Agency Best Practice FAQs around EDDI CMS and Fostering Connections

This document was created by the Fostering Connections Project Team and approved by the Fostering Connections project Operations Working Group

CONTENTS

ABOUT

The agency best practice FAQS is a guide for agencies across Victoria around Fostering Connections and EDDI Carer Management System (CMS).

Fostering Connections was launched on 21 January 2016, bringing Victoria's 25 foster care agencies together to recruit more foster carers. Fostering Connections is led by an extensive media campaign, including print, radio and digital advertising encouraging people to apply to become foster carers.

The media campaign is supported by a central Fostering Connections website offering information on foster care. The website includes an online form where you can submit your details and apply to become a carer. These details are referred on to an agency.

The website is supported by an enquiry line, where people can ask further questions about becoming a carer and ask the operator to submit an application to an agency on their behalf.

Behind this campaign is the EDDI CMS database. Your agency uses EDDI CMS to accept prospective carer enquiries referred via the central website and enquiry line, as well as documenting new enquiries that come direct to your agency. The database tracks the carer journey from enquiry to accreditation and post-accreditation, offering current, insightful data to agency staff and senior management. EDDI CMS also operates as a functional database for accredited carers, identifying carer households available to accept placements.

The best practice FAQs in this document aren't compulsory for agencies. However, in the spirit of sector collaboration and innovation, we encourage agencies to follow these guidelines and embed them in their work processes. In doing so, we can work as a sector to improve foster carer attraction and recruitment in Victoria.

Prepared by Dan Christie
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Page 3

NEW WORKERS

A new worker has started on my home based care team, what do I do?

When a new worker starts, set them up with an EDDI CMS login, make sure they read the user guides and give them the login details for the Information for Agencies page on the Fostering Connections website.

What is the website address for EDDI CMS?

The address is https://eddi.mackillop.org.au

How do I register a worker with an EDDI CMS login?

- Email the EDDI CMS helpdesk at eddi@mackillop.org.au with the name, email and agency branch of the relevant worker e.g. Janet Jones, jjones@berrystreet.org.au, Berry Street – North Western
- Cc in the project team at fcadmin@cfecfw.asn.au
- Request a confirmation once the update has been actioned

What is the Information for Agencies page?

The Information for Agencies page sits on the Fostering Connections website. It provides campaign information and support for your agency including:

- Monthly updates on Fostering Connections
- Project Key Contacts and Information
- Resources from the Fostering Connections Media Campaign
- EDDI user guides and information
- Information on the Fostering Connections Enquiry Line

How do I access the Information for Agencies Page?

Via the Agency Information link at the bottom of the home page on the Fostering Connections website. Your agency has been assigned a unique login to access this page, contact the project team on fcadmin@cfecfw.asn.au if you have misplaced your login.

How do I access the 'Share File' module in EDDI CMS

The Share File module is the *green icon* on your EDDI CMS home page. You can also access from the drop down menu under the *System* heading at the top of each page.

What is in the 'Share File' module

The 'Share File' module contains EDDI CMS user guides and documents that are useful for all agencies. Documents currently in the Share File Module include:

- *EDDI CMS carer module user guide* – this gives you a full overview on how to use EDDI *CMS*

- *EDDI CMS Hira user guide* – Hira is the EDDI CMS help tool, it is still in development but there are a few videos already available

- *EDDI CMS reports user guide* – this gives you information on reports you can access through EDDI CMS and how to use them

- *EDDI CMS Carer Audit Module user guide* – this is a guide to the Carer Audit Module, which helps you track who has updated carer records and the date an update was made

- *Shared Training and Information Session Calendar* - displays each agency's dates for carer training and information sessions, where they are available. The calendar provides opportunities to access and send your carers to training offered by other agencies, if it better suits the carer and if there are spots available

- *EDDI CMS Dictionary* – this provides definitions of the terms that appear in EDDI CMS (coming soon)

- *Agency Best Practice FAQs around EDDI CMS and Fostering Connections* (coming soon)

These documents are also available on the 'Information for Agencies' page on the Fostering Connections website.

A worker has left my home based care team, what do I do?

Follow exactly the same process as registering a new worker, but advise the EDDI CMS team that you want the person's details deactivated.

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Page 5

EDDI CMS SUPPORT

I'm having problems with EDDI CMS. Who do I contact?

Your first port of call is always the EDDI CMS helpdesk on 1300 807 041 or eddi@mackillop.org.au.The project team is available as a backup, the EDDI CMS helpdesk team is specifically trained to help you with technical and user issues.

Can we get training on the EDDI CMS system?

We encourage managers to become confident enough with EDDI CMS to train their own staff, and to reach out to the EDDI CMS helpdesk if they need support.

However, if you or your team needs to refresh your EDDI CMS training, the project team can offer assistance over the phone or via Skype for groups. Contact Dan on fcproject@cfecfw.asn.au / 03 9094 3512 to discuss the options available.

