Salesforce CRM User Manual

ST FRANCIS FAMILY CENTRE AND
ST MARK'S STAY & PLAY

JULY 2021

Contents

Introduction: Guidance, support and terminology

Welcome to the Salesforce CRM user manual for St Francis Family Centre and St Mark's Stay & Play. This manual is designed to give you an induction to all the key functionality and should be your first port of call for any issues you are having when using the system. There are also some short training videos available. Although these were created for our school counsellors, the following videos will be useful to show you the key steps to follow when undertaking tasks such as:

Creating a contact (Child)

Creating a contact (Parent)

Creating a programme engagement (Remember to select 'Add contact to non-school programme' and in the 'Program' field select either St Francis Family Centre or St Mark's Stay & Play – see section three below)

Recording a service delivery (1 to 1 session) (Remember to select 'SF: Nursery' or 'SM: Session' in the 'Service' field – see section four below)

Recording a service delivery using bulk service deliveries (group session)

Recording a consultation

Recording a safeguarding case

- Further information on recording a safeguarding case
- Further information on monitoring a safeguarding case
- Further information on closing a safeguarding case

(Remember some of the safeguarding procedures shown in the video will not be relevant as you are not working in schools – please see precise guidance for St Francis and St Marks in section seven below).

If you have any difficulties that are not addressed by these resources, for example things not working as expected, then CCS has a System Administrator who looks after the day-to-day running of the system and can help to support you with any issues. Your System Administrator is Pauline Murphy (paulinem@cathchild.org.uk).

Some terminology used in this manual may not be familiar and an explanation of key terms is outlined below:

- **Contact:** Adding a child or parent to the system is called adding a 'Contact'. The Contact Record holds limited information such as name, date of birth, address and contact details. All users can view these records.

- **Program Engagement:** A Program Engagement is where all information related to a specific piece of work with a child is captured (referral information, Service Deliveries and Safeguarding Cases). Access to this is limited to the member of staff creating the Program Engagement and managers.

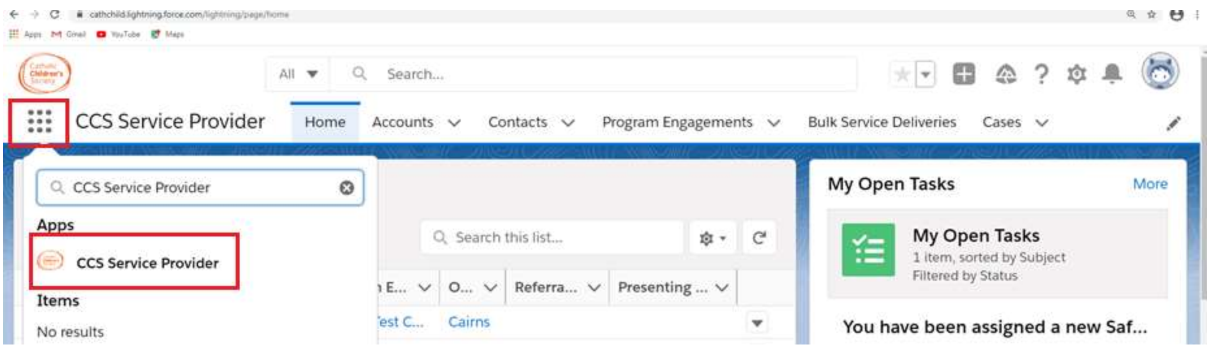
- **Service Deliveries:** A Service Delivery is a session. These are captured within a Program Engagement. For example, if a child is referred for a nursery space and receives 3 sessions per week you will add them as a Contact, create a Program Engagement then record 3 Service Deliveries each week within this.

- **Case:** Case is an abbreviation for Safeguarding Case. A Case should be created within a Program Engagement whenever you have a safeguarding concern.

To summarise, the three basic steps for using Salesforce are:

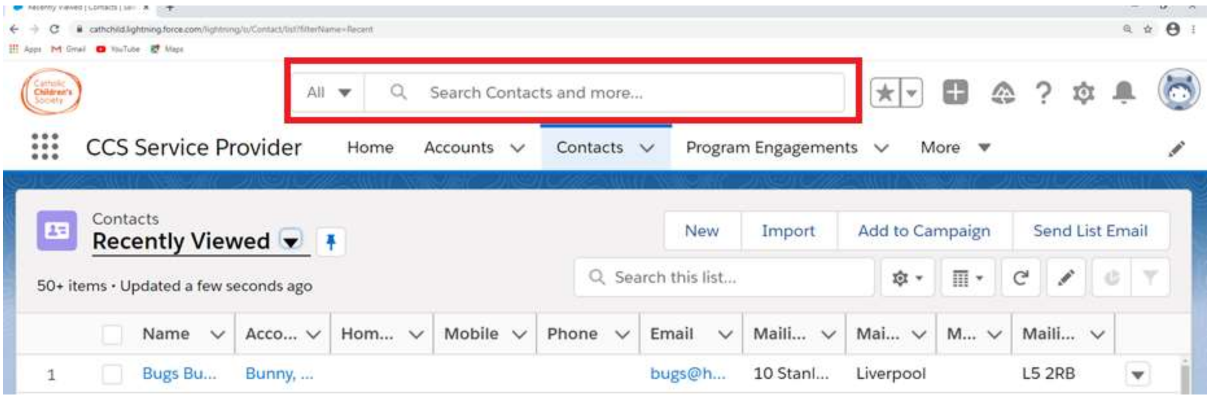
Create Contact → Create Program Engagement → Add Service Deliveries

Please also remember is important you are logged on as a 'CCS Service Provider' to ensure the CRM is configured properly. If, after you log on, you cannot see CCS Service Provider in the top left of your screen please click the square icon. Then type 'CCS Service Provider' and select the App that appears.



1. Creating a contact (child)

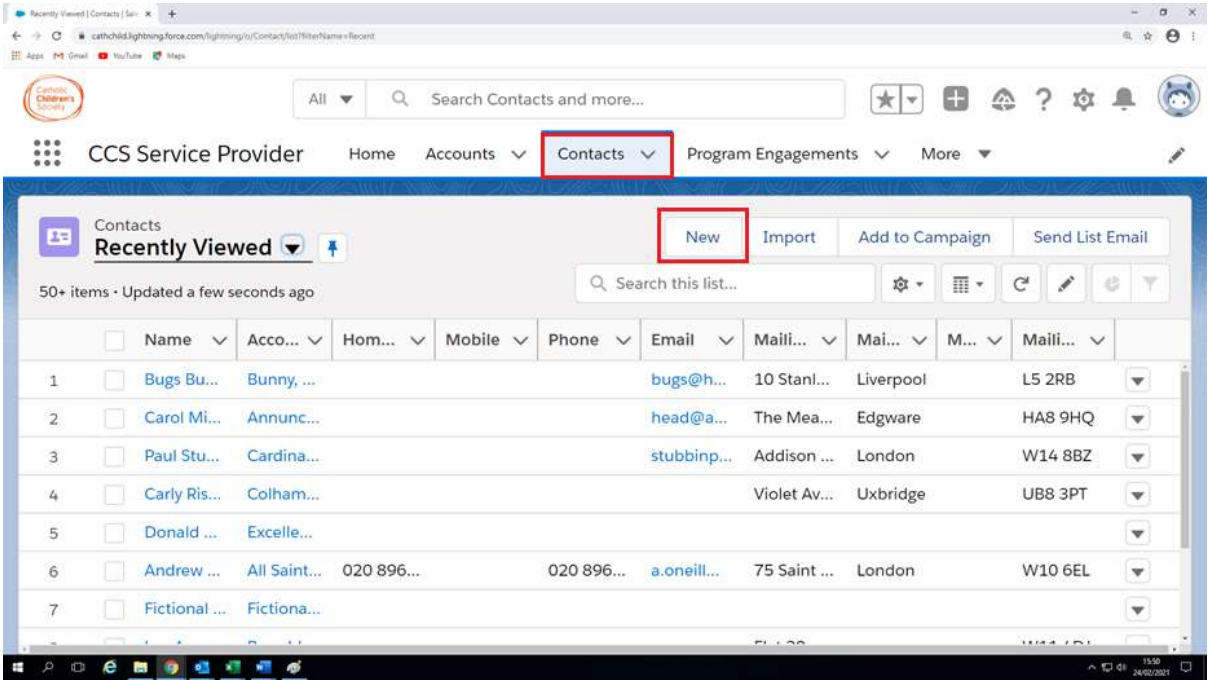
To preserve data quality, before creating a Contact in the system you should always use the Global Search Bar to ensure that the Contact does not already exist in the system:



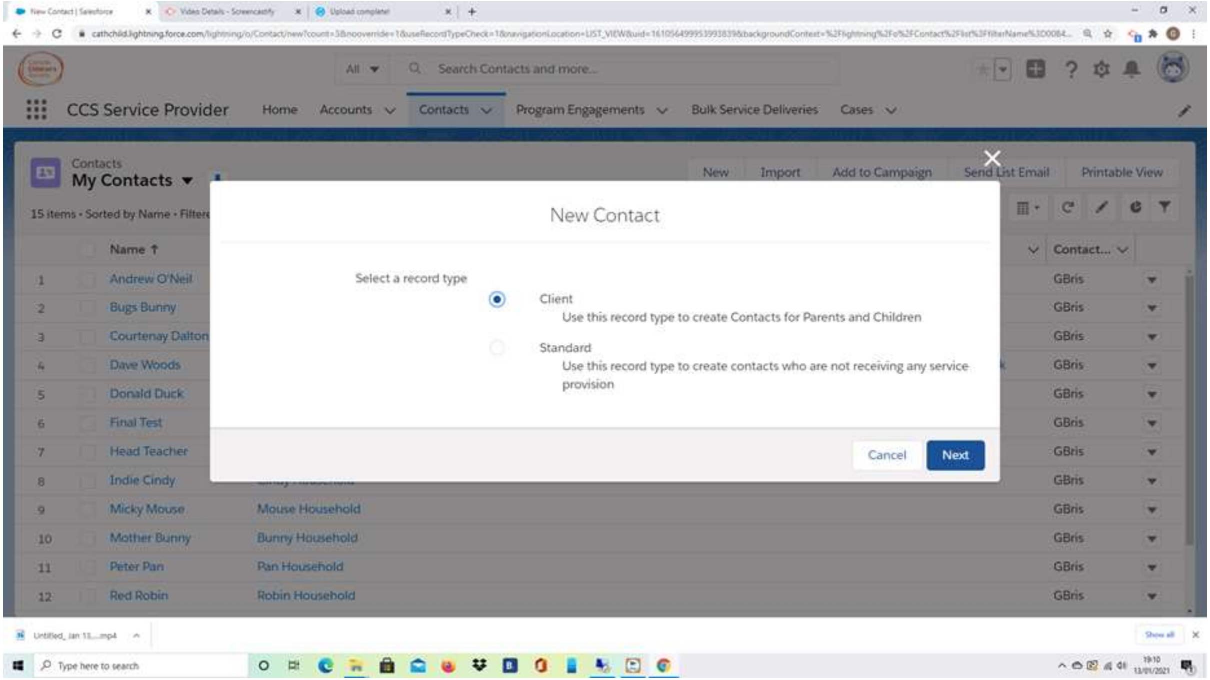
If a contact with the same name appears you can click on the record to verify if this is the same child (e.g. does it have the same DOB or address). If it is the same child, please use this Contact Record to create a new Program Engagement (see 'Creating a Program Engagement' section below).

If the Contact is not already on the system you can add them by following these steps:

(i) Navigate to the 'Contacts' tab in the Navigation menu and click 'New'



(ii) Select the <u>**'Client'**</u> Record Type (this is the record you always use for children and parents. Never use 'Standard')



(iii) Complete all fields as required.

