## CHARITYLOG GUIDANCE FOR COUNSELLING MEMBERS

### LOGGING IN

Go to [CRM Charity Software | Cloud-Based Case Management Tool (charitylog.co.uk)]() the organisation is evolve and the password will be advised to you separately by email, this takes you to the personal log in screen.  Your user name and password will be advised to you separately by email, when you log in you will be invited to change your password immediately. Then go to the home page (little house symbol on the left).

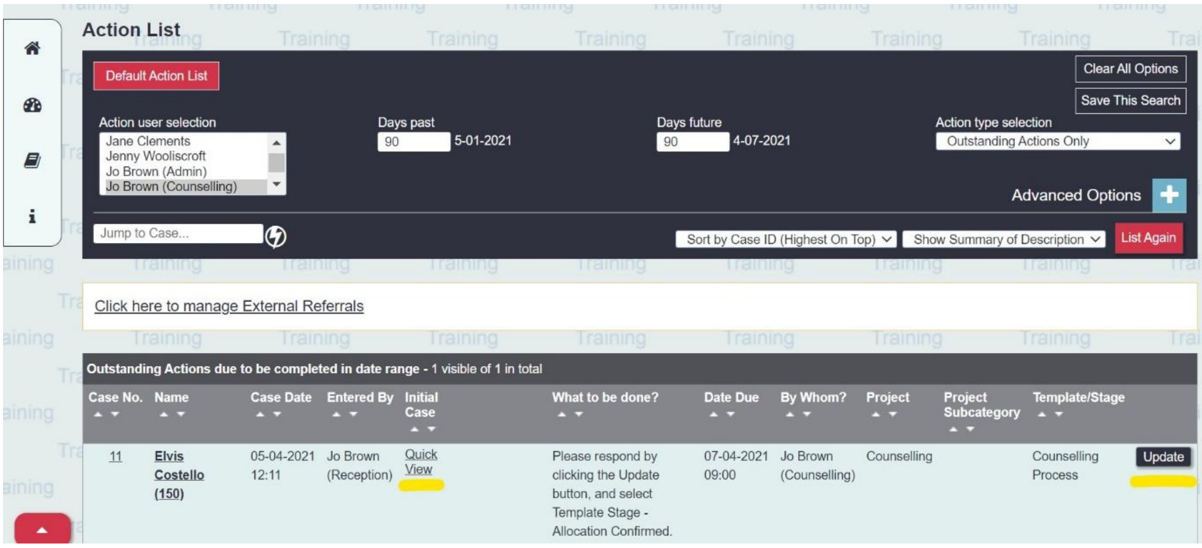
Your home page shows the Welcome page and the Contact Management tab (top left). Select the contact management tab >activity>action list to access the action list of clients allocated to you.

## 1. ACTION LIST

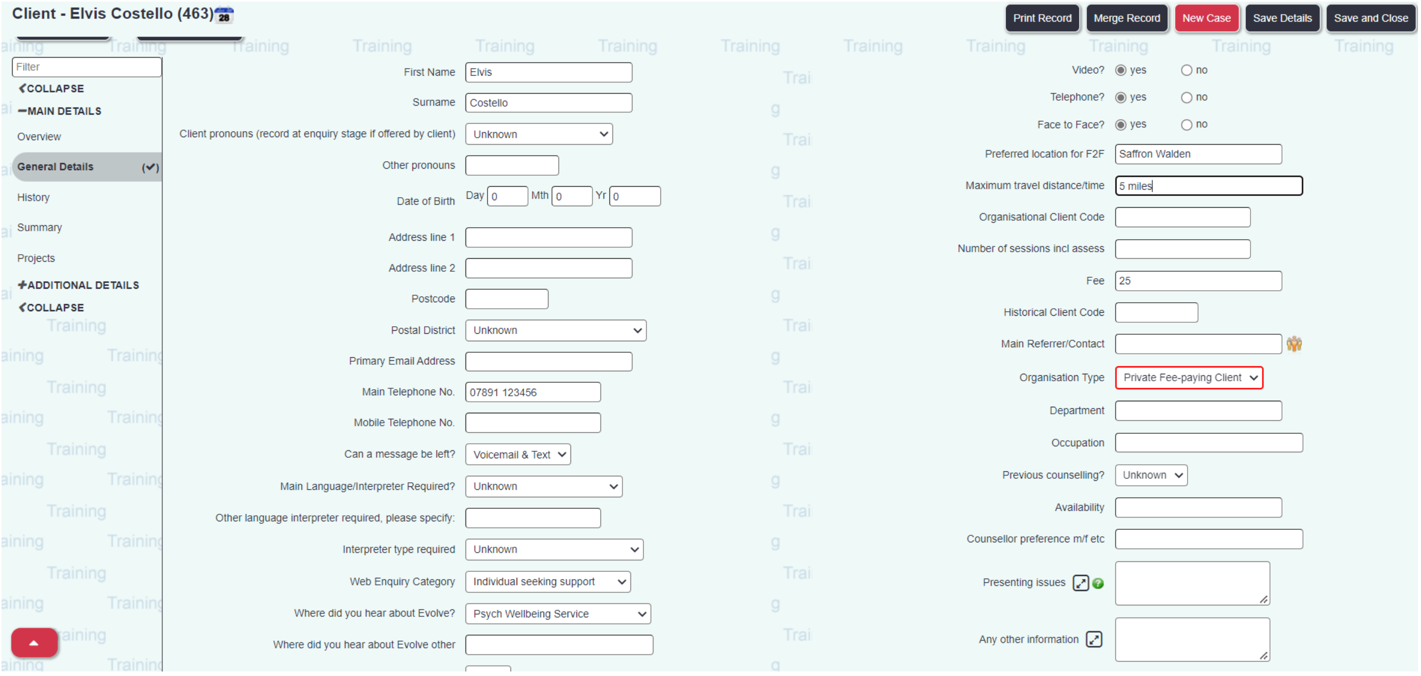
This basically corresponds with the administrative stages of the counselling case.  With this system you will enter this information live on-line as you progress with the client. (Also see visual aid guide)

| | **Corresponding Charitylog Template Stage** |
|---|---|
| I have received the client allocation and have agreed the date/time of the first session, or<br>I have accepted the transfer of a client from another counsellor and agreed the next session date, or<br>The client has moved from organisational to private fee-paying. | Counselling in Progress |
| The client attended their last session (date) and has finished counselling, or the client requests reallocation. | Counselling Case Closed |
| The counsellor has agreed a short break with the client. | Counselling Paused |