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Page 6

EDDI CMS MODIFICATION

I think something should be changed/updated or added in EDDI CMS, who do I speak to?

If you want to suggest a change to the EDDI CMS system, contact the EDDI CMS helpdesk in the first instance. They will be able to determine if the change you are requesting is a minor change, which they can implement themselves, or a major change which requires more extensive development work.

If the EDDI CMS helpdesk advise you are requesting a major change, contact the project team and they can add your suggestion to the list of recommended changes for future updates.

Recommended changes need to be cleared by the Fostering Connections project Operations Working Group before being implemented and depend on the funding available for system improvements.

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Page 7

NEW ENQUIRIES

I have received a new enquiry referral in EDDI CMS through the enquiry line or centralised Fostering Connections website.

How are enquiry referrals allocated?

Enquirers have the option to select from a list of agencies available in their area when they submit their enquiry. If they don't have a preference, enquiries are allocated according to a rotating, proportional system based on your agency's targets.

How long do I have to respond to an enquiry?

You have two business days to respond to an enquiry. The Fostering Connections carer enquiry line operator will contact your agency if you haven't responded at 1.5 days as a reminder.

How soon should I contact the enquirer once I accept an enquiry?

Please make sure you contact the enquirer within 1 business day of accepting an enquiry through EDDI CMS. Enquirers have been advised they will receive contact within 2-3 days of submitting an enquiry.

Should I acknowledge Fostering Connections when I first make contact with the enquirer?

Yes. The enquirer may not be aware when you first make contact that they have been referred to your particular agency, and be may expecting to hear from Fostering Connections. Best practice would be to say a variation of:

 "Hi ENQUIRER NAME. My name is Joan and I'm responding to your query about becoming a foster carer through Fostering Connections. Your query has been referred on to INSERT AGENCY and I am here to answer any further questions you may have"

No one is available to accept an enquiry referral. What do I do?

Please contact a senior manager at your agency to discuss alternative arrangements if all members of your team are scheduled to be out of the office on a particular day. The EDDI CMS team and enquiry line operator can't hold enquiries on an agency's behalf.

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Page 8

Do I contact an enquirer before or after accepting their referral in EDDI CMS?

Contact the enquirer **after** accepting their referral in EDDI CMS. This ensures the enquiry doesn't bounce to another agency and the person is contacted multiple times by different agencies.

What happens if I reject a referral by mistake?

Once you reject a referral it is allocated to the next agency on the list and can't be reallocated.

I am from an agency with multiple services/branches. How do I know when my branch has received a referral?

An email notification system has been set up to alert you when your service/branch has a new enquiry. Please don't reject enquiries you haven't received an email notification for.

What is my next step if I can't reach a person who has made a new enquiry?

Standard practice across the sector is to make three contact attempts before closing off an enquiry.

To close off an enquiry, complete the IEF (Initial Enquiry Form) event in the relevant household record's event's section and note in the comments box 'unable to contact'. You can't close an enquiry without completing an IEF event, so make sure this step is completed first. This step will be reviewed in future upgrades.

After this step, go to the household section of the record and update the phase from 'Enquiry' to 'Enquiry – Withdrawn'. Scroll down to the exit reason field at the bottom of the page and select the exit reason 'involuntary exit' and exit sub reason 'unreachable/no contact'.

The sector requires agencies to enter exit reasons for enquiries that have been closed off, so please ensure you keep this information up to date.

For definitions of exit reasons, please see the **EDDI CMS Dictionary**.

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Page 9

I have called the enquirer and they have already been accepted by another agency. Why?

This may have been for a number of reasons, including:

- The enquirer has approached a number of agencies directly in addition to making an enquiry through the carer referral service or centralised website
- The enquirer has submitted multiple web enquiry forms to different agencies via the centralised website
- A person has submitted an enquiry or number of enquiries on a person's behalf, with or without their consent
- An agency has contacted an enquirer before accepting or rejecting their referral in EDDI CMS
- An agency has accepted a referral in EDDI CMS by mistake and passed the enquirer's details onto another agency by phone or email, rather than letting the system reallocate the enquiry

What happens when I receive duplicate enquiry referrals?

If you receive multiple enquiries from the same prospective carer, or a referral that has already been picked up by another agency, please **accept the duplicate referral** and then **close off the duplicate record** in EDDI CMS using the exit reason 'unreachable/no contact'.

Please don't reject duplicate enquiries as this will cause them to bounce to other agencies.

Please don't persist in contacting the enquirer if they have already been accepted by another agency. The first agency to accept a referral and contact the enquirer owns the enquiry.

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Page 10

EDDI CMS DATA AND DIRECT ENQUIRIES

I have received a new enquiry referral direct to my agency*;* do I need to enter the record into EDDI CMS?

Yes. Enter all new enquiries that have come direct to your agency since 21 January 2016 into EDDI CMS. See the EDDI CMS user guide for instructions.

