within the Referral tab.

- Enter the referral agency into the Agency field (a dropdown list will also appear)
- Fill in other information about the Referrer

Referral Meetings Surveys

Referrer's contact details

Referral date: Required Address:

Agency:

Region: Phone:

Name: Email:

DR Referral? Contact made with family within 5 working days?

This will open a new portion of the input screen.

You must enter the lead agency and referral date

- **Lead Agency** (agencies have been pre-loaded; the SF Reporter will offer you suggestions as you type; click to accept a suggestion).

See [Choosing Agencies](#) for more information about searching for Agencies.

- **Referral status**

Tick 'Referral threshold/entry criteria met' if appropriate
The other boxes are to be used in the case Closure stage (see section 9).

- **Enter the family/whānau contact details**

Children/tamariki and young people/rangatahi in the family/whānau




- Click on **Add Child** for each family/whānau member you want to input information on.

An input box will appear. There are 3 required fields:

- Full Name
- Gender
- Date of Birth.

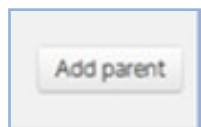


Note You cannot proceed without adding a birthdate.

-  **Note** If you do not have this information, you can add an approximate date, but the correct date must be obtained and entered as soon as possible.
-  **Note** The system will transfer the address information first entered in the family/whānau details. If the address is different just delete and add the new address.
-  **Important note:** Use and spell people's names consistently and accurately. A database is only good as the information added to it. (SF Reporter does not have a spelling checker built in, although if you have a spell-check function on your browser this may operate.)

Parents/caregivers and whānau members

- Click on **Add Parent** for each family/whānau member you want to input information on.

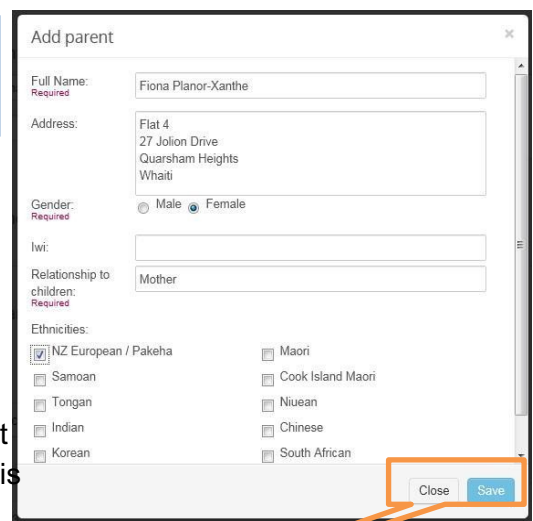


A drop-down input box will appear.

There are 3 required fields:

- Full Name
- Gender
- Relationship to children.

The system will transfer the address information first entered in the family/whānau details. If the address is different just delete it and add the new address.



Finishing the Referral editing

- Click SAVE– this will save your changes
- Click CLOSE to exit without doing anything. This will lose all changes.

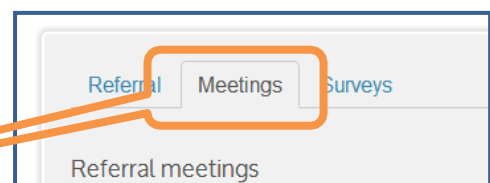
List of referrals

2.



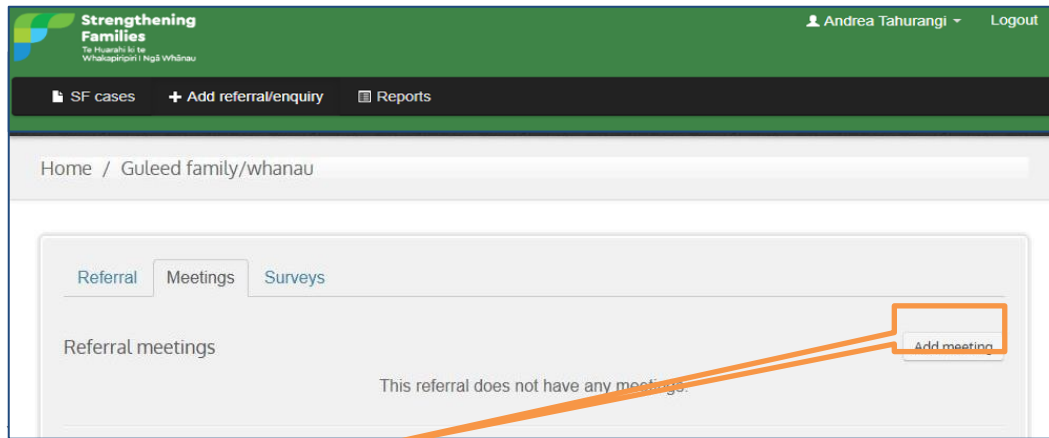
There are three grey tabs at the top of the screen