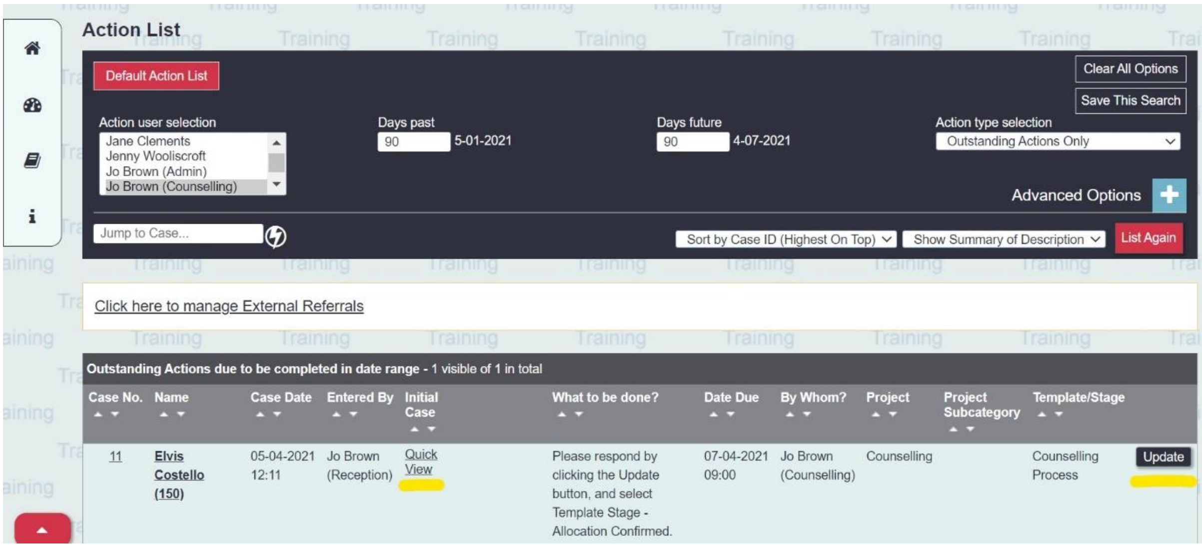
We will email you when a new client has been allocated to you so there is no need to continually check Charitylog. When you log in to Charitylog you will find an action in your action list regarding this referral which looks like this.




You can, from your action list, click on the name field and this will take you to the client record that will give you the client contact details as well as information on whether they are a fee-paying private client or organisational. There will also be a brief description of what they have told us of their presenting problem(s).



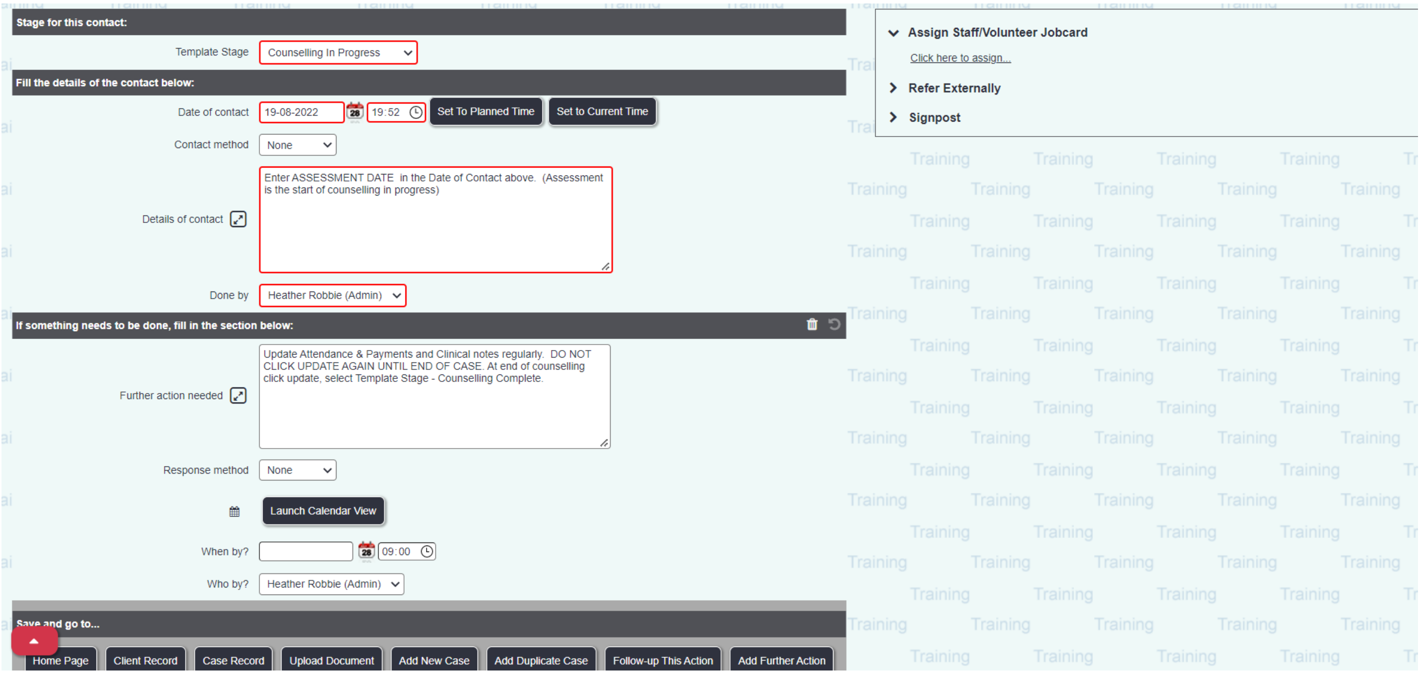

To take action from your action list, click the **UPDATE button** (on the right-hand side). If at any stage you want to return to the action list, click on the black **CONTACT MANAGEMENT** tab top left of screen, then select **ACTION LIST.**




When the assessment session has been confirmed with a new client, go to your Action list, **click the UPDATE button** and select **TEMPLATE STAGE Counselling in Progress.** *(Ignore the first four Template Stages Enquiry, Suitable to Allocate, Unable to Allocate, Waiting List and Allocation which are only used at intake/Head of Counselling).*

You will notice that the 'Details of contact' and the' Further action needed' fields now show pre entered information as an aid/reminder for you in learning how to use the system, but these can be overwritten if you want to remind yourself of something else or enter additional information. You will need to enter accurate dates (see summary at end of chapter).

