

Ivo User Manual

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software for people who help people

Familiarisation

1 Familiarisation

This section introduces you to the Ivo interface - that is, the various ways that Ivo will communicate and interact with you.

Some of the concepts may be new to you, but don't be concerned at this point. The section called [Getting Started - Entering new data](#) will give you more information on how you actually go about doing the things that you, as an Advocate, will be most likely to do with the system.

Ivo uses a 'web-style' interface that incorporates hyperlinks and a lot of white space. While we endeavour to make the layout intuitive, and, as far as possible, reasonably self-explanatory, there will always be a learning curve involved in coming to terms with a new system.

However, we've invested a lot of time in managing to accommodate different approaches to data entry, while still achieving consistent data input.

It's also important to remember that much of what you see in the system can be altered on an organisational basis. For example, one organisation's "client advocacy" may be another's "case management". Many of Ivo's textual labels and buttons can be renamed to accommodate such differences. As a result, the pictures in this document may not exactly mirror what you may see on your screen.

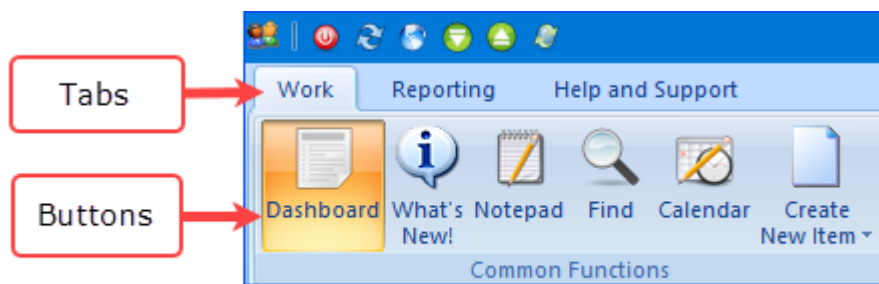
1.1 Ivo controls

Ivo is designed to be user friendly, and one of the methods of achieving this is by utilising consistent visual prompts which help you to recognise what on-screen controls do and how they behave. The following describes the icons used in Ivo to designate certain control types.

The application "ribbon" toolbar

The ribbon remains in view throughout the Ivo application, and incorporates two key areas as indicated in the figure below:

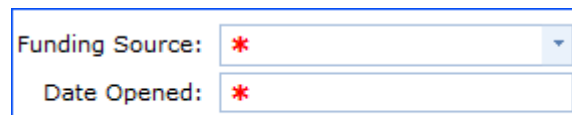
- 'Tabs', which divide areas of functionality into logical groups, for example, the "Work" tab and "Reporting" tab.
- Within each tab, buttons are grouped into sub-groups (e.g. the Dashboard button is located in the "Common Functions" grouping). Note that this area of the ribbon provides an indication of where you are currently working in the system, by way of the highlighted button.



Mandatory fields

In any robust information system which provides meaningful data reporting, some data entry fields must be mandatory. However, Ivo aims to assist your workflow rather than obstruct it, and as such, there are degrees of "mandatory" within the system.

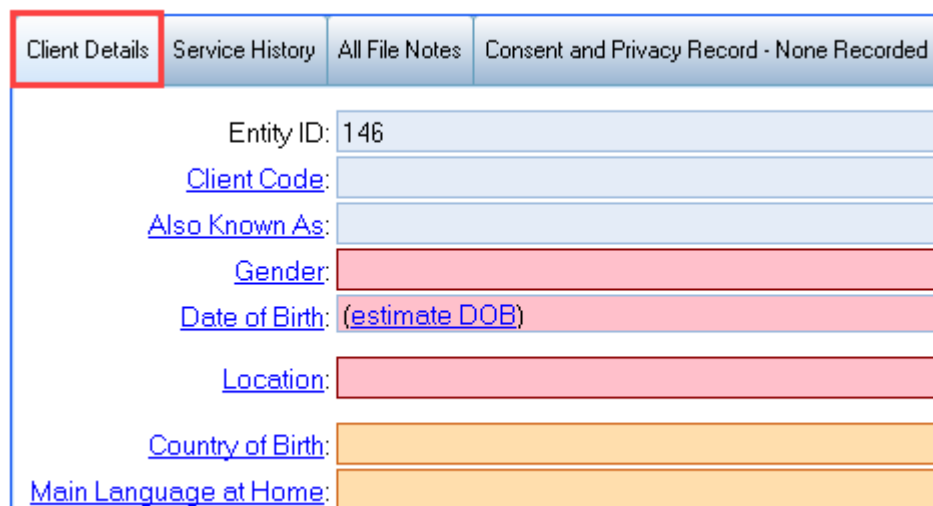
Genuinely mandatory fields - those which must be completed before you can move on - are indicated on-screen by a red asterisk in the control:



Funding Source: *

Date Opened: *

Fields which are mandatory for a client to be included in funding reports, but which are not required right now, will be brought to your attention in the client details tab. Any records for which these fields are incomplete, are classed as having "incomplete data", and will need to be completed at some point in the future. However, you will still be able to move on to another task without being forced to enter the information immediately.

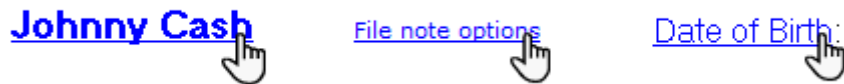


Client Details	Service History	All File Notes	Consent and Privacy Record - None Recorded
Entity ID:	146		
<u>Client Code:</u>			
<u>Also Known As:</u>			
<u>Gender:</u>			
<u>Date of Birth:</u>	(estimate DOB)		
<u>Location:</u>			
<u>Country of Birth:</u>			
<u>Main Language at Home:</u>			

Fields that must be filled in before reporting to your funder are coloured red, fields that are non mandatory but highly desirable by the funder, are coloured orange and blue fields are optional.

Hyperlinks

Any text underlined in the application features 'hyperlink' functionality, which will open another area to provide more information on the underlined text.



Date & time fields

Ivo uses 'intelligent' date and time fields consistently across the system.

Consider the date 22-Jul-2020. Any of the following entries would be accepted for this date in a date field within Ivo:

"22/7/2020"; "22/7/20"	The common way the date would be entered
22/7	A handy shortcut in Ivo - if you omit the year, Ivo will assume the current year.
"22-jul-20"; "22 july"	You can use the abbreviated or full month name
"22-7"; "22.7"; "22,7"; "22 July 2020" etc	Use can use slashes, spaces, dashes, fullstops, commas to separate the parts of the date

Provided the format is date followed by month, and if specified, year, Ivo will be able to determine the date. Regardless of the format you use to *enter* the date, Ivo will *display* the date in the format "dd-mmm-yyyy" eg. "22-Jul-2020" - this ensures there is no ambiguity regarding the date.

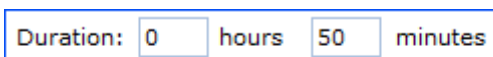
Ivo has some other useful date shortcuts that can make your job much faster and easier:

"t" for today	In the date field, type the letter "t" and press the tab key on your keyboard to enter today's date.
"y" for yesterday	Type the letter "y" and press the tab key to enter yesterday's date.
"t-3" for 3 days ago	Type the letter "t" then "-" (minus) then "3" then the tab key to enter the date from three days ago. You can enter "t-" any number and Ivo will work out the date that you mean.

Similarly, time fields behave intelligently too, for example -

Entering this...	Results in this....
2	2:00 PM (because Ivo knows it's unlikely that you're working at 2am)
2am, 2a	2:00 AM (because 'unlikely' doesn't mean 'impossible')
9	9:00 AM
9p	9:00 PM
15, 1500	3:00 PM
3:25, 3.25, 325	3:25 PM

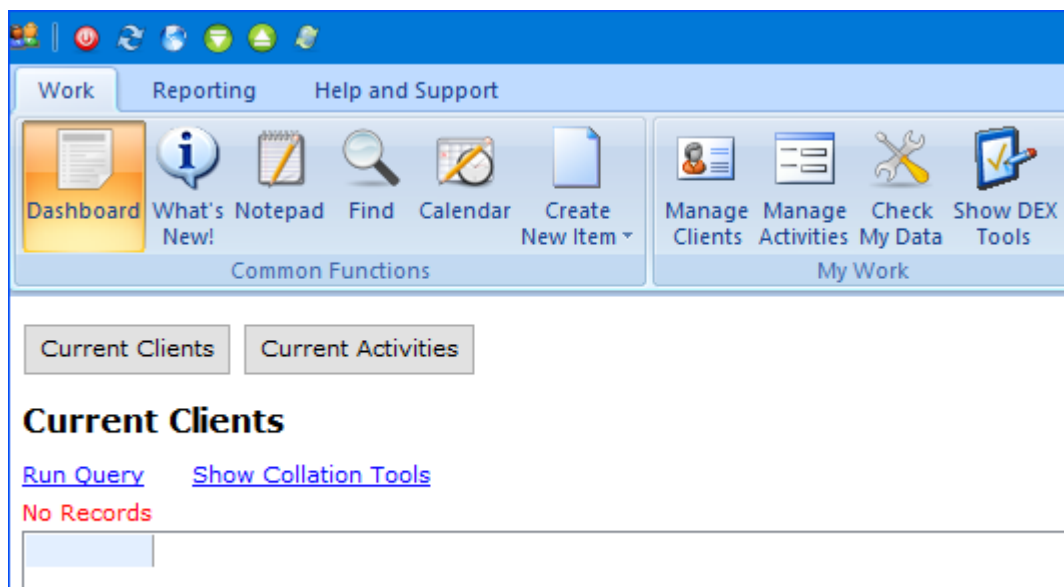
Note that wherever you find a *Duration* field, you must specify both the *Hours* (even if that is zero) *and* the *minutes*. When you enter a value into the minutes field, Ivo will autofill a zero value into the hours field.