- Referral
- Meetings
- Surveys



➤ Click on Meetings

Meetings will be listed on this screen. At first, this list will not be populated. As you add meetings, they will be listed as you work through them.



Click on Add meeting

Add the meeting date and type.

There are 3 types of meetings in the drop-down box–

- Initial (one only)
- Review (add as many review meetings as needed)
- Final (one only)

There are 2 check boxes about the meeting:

- Family present at meeting?
- Initial meeting held within 15 working days

Click on these to activate them

And 2 check boxes to use if the Referral does not proceed for any reason: tick appropriate box

- Initial meeting did not proceed (referral should be closed)

*Click this if the SF process is stopped / cancelled **before the Initial meeting.***

- Case did not proceed after this meeting (referral should be closed)

*Click this if the SF process is stopped / cancelled (**no Final meeting can be held**).*

In either case, you should then close the Referral (see section 10)

Initial meeting

Within a Referral, choose the Meetings tab.

- Click on **Add Meeting**

Initial meeting will automatically show on the screen and the meeting date.

Add participating agencies and contacts once, once you have added the Agency and saved by clicking update Meeting-

Then, add information about the meeting in the boxes specified:

Add agency

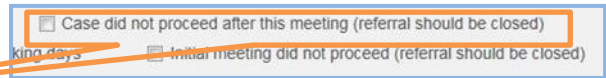
Add issue

Add agency

An input box will appear.

Stopped / cancelled SF process

If a planned meeting does not happen, go back to the **previous** meeting, and tick the box 'Case did not proceed after this meeting.'



You should then rate the agencies and issues and close the case.



Note - you will not be able to close the case unless you rate the issues, and tick you have received a final case report



Note - rate the agencies attending otherwise they will show up as being absent from the meetings.



Note - If you undo this check box, the meeting will reappear in the in the Meetings List and the meeting stats in any report you create will be adjusted.

Edit agency

Throughout the process you will need to return to the list of 'Agencies Invited' and update the status of each.

- Click on an agency name to select it. This will open the **Edit agency** input box.

Add or edit Agency, Contact name, Contact details as required:

Add issue

Issues addressed at meetings can only come from the **Action Plan** document, not inputted from the **referral form**.

- Choose the 'Issue discussed at meeting?' check box if needed

Add issue(s) from the drop-down box

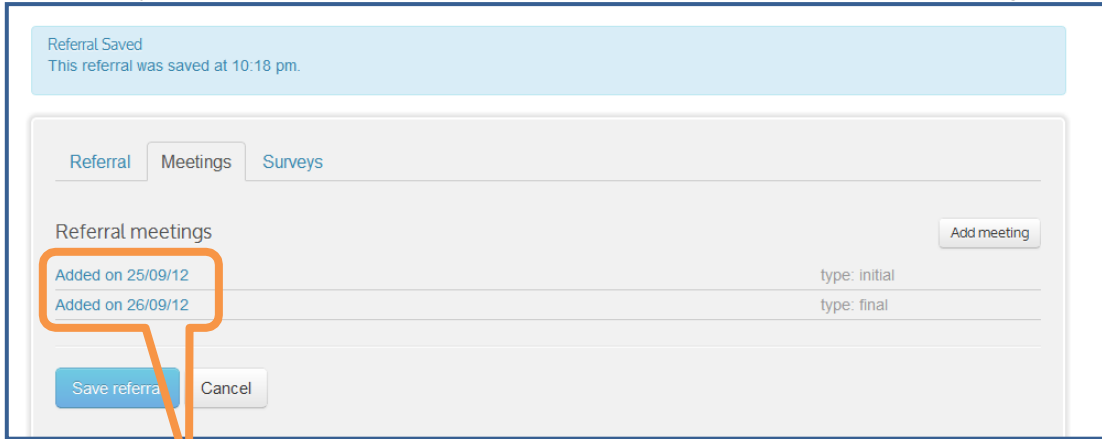
- Select as many as needed
- Issues inputted into the Reporter should be identifiable on the Final case report