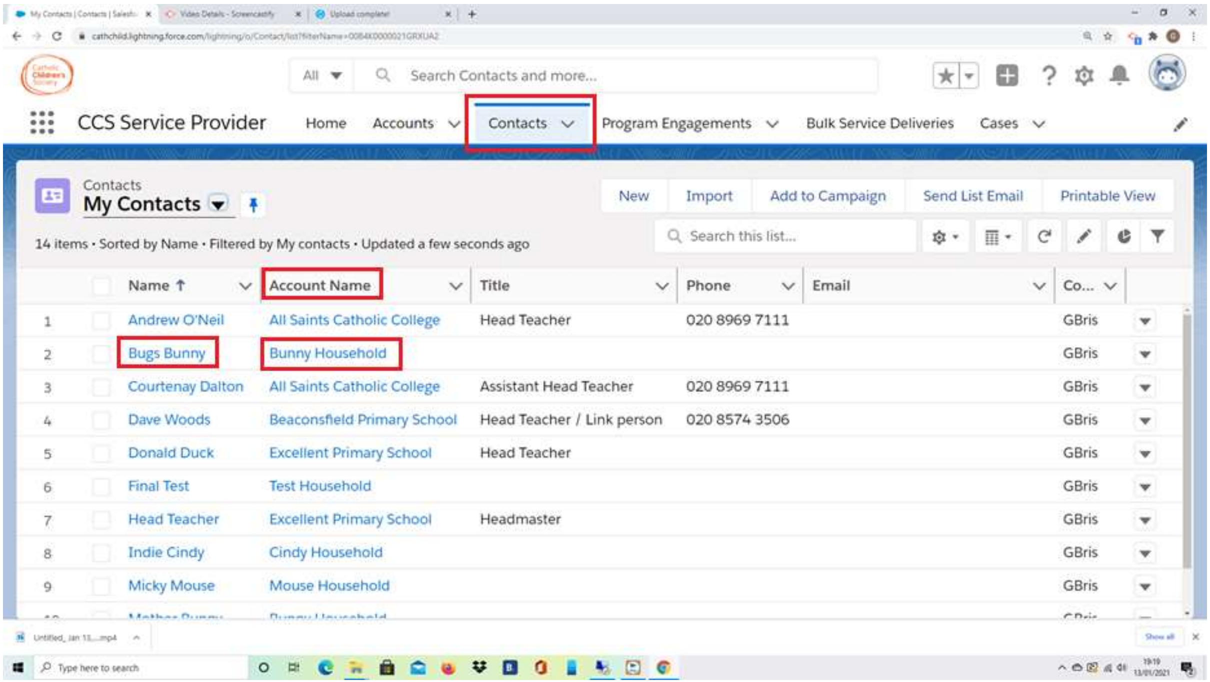
(iv) Account name: If this is the first family member that has been added to the system leave the 'Account name' field blank. The system will then automatically create an account name using the individual's surname (e.g. Smith household). This can then be used for adding additional family members (see section below)

(v) Adding an address: You can use the 'search address' field to quickly find the address you want to input. Sometimes this suggests addresses abroad. However, if you add UK this will focus the search and should find the correct address (e.g. enter '3 Stanley Road UK'). Please ensure that the address suggested is correct and include full details, including the postcode.

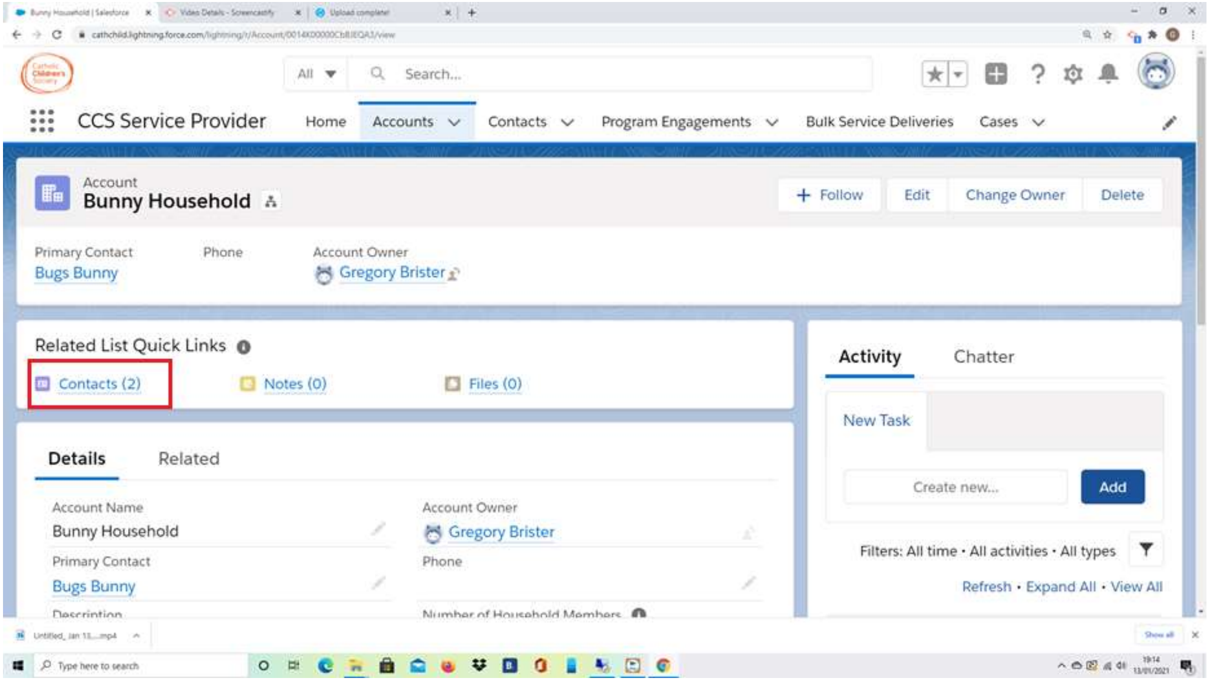
2. Creating a contact (parent) and linking family members

To reduce the chance of accidentally creating a duplicate household please follow these steps when adding a parent as a Contact on the system:

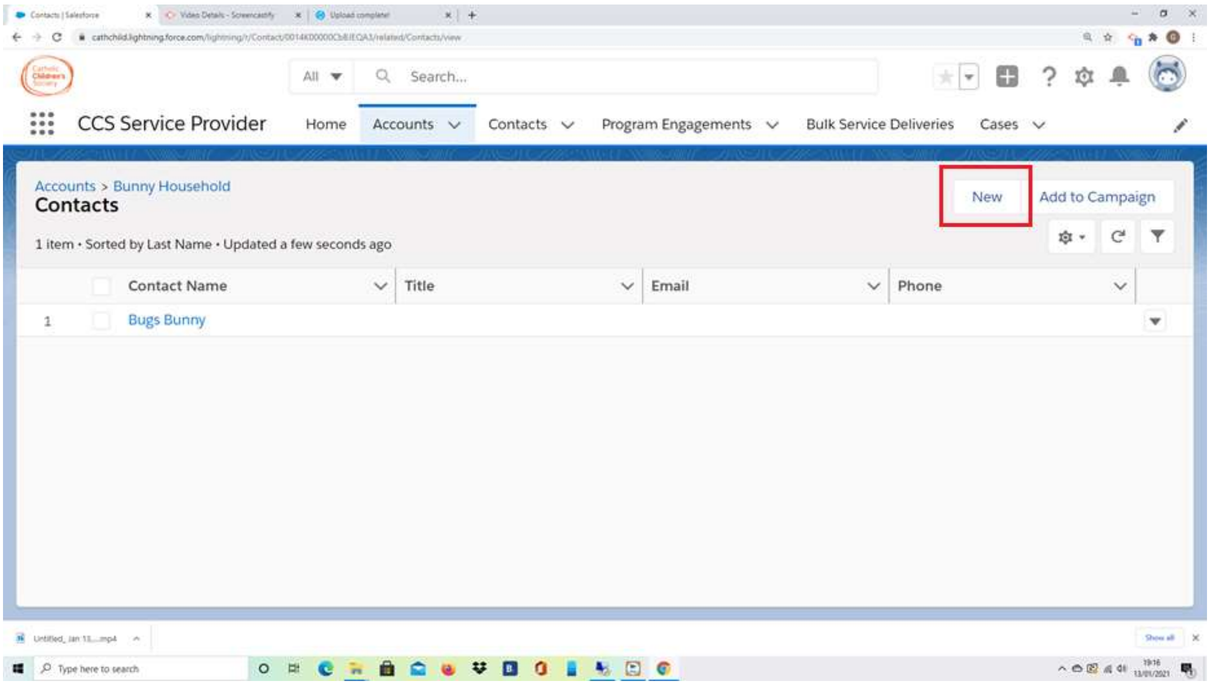
(i) Find the child under 'Contacts' and click on their <u>'Account Name'</u> e.g. for Bugs Bunny this would be 'Bunny Household'



(ii) Within this household record select 'Contacts'



(iii) Select 'New'



(iv) Select Record Type 'Client'

(v) Complete all the relevant fields.

(vi) For parents you can leave DOB and UPN blank.

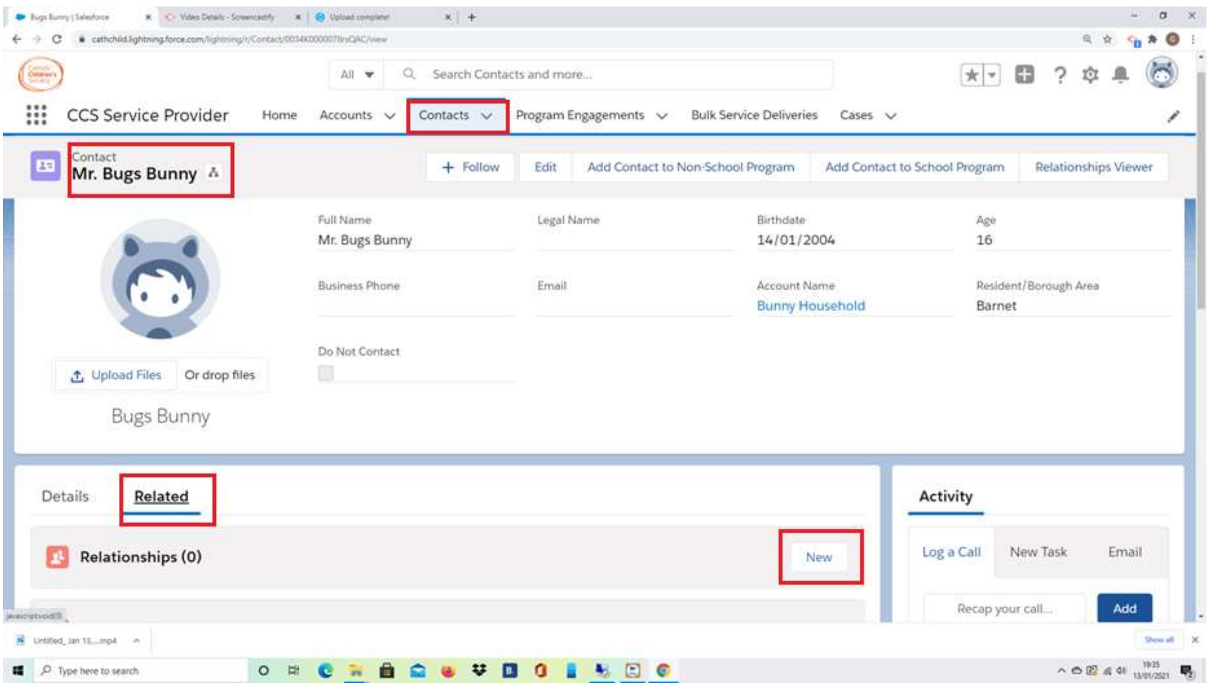
(vii) The field ‘Account name’ will automatically be filled with the household name that has been allocated to the child using the child’s surname (e.g. Bunny Household). If the mother has a different surname to the child (e.g. Smith) enter this in the ‘Surname’ field. When you save the record the account name will automatically update as ‘Bunny and Smith Household’. If you then add the father to this household and his surname is Jones, the account name will again update to ‘Bunny, Smith and Jones Household’.

