



Australian Government
Australian Institute of
Health and Welfare

Specialist Homelessness Services Collection

New SHIP Case Plan functionality



Stronger evidence,
better decisions,
improved health and welfare

Home

This information pack provides information about new functionality for the Plans tab in SHIP.

It includes the following sections:

- [Overview of new case plan functionality](#)
- [Case plan Support Domains](#)
- [Adding case Notes, Payments and Tasks directly from within Plans](#)
- [Viewing and exporting associated Notes, Payments and Tasks](#)
- [Outputting Plans Reports and Lists](#)

Overview of new case plan functionality

Additional case plan functionality enables SHIP users to:

- record case plan actions against individual support domains
- record Notes, Payments and Tasks from within the actions of a case plan
- view Notes, Payment and Task records associated with a case plan action from within the Plan tab, then export to XLS or PDF.

Overview of case plan support domains

Selecting Support Domains for case plan actions can assist:

- to identify areas in which change is needed
- to set goals and measure progress
- the implementation of a consistent case management framework
- more comprehensive reporting of case management outcomes.

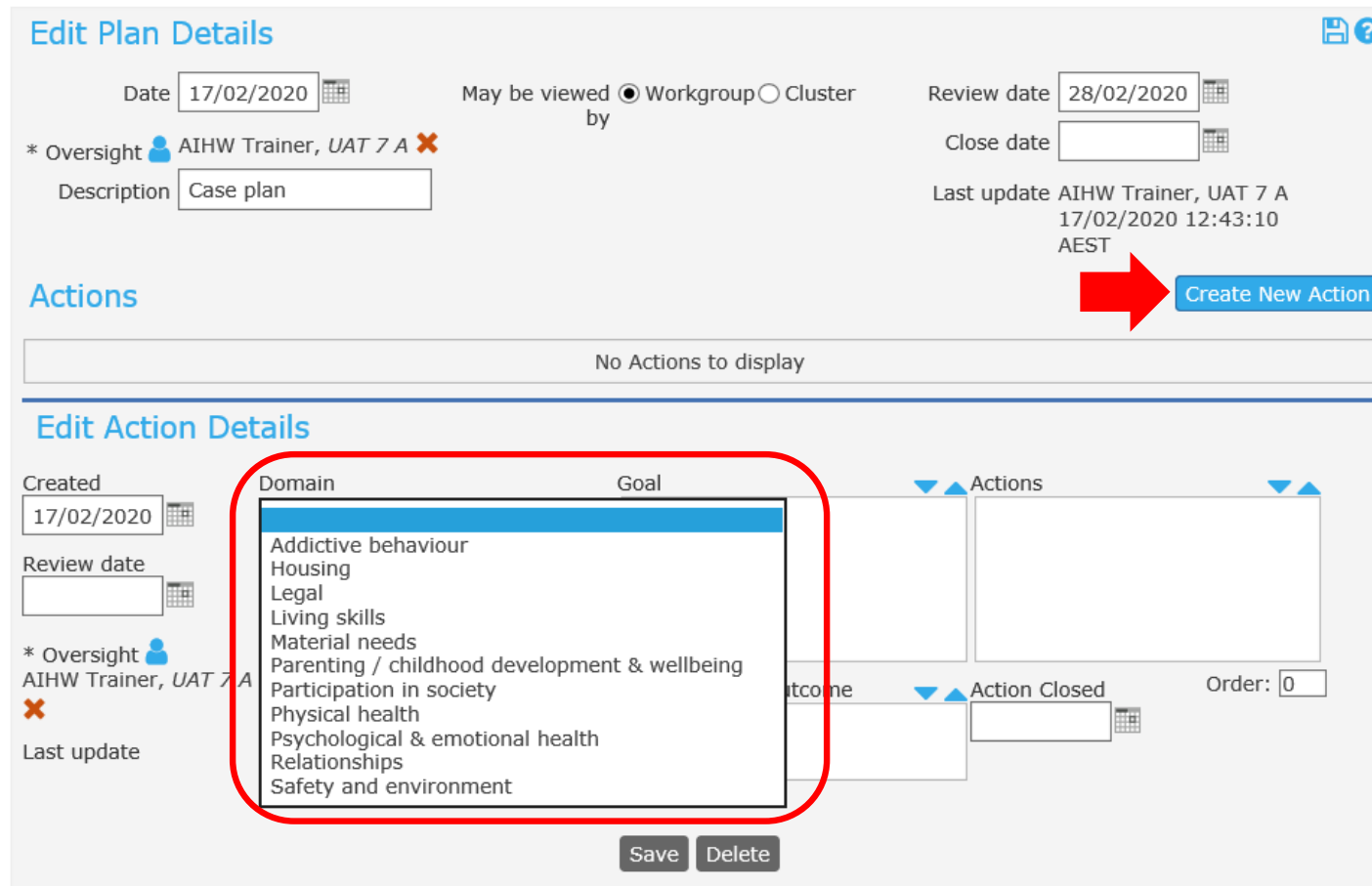
NOTE: The use of support domains is optional – seek advice from your management for agency operational guidelines.