In general, the **Details of Contact** field is for notes about the current action, the **Further Action Needed** field sets a reminder for what to do next, and will appear on your home page action list.

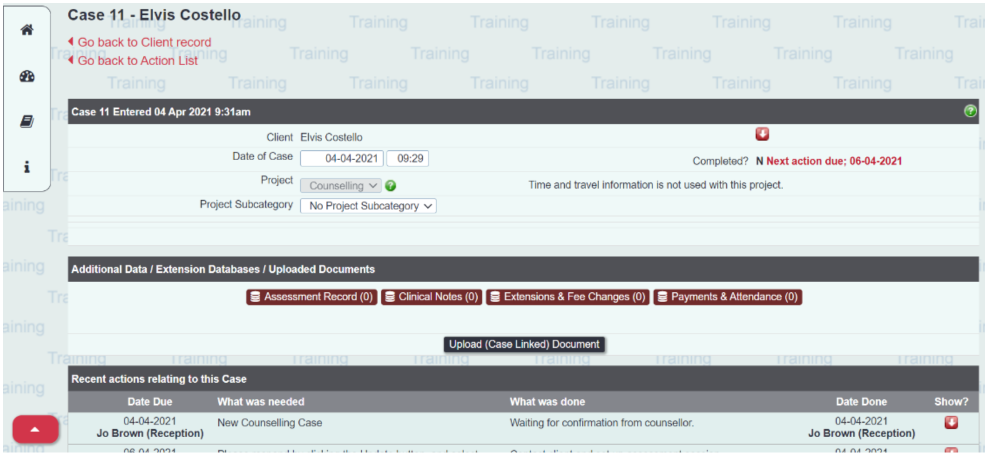



Set the Date of Contact as the date of the first session (assessment). Again, it is important that you select the correct Template Stage (and dates) as system reports are generated based on this (e.g., how many counselling cases are currently in progress). Set the When by? date to the date and time of the first session (assessment). **Save and go to Case Record** where you will enter the assessment, attendance/payment and clinical notes (see below). If the client does not respond to contact or does not commence counselling (Place Not Taken), go to **TEMPLATE STAGE Counselling Case Closed** instead and select the appropriate **Simple Outcome** (see Endings below). Make sure the day and time of closure are after the day and time of the first planned session.

Video Counselling in Progress [https://youtu.be/5fVeZcSGpCI](https://youtu.be/5fVeZcSGpCI)

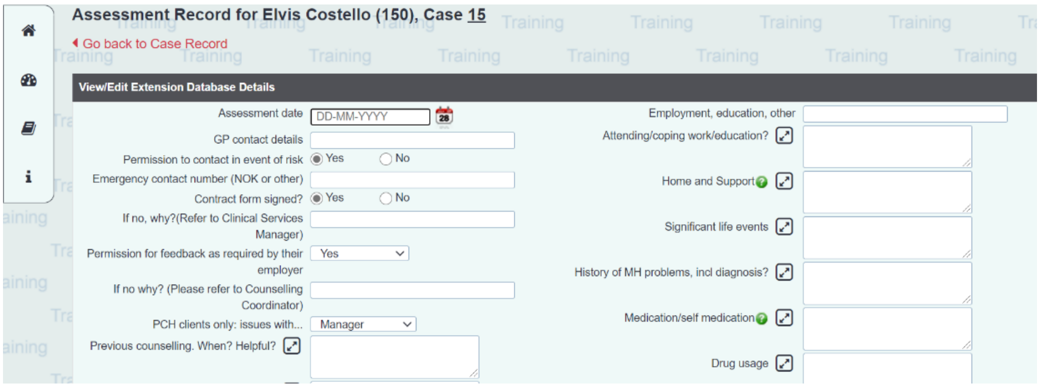
Once counselling sessions are up and running, there is usually no need to click **UPDATE** again until the counselling has finished, and you are ready to close the case (otherwise the case history will become quite cluttered). While the case is open you can access the case record by clicking the **case number** (in the first column of action list).

This is how the case record looks



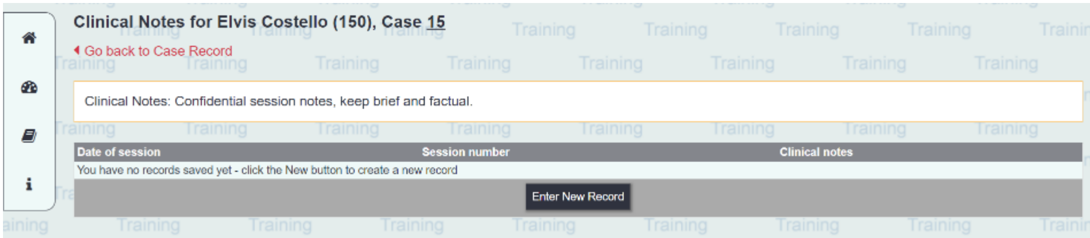

Notice the Assessment Record, Clinical Notes, Attendance & Payments brown tabs. The Extension & Fee Changes tab is accessed by clicking the red arrow to the right of the other buttons. Click on each one to enter information that you would normally record on paper forms.

When you click on the Assessment Record it looks like this (top half of screen)

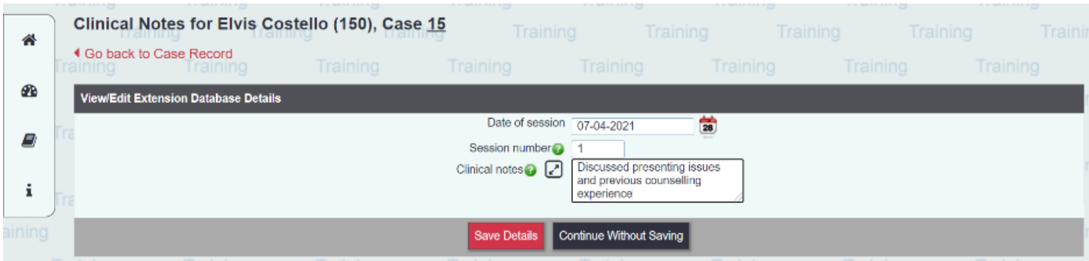



The Assessment Record captures exactly the same information as you currently collect on the paper form, if you hover your mouse over the green? next to field titles you will get additional information about each question. Complete the form and **Save.**

The other tabs Clinical Notes, Attendance & Payment, Extension & Fee Changes,  are of a slightly different format in that you can enter multiple records i.e., one record per session.  For example, when you click on the Clinical Notes tab you get this screen.