(viii) Address: The address field will automatically be filled with the child’s address details. If you alter this, the address for each member of the household will update. You cannot have different addresses for members of the same household. If the parent lives at a different address, you need to set them up as a different household. To do this follow the steps outlined in Section 1 and leave the ‘Account name’ field blank. This will create the parent as a new household and you can then record a separate address.

(ix) Click Save

You now need to show the relationship between the child and parent. To do this:

(x) Go into the child’s record, select the “Related” tab and click “New” under “Relationships”

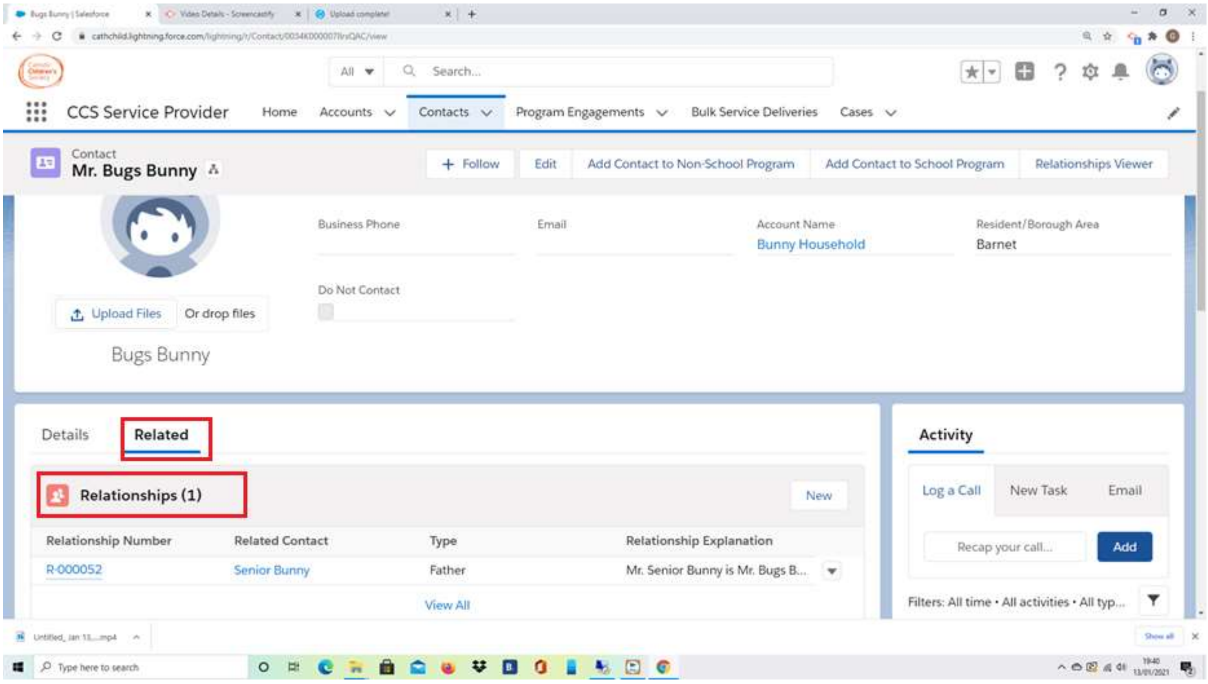


(xi) Select the parent’s name in the field ‘Related Contact’

(xii) Use the ‘Type’ field to define how the Related Contact is connected to the Contact e.g. Father/Mother.

(xiii) Click ‘Save’

The new relationship will appear in each Contact’s record in the ‘Related’ tab under ‘Relationships’.


CCS Service Provider
Home
Accounts
Contacts
Program Engagements
Bulk Service Deliveries
Cases
Contact
Mr. Bugs Bunny
+ Follow
Edit
Add Contact to Non-School Program
Add Contact to School Program
Relationships Viewer
Business Phone
Email
Account Name
Bunny Household
Resident/Borough Area
Barnet
Do Not Contact
Upload Files
Or drop files
Bugs Bunny
Details
Related
Relationships (1)
New
Relationship Number
Related Contact
Type
Relationship Explanation
R-000052
Senior Bunny
Father
Mr. Senior Bunny is Mr. Bugs B...
View All
Activity
Log a Call
New Task
Email
Recap your call...
Add
Filters: All time • All activities • All typ...

3. Creating a Program Engagement

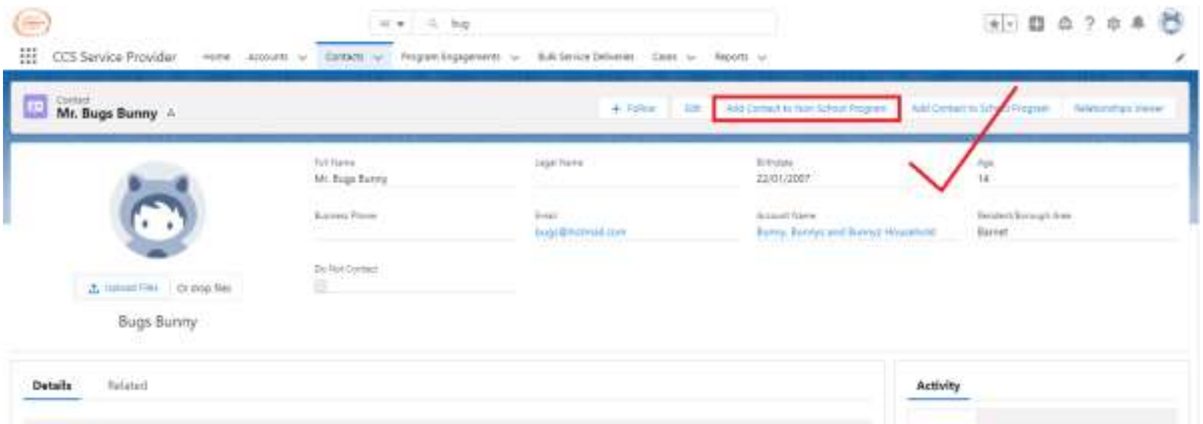
A Program Engagement is where you will capture all the information related to a specific piece of work with a child. Within this you capture Service Deliveries, Consultations and Safeguarding Cases. The Program Engagement should be created against the child's record, <u>not</u> the parents.

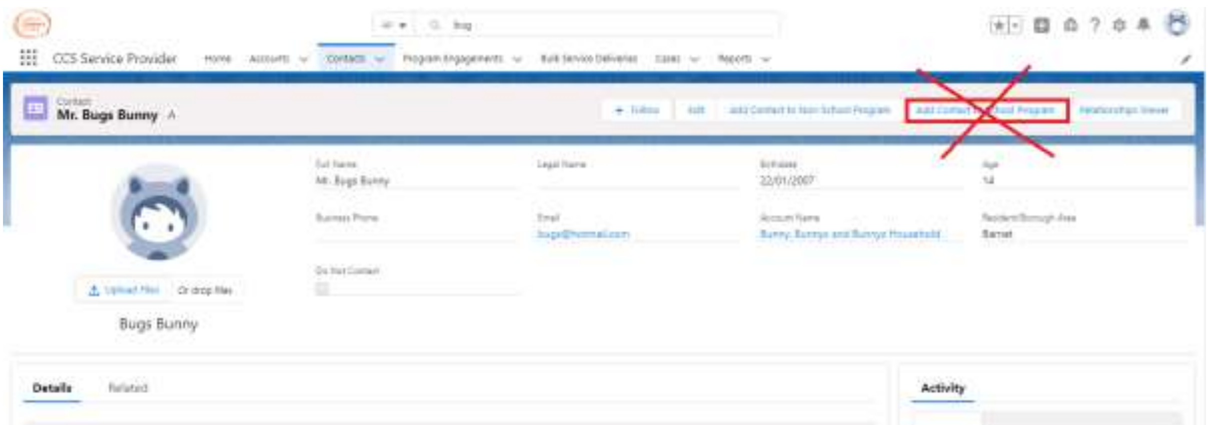
To create a Program Engagement:

(i) Click the 'Contacts' tab

(ii) Click on the name of a Contact you want to create a Program Engagement for (NB. This should always be the child. Never create a Program Engagement for a parent)

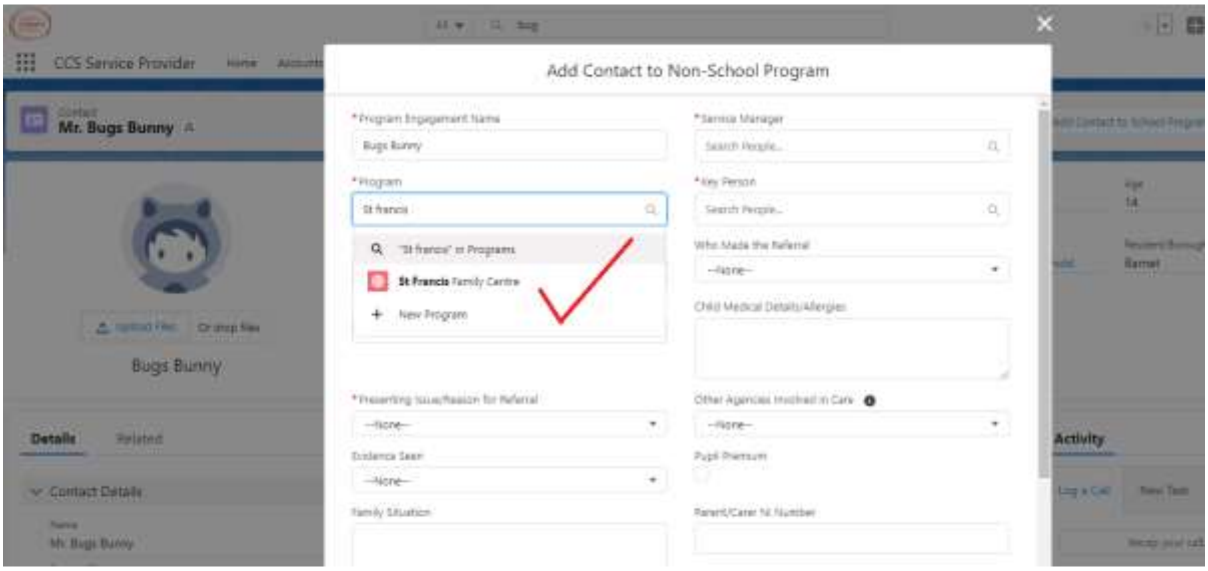
(iii) Click the 'Add Contact to Non-School Program' (do <u>not</u> select 'school program' and do <u>not</u> select 'New Program Engagement' via the Program Engagement tab).

