



**SUPPORTING
FAMILIES**
in Mental Illness

Auckland

BENECURA

FIELDWORKER GUIDE

2013

Benecura is a Client Management System (CMS) software platform (Build 2.4.1 Version 1.8) for Non-Government Organisations (NGO) providers of community health, disability, and social services developed by **Benecura Ltd 2010**.

For more information, please visit:

www.benecura.com

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Disclaimer: This product is meant for training purposes only.
All client names and information used in examples are fictional.
Any resemblance to real persons, living or dead, is purely coincidental.

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INTRODUCTION

1

1 INTRODUCTION

1.1 ABOUT THIS GUIDE

This Guide has been prepared with the needs of the **Client** and the **Field /Support Worker** foremost. The goal is to take SFMI practices for Field/Support Workers and show how these are recorded on the **Benecura Client Management System (Build 2.4.1 Version 1.8)**. The focus is on core practices that Field/Support Workers undertake. Due to the diverse range of activities and Clients, combined with the capacity of data entry and collation, this is not intended to allow for all potential ways of interacting with Benecura. It is a starting point and a training supplement for SFMI to get Field/Support Workers using Benecura.

Benecura: Developed with the sector – for the sector:

Benecura is the Client Management System (CMS) software platform for Non-Government Organisation (NGO) providers of community health, disability, and social services. Developed in close collaboration with the sector, for the sector – Benecura represents the optimum combination of both technology and sector expertise.

Family & Whanau Progress Notes: Records & Management:

SFMI Auckland is mindful that any family/whanau member or a third party about whom a record is held, may obtain those records. Such records provide critical information as staff or agencies involved with families can change, and also at times of crisis or during a review of any serious event.

The following policy describes how recorded information from SFMI Auckland family and whanau case-work is managed in order to ensure consistency, safety and to be in line with relevant legislation.

The following 'definition of a health record' is based on the [NZMI Standard Health Records](#) and applies to the family and whanau records managed SFMI Auckland:

“The health record describes every aspect of the healthcare provided to an identifiable client and may be in a single file, multiple file, hard copy or electronic format.”

1.2 KEY AIMS & PURPOSE

- Each person identified as a family/ whanau client of SFMI Auckland will have the choice to have either an individual confidential record (file), or to have their information recorded in a shared family/whanau file(*).
- Family / whanau consent regarding recorded information will be regularly updated, clear and accessible in files.
- Collection and management of family/ whanau information shall comply with relevant legislation
- SFMI Fieldworkers have clear guidance on how to record information gained through family / whanau casework.

(*) Some family members who have participated only briefly in casework with SFMI staff may have their information logged in the appropriate section of the main family /whanau file.

1 INTRODUCTION

1.3 HOW THIS GUIDE IS ORGANISED

This Guide is separated into **two major sections**:

The first section focuses on **Navigation** of Benecura; explaining the various parts of the interface, where common activities are grouped, and how the menu system works. While **training** on the Benecura_Demo site, this section will guide you through the main areas of Benecura and what you will find there and where you will enter information. Once you have completed this section you should confidently be able to further explore and interact with Benecura.

Specific entry criteria based around individual SF Branch Policies will need be provided by your Branch Coordinator. There are spaces for notes in Section 4 to be completed as required as these policies may change from time-to-time.

The second section focuses on **Common Tasks** that will be required of Support/Fieldworkers when accessing and interacting with Benecura, such as entering a face-to-face meeting or logging a phone call. This section is designed to provide a quick overview of common tasks once you are comfortable with navigating the interface.

In order to provide easy navigation, and focus on the Benecura User Interface (what you see when you login), this Guide incorporates a mixture of **screen captures** to identify key navigation points. It also provides a series of **Tips** and **Notes** to improve workflow for use while logged-on to the Benecura_Demo site.

TECHNICAL NOTE:

The Guide is deliberately laid out as a two-page landscape document so that Users can quickly refer to screen captures and explanations of the database during training.

If you wish to view an electronic copy of the information in [Adobe Acrobat](#), you must ensure that in the [View/Page Display](#) drop-down menu, you tick the [Two-up Continuous](#) option to see both pages of the spread.

Finally, we value feedback at Supporting Families and encourage users of this manual to send us their thoughts and recommendations so that we can continue to improve this resource.