Case plan support domains

Addictive behaviour	Alcohol use, Other substance use, Gambling
Housing	Shelter, Tenancy, Safe and secure accommodation, Affordable housing
Legal	Offending, Involvement with legal system, Citizenship status, Identification documents
Living skills	Self-care, Instrumental activities of daily living, Administration &/or Guardianship, Ability to seek support
Material needs	Financial resources, Government payments, Food, Clothing, Utilities, Transport
Parenting/ childhood development & wellbeing	Education/School, Play activities, Parenting skills
Participation in society	Employment, Education/School, Leisure, Community Events, Civic responsibilities, Cultural participation
Physical health	Medical conditions and disabilities, Dependence on medicinal substances and medical aids, Energy and fatigue, Pain and discomfort, Sleep and rest, Mobility, Fitness, Children's physical development
Psychological & emotional health	Diagnosed mental illness, Affect/mood, Motivation/aspiration, Satisfaction/fulfilment, Self-esteem/Body image, Cognitive functioning, Spirituality, Children's psychological development
Relationships	Family connection and dynamics, Care-giving, Interpersonal relationships, Social networks, Sexuality
Safety and environment	Physical/Emotional violence, Sexual violence/abuse, Neglect, Self-harm, Identity, Rights and discrimination, Choice, Control and freedom, Physical Environment

Case plan support domains

Case plan Support Domains become available in a case plan after a new 'Action' is created.



Edit Plan Details

Date: 17/02/2020
May be viewed by: Workgroup Cluster
Review date: 28/02/2020
Close date:
* Oversight: AIHW Trainer, UAT 7 A
Description: Case plan
Last update: AIHW Trainer, UAT 7 A
17/02/2020 12:43:10 AEST

Actions

No Actions to display

Edit Action Details

Created: 17/02/2020
Review date:
* Oversight: AIHW Trainer, UAT 7 A
Last update:
Order: 0

Domain	Goal	Actions
Addictive behaviour		
Housing		
Legal		
Living skills		
Material needs		
Parenting / childhood development & wellbeing		
Participation in society		
Physical health		
Psychological & emotional health		
Relationships		
Safety and environment		

Save Delete

Functionality to create Notes, Payments or Tasks

After an Action is saved, functionality to create a new Note, Payment or Task becomes available.

Actions Create New Action

Date/Worker	Issue	Goals	Actions	Review/Close
17/02/2020 AIHW Trainer	Housing Currently in emergency accommodation	Find long-term independent housing	Complete and submit housing application	Review: Not Set Closed: Not Set

Edit Action Details

Created: 17/02/2020

Review date:

* Oversight: AIHW Trainer, UAT 7 A

Last update: AIHW Trainer, UAT 7 A, 17/02/2020 12:53:11 AEST

Domain: Housing

Issue: Currently in emergency accommodation

Goal: Find long-term independent housing

Comments on Outcome:

Outcome: Goal not achieved (1) Goal fully achieved (5) N/A


Actions: Complete and submit housing application

Action Closed:

Order: 0

Save Delete

Print View



- New Note
- New Payment
- New Task

Functionality to create Notes, Payments or Tasks

An example of a Note created from within the case plan 'Action' – Related Action is also displayed.