A screenshot of a software interface showing a 'Duration' field. The field is divided into two parts: 'hours' and 'minutes'. The 'hours' part contains the number '0' and the 'minutes' part contains the number '50'. The entire field is enclosed in a blue border.

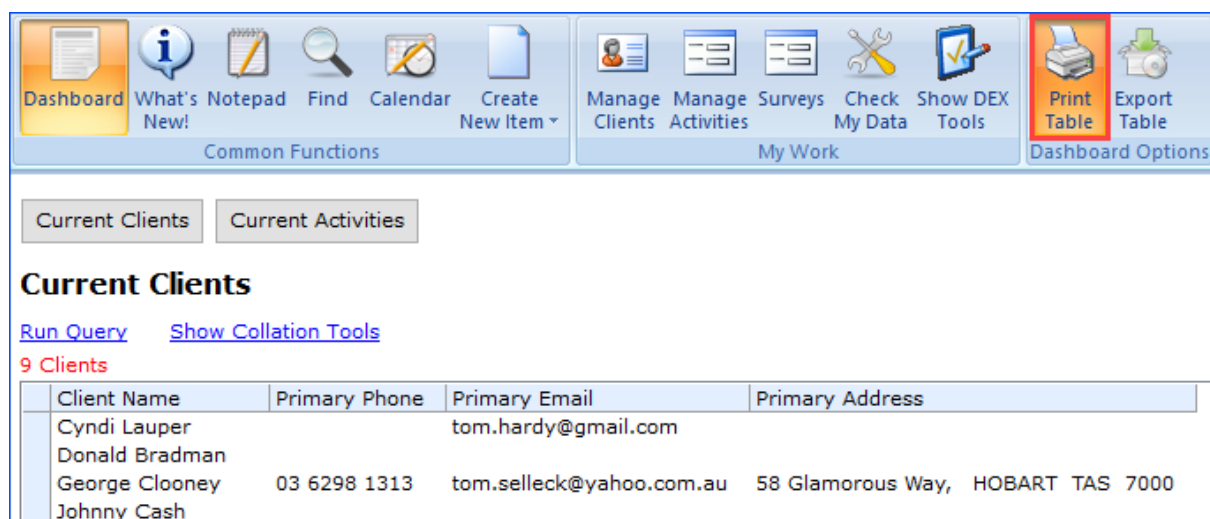
1.2 The Dashboard screen

The Ivo Dashboard places commonly used information easily within your reach, and is the first thing you see when you login to Ivo. The data you see here is particular to the workload of the logged in Advocate. If that Advocate doesn't have any records in the system yet, they'll be greeted with a fairly clean slate.



The default options are the Current Clients and Current Activities tables, as seen above.

When viewing the Current Clients or Current Activities, double-clicking a record will open it on the Manage Clients screen. The Dashboard also features a print button at the far right end of the toolbar, which is handy if you need to print a list of current clients or activities for a planning meeting, for example.

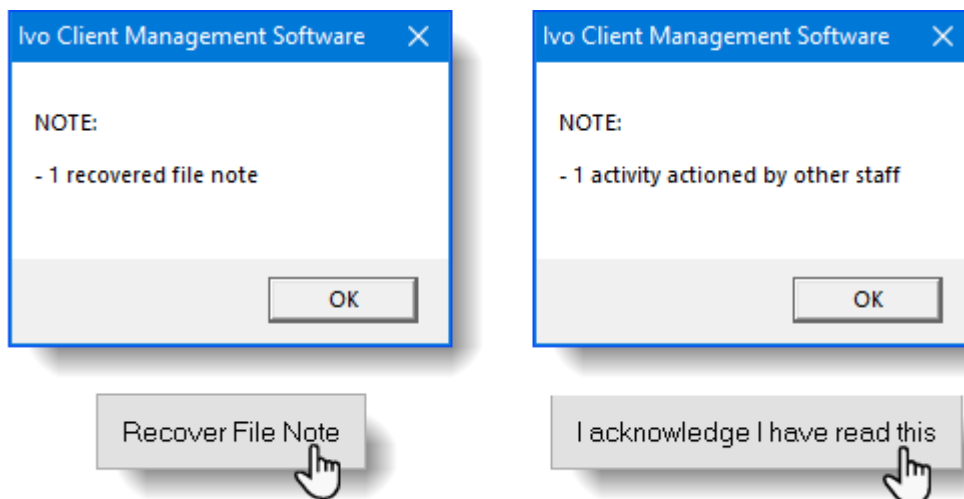


Other notifications

The Dashboard also provides notifications to you, for such things as -

- 'x activities actioned by other staff' - when another staff member adds a file note to a client you are managing (for example, if you were away sick or on leave)
- 'x activities transferred/assigned to you' - when an activity record (eg. advocacy issue, education session etc) is either transferred to you, or assigned to you when created
- 'x recovered file notes' - Ivo automatically saves file notes as you type them. If something goes wrong, such as losing power to your computer, then Ivo will automatically recover the file note.

Notifications look like this -



When you click the "OK" button, the list of notifications will be displayed, and the first one will be automatically selected. The details of the notification are displayed on the right-side of the screen. Every notification has actions that can be taken, such as "Recover File Note", or "I acknowledge I have read this" as shown above. You must take an action in order to resolve the notification. Ivo will continue to notify you every time you login until each notification is actioned.

When you click on the Recover File Note button at the bottom right hand side of the screen it will open the file note you were working on, so you can continue entering details.

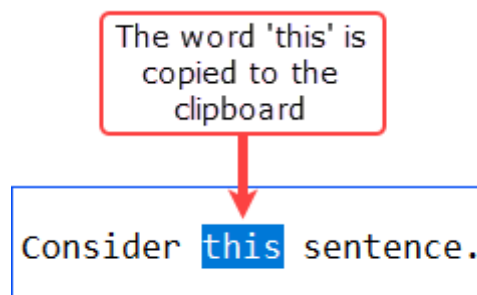
1.3 Clipboard functions

Microsoft Windows has a built in 'clipboard' which allows you to move text, images, and files from one location to another, which can save you time and effort when entering data in Ivo.

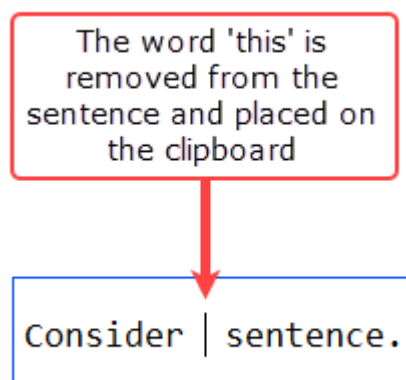
You don't need to know how to use the clipboard to use Ivo, but this section has been included simply because understanding the clipboard can have a very positive effect on your efficiency when using all Windows applications (not just Ivo).

The clipboard is not something you usually see on a computer, it's just there all the time, in the background. You can put things onto the clipboard either by copying or cutting. Copying leaves the original in place and places a copy on the clipboard, whereas cutting actually removes the item to the clipboard.

Consider this sentence. If I copy the "this" in the sentence, the following occurs:



If I cut "this", the following occurs:



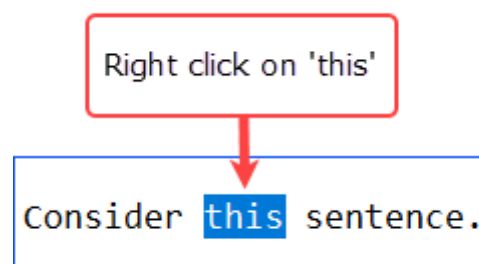
The clipboard is best thought of as only being able to hold one lot of cut or copy material at a time. You can select multiple things and copy them to the clipboard successfully (if you select them all and copy them all *at once*), but if you copy things one at a time, only the last thing copied remains in the clipboard.

So if you cut or copy something, remember to paste it where you want it, before copying something else.