Finish editing the meeting

- Click **UPDATE MEETING** – this will save your changes
- Click **CANCEL** to exit without doing anything. This will lose all changes.

The meeting will now appear in the Meetings List.

It will always be linked to a specific Referral – there is no overall list of meetings.



Click on a meeting to re-open it to Edit

'Housekeeping' after a meeting

After you host a meeting it's normal to do a clean-up, and SF Reporter is no exception. Check that you have done your housekeeping —

- Recorded Agencies present /absent, and checked the box if their absence affected the plan
- Checked all agenda items and
 - Added any additional issue(s) discussed

Record the meeting attendees

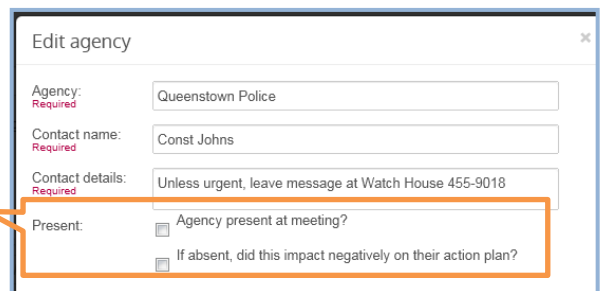
- You must tick either one of these boxes after every meeting-

- Agency present at meeting?



Important note: don't forget to tick this if the Agency attended; otherwise, they will be counted as absent.

- If absent, did this impact negatively on their action plan?



IN-CONFIDENCE

For every meeting after the Initial Meeting, SF Reporter will automatically include all the Agencies that were invited to the Initial Meeting.



NOTE: DELETE any not invited to subsequent meetings.



Important note: If you don't rate all agencies present at a meeting, they will be shown as absent in any report

Referral Meetings Surveys

Edit meeting

Meeting Date: Meeting Type:

Family present at meeting? Case did not proceed after this meeting (referral should be closed)

Initial meeting held within 15 working days Initial meeting did not proceed (referral should be closed)

Agencies invited (must include Lead Agency) Add agency

District Truancy Service (Non Government Organisations)	c: Uni Moeler	<input checked="" type="checkbox"/> delete
Doubtless Bay Kindy (Education)	c: Garry Palmer	<input type="checkbox"/> delete

Attending Review and Final meetings (Very Important)



Note: When you create the first review meeting you will notice that all agencies flow through to the Review meeting, some of these agencies may not be required nor be invited, please delete the ones at this stage who are not required or invited.

Add additional issues

As meetings progress, SF Reporter will automatically carry forward all issues. You should add additional issues from the Action Plan as the SF process proceeds.

Add issue

Issue:

Discussed: Issue discussed at meeting?

- Add Outcome from the drop-down box
- Click on 'Issue discussed at meeting?' if appropriate

You will have an opportunity to rate the process's impact on these issues as part of case closure (see [Rating Outcomes](#)).

8. Closing a Referral

There are several possible reasons for closing a Referral:

1. It fails to meet the Strengthening Families threshold.
2. The case has been set up in the system, but the Initial meeting does not proceed.
3. The case is closed after the first review, or a review meeting is deemed the final meeting.
4. The case does not proceed to Review or Final meetings for a range of reasons. Typically, the family/whānau withdraws consent, or their case is escalated to other agencies.
5. The SF process (Initial meeting, Review meeting/s, Final meeting) is successfully completed and the family/whānau no longer requires our assistance.

