

LOGGING IN

Go to [CRM Charity Software | Cloud-Based Case Management Tool \(charitylog.co.uk\)](https://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 I have accepted the transfer of a client from another counsellor and agreed the next session date, or 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.

Action List

Default Action List

Action user selection: Jane Clements, Jenny Wooliscroft, Jo Brown (Admin), Jo Brown (Counselling)

Days past: 90, 5-01-2021

Days future: 90, 4-07-2021

Action type selection: Outstanding Actions Only

Clear All Options, Save This Search

Jump to Case..., Sort by Case ID (Highest On Top), Show Summary of Description, List Again

Click here to manage External Referrals

Outstanding Actions due to be completed in date range - 1 visible of 1 in total

Case No.	Name	Case Date	Entered By	Initial Case	What to be done?	Date Due	By Whom?	Project	Project Subcategory	Template/Stage
11	Elvis Costello (150)	05-04-2021 12:11	Jo Brown (Reception)	Quick View	Please respond by clicking the Update button, and select Template Stage - Allocation Confirmed.	07-04-2021 09:00	Jo Brown (Counselling)	Counselling		Counselling Process

Update

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).

Client - Elvis Costello (463)

Print Record Merge Record New Case Save Details Save and Close

Filter

COLLAPSE

MAIN DETAILS

Overview

General Details (✓)

History

Summary

Projects

ADDITIONAL DETAILS

COLLAPSE

First Name: Elvis

Surname: Costello

Client pronouns (record at enquiry stage if offered by client): Unknown

Other pronouns:

Date of Birth: Day 0 Mth 0 Yr 0

Address line 1:

Address line 2:

Postcode:

Postal District: Unknown

Primary Email Address:

Main Telephone No.: 07891 123456

Mobile Telephone No.:

Can a message be left?: Voicemail & Text

Main Language/Interpreter Required?: Unknown

Other language interpreter required, please specify:

Interpreter type required: Unknown

Web Enquiry Category: Individual seeking support

Where did you hear about Evolve?: Psych Wellbeing Service

Where did you hear about Evolve other:

Video?: yes no

Telephone?: yes no

Face to Face?: yes no

Preferred location for F2F: Saffron Walden

Maximum travel distance/time: 5 miles

Organisational Client Code:

Number of sessions incl assess:

Fee: 25

Historical Client Code:

Main Referrer/Contact:

Organisation Type: Private Fee-paying Client

Department:

Occupation:

Previous counselling?: Unknown

Availability:

Counsellor preference m/f etc:

Presenting issues:

Any other information:

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**.

Action List

Default Action List

Clear All Options

Save This Search

Action user selection: Jane Clements, Jenny Wooliscroft, Jo Brown (Admin), Jo Brown (Counselling)

Days past: 90 5-01-2021

Days future: 90 4-07-2021

Action type selection: Outstanding Actions Only

Advanced Options +

Jump to Case...

Sort by Case ID (Highest On Top)

Show Summary of Description

List Again

Click here to manage External Referrals

Outstanding Actions due to be completed in date range - 1 visible of 1 in total

Case No.	Name	Case Date	Entered By	Initial Case	What to be done?	Date Due	By Whom?	Project	Project Subcategory	Template/Stage	
11	Elvis Costello (150)	05-04-2021 12:11	Jo Brown (Reception)	Quick View	Please respond by clicking the Update button, and select Template Stage - Allocation Confirmed.	07-04-2021 09:00	Jo Brown (Counselling)	Counselling	Counselling Process		Update

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.

Stage for this contact: Template Stage **Counselling In Progress**

Fill the details of the contact below:

Date of contact **19-08-2022** **19:52** **Set To Planned Time** **Set to Current Time**

Contact method **None**

Details of contact ☒ Enter ASSESSMENT DATE in the Date of Contact above. (Assessment is the start of counselling in progress)

Done by **Heather Robbie (Admin)**

If something needs to be done, fill in the section below:

Further action needed ☒ Update Attendance & Payments and Clinical notes regularly. DO NOT CLICK UPDATE AGAIN UNTIL END OF CASE. At end of counselling click update, select Template Stage - Counselling Complete.

Response method **None**

Launch Calendar View

When by? **09:00**

Who by? **Heather Robbie (Admin)**

Save and go to...