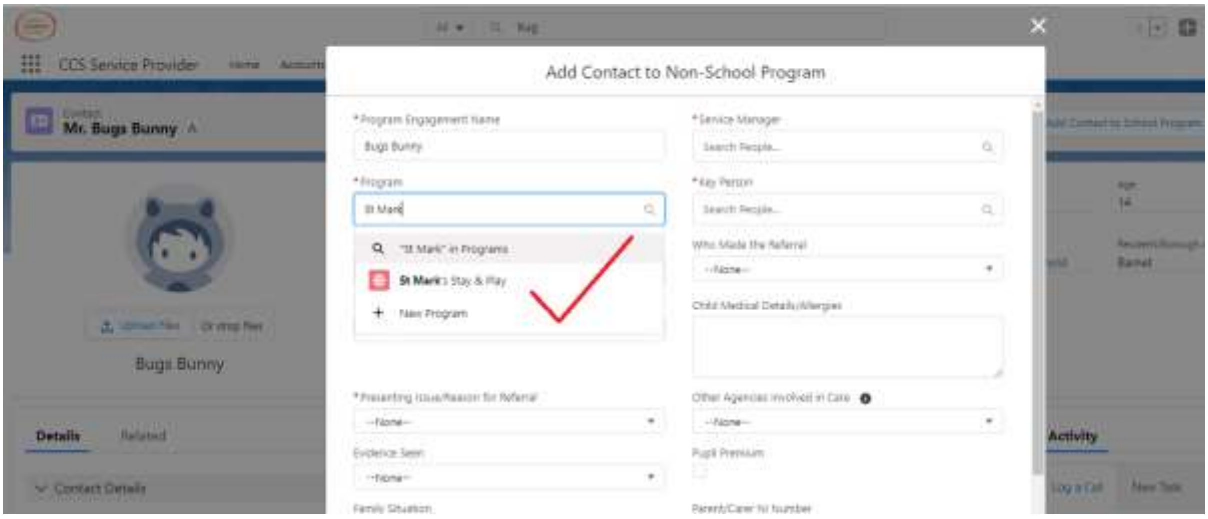




(iv) Complete all relevant fields with referral information

(v) For the ‘Program’ field always select ‘St Francis Family Centre’ or ‘St Mark’s Stay & Play’.

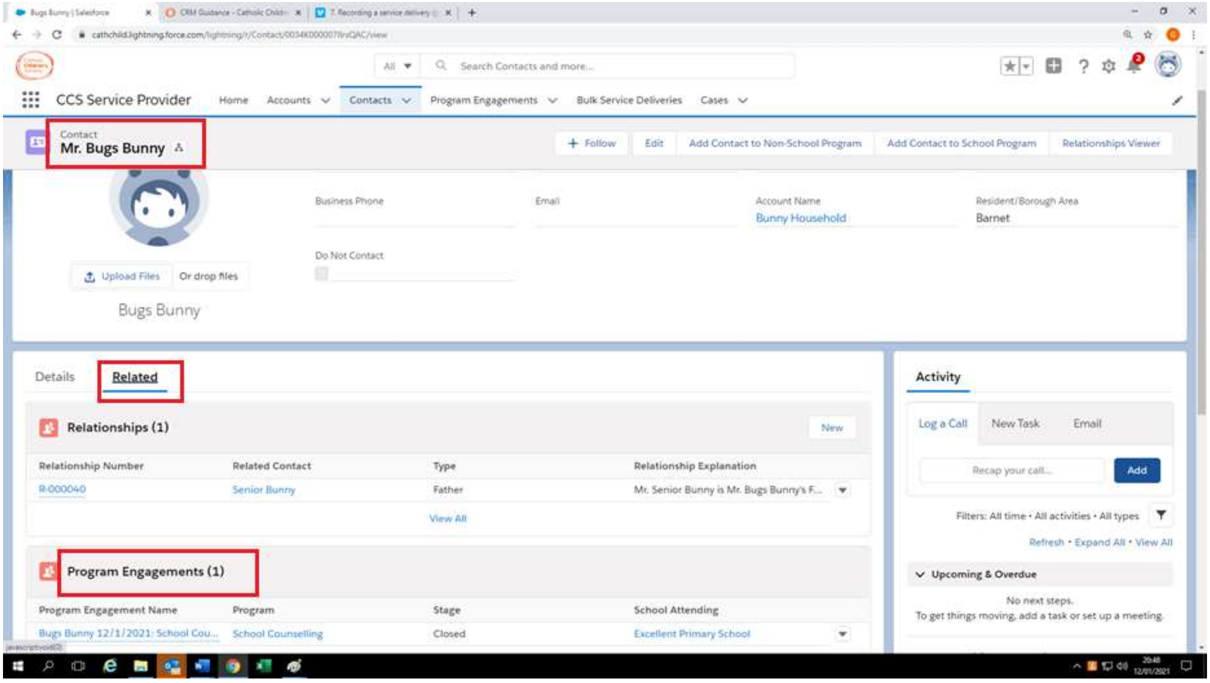




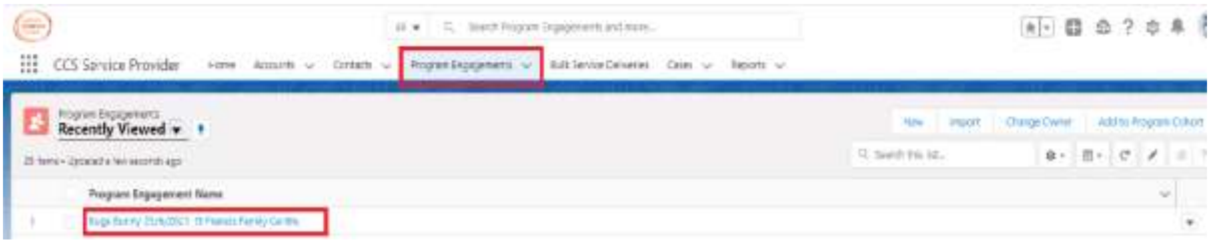
(vi) For the ‘Stage’ field select ‘In Progress’

(vii) Click ‘Save’

The Program Engagement will now appear within the child’s Contact record (in the ‘Related’ tab under ‘Program Engagements’):



It will also be listed under ‘Program Engagements’ in the top task bar:



Once the piece of work ends and the Program Engagement is closed, if the child is referred to you again you must create a new Program Engagement. This applies even if there is no gap, for example if a child attends nursery and is then referred for after school. You should have one Programme Engagement for the nursery attendance and create a new Programme Engagement for the after school.

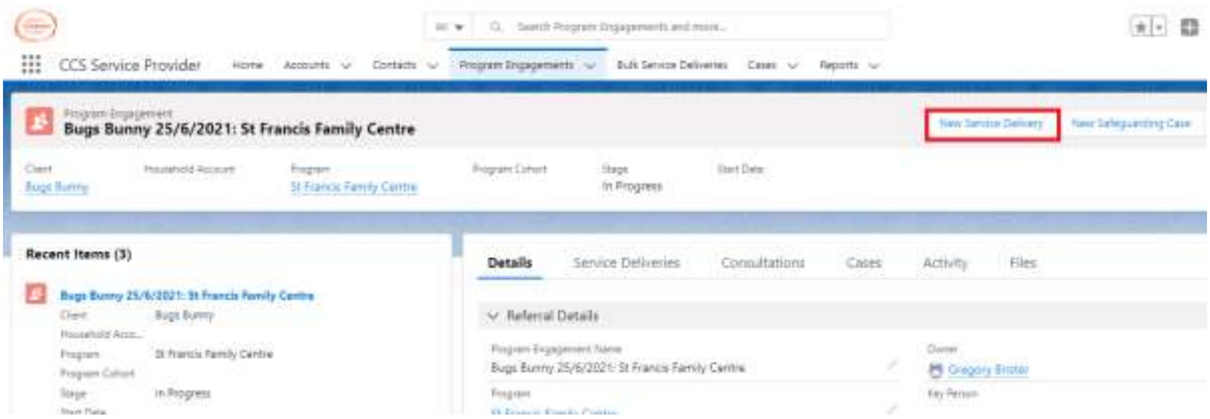
4. Recording a Service Delivery (Nursery/Stay and Play session)

A service delivery is a session you have provided. These are logged within a child's Program Engagement (so the Programme Engagement must always be created for a child first before any Service Deliveries can be logged).

To record a nursery/play session:

(i) Navigate to the Program Engagement you wish to add a Service Delivery to

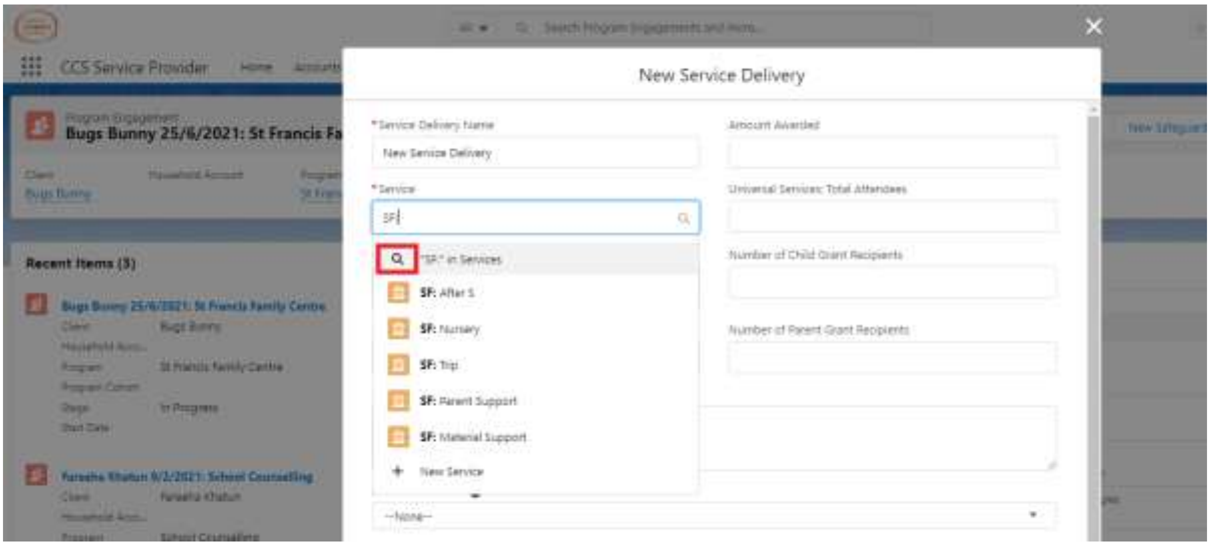
(ii) Click the 'New Service Delivery' button