- Save and close the Note to return to the Plans tab.

The screenshot displays a software interface with a top navigation bar containing tabs: Search, Details, Notes, Payments, Accommodation, Status, Alerts, Referrals, Plans, Tasks, Documents, Membership, and Memo. The 'Plans' tab is active.

The main content area is split into two panels. The left panel, titled 'Edit Plan Details', shows a form for a plan with the following fields:

- Date: 17/02/2020
- May be viewed by: Workgroup (selected) / Cluster
- * Oversight: AIHW Trainer, UAT 7 A
- Description: Case plan

Below this is an 'Actions' table with columns 'Date/Worker Issue' and 'Goals':

Date/Worker Issue	Goals
17/02/2020 AIHW Trainer Currently in emergency accommodation	Find long-term independent housing

The right panel, titled 'Edit Note Details', shows a form for a note with the following fields:

- Client: Mary Kennedy
- Date: 17/02/2020
- * Worker/s: AIHW Trainer, UAT 7 A
- Related Action: 17/02/2020 - Complete and submit housing application (highlighted with a red box)
- * Contact type: Client meeting

Below this is a 'Notes' section with the text: "Mary has just entered our emergency accommodation and indicated that her long-term goal is to leave the city and access independent housing in a regional area, closer to her parents."

At the bottom of the right panel, there is a 'Housing / Accommodation' section with a table of checkboxes:

Needs Identified	Support Provided	Referral Arranged	Housing / Accommodation
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Short term or emergency accommodation
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Medium term/transitional housing
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Long term housing
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Assistance to sustain tenancy or prevent tenancy failure or eviction
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Assistance to prevent foreclosures or for mortgage arrears

A red arrow points to the close button (an 'x' icon) in the top right corner of the 'Edit Note Details' window.

Functionality to create Notes, Payments or Tasks

New Notes, Payments or Tasks can also be created from within a list of Actions.

AEST

Actions Create New Action

Date/Worker	Issue	Goals	Actions	Review/Close
17/02/2020 AIHW Trainer	Housing Currently in emergency accommodation	Find long-term independent housing	Complete and submit housing application	Review: Not Set Closed: Not Set
17/02/2020 AIHW Trainer	Parenting / childhood development & wellbeing Poor school attendance	Improve Rose's school attendance	Seek consent from family to contact the school. Organise a time to meet with Rose's teacher	Review: Not Set Closed: Not Set
	Material needs Currently nil income	Gain Centrelink Payments.	Advocate with Centrelink. Complete applications. Assist to access birth and marriage certificate.	Review: Not Set Closed: Not Set

New Note
New Payment
New Task

Save

Print View

AIHW

Viewing associated Notes, Payments and Tasks

Click on 'List' icons to view Notes, Payments and Tasks associated with each Action.

Actions Create New Action

Date/Worker	Issue	Goals	Actions	Review/Close
17/02/2020 AIHW Trainer	Housing Currently in emergency accommodation	Find long-term independent housing	Complete and submit housing application	Review: Not Set Closed: Not Set 4 - Goal mostly achieved Application completed. Need to check and submit.
17/02/2020 AIHW Trainer	Parenting / childhood development & wellbeing Poor school attendance	Improve Rose's school attendance	Seek consent from family to contact the school. Organise a time to meet with Rose's teacher	Review: Not Set Closed: Not Set
17/02/2020 AIHW Trainer	Material needs Currently nil income	Gain Centrelink Payments.	Advocate with Centrelink. Complete applications. Assist to access birth and marriage certificate.	Review: Not Set Closed: Not Set 4 - Goal mostly achieved Payment to commence while waiting certificates of identification.