Home Page **Client Record** **Case Record** **Upload Document** **Add New Case** **Add Duplicate Case** **Follow-up This Action** **Add Further Action**

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>

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

Case 11 - Elvis Costello

Go back to Client record
Go back to Action List

Case 11 Entered 04 Apr 2021 9:31am

Client: Elvis Costello

Date of Case: 04-04-2021 09:29 Completed? **N** Next action due: 06-04-2021

Project: Counselling Time and travel information is not used with this project.

Project Subcategory: No Project Subcategory

Additional Data / Extension Databases / Uploaded Documents

Assessment Record (0) Clinical Notes (0) Extensions & Fee Changes (0) Payments & Attendance (0)

Upload (Case Linked) Document

Recent actions relating to this Case

Date Due	What was needed	What was done	Date Done	Show?
04-04-2021	New Counselling Case	Waiting for confirmation from counsellor.	04-04-2021	
	Jo Brown (Reception)		Jo Brown (Reception)	

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)

Assessment Record for Elvis Costello (150), Case 15

Go back to Case Record

View/Edit Extension Database Details

Assessment date: DD-MM-YYYY

GP contact details: [text field]

Permission to contact in event of risk: ☒ Yes ☐ No

Emergency contact number (NOK or other): [text field]

Contract form signed?: ☒ Yes ☐ No

If no, why?(Refer to Clinical Services Manager): [text field]

Permission for feedback as required by their employer: Yes [dropdown]

If no why? (Please refer to Counselling Coordinator): [text field]

PCH clients only: issues with...: Manager [dropdown]

Previous counselling. When? Helpful? ☒

Employment, education, other: [text field]

Attending/coping work/education? ☒

Home and Support ☒

Significant life events ☒

History of MH problems, incl diagnosis? ☒

Medication/self medication ☒

Drug usage ☒

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.

Clinical Notes for Elvis Costello (150), Case 15

Go back to Case Record

Clinical Notes: Confidential session notes, keep brief and factual.

Date of session	Session number	Clinical notes
You have no records saved yet - click the New button to create a new record		

Enter New Record

Click on Enter New Record and the fields appear

Clinical Notes for Elvis Costello (150), Case 15

Go back to Case Record

View/Edit Extension Database Details

Date of session: 07-04-2021

Session number: 1

Clinical notes: Discussed presenting issues and previous counselling experience

Save Details Continue Without Saving

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.

Clinical Notes for Elvis Costello (150), Case 15

Go back to Case Record

Clinical Notes: Confidential session notes, keep brief and factual.

Date of session	Session number	Clinical notes
07/04/2021	1	Discussed presenting issues and previous counselling experience

Enter New Record

Video Assessment record and clinical notes <https://youtu.be/n261d72Ec8>

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.