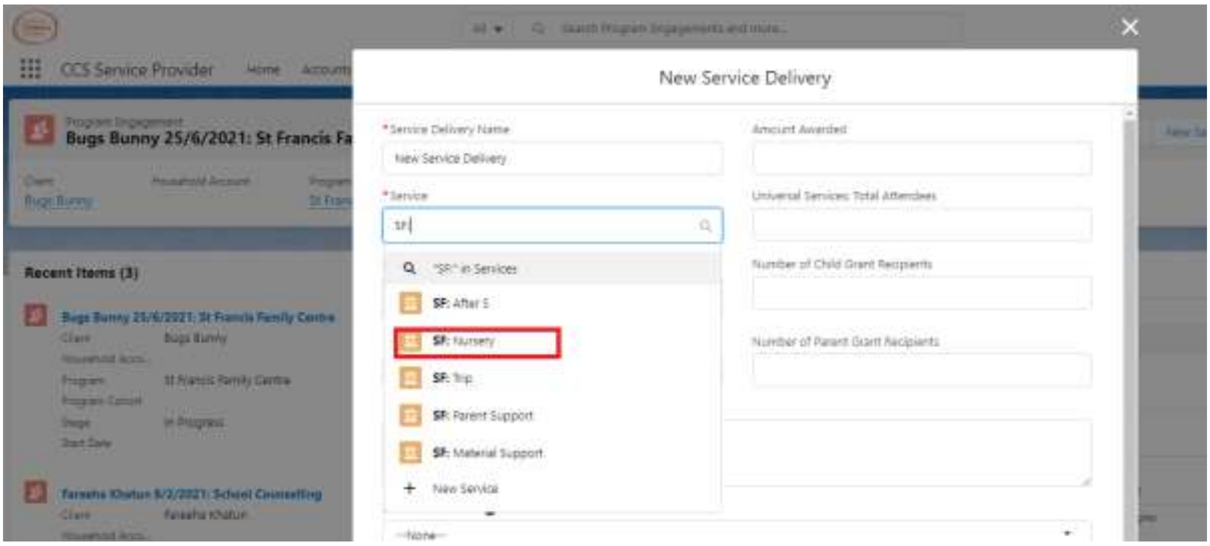


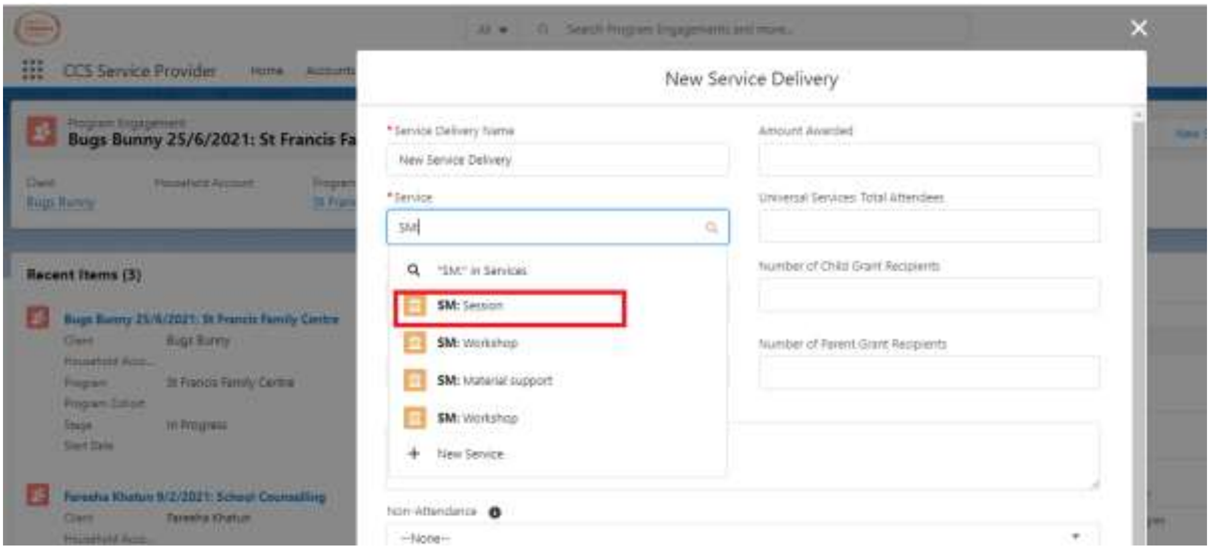
(iii) Complete all relevant fields (always leave the field 'Universal Services: Total attendees' blank).

(iv) The 'Session Summary' field can be left blank unless there is any key information that should be captured there (seek guidance from your manager on this)

(v) In the 'Service' field type 'SF: Nursery' (for St Francis) or 'SM: Session' (for St Mark's). Alternatively type 'SF' or 'SM' and click the magnifying class. This will list all the services we provide under St Francis/St Mark's and you can select the relevant service:





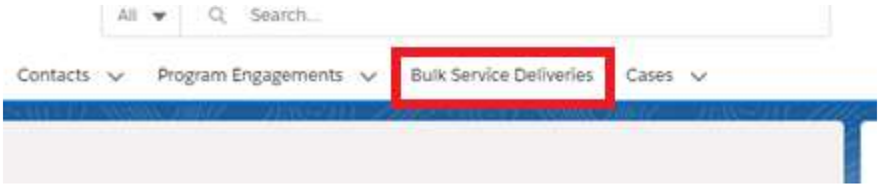


(vi) Click ‘Save’. The Service Delivery will now be recorded under the ‘Service Deliveries’ tab within the child’s Program Engagement.

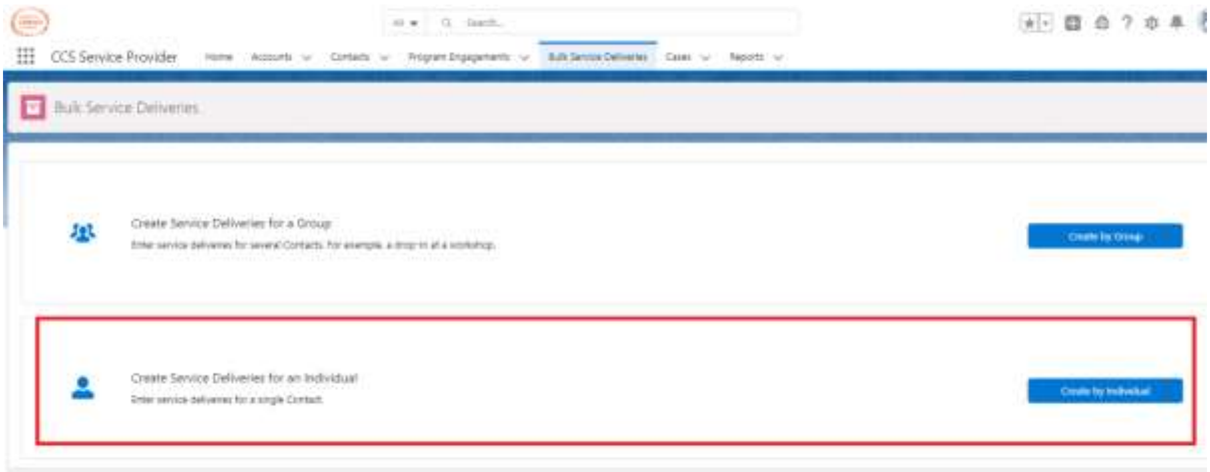
5. Recording a Service Delivery using 'bulk service deliveries'

You can use Bulk Service Deliveries to quickly enter multiple Service Deliveries at once. For example, for a service that is provided for a group of children. To use this function:

(i) Click the "Bulk Service Deliveries" tab at the top of the task bar.



(ii) Select create Service Deliveries for an individual



(iii) Search for and select the Client in the 'Client' field

(iv) Select the Program Engagement you want the service delivery added to

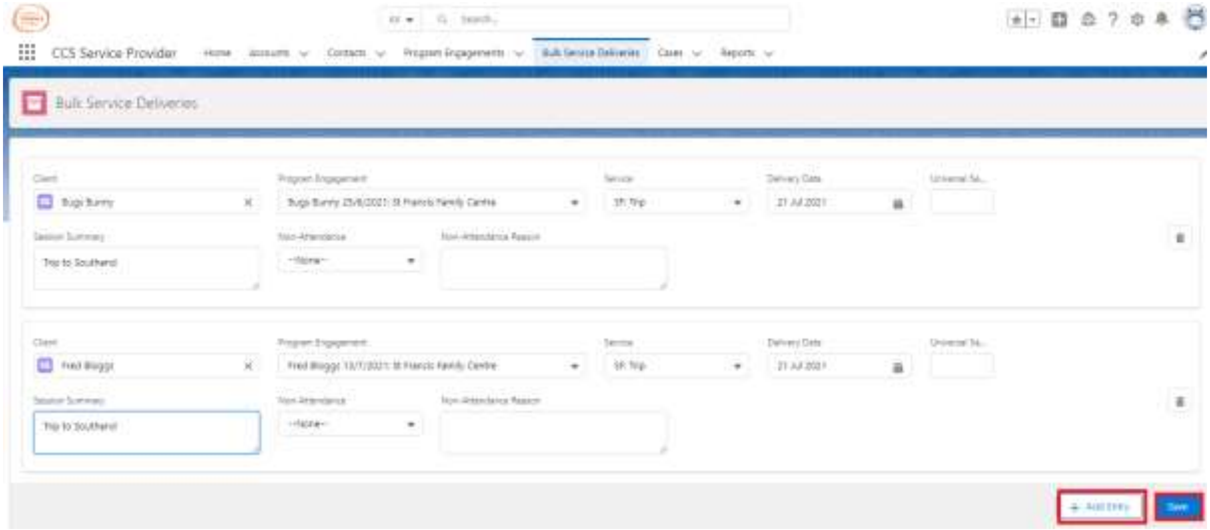
(v) Select the relevant Service from the drop down menu

(vi) Enter the Delivery Date

(vii) Leave the 'Universal Services: Total attendees' field blank.

(viii) Record a Session Summary if applicable

(ix) Click "Add Entry" to add another Service Delivery for another client and repeat the same steps.



(x) Click “Save”. A message then confirms the number of Service Deliveries that will now be automatically stored under each child’s Program Engagement.

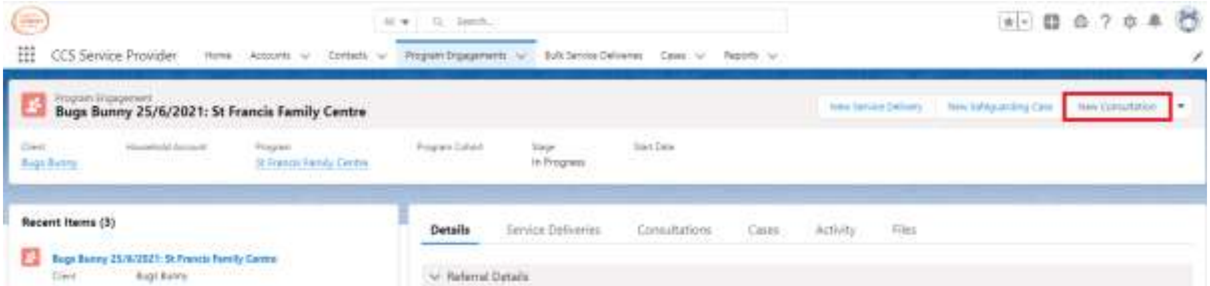
6. Recording a Consultation

Consultations provide a means of recording key information gained via meetings/telephone calls/emails/conversations with parents/other professionals. We do not expect you to keep a record each time you discuss a client. Please use your professional judgment to decide what key information should be recorded to inform your work.

To log a Consultation:

(i) Go to the child's Program Engagement

(ii) Click 'New Consultation'



(iii) Complete all fields

(iv) If your consultation was with more than one person add details in the 'Meeting/Consultation Held With' field.

(v) Click 'Save'

The Consultation will now appear under 'Consultations' tab within the Program Engagement

7. Recording a Safeguarding Case

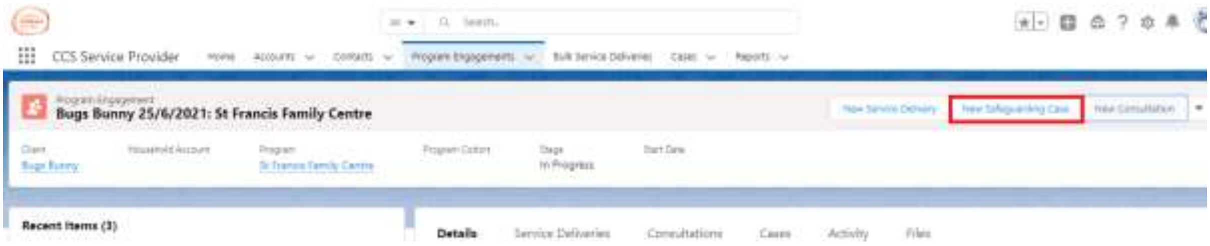
If you have a safeguarding concern this should be captured within a child's Program Engagement under 'Cases'. You should always speak with your line-manager if you have a safeguarding concern. Recording details on Salesforce does <u>not</u> replace this.

Recording a concern

To record a safeguarding concern:

(i) Go to the child's Program Engagement

(ii) Select 'New Safeguarding Case'



(iii) Complete all relevant fields (fields about school do not need to be completed)

(iv) Threshold: Select 'High' or 'Low' (see Appendix A for definitions)

(v) LA notified: This should always be done via the DSL/Deputy DSL.