In all these situations, you must close the Referral.

Referral does not meet threshold (1)

- Leave the 'threshold/entry criteria met' box unticked;
- Select the closure reason from the drop-down box; and
- Close the case.

Referral does not proceed (reasons 2 and 3)

There are 2 check boxes to use if the Referral does not proceed for any reason:

- Initial meeting did not proceed (referral should be closed)

*Click this if the SF process is cancelled **before the Initial meeting** can be held (note delete agencies you have placed in the tool otherwise these will show up on the report, noel check this out.*

- Case did not proceed after the initial meeting (referral should be closed)

Click this if the SF process is aborted (no Final meeting can be held)



Note: Agencies to be rated, issues rated, final case report ticked, then case can be closed.

Closure (reasons 1 to 4)

In Strengthening Families Cases, open the relevant Referral for editing.

- Scroll down to Referral Status
- Input the Closure Date,
- or use the drop-down date box as shown.

Choose Closure Reason

from the options given in the drop-down box.

➤ Save Referral



Note: Ticking or not ticking the 'Threshold / entry criteria met' box, changes the list of Closure Reasons that you are offered.

Review

You must review all the issues discussed, record the final outcomes, and rate all the Agencies.

Rating Outcomes

Choose the outcome from:

- [no selection] – shows as “no outcome yet”
- Significant improvement
- Slight improvement
- No change
- Slight deterioration
- Significant deterioration



Rating Agencies

NOTE: You must also review all Agencies' attendance/absence (see [Add evaluation](#))

Final case management report required

- The case cannot be closed until this check box can be ticked:
 - Final case management report received from lead agency?
 - A paper based copy of this report needs to be in your filing system.

Closed Referrals

Once you have saved the closure, the Referral will disappear from the list of active referrals but will be shown in the list of Closed Referrals.

My closed referrals		
<input type="text"/>	<input type="button" value="Clear"/>	<input type="button" value="open referrals"/> <input type="button" value="enquiries"/>
Referral #2184	Harrison family/whanau	Created on 12/09/2013
Referral #2165	Patel family/whanau	Created on 11/09/2013

Final checklist

Have you...

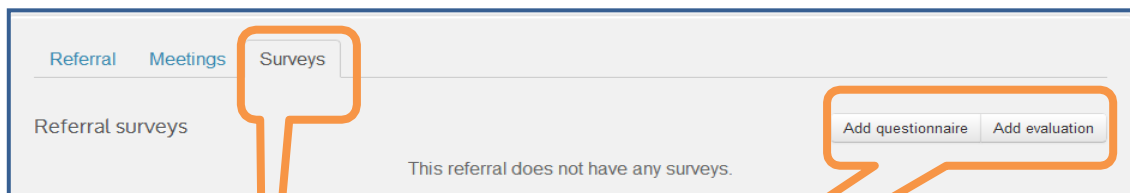
- created a Final meeting (or used the checkboxes for meetings which did not occur)?
- rated the Outcomes by fully filling in all Issues ratings?
- reviewed all Agencies' attendance/absence, ticked the checkboxes for all Agencies that attended and deleted all Agencies from meetings which did not occur

9. Surveys

The SF Reporter enables Coordinators to record Clients' perceptions of the Referral process using the Strengthening Families evaluation forms.

You will do your normal survey process, using the forms outlined in the practice guidelines; however, the information will need to be added into the system.

Please keep a hard copy for your manager and contractual monitoring requirements. Within the Referral screen there are three grey tabs:



- Referral
- Meetings
- Surveys

➤ Click on Surveys

There are two buttons

- Add questionnaire (for families/whānau)
- Add evaluation (for agencies)

Add questionnaire

This opens a new screen.

There are 7 questions that can be put to Referral Clients, with 5 drop-down options from "Strongly Agree" to "Strongly Disagree" within each, plus a "Not Answered" option.

IN-CONFIDENCE

Coordinators should administer the survey verbally, entering clients' responses on-screen.

- Click **SAVE** – this will save your changes
- Click **CLOSE** to exit without doing anything. This will lose all changes.