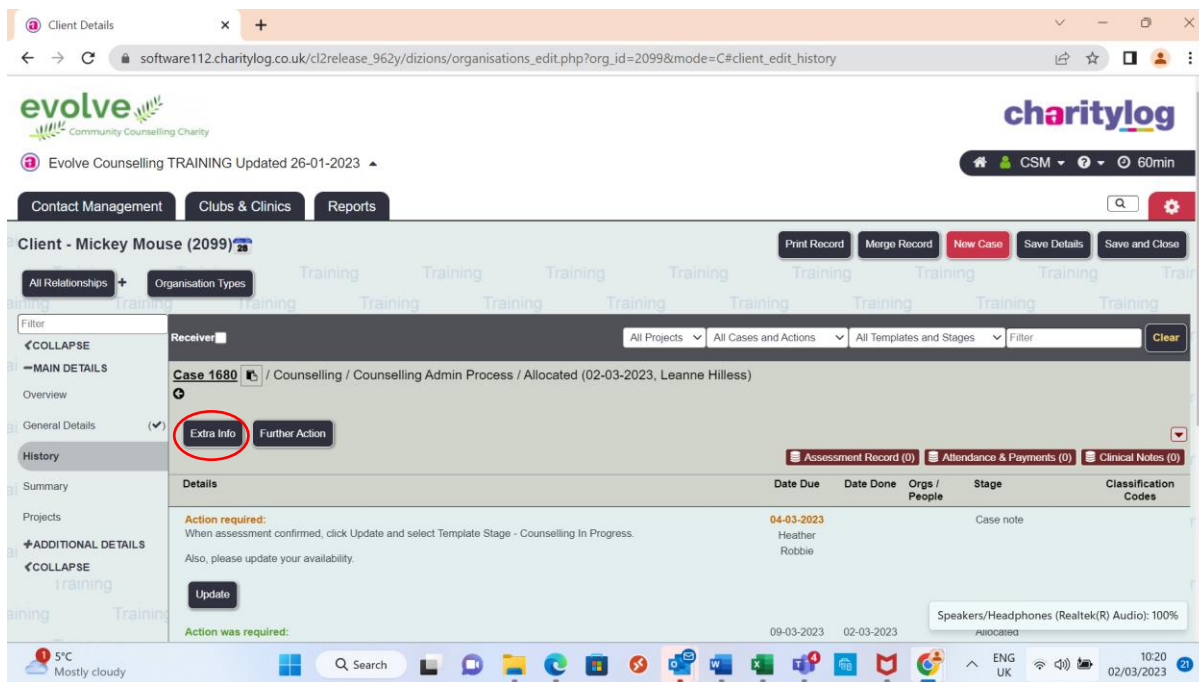
EXTENSION REQUEST

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

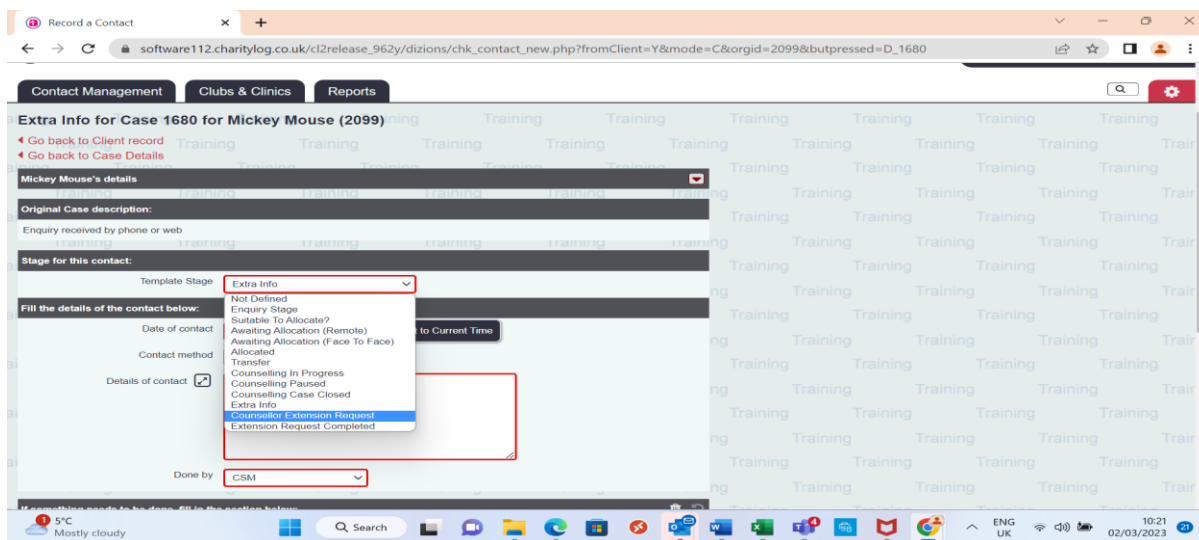
Fee-paying clients and the organisational clients whose extensions go through the CSM should use the process set out below.

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.