(vi) Description: Write up details of the concern

(vii) Summary of initial actions taken: The summary should contain only facts (not opinion) and include:

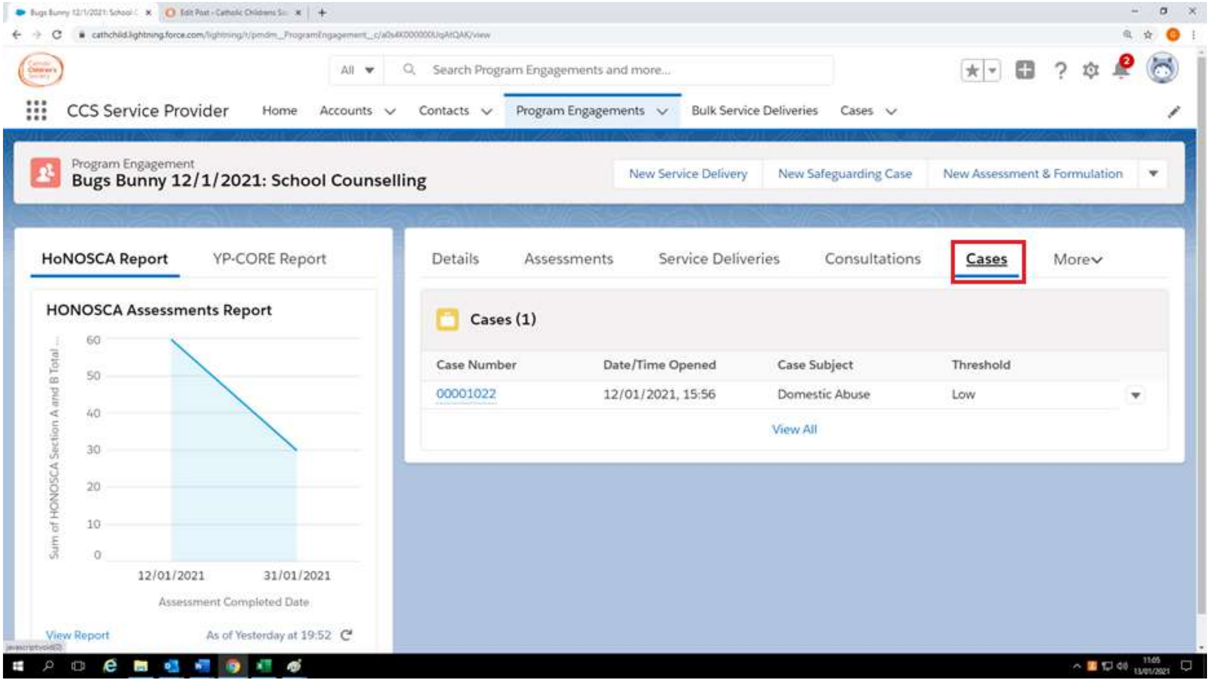
a. Who the concern was raised with (including their name, job title and role in safeguarding if applicable)

b. Any new information given to you by other professionals at this point

c. What information has informed decision making and actions agreed (e.g. are there historical or other existing concerns)

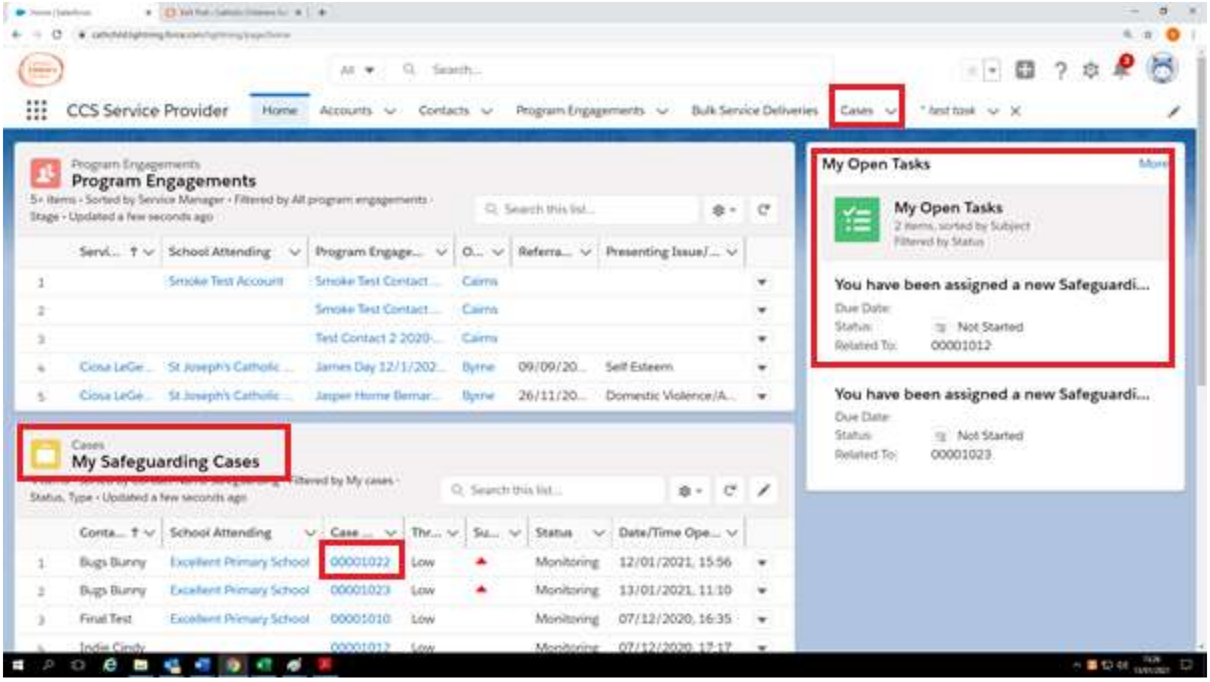
d. What actions have been agreed: These may range from carrying out further investigations with the child, parents being consulted, social care being informed etc. Good practice is that the DSL, not you, carry out and complete any further investigation into the concern raised.

(viii) Click 'Save': This will now be saved within the Program Engagement under 'Cases'



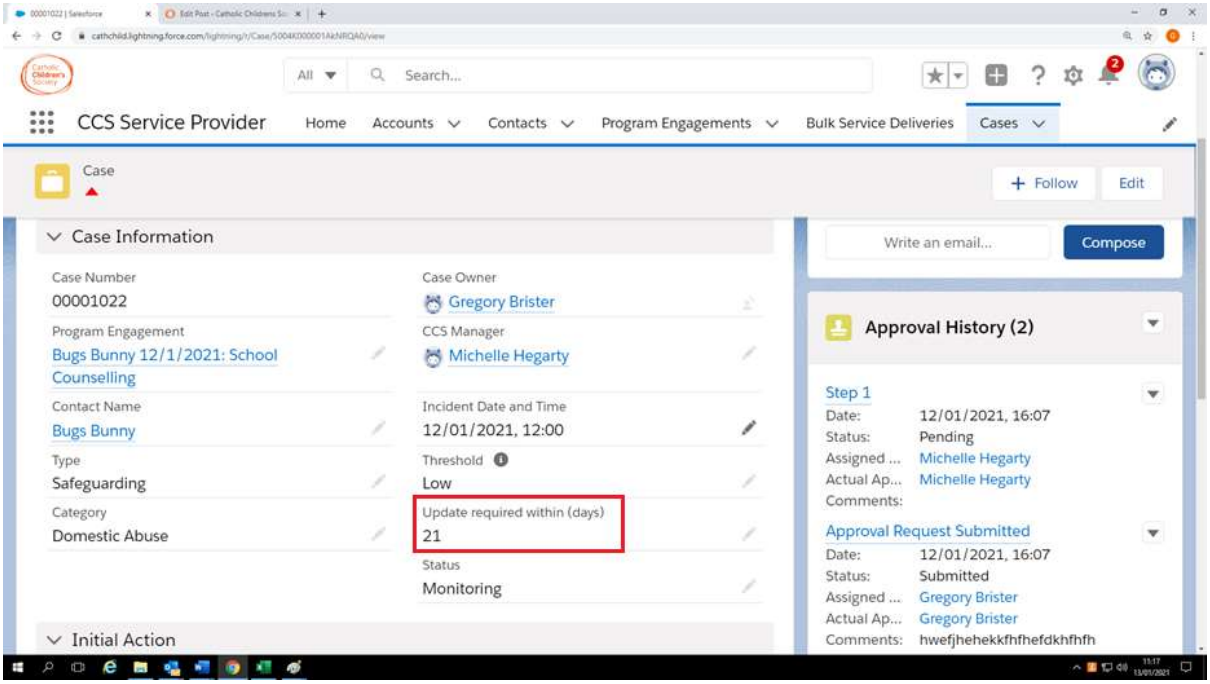
Upon creation of a Safeguarding Case, the person who created it (the key person referred to as 'case owner') will be assigned a task titled 'You have been assigned a new Safeguarding Case'. This will appear in the 'My Open Tasks' list on your Home Page.

The case will also appear under 'My Safeguarding Cases' on the Home Page (click on the title 'My Safeguarding Cases' for a full list of all open cases and then click on the 'Case number' to go directly through to each Safeguarding Case. Alternatively, to access a full list of all your Safeguarding Cases (both open and closed) go to the tool bar at the top of the screen and select 'Cases'



Monitoring Actions

Depending on the threshold allocated (High or Low) the field 'Update required within (days)' will automatically populate with 7 days for a High concern or 21 days for a Low concern.

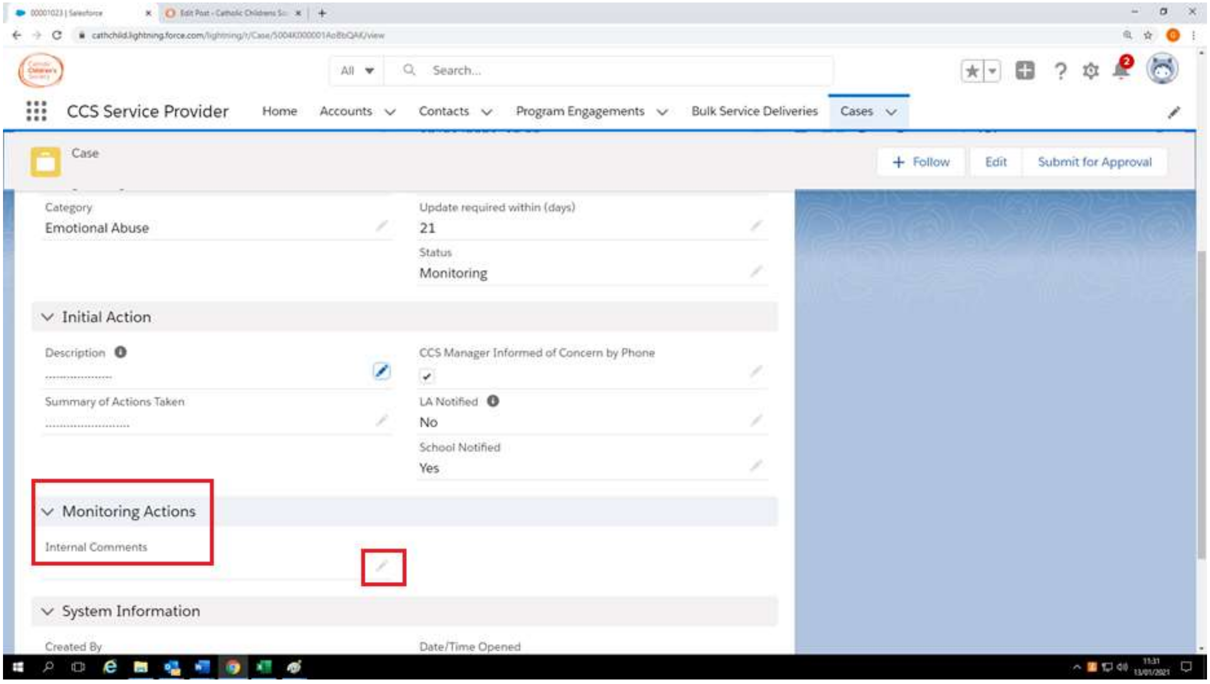


You must update the 'Monitoring Actions' section within this timeframe. Each time you add an update this timeframe will be refreshed and a further update will be required within 7 or 21 days (until the point at which you submit a case closure request for approval (see below).

To add a Monitoring Action:

(i) Go to the child's Program Engagement, go to the 'Cases' tab and click the Safeguarding Case you want to update.