Add evaluation

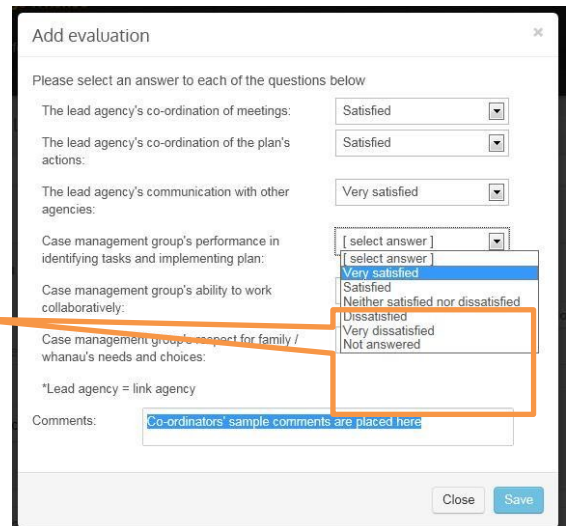
This opens a new screen.

Coordinators can record their impressions of the Referrals process and the Lead or Link agencies.

There are 6 questions to record your impressions, with 5 drop-down options from “Very Satisfied” to “Very Dissatisfied” within each, plus a “Not Answered” option.

There is also a box for Comments.

- Click **SAVE** – this will save your changes
- Click **CLOSE** to exit without doing anything. This will lose all changes.



The screenshot shows a web form titled "Add evaluation". It contains six questions, each with a dropdown menu. The first three questions have their dropdowns set to "Satisfied" or "Very satisfied". The fourth question, "Case management group's performance in identifying tasks and implementing plan:", has its dropdown menu open, showing six options: "Very satisfied", "Satisfied", "Neither satisfied nor dissatisfied", "Dissatisfied", "Very dissatisfied", and "Not answered". An orange box highlights this dropdown menu. Below the questions is a "Comments:" field with a text area containing the placeholder text "Co-ordinators' sample comments are placed here". At the bottom right of the form are "Close" and "Save" buttons.



Note: Lead agency = link agency

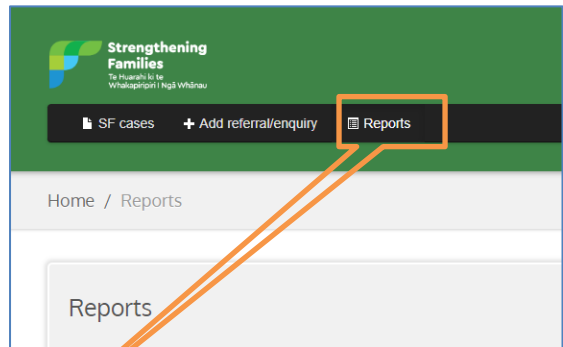
10. Reports

With the SF Reporter, you no longer need to send a monthly national report to OT national office. OT are now able to create data reports on all Strengthening Families Coordinator numbers and information at any time.

The Reports function enables you to develop your own reports for your LMG and Manager. No identifying personal information about clients will be included in the reports.

The reports are purely statistical.

- Click on the black Reports box on the Home / SF reports screen
- This opens the Reports dialogue box.



Reports

From: 29/08/2013 To: 12/09/2013 Coordinator: Alistair Stewart Type: How much did we do?

"How much did we do" report sections.

Activities during the period Children's and Young People's ages

Cases by region Referrals received, by agency

Ethnicities Referrals closed (without reaching threshold).

Genders

Generate report

Within the SF reports input box:

- Specify the start and end dates the report is to cover
- Choose 'Type' from
 1. How much did we do
 2. How well did we do?
 3. Is anyone better off?
- Check the other boxes as needed



Note: these check boxes will change as you select different report types

How much did we do? [Create new report](#) [Download as pdf](#) [Add comments and download as pdf](#)

Strengthening Families report: How much did we do?
Time period: 29 Aug 2013 - 12 Sep 2013 Coordinator: Alistair Stewart
Region: Southern Region RPO: Canterbury RPO: Canterbury