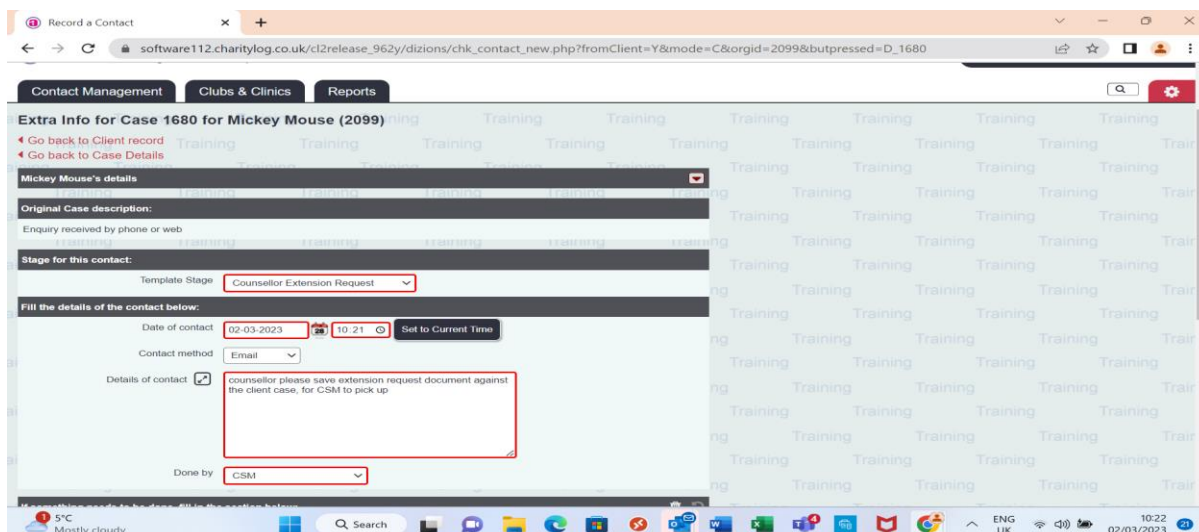
1. To request an extension, click on the extra info button, ringed in red below.



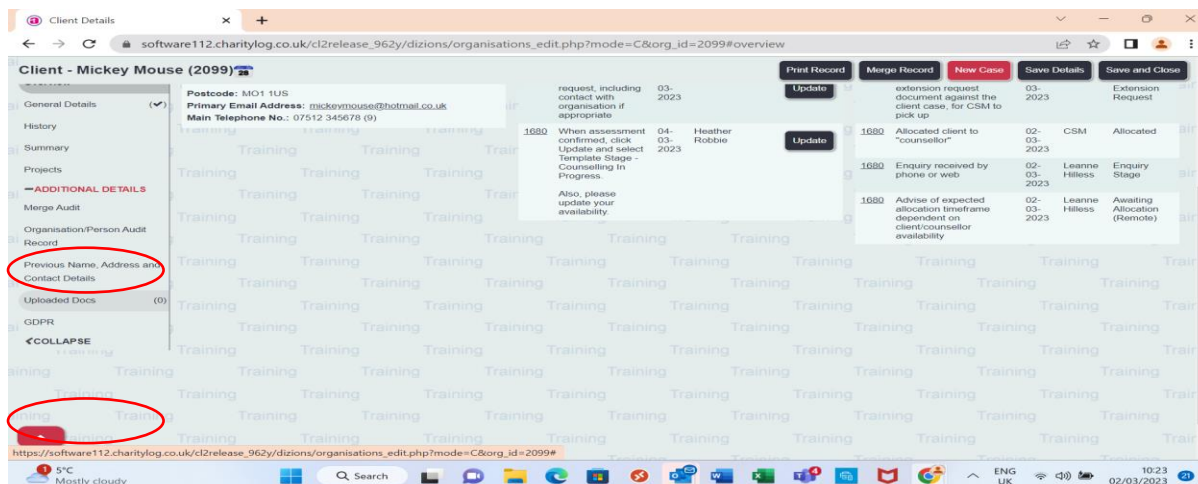
2. At template stage click Counsellor Extension Request



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



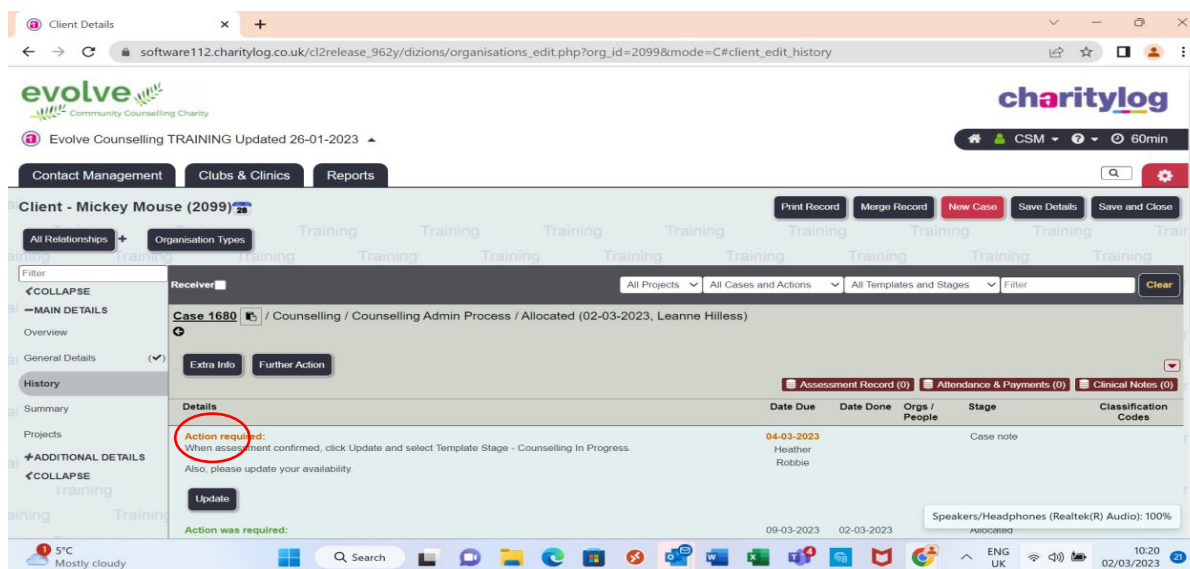
4. In client record click additional information and upload document. Please attached extension request form to the client record.