(ii) Click on the pen icon next to 'Internal comments' under 'Monitoring Actions'.

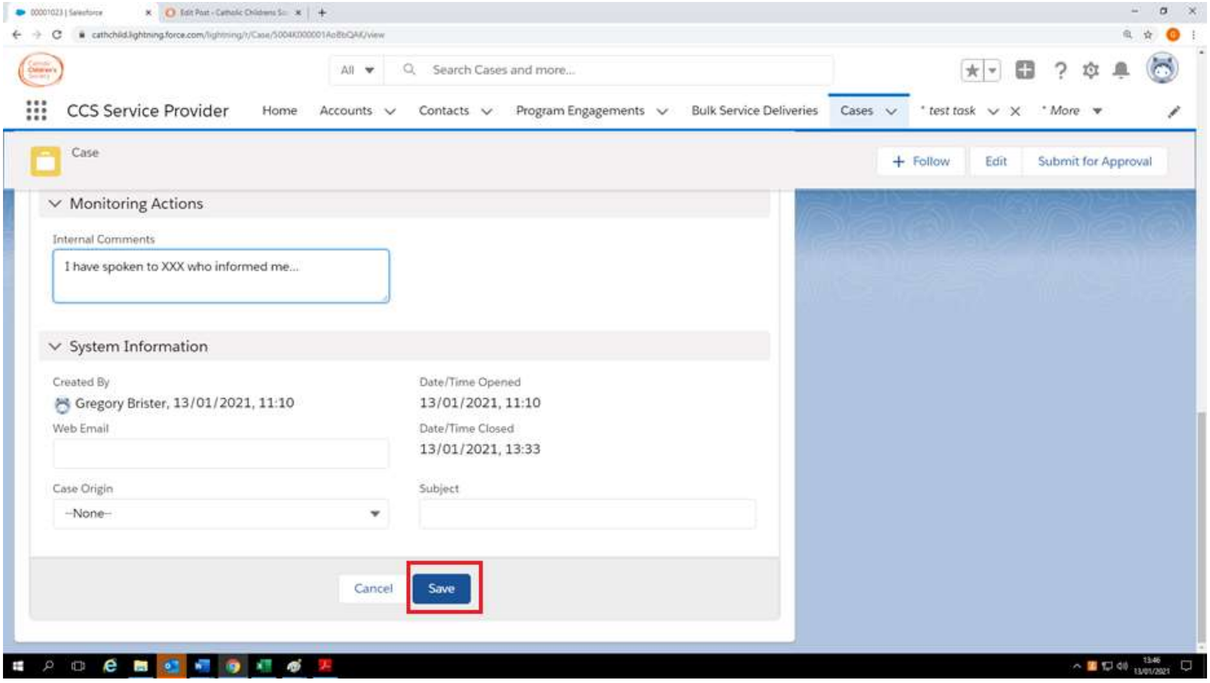


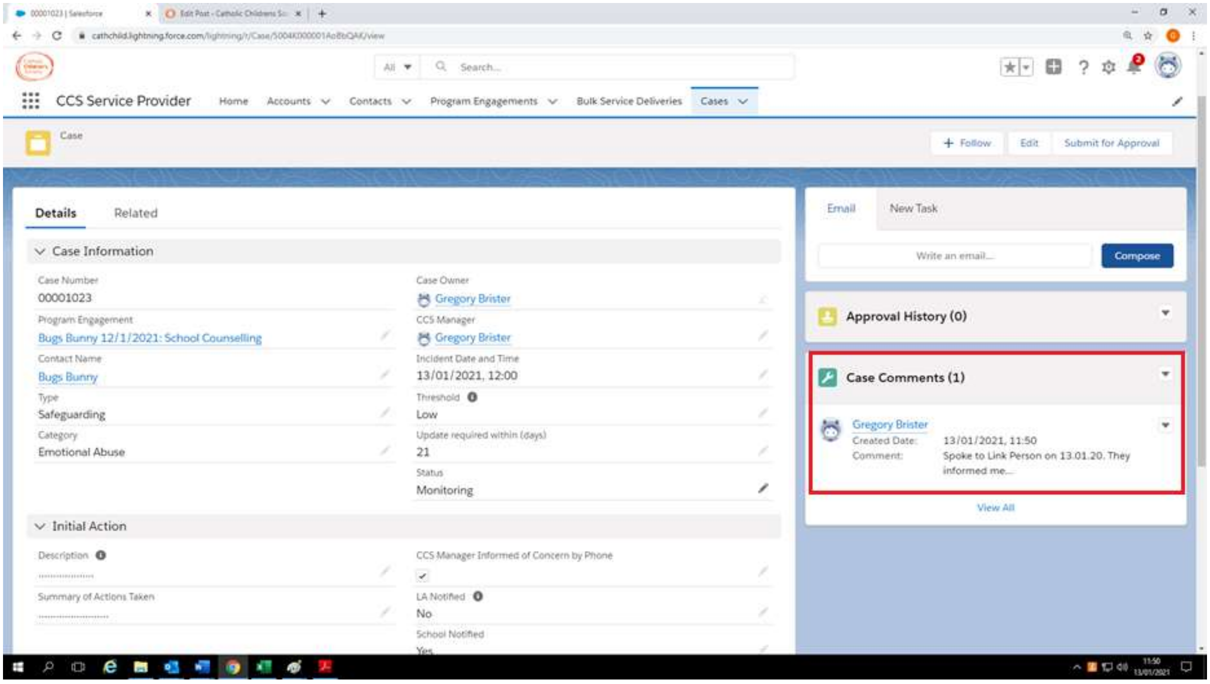
(iii) Add details of any further actions that have been taken to monitor/address the concern. This should include:

a. The name and job title of the person giving the update.

b. The actions taken and who has taken them: This may be centre staff, parents/carers and/or external agencies. The description must be brief and contain only facts and no opinion. The update must highlight the rationale for the actions taken and must demonstrate why any initially agreed actions have not been completed.

(iv) Click 'Save'. This will now be recorded on the right-hand side of the page under 'Case Comments'. Each time you add a comment and save the record it will appear here.



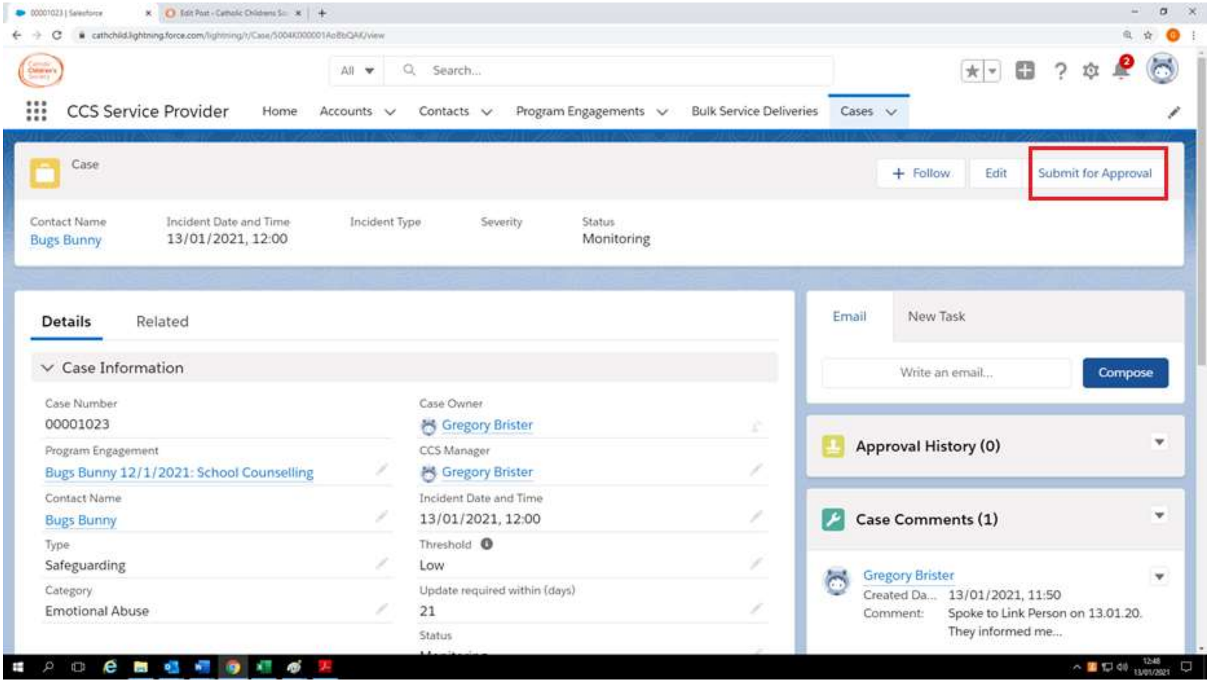


Closing a Safeguarding Case

Once you are confident all appropriate actions have been completed to safeguard the child you can request that your line-manager approves the closure of the case. To do this:

(i) Go to the child's Program Engagement, go to the 'Cases' tab and click the Safeguarding Case

(ii) Click the button on the top right of the page entitled 'Submit for approval'

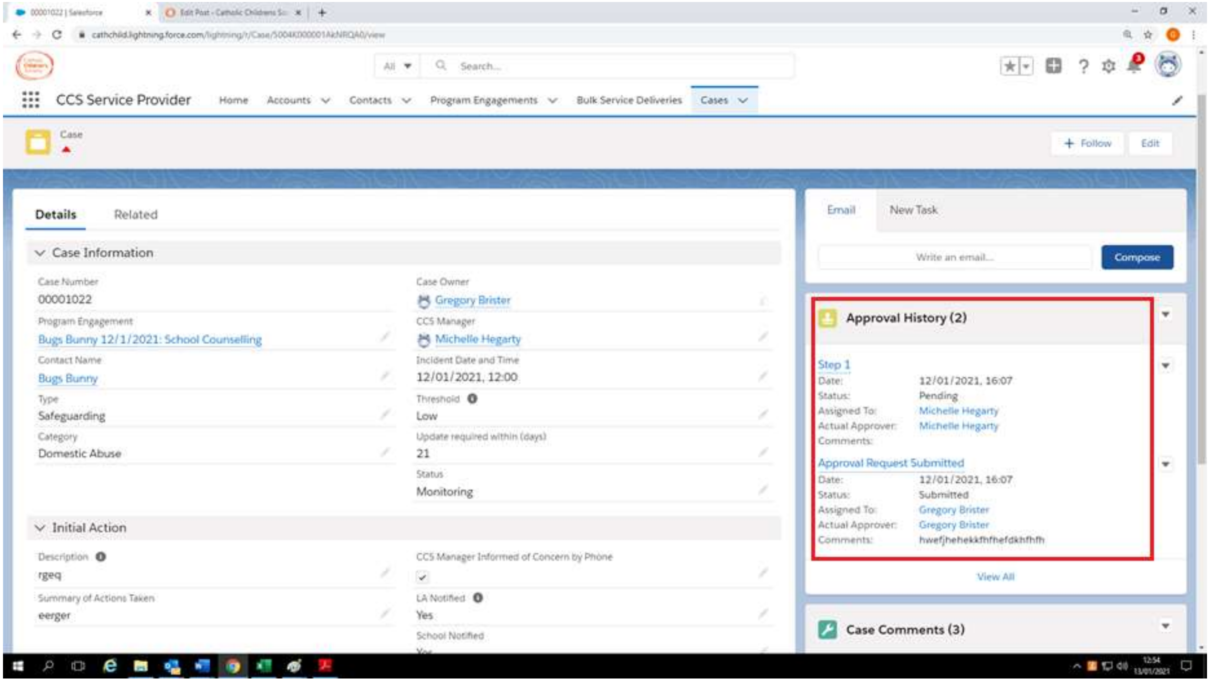


(iii) Complete the comments box outlining why you feel the case can be closed. This should include brief information outlining that all agreed actions have been taken (or where this is not the case the reasons why).