Activities during the period		Cases by region		
	Number	Region	Open	Closed
Total enquiries received	11	Southern Region	0	2
Referrals that met threshold	2	Total	0	2
CR Referrals that met threshold	1			
Initial meetings held	3			
Initial meetings within 15 days	2			
Initial meetings that did not progress	0			
Total meetings held	7			
Total adults as below	3			
Total children as below	4			
Total case reports received	2			
Dropping open cases	2			

People in cases with initial meetings during this period					
Ethnicities	Adults			Children's and Young People's ages	
	Adults	Children	Total	Age	Children
NZ European / Pakeha	0	1	1	0-3	1
				3-5	0
				6-8	0
				9-11	0
				12-13	2
				14-16	1
				17-18	0
				19-24	0
				25+	0
				Total	4

Genders			
Gender	Adults	Children	Total
Female	2	2	4
Male	1	2	3
Total	3	4	7

Referrals received, by agency			
Sector	Sub-sector	Agency	Referrals
Education	Early Childhood Education	Parentage	1
		Whangapeka District HMC	1
Health	Early Years Health	Kindergarten Association	1
		Ukarewa Health Centre	1
		Repeta Health	1
Non Government Organisations	Ministry of Health	Children	1
	Social Service NGO	Unique Families	1
		Total	7

Referrals closed (without reaching threshold), by reason	
Reason	Number
Total	0

The SF Reporter will gather all the information you have requested into a report format and show it on screen. The example above shows a "How much did we do" report.

The results are reported by totals, ethnicity, age, gender, referring agency sector, and closures.

Create new report

How much did we do? Create new report Download as pdf Add comments and download as pdf

Strengthening Families report: How much did we do?
 Time period: 01 Apr 2014 - 22 May 2014 Coordinator: Noel Doney
 Region: Southern Region RGG: Canterbury RGG LMG: Canterbury

Activities during the period		Referrals Received			
	Number	Region	Opened	Closed	
Total enquiries received	12	Southern Region	9	2	
Referrals that met threshold	4	Total	9	2	
DR Referrals that met threshold	1				
Initial meetings held	6				
Initial meetings within 15 days	1				
Review meetings held	13				
Final meetings held	2				
Total meetings held	21				
Total adults as below	2				
Total children as below	1				
Final case reports received	1				
Ongoing open cases	5				

People in cases with initial meetings during this period

Ethnicities				Children's and Young People's ages	
Ethnicity	Adults	Children	Total	Age	Children
Samoaan	1	1	2	0 - 2	0
Korean	0	1	1	3 - 5	0
Tongan	0	1	1	6 - 8	0
Indian	0	1	1	9 - 11	0
NZ European / Pakeha	2	1	3	12 - 13	1
				14 - 16	0

To create another report of a different type,

- Click on the Create New Report button.
 - You can develop a report for any period and for specific data requirements.
 - The system does not save the report you develop.

Important Note: If you want to keep a record of the report for the LMG, save as PDF on your hard drive.

SF reports Create new report Download as pdf Add comments and download as pdf

There are 3 buttons at the top:

1. Create new report
2. Download as PDF
3. Add Comments and download as PDF

Download as PDF or Excel

A PDF (Portable Document Format) is a suitable format to print out or email your report. Record where the SF Reporter has saved the PDF within your computer or network.

An Excel spread sheet function is available so that you can create graphs or extract information to present in a different way, e.g. graphics. Discuss with your LMG what they prefer.

Add Comments and download as PDF

You may wish to copy and paste your narrative report into the comments section. It is advised that you do this first in Word and then copy and paste, as the system will not save the information.

There is a new excel part so that spread sheets can be made and graphs created.

11. Training

The SFRT Training environment is a workplace or educational setting designed to assist you in gaining work-related skills or competencies. Provided with instruction and using this handbook as guidance the Training environment can assist toward learning how to perform specific tasks in SFRT, without fear of impacting the daily operational data in the SFRT production environment (where you will carry out your daily work).

The Training environment has a blue header to distinguish it from the production environment. Access to Training will be required for specific training requirements and access to the Training environment is achieved through a request to the National Administrator.