What do I do with enquiries received before 21 January 2016?

All enquires received to your agency before 21 January 2016 is classified as heritage data.

At this stage, update heritage data according to your pre-EDDI CMS systems and don't enter them into EDDI CMS. A migration module will be available in future EDDI CMS builds allowing you to import heritage data and keep all your carer records in the one system.

If your agency would like to export heritage data into EDDI CMS immediately, please contact the EDDI CMS Project Manager, Tim Clifton, directly to discuss options. His email is tim.clifton@mackillop.org.au. Please note that there may be a cost associated with this.

What information do I have to update in EDDI CMS to keep my data up to date?

For the data in EDDI CMS to be complete and correct, make sure you are keeping your events, phases and exit reasons up to date.

What are events and why should I update them?

Events capture key milestones a carer is required to complete both pre and post accreditation. Completing events ensures you aren't missing important steps or information both pre and post accreditation.

There are **27 compulsory events** a carer household needs to complete before being registered as accredited in the system.

What are phases and why should I update them?

Phases identify the current status of a prospective or accredited household and are particularly useful for organising placements and running reports.

For prospective carer households, phases provide an easy way for you to track whether a carer has reached a specific milestone toward accreditation.

For accredited carer households, phases provide an easy way for you to identify households available for placement.

What are exit reasons and why should I update them?

Exit reasons log that a carer or prospective carer has left the program.

Exit reasons provide useful data on the number of carers and prospective carers exiting and the reason why they leave the program.

Is there a list of the EDDI CMS Exit, Phase and Events?

A list of EDDI CMS Exit Reasons, Phases and Events is available in the 'share file' module in EDDI CMS. For definitions of Exit Reasons, Phases and Events, see the EDDI CMS Dictionary.

Why is it important to complete the 'How did you hear about Foster Care' field in an Initial Enquiry Form?

Completing the 'how did you hear about us field' ensures you can track what prompts people to enquire about becoming a carer and identify the most popular prompts to action, helping you target your agency's marketing campaigns more effectively.

TRANSFERRING HOUSEHOLD RECORDS

How do I transfer a household record to another agency?

First contact the relevant agency and ask reception to transfer you to the recruitment or home based care team. Please confirm with recruitment/home based care they're happy to accept the transferred referral.

Once you have received approval, you can transfer a record to another agency by selecting the transfer record button at the end of each household record.

Within the transfer record section you can select the details you want to transfer to the whole agency. See the EDDI CMS user guide for further information.

How do I transfer an enquiry to a different service/branch?

At this stage you can only transfer enquiries to an organisation, not a specific branch/service of an agency.

SHARED TRAINING CALENDAR

What is the shared training calendar?

The shared training calendar is a calendar that lists all scheduled Shared Stories, Shared Lives (SSSL) training and foster carer information sessions across the state.

Where do I access the shared training calendar?

It is available in the 'share file' module in EDDI CMS.

Why a shared training calendar?

The calendar helps prospective carers access Shared Stories, Shared Lives (SSSL) training and foster carer information sessions run by other agencies if they have missed your sessions or have to wait for a few weeks before they can attend one of your sessions.

How do I arrange training?

There is a key contact listed at the end of each listed calendar date, along with their phone number and email address.

To discuss booking in a carer at their agency's session, call the key contact to confirm availability.

What fee arrangements are in place if I send my prospective carer to another agency's training?

Any costs related to training need to be negotiated between agencies. Prospective carers from your agency are accepted at the host agency's discretion.

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Page 14

NEW WORKER CHEAT SHEET FOR TEAM LEADERS/MANAGERS

A new worker has started on the Home Based Care Team. Have I:

- ☐ registered them with an EDDI CMS login
- ☐ signed them up to receive the Fostering Connections newsletter
- ☐ sent them the link to the Fostering Connections website
- ☐ given them your password to the Information for Agencies Page on the website
- ☐ made sure they have read the EDDI CMS user guide and dictionary
- ☐ given them the EDDI CMS helpdesk number and email
- ☐ trained them to accept Fostering Connections enquiry line and website referrals in EDDI CMS
- ☐ trained them to enter direct agency enquiries in EDDI CMS
- ☐ Organised a 30 minute phone meeting with Fostering Connections project team

Have I also trained them to:

- ☐ update household records for prospective and accredited carers in EDDI CMS
- ☐ download files in the *Share File* module
- ☐ use the *Carer Audit* module
- ☐ use and download agency reports in the *Business Intelligence* module
- ☐ use *Hira* for information and support

A worker is leaving Home Based Care team. Have I:

- ☐ made sure other members of staff are assigned to household records registered under that worker's name
- ☐ emailed the EDDI CMS team to deactivate their login
- ☐ informed the Fostering Connections project team so they can remove the worker from their mailing list

If you have any questions or need support with EDDI CMS please contact:

EDDI CMS helpdesk eddi@mackillop.org.au / 1300 807 041