Edit Action Details List icon

Created: 17/02/2020

Domain: Parenting / childhood development

Issue: Poor school attendance

Goal: Improve Rose's school attendance

Actions: Seek consent from family to contact the school. Organise a time to meet with Rose's teacher

* Oversight: AIHW Trainer, UAT 7 A

Outcome: Goal not achieved Goal fully achieved N/A

Comments on Outcome:

Action Closed:

Order: 0

Last update: AIHW Trainer, UAT 7 A

Viewing associated Notes, Payments and Tasks

All associated records are displayed – click on 'Create New' to create another record.

Actions Create New Action

Date/Worker	Issue	Goals	Actions	Review/Close
17/02/2020 AIHW Trainer	Housing Currently in emergency accommodation	Find long-term independent housing	Complete and submit housing application	Review: Not Set Closed: Not Set 4 - Goal mostly achieved Application completed. Need to check and submit.
17/02/2020 AIHW Trainer	Parenting / childhood development & wellbeing Poor school attendance	Improve Rose's school attendance	Seek con to contac Organise with Rose	
17/02/2020 AIHW Trainer	Material needs Currently nil income	Gain Centrelink Payments.	Advocate Complete Assist to marriage	

Edit Action Details

Created: 17/02/2020
 Review date:
 Domain: Parenting / childh
 Issue: Poor school attendance
 Goal: Improve Rose's sc attendance
 Outcome: Goal not achieved 1 Goal fully achieved 5 N/A
 Comments on Outc:
 Last update: AIHW Trainer, UAT 7 A

Associated Records

Create New Filter

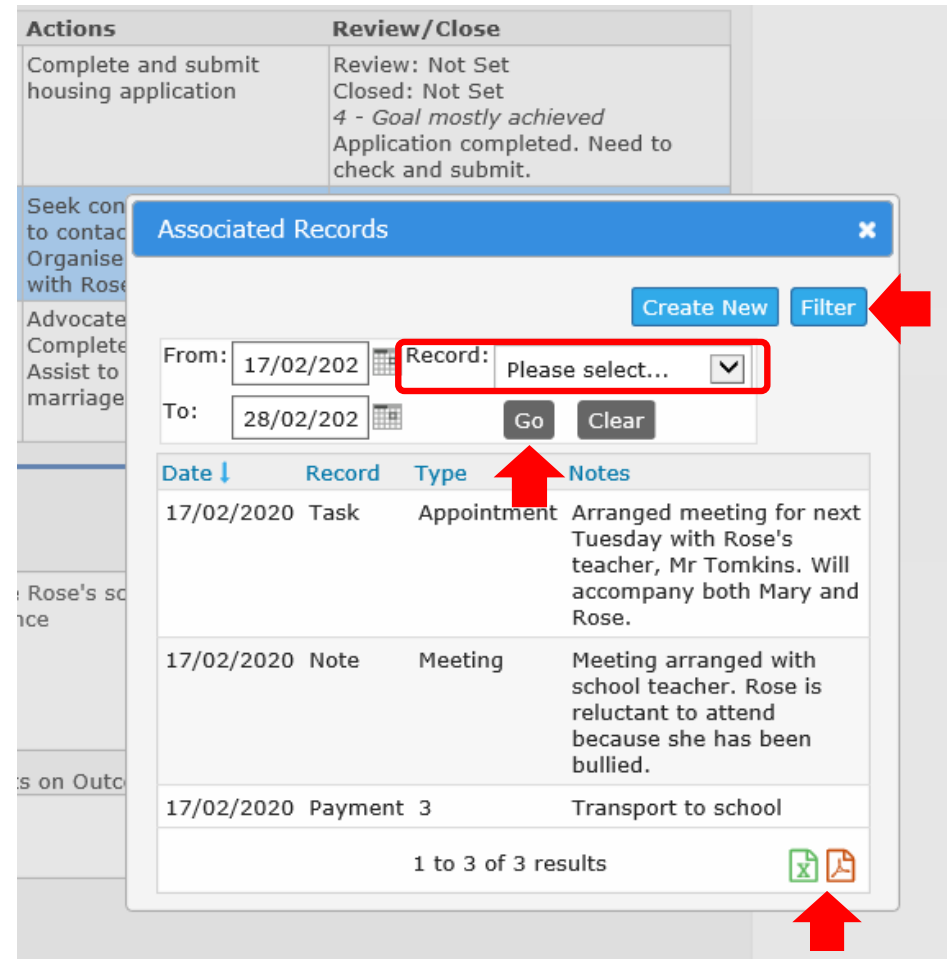
Date ↓	Record	Type	Notes
17/02/2020	Task	Appointment	Arranged meeting for next Tuesday with Rose's teacher, Mr Tomkins. Will accompany both Mary and Rose.
17/02/2020	Note	Meeting	Meeting arranged with school teacher. Rose is reluctant to attend because she has been bullied.
17/02/2020	Payment 3		Transport to school