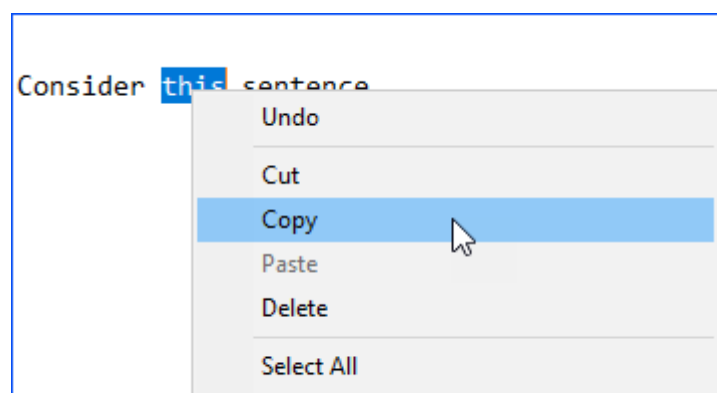
The clipboard Cut, Copy, and Paste options are usually available by at least two methods:

1. The mouse's right button menu.
2. Shortcut keys.

To cut/copy using the mouse, select the text you want to put on the clipboard (highlight by clicking the left mouse button and dragging, and then click on that highlighted text with the right mouse button:



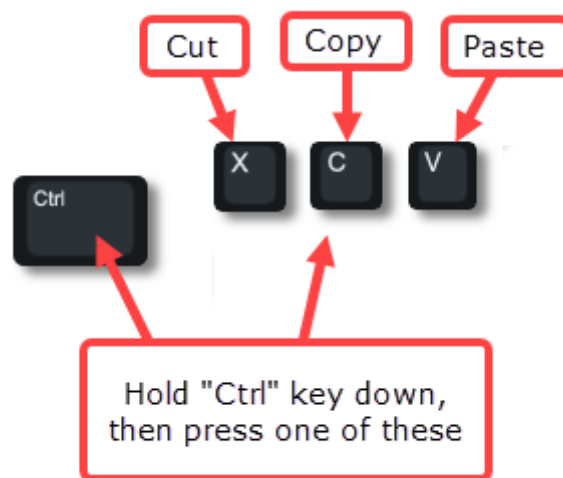
You can then select a cut or copy action from the resultant menu (which may be arranged differently, depending on what software you are using:



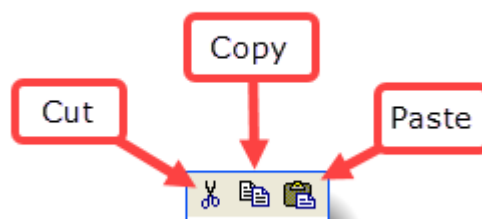
Note that the *Paste* option is also available via this menu. To paste from the clipboard, just put the cursor/mouse pointer where you want to paste, and select *Paste* from the mouse's right click menu.

The shortcut key method of interacting with the clipboard simply replaces the mouse's right-click menu. So, to copy via shortcut keys, you select the text and then activate the copy shortcut keys. The Windows default shortcut keys are as follows:

- To copy, use CTRL+C (i.e. hold down CTRL and tap C whilst CTRL is still held down)
- To cut, use CTRL+X
- To paste, use CTRL+V



Many software applications also have clipboard controls available in their toolbars:

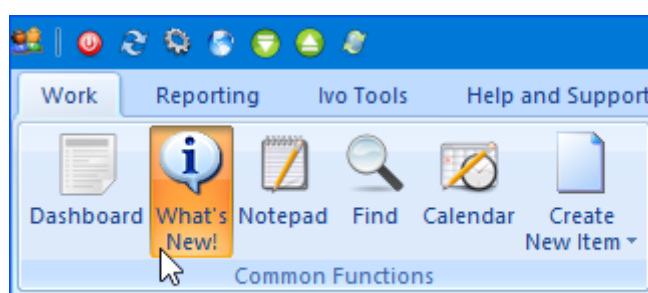


1.4 Help & Support

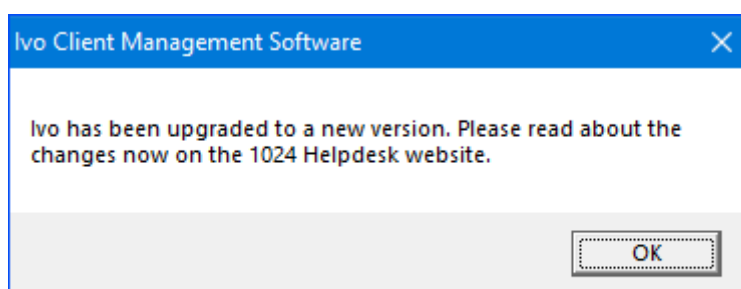
1024 endeavours to make help available for all important areas of the system over time, but due to the continual enhancements made to the system, it is likely that documentation for some areas will not be up-to-date with the current version of Ivo.

What's New!

The What's New! button opens a webpage describing recent changes to the software. It's worth checking this out with each new version of the software, as while we may take some time getting all the documentation up to date, we will list important changes here as a first priority.

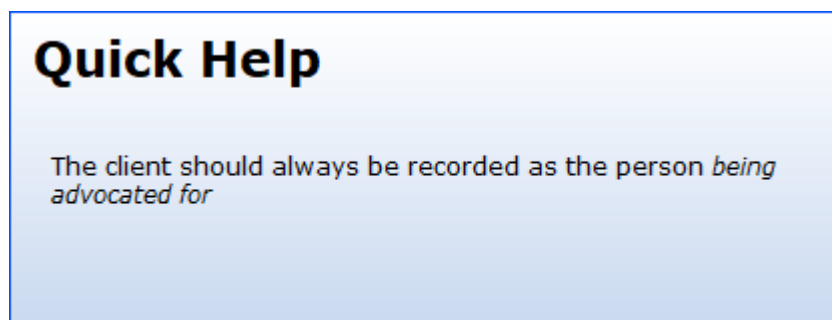


Whenever Ivo receives a significant update, the user is automatically taken to the What's New when they click the OK button on the message below -



Quick Help

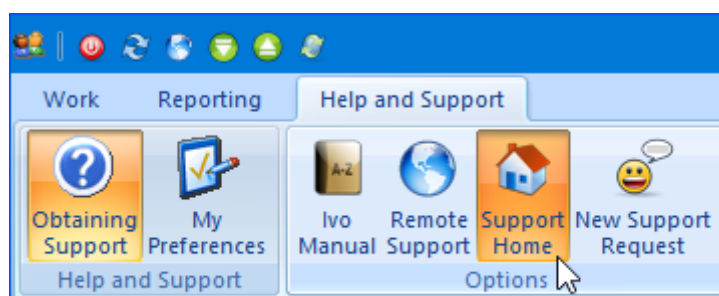
Some areas of the application include on-screen text in the area in which you're working. This is designed to give quick, brief instructions on important points, and on how to work with that particular area of the screen. In many cases Quick Help provides you with all the info you need to get you moving along - but if you get stuck, you can dig for more detail in other areas of the help system.



'Online Support'

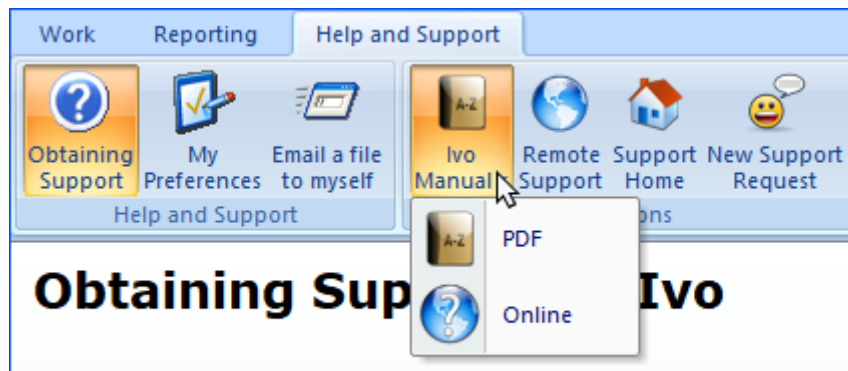
Ivo features an online help function.

You can click on the Support Home button on the toolbar which links to 1024's support page in our website. You can view our Self Help Articles to find a solution to your questions. If you can't find an article that answers your questions, then click on the New Support Request button and you will be taken to the Online Support Request Form where you can enter the details of your request.



Manual

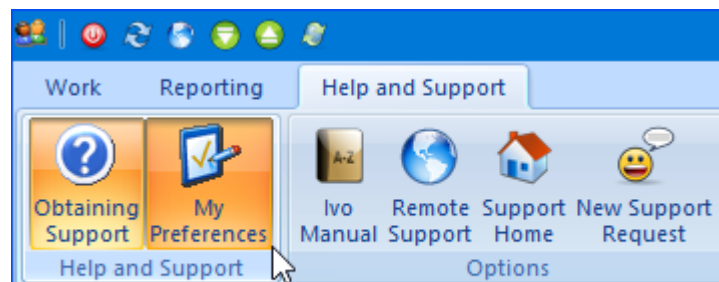
A traditional manual, in PDF format, is available from the 1024 website, and can be accessed via the Help and Support tab, or view it as a web page by selecting the Online option.