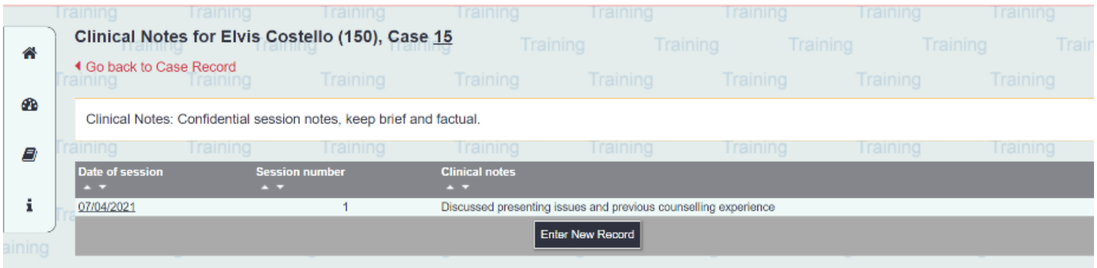



Click on Enter New Record and the fields appear




Enter the date, session number and clinical notes of the session and **Save**.

When you return to the Clinical Notes tab at the next session you will see your first entry and below that the Enter New Record button, click on this and enter the details for session 2 etc.




Video Assessment record and clinical notes  [https://youtu.be/n261d72Ecf8](https://youtu.be/n261d72Ecf8)

Attendance & Payments tab works in exactly the same way and needs to be updated at each session. The “attended” dropdown allows you to record whether the session went ahead or not. For the Assessment session (session 1) please select the client-facing time spent (1 hour, 1.25 hours, 1.5 hours but please note that this does not include any admin time.

The information that is important for you to enter in the Attendance & Payment record is:

1. Client type, session date, session number for all attendance & payment records
2. Payment amount for private clients. If no payment amount is recorded for a session that the client attends, cancels within 48 hours or does not attend (other than for clients who are receiving free of charge sessions) the record will not be processed. Please note that if a client pays for more than one session in advance, you need to allocate the payment amount to each session. For example, if a client pays £40 in advance for sessions 1, 2, 3 and 4. You enter £10 against sessions 1, 2, 3 and 4 rather than £40 against session 1; and enter the actual payment date against each attendance & payment record.
3. If you have an organisational client who has had an authorised extension and was provided with a new code by their employer – this applies mainly to NGH (Northampton General Hospital) but also organisations such as CUPA, TWT (The Wildlife Trust) and some others – you will need to enter the extension code that applies to each session into the "organisation invoice code" field on each relevant attendance & payment record. This is to ensure that we invoice the client's employer correctly. The organisation invoice code information is obtained from the "extension & fee changes" record on Charitylog. Video Attendance and Payment Record https://youtu.be/wBxwBEZJ8y4

Extension & Fee Changes are entered when applicable. If you are working with an organisational client whose employer authorises extensions (the majority of organisational clients, see organisational client list for details) you will need to enter the Extension & Fee Changes record yourself once the client advises you of the extension code. For other organisational and private clients, the CSM will enter the record. Video Extensions and Fee Changes https://youtu.be/BEGX5IkokeA

Upload the signed counselling agreement, and any other case related documents – private client payment receipts as well as outcome forms - using the **Upload (Case Linked) Document** button. Video https://youtu.be/F5uMZECwchg

**Recording out of session contacts:** To record a contact that is not related to counselling sessions, for example a communication from/to a client, please click on the **Extra Info** button that is under the **case number** in **History**. You can then enter the date, contact type and a brief summary of the contact. Please do not press the **UPDATE** button if you wish to add this type of information, as this would result in the client disappearing from your action list!

**If you inadvertently lose a client from your action list:**(typically this can happen if you press the "update" button when logging something other than a change in status), you can easily reinstate the client by following these steps: 1. find the client via the contact management/clients menu. 2. click on "history". 3. click on "extra info" 4. select the template stage that you want to reinstate e.g. "counselling in progress" and set up the fields as you had done previously.

**IMPORTANT: If an organisational client wishes to continue as a private client, you should CLOSE the organisational client case, updating the outcome and inform the Head of Counselling who will open a new private client case and allocate to you, and you will then follow the case stages starting with "counselling in progress" outlined above** (You will still be able to access the original case to view the original Assessment Record and previous case records but all further Clinical Notes, Attendance & Payment should be logged against the new case). Session numbers should continue to be consecutive. e.g. if the client had 3 sessions as an organisational client and moves to private, the first private session would be session number 4. Please note that you do not re-do the assessment session when a client moves directly from organisational to private.