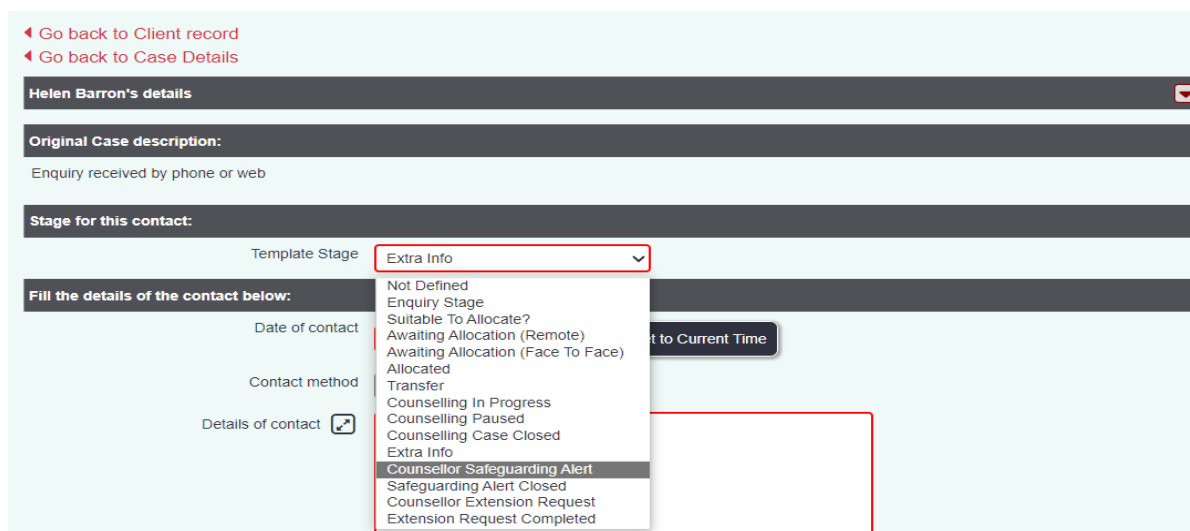
SAFEGUARDING CONCERNS/ISSUES

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.

Template Stage: Counsellor Safeguarding Alert

Fill the details of the contact below:

Date of contact: 20-08-2023 19:02 Set to Current Time

Contact method: None

Details of contact: Counsellor please save at risk/safeguarding notification against the client case, for CSM to pick up

Done by: Heather Robbie (Admin)

If something needs to be done, fill in the section below:

Further action needed: CSM to review safeguarding alert and advise next steps, as required

Response method: None

When by?: 21-08-2023 09:00

Who by?: CSM

Save and go to: Home Page Client Record Case Record Upload Document Add New Case Add Duplicate Case Follow-up This Action

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

Client Details: Mickey Mouse (2099)

Postcode: MO1 1US
Primary Email Address: mickymouse@hotmail.co.uk
Main Telephone No.: 07512 345678 (0)

Request: 1080 When assessment confirmed, click Update and select Template Stage - Counselling In Progress. Also, please update your availability. 04-03-2023 Heather Robbie

Request: 1080 extension request document against the client case, for CSM to pick up. 03-2023

Request: 1080 Allocated client to "counsellor". 02-03-2023 CSM Allocated

Request: 1080 Enquiry received by phone or web. 02-03-2023 Leanne Hilles Enquiry Stage