1.5 Data entry concepts

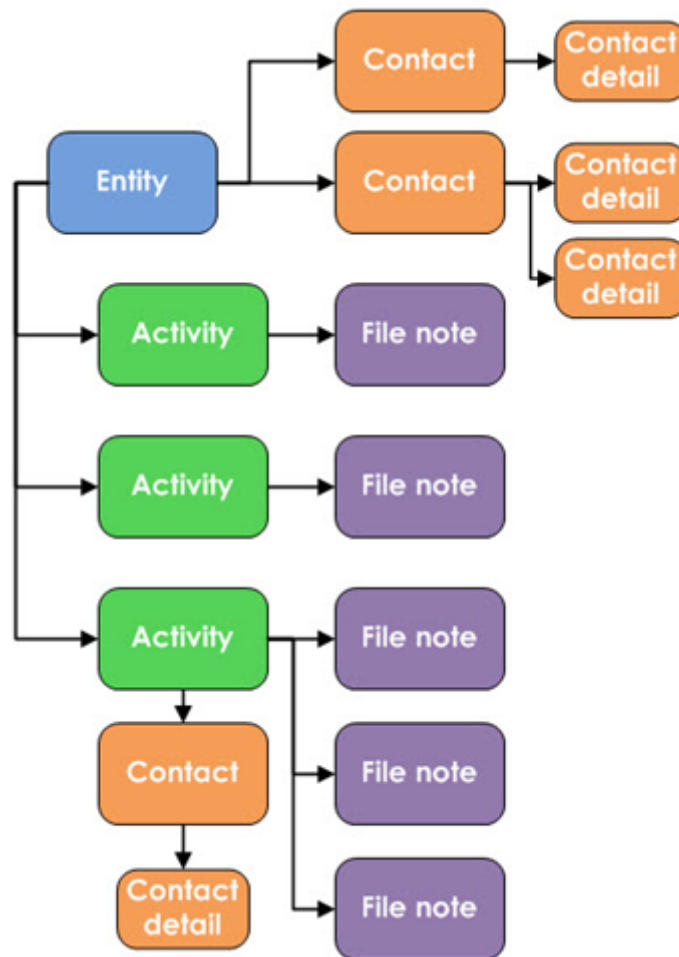
Before we get into the nuts and bolts of how to enter data, it's important to understand some key concepts about how Ivo handles your data:

- Ivo uses a single database. What that means for you is that if one of your colleagues enters Joe Bloggs into the system today, and Joe Bloggs calls *you* in three month's time with a different issue, his basic details will not need to be re-entered.
- Your data is critical and confidential. We always recommend that advocates use password-protected logins. Passwords can be maintained in the *My Preferences* area of the *Help and Support* tab.

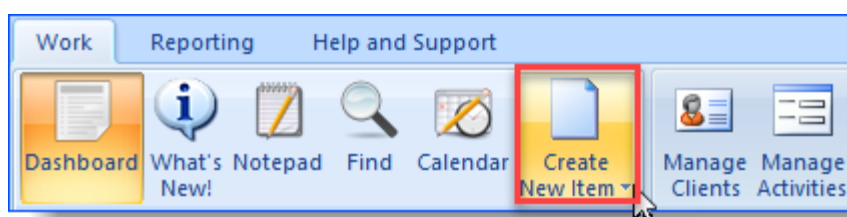


- You should be aware that Ivo maintains an internal audit trail along with the data you see. If a staff member edits or deletes a file note, for example, Ivo makes a record of that fact: who did what, and when, as well as maintaining an archived copy of the original file note itself.
- The central record type in Ivo is the 'entity' record. Entities encompass clients, organisations, staff, service providers etc. However, the term entity is not always used within Ivo - instead we refer to the main kinds of entities in the system, which are clients and organisations.
- Activity records (such as Advocacy, Education Sessions, Waiting List and Inquiries) are attached to entity records. File notes are attached to activity records.

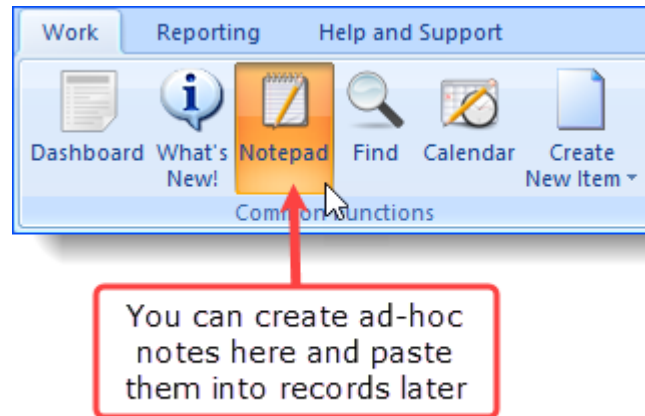
Note that contact details can also be recorded against activities, to cater for those activities where a certain contact may only be applicable to one specific activity.



- Very broadly speaking, Ivo divides the management of data entry into two approaches: creating new records, and managing existing records. So, for example, if you need to open a new Advocacy record for John Smith (regardless of whether John is already on the system or not), you'd do this through the *Create New Item* button. If you want to add detail to that record, once it's already created, you'd do that through the *Manage Clients* button.



- Like all rules, there are exceptions (in this case, for the sake of convenience)... The Notepad allows you to record 'freehand' text to use somewhere else later.



Getting Started

2 Getting Started

Ivo has been specifically designed with the workflow of the advocacy process in mind, and largely this means that Ivo operates on the assumption that for much of what you do there simply *is no set workflow*. An Advocate's role is largely communication and mediation between different parties, in many shapes and forms, which can have a large number of outcomes and new issues, at any point in the process.

While you need to capture these activities for the purposes of reporting and trend analysis, a system that tries to squeeze your workflow into a strict 'do this, now this, now this, and finally this' approach before you can actually get back to dealing with your clients, is not going to advance your effectiveness as an Advocate.

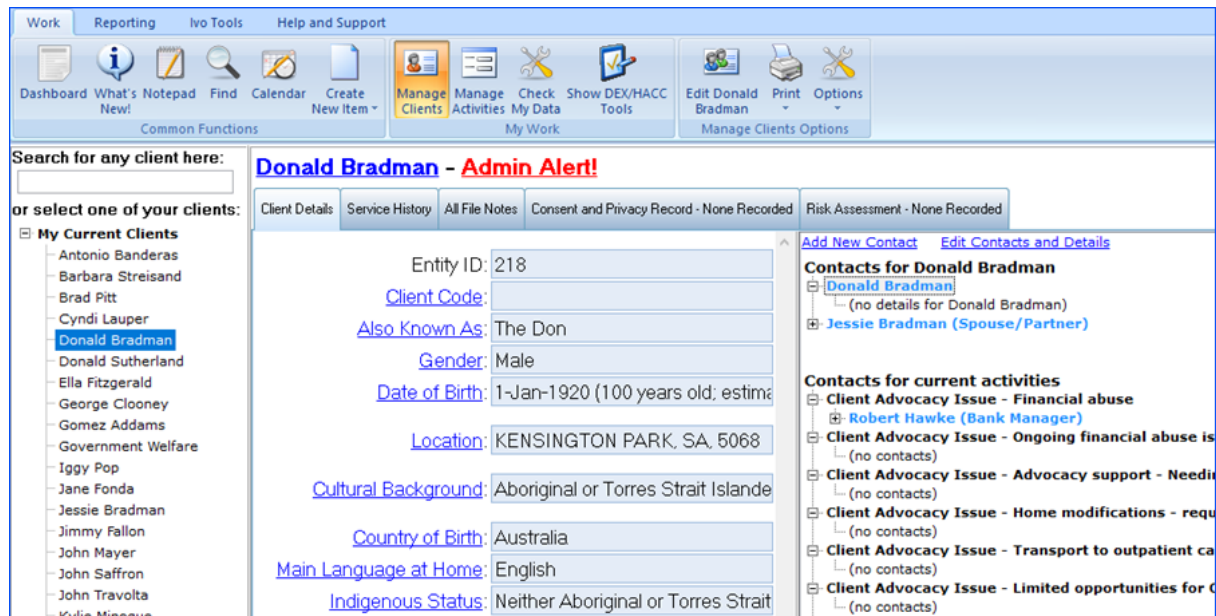
Ivo therefore gives you different ways of entering data, from that more 'regimented' approach for the unusual occasion when you do actually have the luxury of entering all the data the system needs, through to an almost 'freehand' approach which lets you get the information *you* recognise as important into the system, so you can refer to it and/or complete it later on.

Ivo has also been structured to flatten your learning curve. For example, once you've learnt how to enter a new Advocacy record, you pretty much know how to enter Systemic Advocacy, Education Sessions, and Waiting List records as well, because the on-screen process is the same, and the on-screen layout has been kept as similar as possible.

This section will get you started with the key points you need to get your important records into the system.

2.1 Introduction to the Manage Clients screen

The Manage Clients screen is where you will spend most of your time in Ivo. From here you can do everything you need to do for a client.



The Manage Clients screen is divided into two main sections. The panel to the left allows you to select a specific client, whether that is a person or an organisation, from your Current Clients list.

Additionally, at the top left corner of the navigation panel is a search box that can be used to find any entity record in the system. Once a client has been selected in the left panel, their details are available in the panel to the right.

Ivo also searches all the other columns that you can see below; entity ID, client code, D.O.B and also known as.