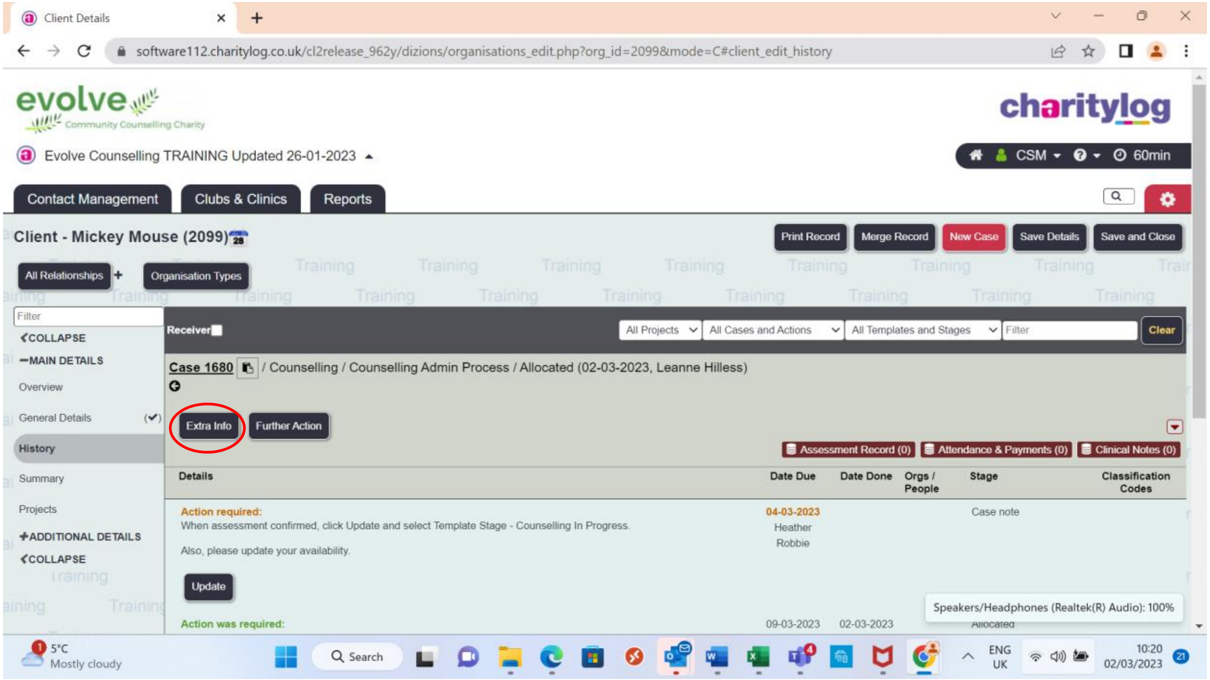
## EXTENSION REQUEST

Please check the Organisational Client List for extension policy for your client.

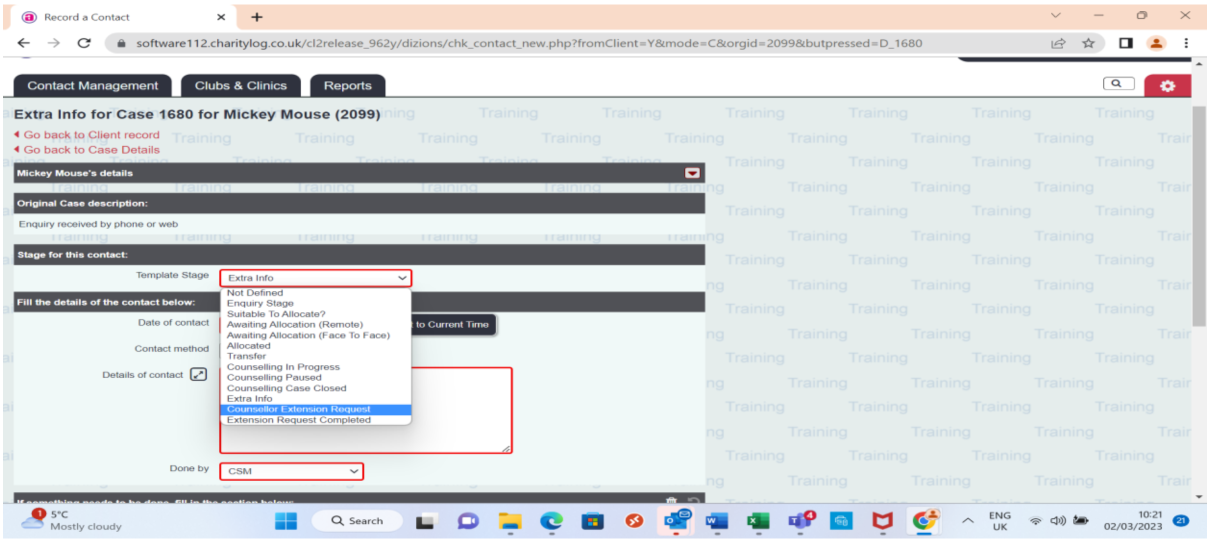
Fee-paying clients and the organisational clients whose extensions go through the CSM should use the process set out below.

Other organisational clients will need to go back to their organisations and ask for the extension, they will be given a code and the counsellor needs to update the Extension & Fee Changes section as normal.

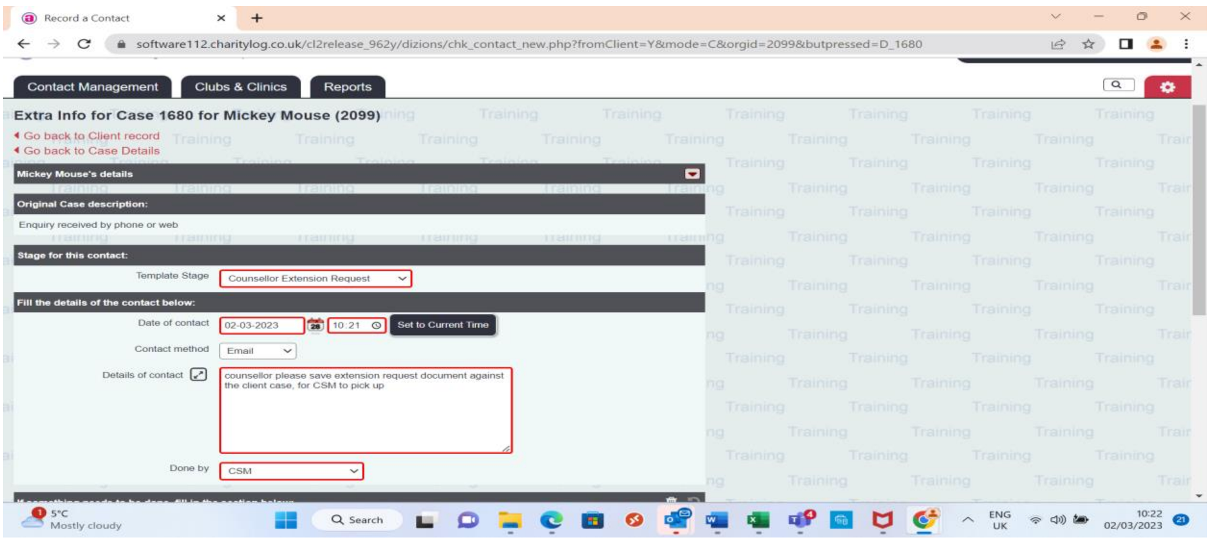
1. To request an extension, click on the extra info button, ringed in red below.