Any issues with access please contact sfrtsupport@ot.govt.nz as below.

12. Support

Read through this list of support options to identify the best contact to help resolve your issue:

General support

1. **Self-help:** Please try to resolve the issue by reading through this manual.
2. **Peer support:** Contact a person in your region, who you know uses the SF Reporter tool.
3. **Advisor support:** Please contact Noel Doney, Senior Advisor, Oranga Tamariki National office via the SFRT Support email inbox sfrtsupport@ot.govt.nz for any of the following:
 - a. to have a user added/removed.
 - b. to have an agency added/removed in the Agencies drop-down boxes. (template)
 - c. if you believe a report is inaccurate.
 - d. to request a Case Delete. This function is only available if there is a significant mistake or multiple entry of the same case. Authorisation by a Strengthening Families Coordinator’s manager will be required. (template)
 - e. to request reassignment of key cases to another Coordinator within the same LMG, should their extended leave be approved. Authorisation by a Strengthening Families Coordinator’s manager will be required.
 - f. to provide access to the Training environment.

Or if **URGENT - Noel Doney T: 64 4 918 9281**

- **SFRT Support Email inbox - sfrtsupport@ot.govt.nz**
- **Please state the nature of your issue in the subject line of your email and your region.**

The image shows a screenshot of an email composition interface. On the left is a 'Send' button with a paper plane icon. To its right are three input fields: 'To' with the value 'SFRTSupport', 'Cc' (empty), and 'Subject' with the value 'Case deletion request - Central Otago'. A red rectangular box highlights the 'Subject' field.

13. Security

Note: all the records you save using the SF Reporter are extremely confidential.

The SF Reporter is protected by a password and a time-out function that will log you out if left unattended for **30 minutes**. The information is secure from 'hacker' threats.

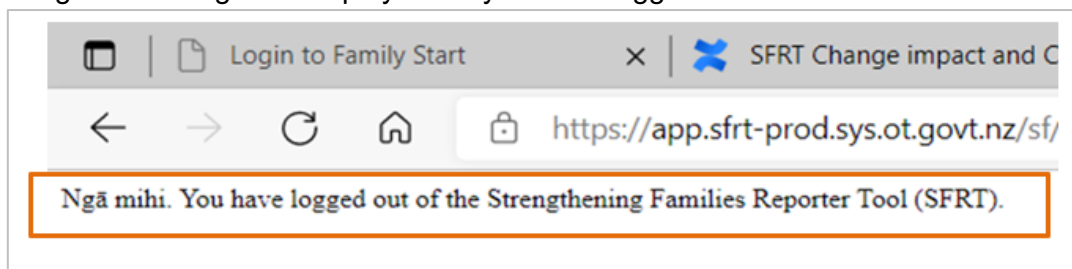
Rather, any confidentiality breach is likely to come from accidental or deliberate use of your laptop/computer when it is unlocked and unattended.

We recommend you use SFRT in a secure location such as your base office. It can be used with a laptop and mobile broadband.

Note it is like Facebook - that is, if you close a session without logging out, a fresh session can be continued without re-logging in. This could breach confidentiality if other users use your computer browser before the time-out lock takes effect.

Important note: logout whenever you are away from your PC.
A logout page will display when you are logged out.

A log out message will display when you have logged out.



User control and protection

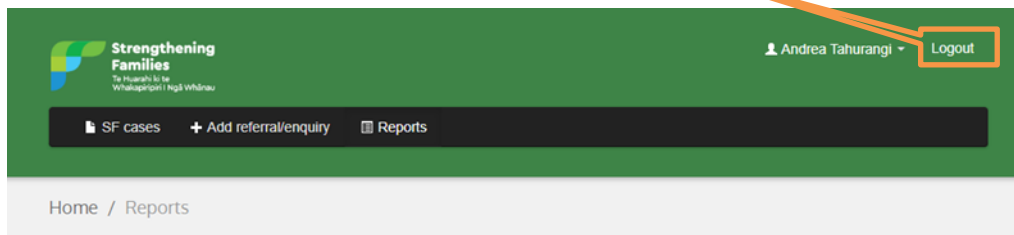
Strengthening Families organisations must follow these protocols:

- SF providers are responsible for any security breaches leading from password sharing amongst their staff.
- If a Coordinator leaves, the Senior Advisor, OT national office, must be advised. Their log-in will be deactivated and new ones issued to replacement/additional staff.
- Employers may require access to the reporter to access practice or monitoring contracted volumes, this will mean sharing password and email address, The organisation is responsible for the management of password sharing
- Do not write your password down; and especially never leave it near your computer.