1 to 3 of 3 results

Exporting associated Notes, Payments and Tasks

To export records associated with an Action:

1. Click on 'Filter'
 2. Enter dates required
 3. Select type of Record required
- OR** do not select type to include all records
4. Click on 'Go'
 5. Click on XML or PDF icon to output records



Associated Records

Create New Filter

From: 17/02/2020 Record: Please select...
To: 28/02/2020 Go Clear

Date ↓	Record	Type	Notes
17/02/2020	Task	Appointment	Arranged meeting for next Tuesday with Rose's teacher, Mr Tomkins. Will accompany both Mary and Rose.
17/02/2020	Note	Meeting	Meeting arranged with school teacher. Rose is reluctant to attend because she has been bullied.
17/02/2020	Payment	3	Transport to school

1 to 3 of 3 results

XML PDF

Exporting associated Notes, Payments and Tasks

An example of exported records in PDF format – ready for printing.



Records associated to Action 17022020 - Seek consent from family to contact the school. Organise a time to meet with classroom teacher.

Date	Record	Type	Notes
17/02/2020	Task	Appointment	Arranged meeting for next Tuesday with Rose's teacher, Mr Tomkins. Will accompany both Mary and Rose.
17/02/2020	Note	Meeting	Meeting has been arranged with school teacher. Rose is reluctant to attend school because she has been bullied.
17/02/2020	Payment	3	Transport to school for meeting with classroom teacher.

Case Plan Reports and Lists

To run a case plan Report:

- Go to Reports tab on Reports page
- Select 'Plan Report'
- Decide who to include –
e.g Persons with plan current....
- Select period of interest
- Select 'Generate Report'
- Go to Results tab to view report

Specialist Homelessness Information Platform

Reports Lists Financial SHS Referrals Reception Custom Results

Workgroup UAT 7 A

Report type Plan Report

Include in report Persons with plan current in report period

Period of Interest This Financial Year

Start date 01/07/2019

End date 17/02/2020

Generate Report

Request Submitted

This report may take a few minutes to run. The report will be displayed in the results tab.
The report ID number is: 9667
Please delete the report when no longer of use.

Case Plan Reports and Lists

To output a case plan List:

- Go to Lists tab on Reports page
- Select 'Plans' as List type
- 'Include identifying details in list' will output client names
- 'Show both structured and unstructured data' will include notes
- Select 'Export List' to output in Excel
- Go to Results tab to export list

Specialist Homelessness Information Platform

Reports **Lists** Financial SHS Referrals Reception Custom Results

Workgroup UAT 7 A
(To view lists for another workgroup change to that workgroup.)

List type Plans

Include in report Persons with plan current in report period

Include Identifying Details Include identifying details in list

Show in list Show both structured and unstructured data in list

Period of Interest This Financial Year

Start date 01/07/2019

End date 17/02/2020

Export List View List

Note: Because of browser limitations it may not be possible to view very long lists. If a list does not open in your browser delete it from the results page and use the Export List option.

Request Submitted

This report may take a few minutes to run. The report will be displayed in the results tab.
The report ID number is: 9668
Please delete the report when no longer of use.