Request: 1080 Advise of expected allocation timeframe dependent on client/counsellor availability. 02-03-2023 Leanne Hilles Awaiting Allocation (Remote)

Organisation/Person Audit Record

Collapse

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>

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)

The screenshot shows the 'Contact Management' tab with the 'Action List' sub-tab selected. The interface includes a search bar, a dropdown menu for 'Action user selection' (showing users like Jane Clements, Jenny Wooliscroft, Jo Brown (Admin), and Jo Brown (Counselling)), and filters for 'Days past' (90) and 'Days future' (20-07-2021). The 'Action type selection' is set to 'Outstanding Actions Only'. There are also buttons for 'Clear All Options', 'Save This Search', and 'Advanced Options'.

Click on tab to view drop down menu

The screenshot shows the 'Contact Management' tab with the 'Action List' sub-tab selected. A dropdown menu is open, showing options like 'Action List', 'Calendar', 'Counsellors', 'Availability', 'Clients', 'Counselling Members', 'Anonymous Data', and 'Collection'. The 'Action List' option is highlighted.

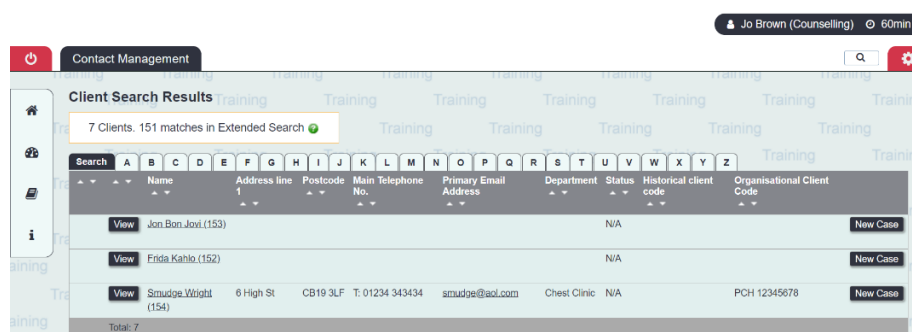
ORGS & PEOPLE

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>

The screenshot shows the 'Counsellor Availability - New Counsellor Availability' form. It includes a sidebar with navigation links like 'Contact Management', 'Clubs & Clinics', 'Reports', and 'Counsellor Availability'. The main form area has a 'How many spaces currently available' field (set to 0) and a 'Time of day' dropdown. There are sections for 'Available Monday' through 'Available Friday', 'Available Saturday', and 'Available Sunday', each with 'Yes' and 'No' radio buttons and a 'Time of day' dropdown. There are also checkboxes for 'Are you currently working face to face?', 'Telephone counselling', 'Video counselling', and 'Flexible appointments for shift workers'. At the bottom, there are fields for 'Specific vailability' and 'Counsellor absences - please insert dates here'.

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.

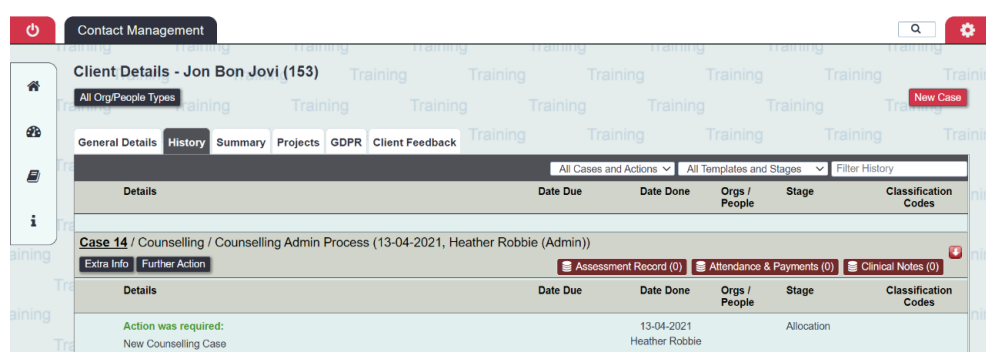


General Details tab contains all the information gathered at intake: contact details, number of sessions, fee agreed (private clients) organisational code (for organisational clients), you cannot edit the general details, if changes in client details are necessary, please inform the Administrator.

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>

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/5fVeZcSGpCl>

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

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

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