(iv) Click 'Submit'.

(v) In the 'Choose Next Approver' field search for and select your line-manager.

(vi) Click 'Submit'. This approval request will now appear under 'Approval History' and show that the request has been submitted to your line-manager and is 'Pending'.



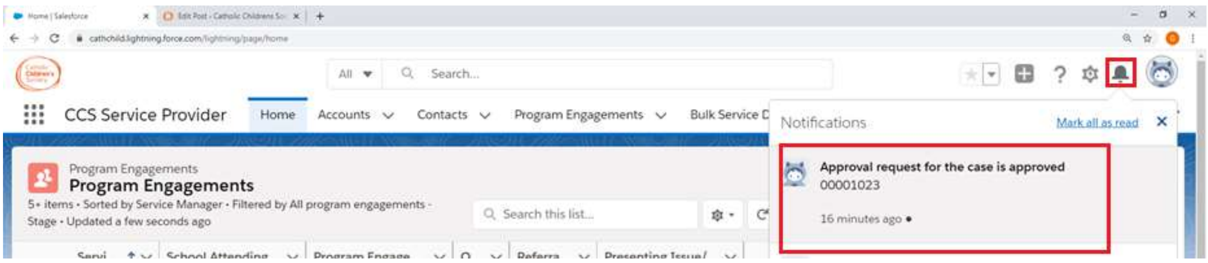
Your line-manager will receive an email notifying them of your request. They can then either approve the request or reject it. In both cases the outcome will be updated from pending to either ‘Approved’ or ‘Rejected’ and your line-manager will include comments as to why they have made that decision.

Please note:

- If the request is approved the case will be automatically marked as closed

- If the request is rejected the case will remain open and you must continue monitoring and providing updates on the system within the specified timescales (7 or 21 days) until your line-manager is happy for the case to be closed. You will need to submit a new closure request using the ‘Submit for Approval’ button.

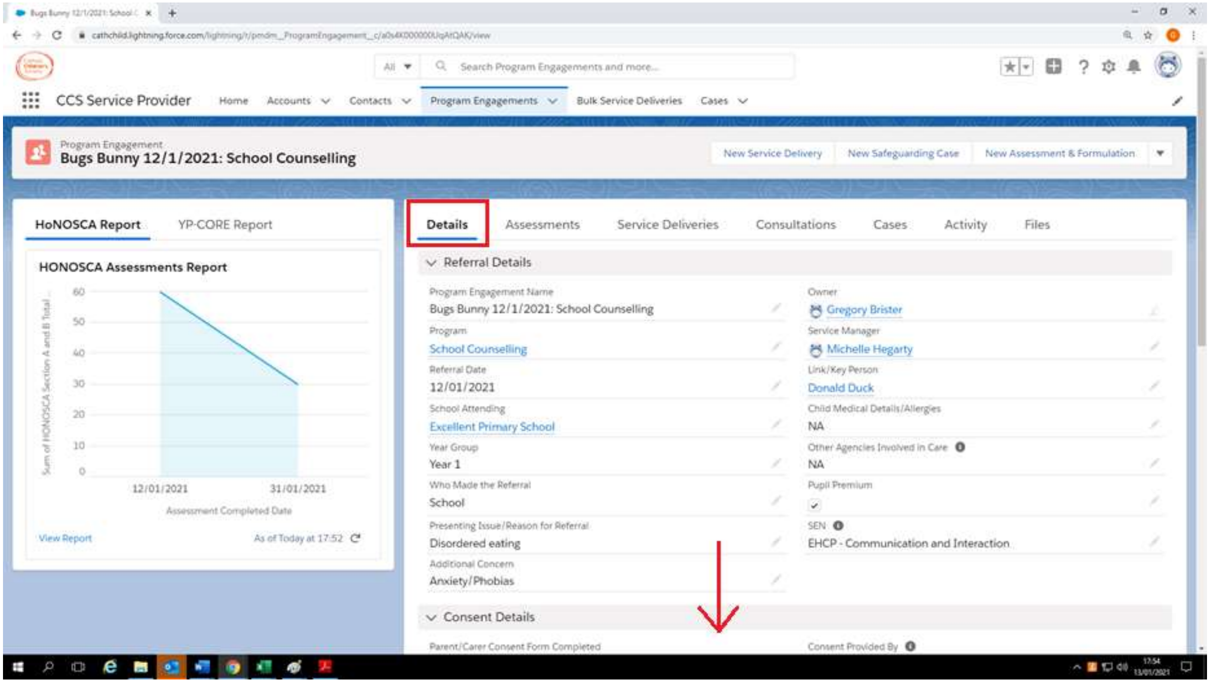
Whatever decision your line-manger makes, you will receive an email via Salesforce notifying you that the request has been approved or rejected. You will also receive a notification which will appear under the bell icon (see the top right of your screen). The bell will have a number next to it which indicates the number of new notifications you have received. Click on the bell and you will see a list of all your notifications.

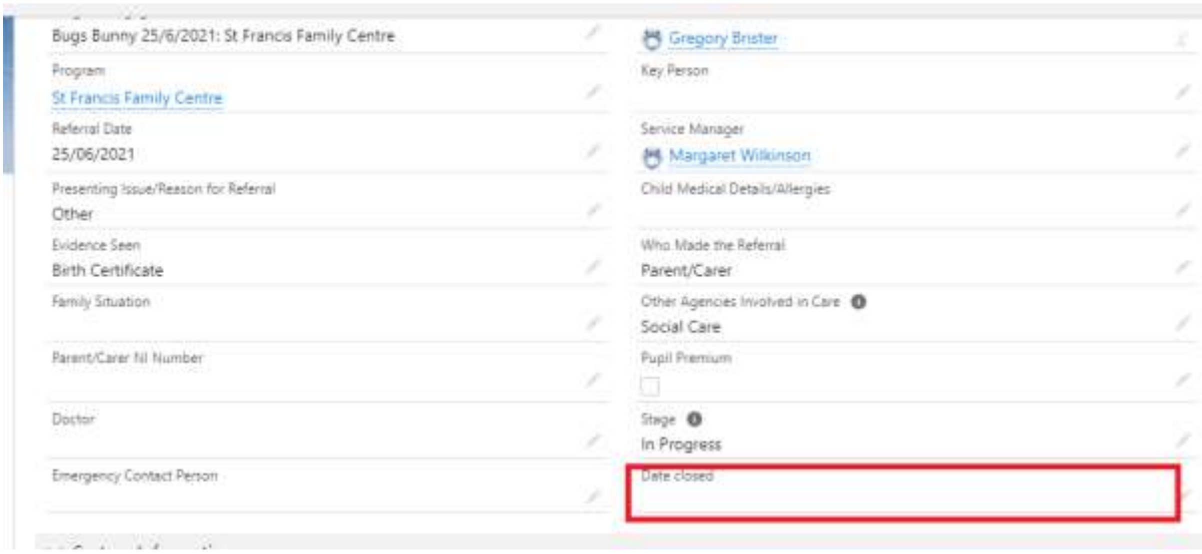


Remember that once a Safeguarding Case is closed you can continue adding Service Deliveries as normal under the child’s Program Engagement. You are requesting to close the Safeguarding Case <u>not</u> the Program Engagement.

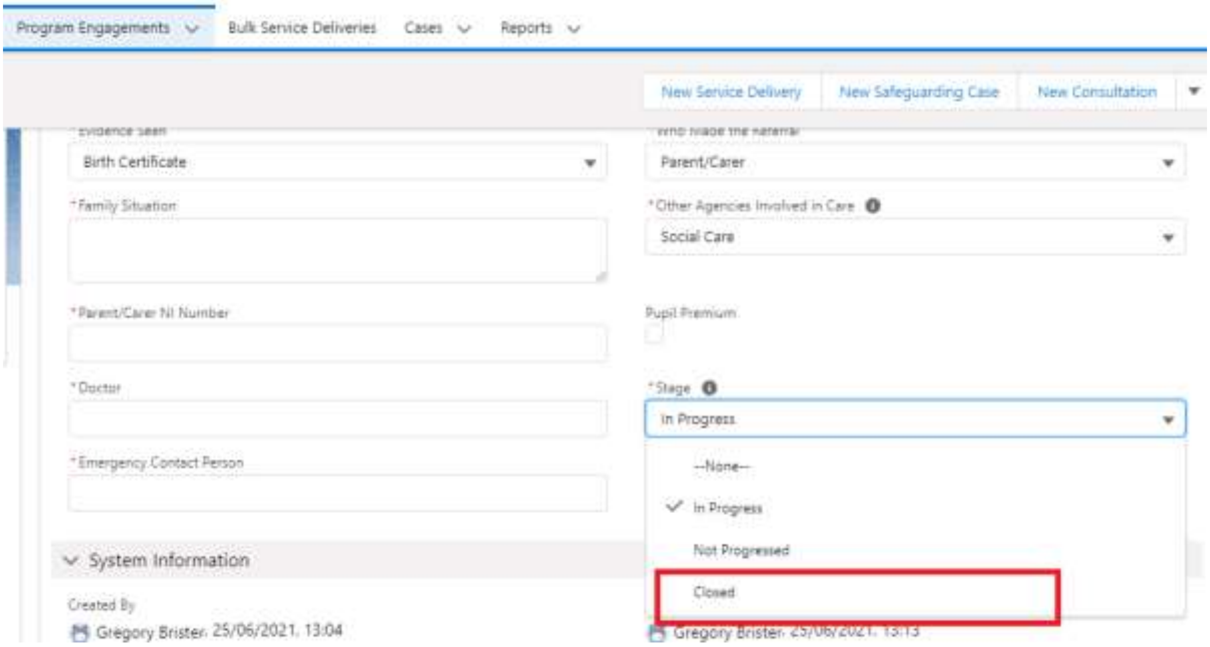
8. Closing a Program Engagement

(i) Navigate to the child's Program Engagement and go to the 'Date closed' field at the bottom of the 'Details' tab.





(ii) Stage: Where all sessions have been delivered and the work has come to a close change the 'Stage' field to closed. It is very important this is completed so we have an accurate picture of how many children are accessing our services. For St Francis a Program Engagement should be closed when you know a child is leaving the centre. For St Mark's, you should close the Program Engagement when you know the child will no longer be coming to the Stay & Play.



(iii) Click 'Save'

9. Appendix A: Safeguarding Thresholds

Our Salesforce CRM is used to monitor safeguarding concerns raised by CCS staff. To ensure this monitoring is as robust as possible all concerns should be logged as either 'High' or 'Low'. This guidance sets out the threshold criteria for these categories.

Updates on what actions have been taken after a concern has been raised should be added to the Salesforce CRM ASAP and no later than:

- Within 7 days for concerns rated 'High'
- Within 21 days for concerns rated 'Low'

If the case cannot be closed, further updates will be required at least every 7/21 days.

Recording Category	Level of Intervention Required	Guidelines
High	**Child Protection** **Child in Need**	The concern raised is such that external agencies need to be consulted. This would be categorised as children who are, or who may be: • Suffering significant harm • Vulnerable to /at risk of suffering significant harm This includes where that harm is caused by the child themselves (e.g. self-harm, suicidal ideation, violence against another, radicalisation). It also includes being witness to domestic abuse. If a concern is raised about a child who is currently the subject of a CIN plan, Looked After, or subject to Child Protection it should be raised as high, even if it may not seem severe in nature.
Low	**Early Intervention** **Prevention**	The concern raised is such that either preventative or early interventions measures are required. This could mean offering parents/carers support and/or meeting with parents/carers to discuss the concern. There may be a need for the child (or the take up of the support offered) to be monitored and the concern escalated if it remains present.

Notes

- This guidance should be read in-line with our safeguarding policy/procedure.
- These 'thresholds' should not be confused with local authority thresholds.
- This criterion should only be used as a guide for assessing which, if any, external agencies should be consulted.