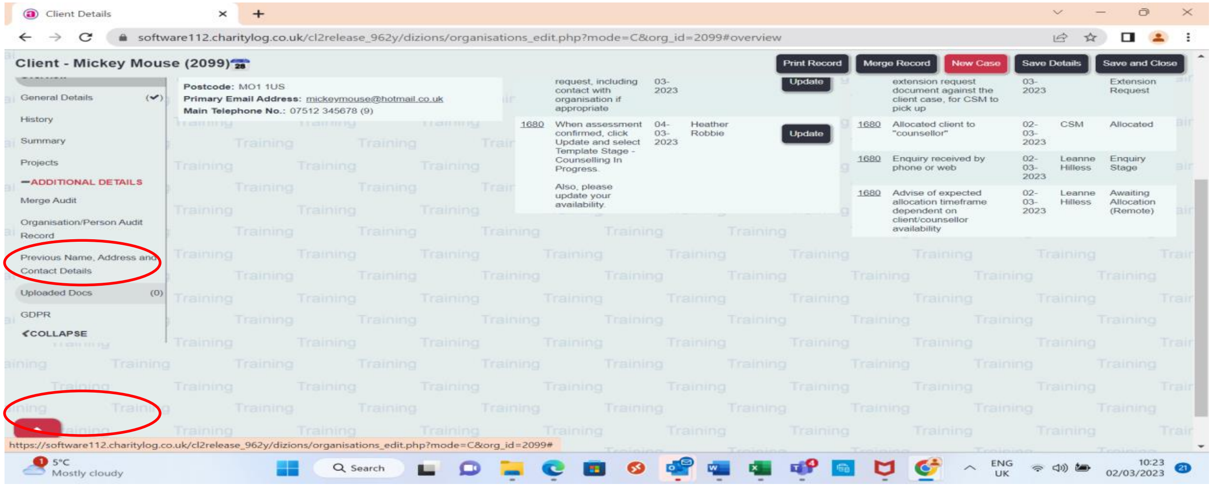

2. At template stage click Counsellor Extension Request




3. This is what the page will look like, please save, and return to client record.



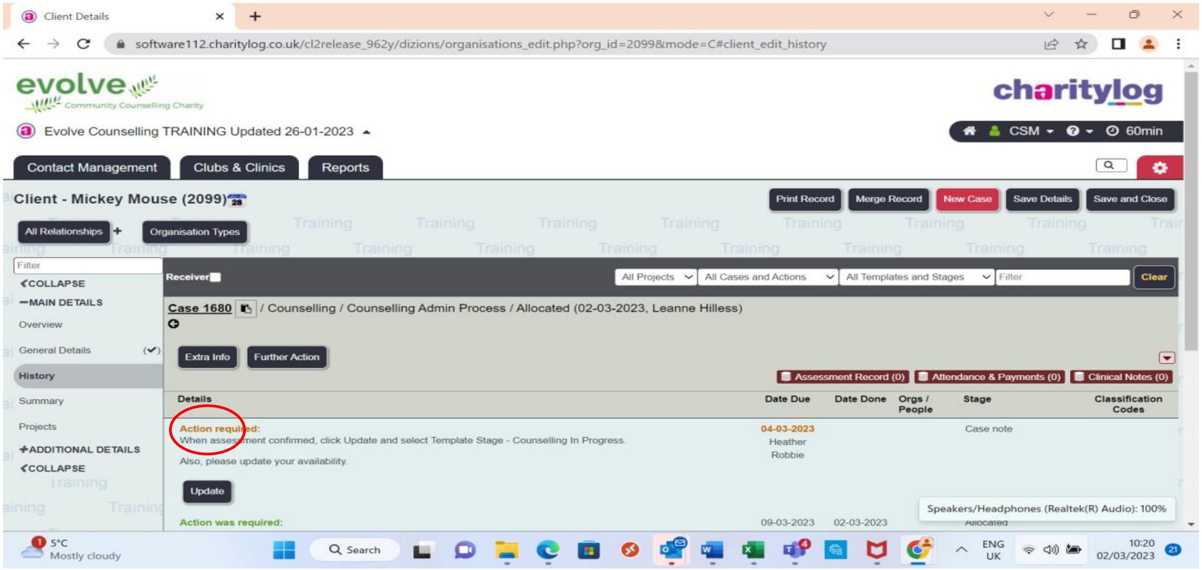
4. In client record click additional information and upload document. Please attached extension request form to the client record.



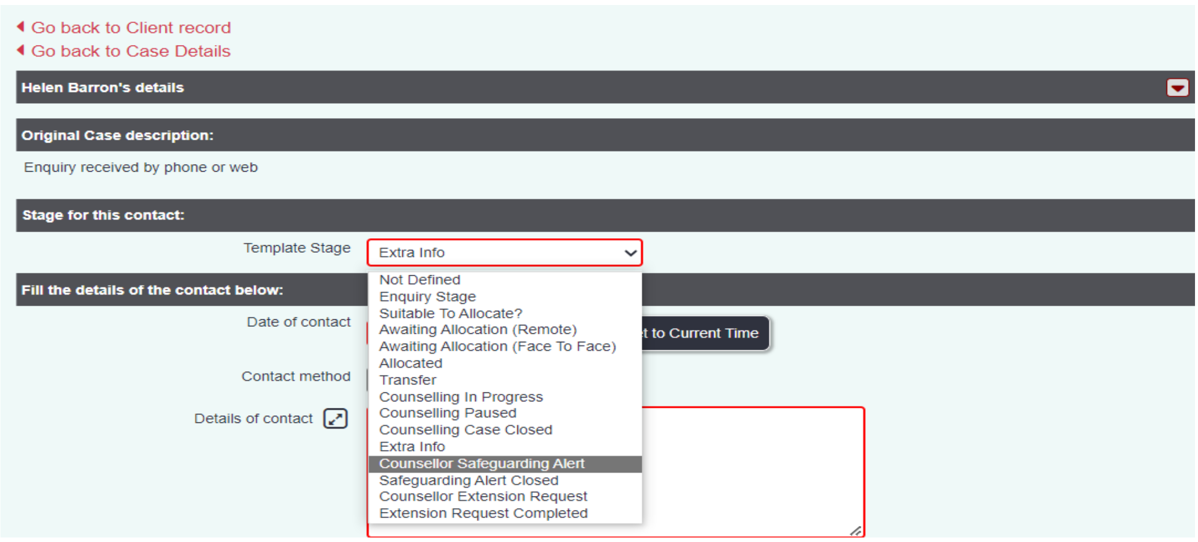

## SAFEGUARDING CONCERNS/ISSUES

If you have a safeguarding concern for, or issue with, your client, to alert the Head of Counselling for their attention and action:

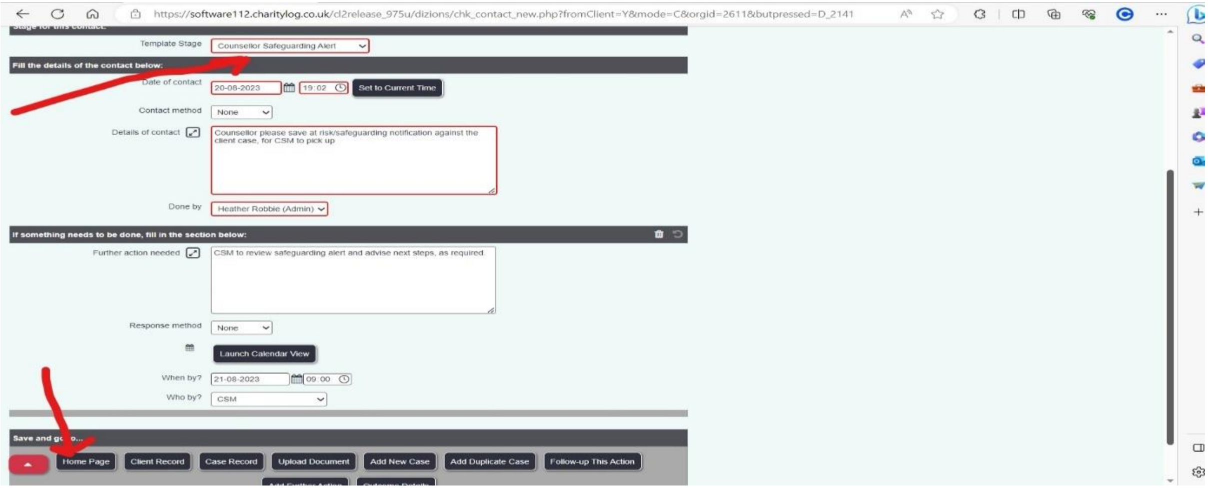
1. click on the extra info button, ringed in red below.



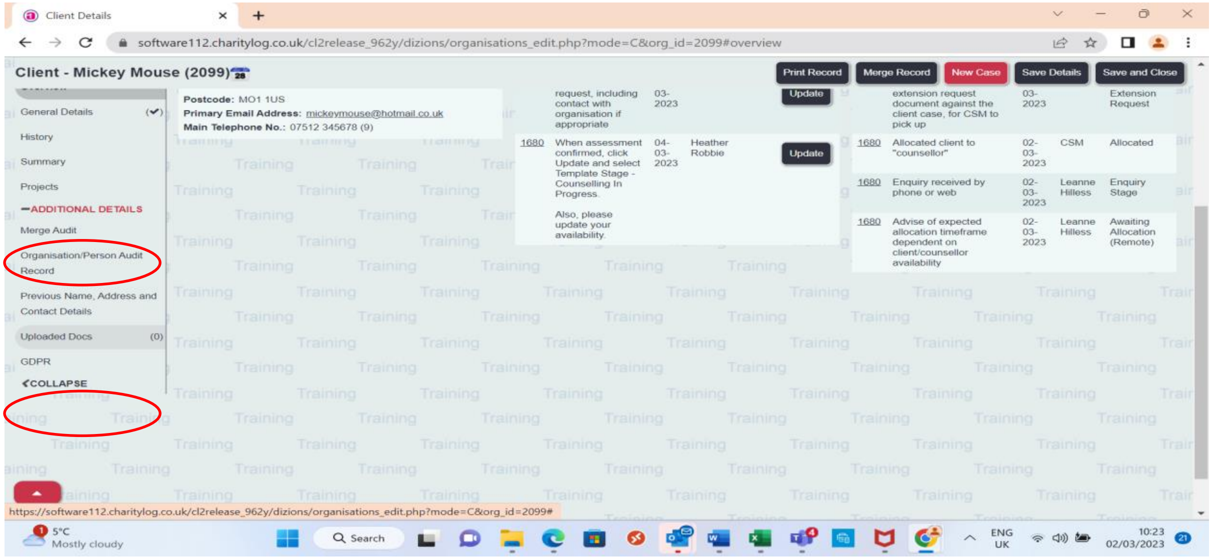

2. At template stage click Counsellor Safeguarding Alert



3. This is what the page will look like, please save, and return to client record.




4. In client record click additional information and upload document. Please attach safeguarding "at risk" form to the case record.




The CSM will act on the alert, advising on next steps and uploading further information if required/relevant.

## ENDINGS

When the contract ends (even if the client transfers to another counsellor or you decline an allocation) make sure all your Clinical Notes and Attendance & Payment tabs etc are up to date, **click the UPDATE button** and select **TEMPLATE STAGE Counselling Case Closed,** enter Date of Contact as the date of final session. There will be no further actions set on this existing case. Then select **Save and go to Outcome Details** and complete the form, especially **Simple Outcome** in the dropdown menu. "Place Not Taken" refers to a client who has been allocated to you but declines the offer of counselling or never attended any sessions. "Disengaged" means that they attended one or more session after the initial assessment then discontinued, other than by way of a planned ending. Use "Assessment only" if the client only if the client was allocated and attended only the initial assessment session. Use "Counsellor Withdraws" if you cannot take on the client, or "Client requested re-allocation" in that instance. **If a client needs to be re allocated for any reason, please close the case with the simple outcome either "counsellor withdraws" or "client requested reallocation" and contact the Head of Counselling to set up a new case and reallocate the client**. *(Do not use the Inappropriate referral option as it is a Reception option).* **Save**.

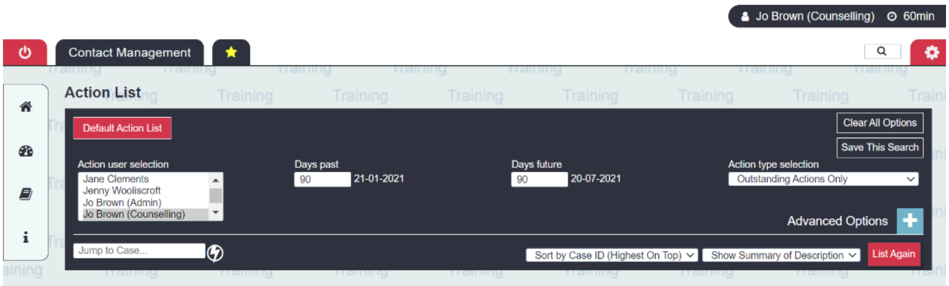
Video Closing a Case [https://youtu.be/7Stc0vnz09c](https://youtu.be/7Stc0vnz09c)

The only other template stage you might use is **Counselling Paused,** e.g., for clients you have already been working with who taking a short break from sessions before resuming. Enter Date of Contact as the date of the last session before the pause and set the When by? date to the approximate date of return.  Please do not “pause” clients for agreed breaks such as holidays.  When the client returns to sessions, go to **Counselling in Progress** (as above).