The screenshot shows the Ivo software interface. At the top, there are two main sections: 'Common Functions' and 'My Work'. 'Common Functions' includes icons for Dashboard, What's New!, Notepad, Find, Calendar, and Create New Item. 'My Work' includes icons for Manage Clients, Manage Activities, Check My Data, and Show DEX/HACC Tools.

Below the navigation bar, there is a search section titled 'Search for any client here:'. A text input field contains the word 'Donald', which is highlighted with a red border. To the right of the input field, the text 'Donald Sutherland' is displayed in a large, bold, blue font.

Below the search input, it says '4 Matches'. Below this, there is a table with the following data:

Entity ID	Client Code	Date of Birth	Also Known As	Entity Name
218		1-Jan-1920	The Don	Donald Bradman
8		20-Jun-1941	Donnie	Donald Sutherland
115				Donald Trump
242				Ronald McDonald House

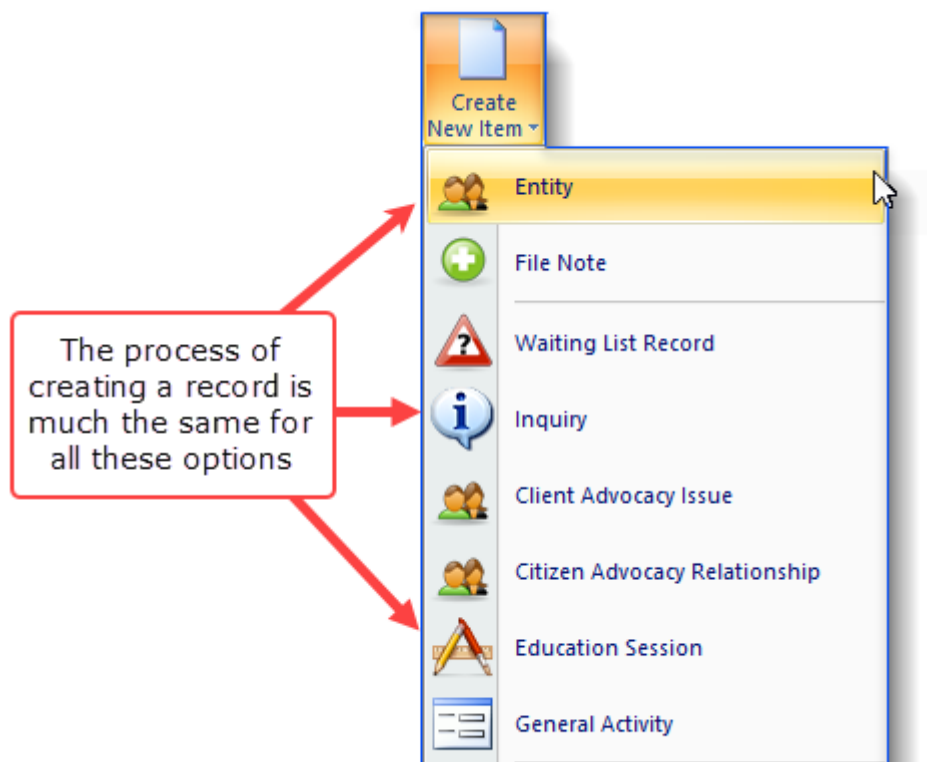
In the right hand panel, the following functions are available:

- [Adding/Editing contacts & details](#)
- [Adding/Editing demographic data](#)
- [Specifying administrative alerts](#) for a client
- [Reviewing/creating/editing service history](#) for the client
- Adding [activity-specific contacts](#)
- [Completing statistics](#)
- [Printing client summaries](#) and file notes.

2.2 Creating activity records

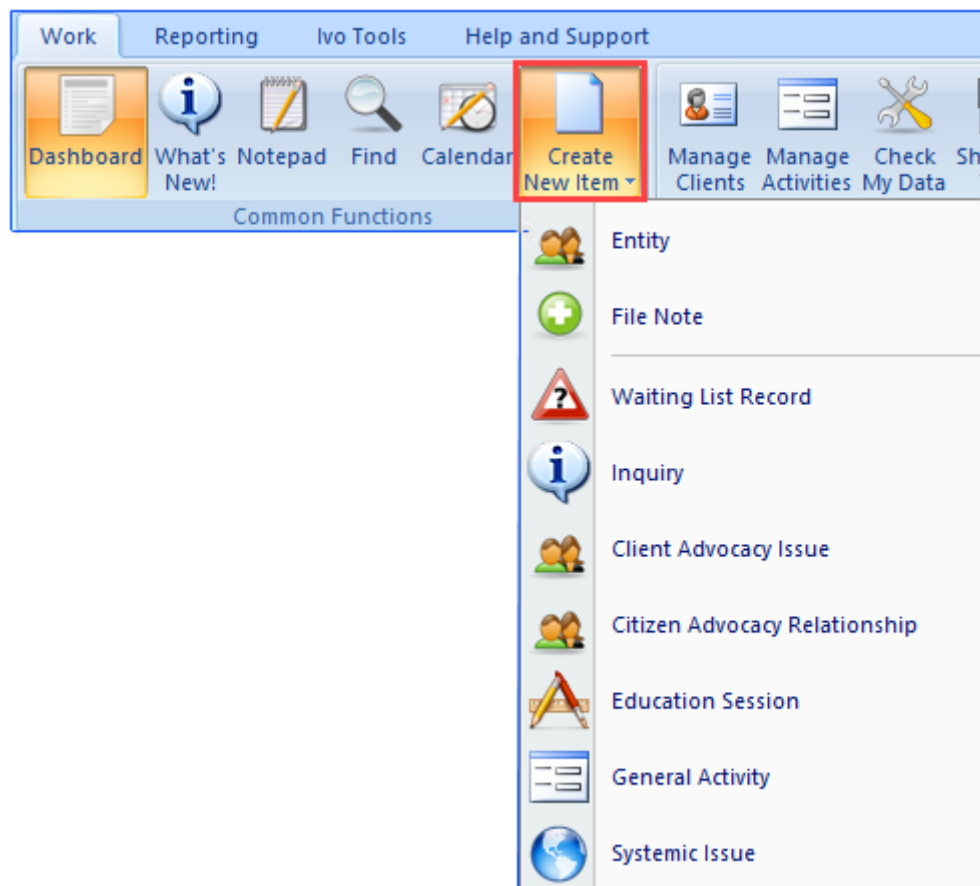
This section provides an overview of how Advocacy records are entered into Ivo. Remember, once you are familiar with how to add an Advocacy record, the process of entering other record types will also be familiar to you.

It is important to note that your 'Create New Item' menu will likely be different from the menu you're viewing here, as it can be customised for your organisation



2.2.1 Step 1 - The Create New Item button

The Create New Item button is a central entry point to raising new records in the system. The button acts as a drop-down list which allows you to select the type of record you would like to create:



To create a new Advocacy record, choose the Client Advocacy Issue option. This will open the [New Client Advocacy Issue screen](#).

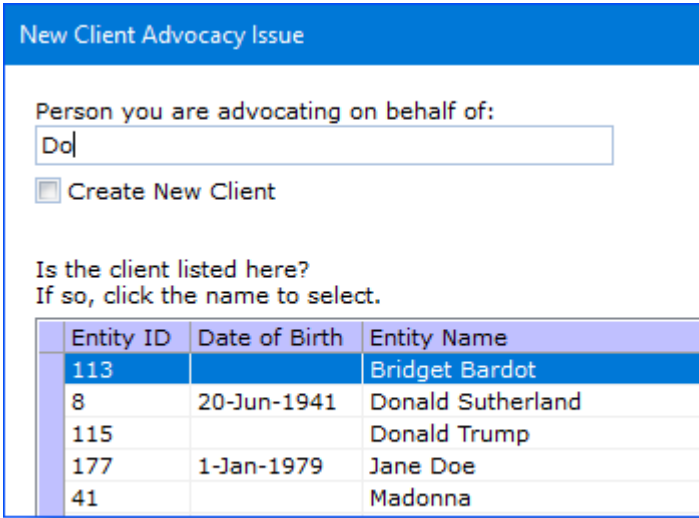
2.2.2 Step 2 - The New Client Advocacy Issue screen

This is a "one-screen-captures-all" method of entering the required data for a record, and uses a unique, unobtrusive 'wizard' for recalling/creating client s.

In the early stages of working with a client, you will often not have all the information relating to either the client, or their issue. Therefore, at this stage, Ivo only requires a minimum of mandatory data - such as a brief title, date, funding source etc. Depending on the funding source selected, one or two additional fields of data may also be required.