Password rules

- ✓ Password must contain a lower case letter
- ✓ Password must contain an upper case letter
- ✓ Password must contain a special character
- ✓ Password must contain a number
- ✓ Password must contain at least 12 characters

- Exiting Always exit by clicking Logout at the top-right hand corner of your screen.



IMPORTANT:

- In Closing a case, If in doubt re closing a case, don't close, ask for assistance.
- If you create a case by mistake this can be deleted by National Office only.
- National Office can only delete cases, cannot do any other changes to an open case.
- If you have a SFC in your area who has a level of expertise re. the Reporter phone them for help.
- National office can help you navigate your way through difficulties. See the [Support section](#).

Glossary

Agency

Any organisation involved in the SF process.

Browser

Software used to access the Internet. (Chrome, Firefox, and Safari are the major brands in approx. order of popularity). Note – Google is not a browser.

Case

Any SF process that has met the Threshold and is activated by a Referral; it may proceed to a Meeting.

Closure

Process to close a case. All cases must eventually be closed.

Coordinator

Formally appointed Strengthening Families worker. Employee of a SF provider or (in some cases) OT.

Differential Response (DR)

OT response framework, offering a wider range of options, earlier response to family needs and the opportunity to link families to community-based services.

Enquiry

Any contact from anyone to a SF Coordinator, about a family/whānau.

Evaluation

E-component of the SF Reporter that Coordinators use to record their impressions of the Referrals process and agencies.

Final Meeting

Meeting which closes the case.

Initial Meeting

First Meeting which is a SF case process. There can only be one Initial Meeting. (Not a home visit or phone call)

Issue

Any economic, social, housing, health, parenting etc. problem identified by the family/whānau.

Lead Agency

SF provider engaged by a Coordinator to lead responsibility for the SF process for a family/whānau.

Local Management Group (LMG)

Committee of local NGO / Government. Managers with SF joint governance and improvement responsibilities.

Login

Process of securely using the SF Reporter. Another name for User ID.

Meeting

Diarised face-to-face meeting between agencies addressing a family/whānau issues as part of the SF process, with the family/whānau present or not. See Initial, Review, and Final meetings.

Multi factor authentication (MFA) Multi-factor authentication is an electronic authentication method in which a user is granted access to an application only after successfully presenting two or more pieces of evidence.

Outcome

Records the result of the SF process for a family/whānau. Options are available ranging between Significant Improvement and Significant Deterioration.

Referral

Official notification by an NGO or other organisation or a self-referral that a family/whānau is experiencing issues suitable for the SF process.

Report Function

Function of the SF Reporter which gathers statistical information about cases over a specified time. Reports are available for How much did we do? How well did we do? Is anyone better off?

Results Based Accountability™ (RBA)

Framework which communities, agencies and teams use to focus on results/outcomes to make a positive change for communities, whānau and clients.

Review Meeting

Meeting as part of the SF case process.

Self-referral

Any contact with a SF Coordinator by anyone within a family/whānau.

Senior Advisor, Strengthening Families

Oranga Tamariki Ministry for Children national office staff member in charge of Strengthening Families programme support. Currently Noel Doney.

Survey

E-component of the SF Reporter that Coordinators use to ask family/whānau about their impressions of the SF process using a Questionnaire.

Threshold

Set of conditions that need to be met for a SF Enquiry to become a Case / Referral.

Tool (The)

Another name for the SF Reporter.

User

Authorised Strengthening Families Coordinator, or designated manager or team leader.

User ID

Authorised user's SF Reporter name; usually their email address.



Strengthening Families

Te Huarahi ki te Whakapiripiri I Ngā Whānau