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NAVIGATION

2

2 NAVIGATION: USER INTERFACE

IMPORTANT: there are two websites where you can access the Benecura. Remember to check which website you are logged onto:

- The **LIVE** website: https://sfmi.appserv.co.nz/benecura_live
This site is where **actual** Client and Staff information is stored. Anything you enter in this site is kept and is an **official record** of your work. This is the site you will use day-to-day.
- The **DEMO** website: https://sfmi.appserv.co.nz/benecura_demo
This site is where you can practice and train in using Benecura. This site does not have real Client or Staff information; it is available for training Staff.

The screenshot displays the Benecura user interface. At the top, a navigation bar includes a search function and a menu with options like Personal, Referral, Client, Service, Quick Entry, Timesheet, Invoice, Payroll, Staff, Organisation, Reports, and Domain Admin. The main content area shows a client record for '999, Case' with a Client ID of 12190. The record is updated and created on 5/10/2010 at 4:41:15 PM. A left-hand navigation menu lists various sections: Client Information, Client Schedule, Personal Details, More Details, Ethnicity & Culture, Addresses, Contact Numbers, Connections, Training / Education, Skill Set / Qualification, Incomes, Disabilities, Offending History, Health History, Addiction History, Risk History, Staff Exclusion, Services, Referee Details, and Record Requests. The main form contains fields for Title, First Name (Case), Last Name (999), Known As, Gender, Date of Birth, NHI Index, Short Code Name, Number of Dependents, Marital Status (Not Known), Occupation (Not Known), Donor/Volunteer checkboxes, Community Services Card Number, Expiry, High User Card Number, and Expiry. A 'Save' button is located at the bottom right of the form.

Figure 1: Benecura Interface Menu

2.1 USER INTERFACE:

The User interface is comprised of **four** sections:

Top Navigation Menu:

- All Service coordination and Client data entry can be navigated through this menu.

Search Menu/ Client tree-view: (either one or the other will appear on the far left of your screen)

- The search menu can be used to search for clients already entered into Benecura;
- The client tree-view is used to enter client service coordination details.

Data Entry field:

- The data entry field allows for client, staff and service delivery information to be entered into Benecura.

Side Menu:

- The floating menu acts as a shortcut to access information in the data entry field.

2 NAVIGATION: *IMPORTANT TIPS & NOTES*

2.1.1 Security Policy:

- a) The information in Benecura is of a **personal** and **confidential** nature. SFMI is committed to ensuring that the privacy of family / whanau and service users / tangata whaiora is respected and upheld at all times.
- b) All information recorded and reported by Benecura is associated with the person who entered the data as determined by their login. Once entered and saved, information is kept on the system. It is important that Field/Support Workers keep accurate and appropriate records.
- c) Passwords should contain both letters and numbers and be at least 6 characters long. Passwords are **NOT** case-sensitive. **Different passwords** should be used for the **Demo site** and the **Live site**.

2.1.2 Login:

To login to the Benecura homepage use **Windows Internet Explorer** (Windows IE) to navigate to:

https://sfmi.appserv.co.nz/benecura_live

Or when training:

https://sfmi.appserv.co.nz/benecura_demo

- ① **Username** - Your Benecura User name format is **First name and initial of your Last name**: e.g. 'JoeB'. **Your user name is NOT case-sensitive**: e.g. if your name is 'Jane Smith', your Username could be either 'janes' or 'JANES'.
- ② **Password** - You will be allocated a Benecura password from a SFMI Branch Coordinator. **Refer Section 2.5.1 p27** for information about how to reset your password
- ③ **Domain** - SFNZ
- ④ **Login**.

IMPORTANT TIPS AND NOTES

*

Security Policy

*

Login

TIP:

You can tell if you are logged into the 'Live' Benecura site as the SFMI logo appears on the Home Page. In the 'Demo' site you will see the Benecura logo only.



Figure 2: Benecura Login Screen

NOTE:

Users are allowed **3 incorrect login attempts** with their User name and password before the account is **automatically locked**.

After an account is locked, the User will need to contact their Branch Coordinator in order to unlock their account:

SFMI Branch Coordinator:

NOTE:

Remember to record the contact details of your SFMI Branch Coordinator