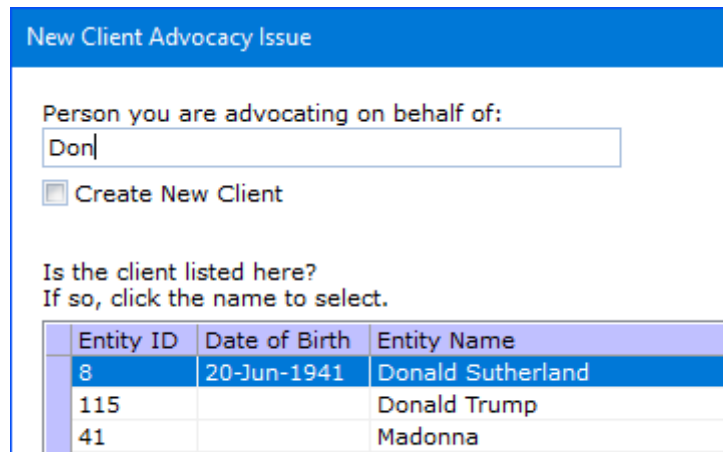
The left side of this screen is devoted to locating the correct client for the issue. The right side is devoted to the details of the issue.

When you start typing the client's name, Ivo performs an instant search based on your every keystroke after the first two letters. If you type "Do", Ivo will offer you a choice of clients who are already in the system:



Entity ID	Date of Birth	Entity Name
113		Bridget Bardot
8	20-Jun-1941	Donald Sutherland
115		Donald Trump
177	1-Jan-1979	Jane Doe
41		Madonna

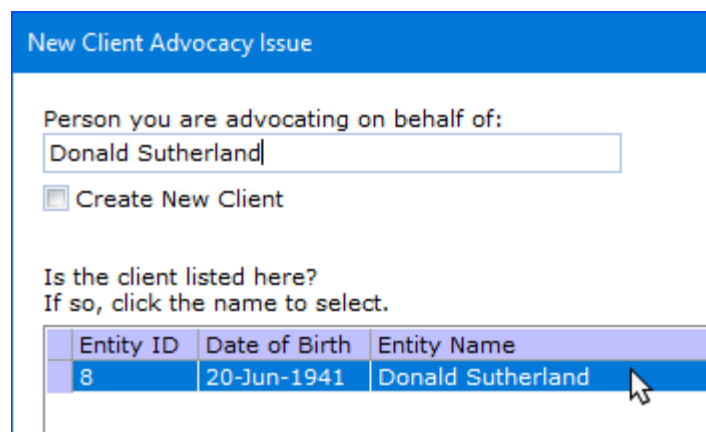
If you keep typing, so your entry says 'Don', the names with "Do" drop out of the suggested matching names, leaving only those names that contain the letters "Don" anywhere in the name:



The screenshot shows a web form titled "New Client Advocacy Issue". It has a section "Person you are advocating on behalf of:" with a text input field containing "Don". Below this is a checkbox labeled "Create New Client". Further down is a section "Is the client listed here? If so, click the name to select." followed by a table of suggestions.

Entity ID	Date of Birth	Entity Name
8	20-Jun-1941	Donald Sutherland
115		Donald Trump
41		Madonna

If one of the displayed names is in fact the client you're creating the issue for, you would just click on the name. For example, if your client was Donald Sutherland, clicking on his name populates the "Person you are advocating on behalf of" field with the whole name:



This screenshot shows the same form as before, but the text input field now contains the full name "Donald Sutherland". The table below still shows the same suggestions, but a mouse cursor is hovering over the "Donald Sutherland" entry, indicating it has been selected.

Entity ID	Date of Birth	Entity Name
8	20-Jun-1941	Donald Sutherland

If, on the other hand your client is not in the system, Ivo will alert you to this by replacing the suggested matches with some input fields in which you can enter the personal details of your client. For example, if the client name 'Donald Bradman' is entered, as soon as the 'B' is entered, Ivo recognises that it has no matches, and instead, starts entering the name as a new client record:



New Client Advocacy Issue

Person you are advocating on behalf of:
Donald B

New entity is a: Person

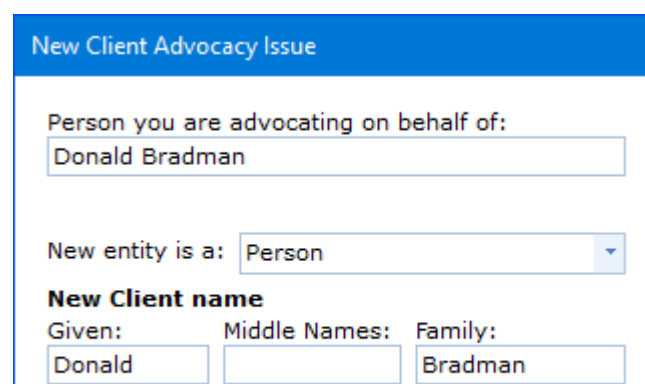
New Client name

Given: Middle Names: Family:
Donald B

Gender: Date of Birth: est

Primary Address:

Note that Ivo will also assist you in the process by using the text you enter to automatically split the data into the Given and Family Names fields:



New Client Advocacy Issue

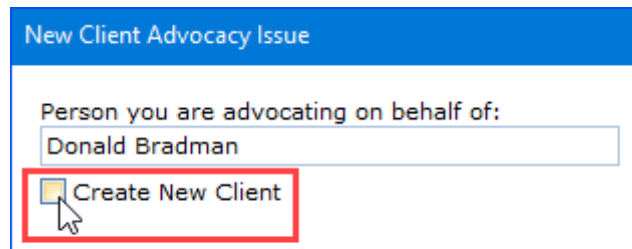
Person you are advocating on behalf of:
Donald Bradman

New entity is a: Person

New Client name

Given: Middle Names: Family:
Donald Bradman

If there is already another client in Ivo with the same name, but you still need to create a new record for a different person, you can check the "Create New Client" check box:



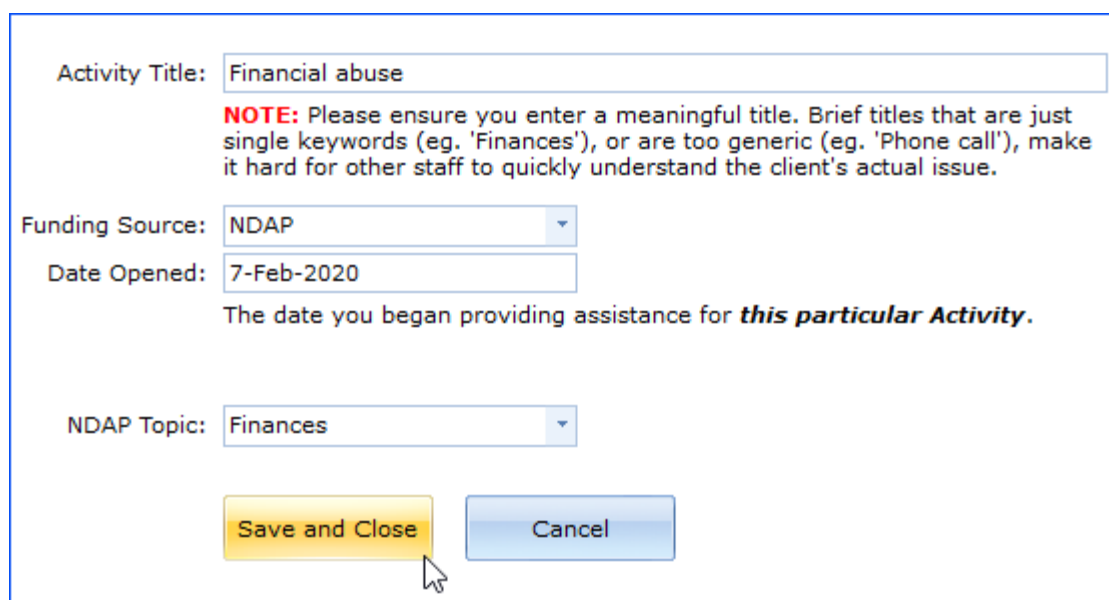
New Client Advocacy Issue

Person you are advocating on behalf of:
Donald Bradman

☒ Create New Client

Remember that Ivo looks at all the records in the system when searching - so just because *you* haven't worked with a person before, that doesn't mean they won't already be in the system.

Once you have specified the client, you can move on to the details of the issue itself, and hit the Save and Close button.



Activity Title: Financial abuse

NOTE: Please ensure you enter a meaningful title. Brief titles that are just single keywords (eg. 'Finances'), or are too generic (eg. 'Phone call'), make it hard for other staff to quickly understand the client's actual issue.

Funding Source: NDAP

Date Opened: 7-Feb-2020

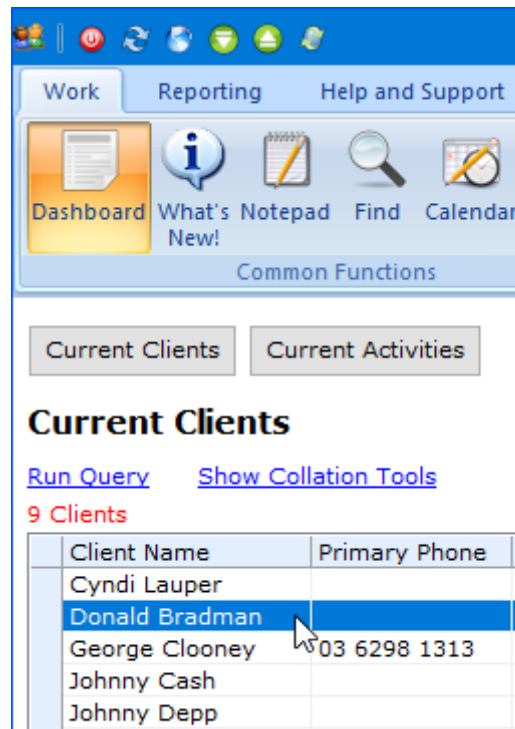
The date you began providing assistance for *this particular Activity*.