**SUMMARY** Updating the action list is only used for administration of the The table below summarises the date information you need to enter at each Template Stage.

| **Template Stage** | **Date of Contact** | **When by? date** |
|---|---|---|
| Counselling in Progress | Date of Assessment/First session | Approximate end of the contract |
| Counselling Case Closed | Date of last session | Not used |
| Counselling Paused | Date of last session | Approximate date of return |

## 2. CONTACT MANAGEMENT TAB (top left of home screen)



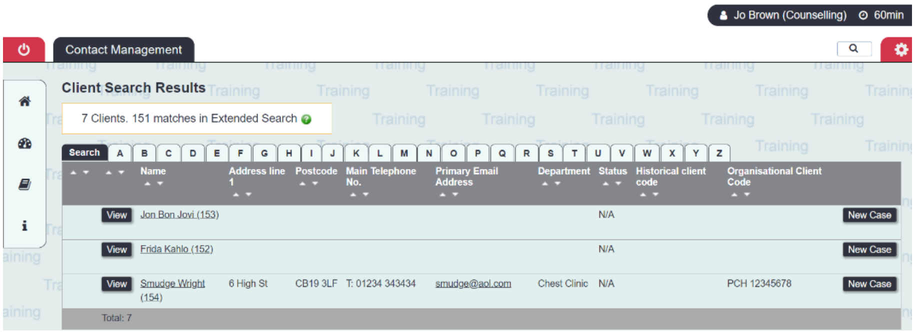

Click on tab to view drop down menu


**ORGS & PEOPLE**

**Counsellors Availability** - Edit and save your own availability regularly, especially number of spaces available, so we have up to date information. To access your record, either select **show all** (you will only be able to view your own record) or **search** for your name. Complete and save.

Video Counsellor Availability  [https://youtu.be/53uyXBc4KLA](https://youtu.be/53uyXBc4KLA)

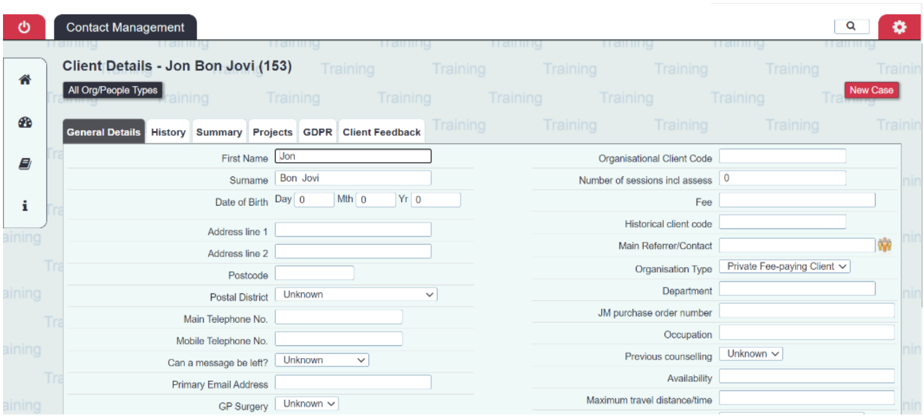
**Clients** – Search for an individual client or select **show all,** you will only see the records of clients that have been assigned to you. Click **VIEW** on the left side**.**



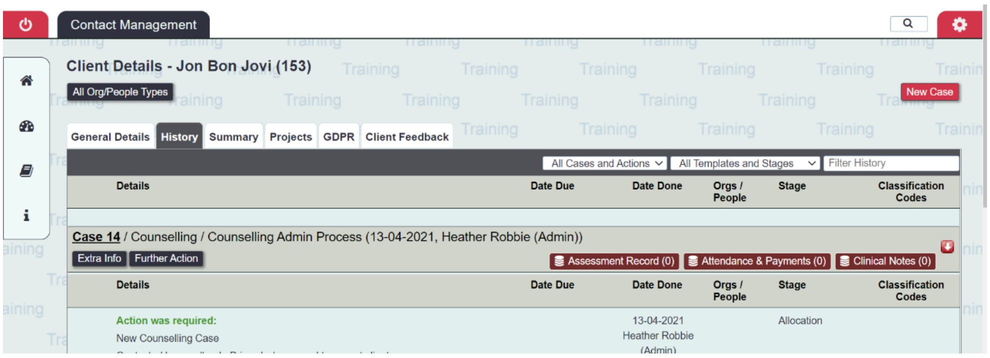

**General Details tab** contains all the information gathered at intake: contact details, number of sessions, fee agreed (private clients) organisational code (for organisational clients), you cannot edit the general details, if changes in client details are necessary, please inform the Administrator.

Please note: All clients have an automatic Charitylog number assigned (in brackets after their name).

**Also note that number of sessions is a single number i.e. 7 sessions. The assessment is always session 1. If a client attends only the assessment the total number of sessions is 1.**




**History tab** shows the case/s history and you can access and update the Attendance & Payment and Clinical notes here (see below). Please note the red arrow button next to Clinical Notes brown button, when you click on it, it displays hidden buttons (including Extensions and Fee changes).




Video Accessing a client record [https://youtu.be/l-cvTJdq2Wg](https://youtu.be/l-cvTJdq2Wg)

**Counselling Members** - view your own record, you cannot edit this, so if you see something that needs to be changed, please inform the Administrator.

**Anonymous Data Collection** – you will now be able to enter the client data collection form information straight on to the system. Video Client Data Collection https://youtu.be/dhtu-VNGvwo

1. Select '**show all'**

2. Select **Create new Anonymous Data Collection** (top right)

3. Enter surname anon

2. Complete record and save - when you try to save, the system will double check that you want to create another record named anon (they will all be named anon), select **Continue to Create New Record** and then click **Save Details.**

**Video recap:**

Accessing a client record https://youtu.be/l-cvTJdq2Wg

Assessment record and clinical notes https://youtu.be/n261d72Ecf8

Attendance and Payment Record https://youtu.be/wBxwBEZJ8y4

Client Data Collection https://youtu.be/dhtu-VNGvwo

Closing a Case https://youtu.be/7Stc0vnz09c

Counselling in Progress https://youtu.be/5fVeZcSGpCI

Counsellor Availability https://youtu.be/53uyXBc4KLA

Extensions and Fee Changes https://youtu.be/BEGX5IkokeA

Uploading a case-linked document https://youtu.be/F5uMZECwchg