NDAP Topic: Finances

Save and Close Cancel

On saving the record, Ivo redirects you to the Manage Clients screen where you can select your new client and review, edit, and enter data. See the section on the [Manage Clients screen](#) for more details on this area.

If you move to the Dashboard screen, you'll now see you have an additional record, which you can recall if you wish, by double clicking on the client's name.



For the purposes of this introductory manual, you've learnt as much as you need to, to create most new records. Systemic Advocacy, Education Sessions, Inquiries, Waiting List, and General Activities records etc are all created in a similar way.

To add more data to the record as you continue working on the activity, see [Step 3 - File Notes](#)

Also, see [the calendar](#) for information on how to enter activity data around a time and date-oriented view.

2.3 Manage Clients screen

This screen is designed to be a one-stop-shop for managing your day-to-day work. As with many functions in Ivo, there is often more than one way to manage your client data, but this area is designed to place all client information within easy reach.

(Note that you can actually manage *any* entity from this screen, such as service providers, contacts etc, not just clients).

The screenshot displays the 'Manage Clients' interface. At the top, there is a navigation bar with tabs for 'Work', 'Reporting', and 'Help and Support'. Below this is a toolbar with icons for 'Dashboard', 'What's New!', 'Notepad', 'Find', 'Calendar', 'Create New Item', 'Manage Clients' (highlighted with a red box), 'Manage Activities', 'Check My Data', 'Show DEX Tools', 'Edit Johnny Cash', 'Print', and 'Options'. The main content area is divided into two sections. On the left, under 'Search for any client here:', there is a search bar and a list of 'My Current Clients' including Cyndi Lauper, Donald Bradman, George Clooney, Johnny Cash (highlighted), Johnny Depp, Louise Parker, Macaulay Culkin, Meryl Streep, Olivia Newton John, and Saul Hudson. On the right, the details for 'Johnny Cash' are shown, including tabs for 'Client Details', 'Service History', 'All File Notes', and 'Consent and Privacy Record - None Recorded'. The details form includes fields for 'Entity ID: 146', 'Client Code', 'Also Known As', 'Gender', 'Date of Birth: (estimate DOB)', 'Location', 'Country of Birth', 'Main Language at Home', and 'Indigenous Status'.

2.3.1 Client details tab

By default, the client details tab is the first view selected when you go to the Manage Clients screen. It contains demographic data, contact information, and other important information that you're likely to need to know 'up front'.

Client Details	Service History	All File Notes	Consent and Privacy Record - None Recorded
----------------	-----------------	----------------	--

Entity ID:	218
Client Code:	
Also Known As:	The Don
Gender:	Male
Date of Birth:	1-Jan-1920 (100 years old; estimated)
Location:	KENSINGTON PARK, SA, 5068
Country of Birth:	Australia
Main Language at Home:	English
Indigenous Status:	Neither Aboriginal or Torres Strait Islander
Household Composition:	
Accommodation Type:	
DVA Card Status:	
Homeless Indicator:	
Education Level:	
Employment Status:	
Income Source:	Other income including superannuation and investments

From here, you can quickly:

- [Add/Edit client contacts & details](#)
- [Add/Edit demographic data](#)
- [Specify administrative alerts](#)

2.3.1.1 Adding/Editing demographic data

Important client details can be entered via the hyperlinks on the Client Details tab of the Manage Clients screen:

Click the blue link for the field you wish to add detail to;

Donald Bradman

Client Details Service History All File Notes

Entity ID: 218

[Client Code:](#)

[Also Known As:](#)

[Gender:](#)

[Date of Birth:](#) (estimate D

The Enter Value window will open for you to add the new value of the field to;

Enter value

Also Known As

The Don

Save and Close Cancel

Click the Save and Close button and the new value will be added to the field.

Donald Bradman

Client Details Service History All File Notes

Entity ID: 218

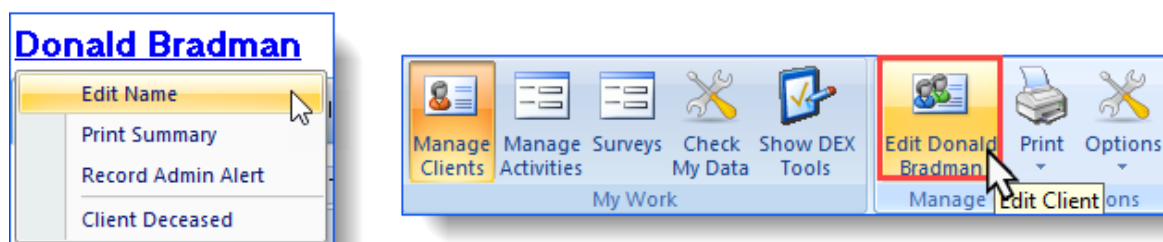
[Client Code:](#)

[Also Known As:](#) The Don

[Gender:](#)

[Date of Birth:](#) (estimate D

You can edit the client's name by clicking the client's name hyperlink itself and selecting Edit Name from the list, or by clicking the Edit Client button, which is available from the Manage Clients or the Manage Activities screens.

The screenshot shows a window titled 'Donald Bradman'. In the top-left corner, there is a 'Navigation' section with 'Close' and 'Undo Changes' buttons. The main area of the window is titled 'Donald Bradman' and contains several input fields. On the left side, there are fields for 'Entity ID: 218', 'Title: Mr' (with a dropdown arrow), 'Given Name: Donald', 'Middle Names: George', and 'Family Name: Bradman'. On the right side, there are fields for 'Also Known As: The Don', 'Gender:' (with a dropdown arrow), and 'Date of Birth:' (with an 'est' button). Below the 'Date of Birth' field, it says 'Age not known'.

Both these methods open the client record with the ability to edit the client's title, names, 'also known as' name, gender, and date of birth.

2.3.1.2 Adding/Editing client contacts & details

Be mindful of the difference between 'contacts' and 'contact details'!

Ivo 'contacts' are other people who may need to be contacted in relation to a person you are dealing with (e.g. next of kin, or a lawyer). 'Contact Details' refers to information such as phone numbers and addresses.

So, a client will probably have their own contact details, but they may also have contacts, who in turn each have their own, different, contact details. Ivo caters for both, and there is no limit to the number and variety of contacts and contact details that can be recorded for a client.

Ivo also allows you to record contacts and details for specific activities, rather than for the client record. For example, for Donald Bradman you may like to record his carer's details as well as his own contact information, and both these could logically be recorded against Donald's main record.

However, one of your activities for Donald may involve, for example, a fellow respite resident who is willing to corroborate Donald's story. This person could be entered as a contact specific to the activity, rather than as a contact you want to be available from Donald's entity record on an ongoing basis. Adding contacts to activities is described in the section called [activity-specific contacts](#) (but the process is exactly as described here).

To add a new contact to a client's record, click on the "Add New Contact" link in the Contacts and Details section of the Manage Clients screen.



The "Add new Contact for "[Client-name]" window will open to fill in the details. The "Contact Name" and "Relationship" fields are mandatory, as indicated by the red asterisk. The "Relationship Description" field is an optional text field which provides the ability to further describe the relationship, or to add something more abstract such as "Do Not Call".

As with any name field within Ivo, once you start typing the first letters of the name, a list of existing records will be shown where you will find if your contact's name already exists in the system.

Add new Contact for Donald Bradman

Contact name: *

☐ Create New Contact

Is the contact listed here?
If so, click the name to select.

Entity ID	Date of Birth	Entity Name	Also Known As	Client Code
221		Jesse James		

Of course, if your contact doesn't already exist then Ivo will allow you to create a new entity record as part of the process.

Add new Contact for Donald Bradman

Contact name:

Relationship:

New entity is a:

Relationship Description:

New Contact name

Given: Middle Names: Family:

Gender: Date of Birth:

Primary Address:

Primary Phone Number:

Primary Email Address:

Primary Web Address:

Editing contact details

To edit the contact details for both the client and the contact of the client, click the "Edit Contacts and Details" link.

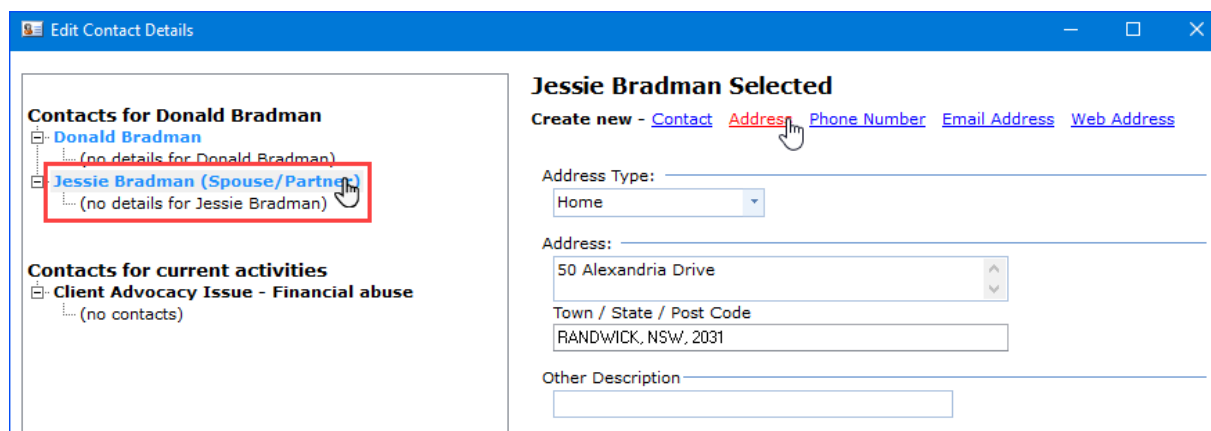


This will open the Edit Contact Details window -

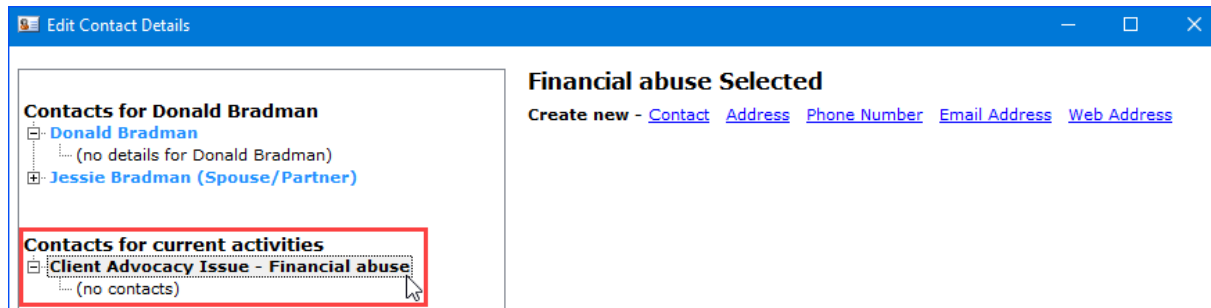


The Client and their Contacts are listed on the left-side of the screen. When this screen first opens, Ivo automatically selects your client's name, so you can add more details for your client immediately, which you do by clicking the various blue hyperlinks (eg. Address, Phone Number etc), filling in the fields for each, and then clicking the "Save" button.

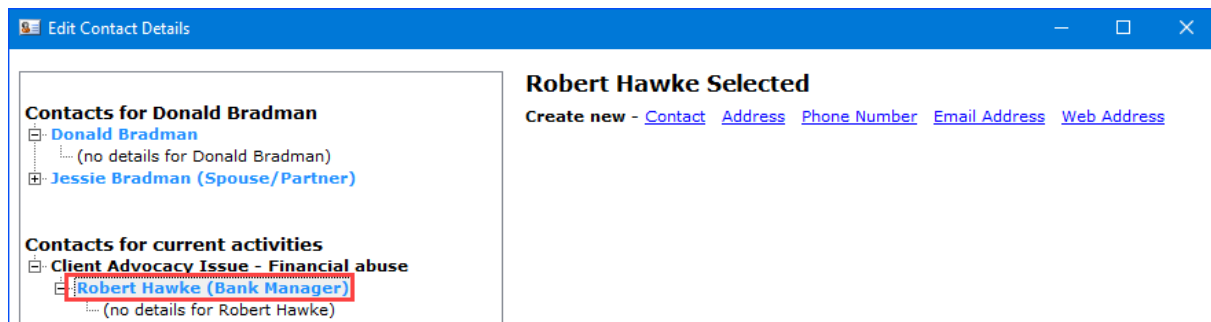
To add details to a *contact*, simply select the Contact's name from the panel on the left (note the name displayed at the top-centre of the window changes to the contact's name), and then use the blue hyperlinks to add the necessary item.



If you need to add a contact for a current activity, click the activity listed under "Contacts for Current Activities" to select it;



You can then add the contact details using the same processes as explained above.



You can also edit existing contact details by clicking on them in the left-side of the window. Lastly, for any entity you can add as many Addresses, Phone Numbers, Emails etc, as necessary.

When you are finished adding all the contact details you can, click on the Close button and you're returned to the main client record screen.

2.3.1.3 Specifying/Editing administrative alerts

Administrative or "Admin Alerts" are designed to give staff a prominent reminder of important information. For example, a client may have a particularly complex or sensitive guardianship arrangement, of which all staff dealing with the client should be made aware. Such a case is catered for by the Record Admin Alerts function, and provides the information up front:

Donald Bradman - Admin Alert!			
Client Details	Service History	All File Notes	Consent and Privacy Record - None Recorded

Admin Alerts can be recorded via the client name hyperlink, or from the Options drop down list on the Toolbar.

The left screenshot shows a context menu for 'Donald Bradman' with the following options: Edit Name, Print Summary, Record Admin Alert (highlighted), and Client Deceased. The right screenshot shows the 'Options' dropdown menu with the following options: Record Admin Alert (highlighted) and Client Deceased.

By using either method, the alert is entered via the Record a new Admin Alert screen.

Record a new Admin Alert for Donald Bradman

Employee: Meryl Streep

Date: 11-Jun-2020

Description: Don has Type 1 Diabetes

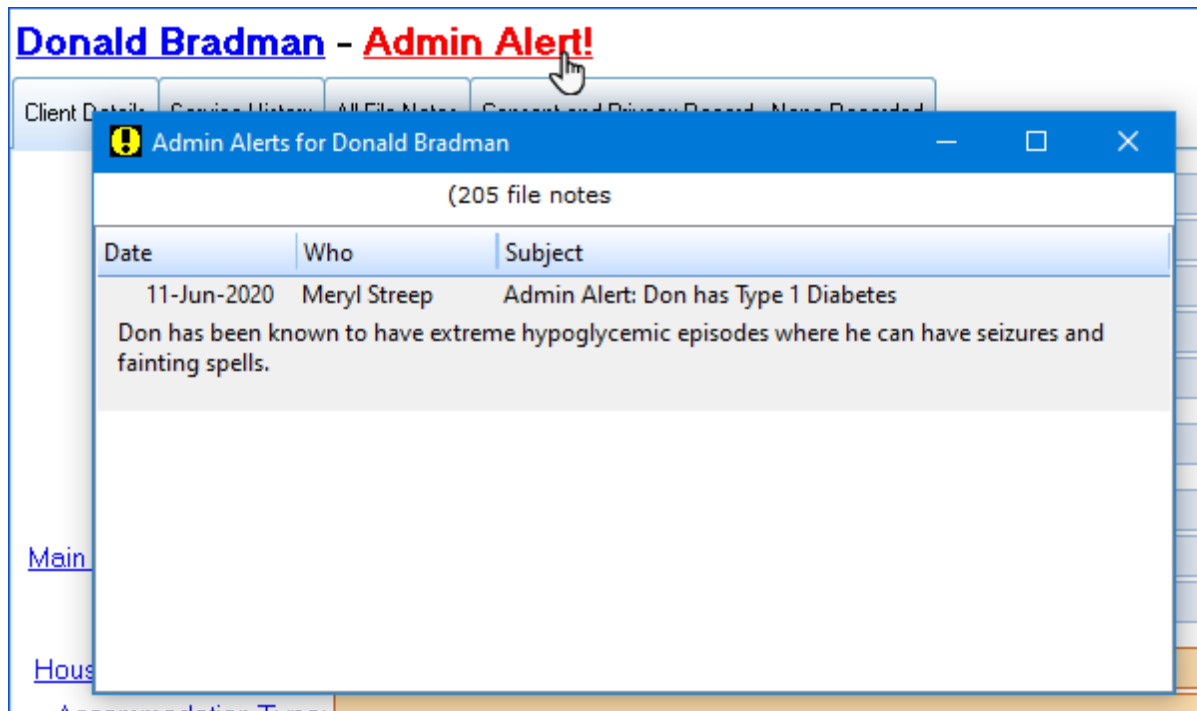
Notes Attachments

Don has been known to have extreme hypoglycemic episodes where he can have seizures and fainting spells.

It is recommended that staff are aware and prepared to give Don a insulin injection if required.

Save and Close Cancel

Any entity can have an Admin Alert, and you can record as many Admin Alerts as necessary for any entity. To view existing alerts, click on the red Admin Alert! link next to the client's name to open the Admin Alert window. To edit an admin alert, double click on the message in the Admin Alert window and it will open the editing window.



2.3.2 Service history tab

This area gives you a quick overview of your organisation's interaction with the selected client, but also allows you to dig deeper into the full detail if required.

The Service history tab is divided into two sections: the top lists the activities applicable to the selected client, while the bottom lists the issue details, file notes and statistics attached to the selected activity.

Status	Activity	Funding	Opened	Employee	Title
Status Group: Open					
Open	Systemic Issue	NDAP	10-Jun-2020	Meg Ryan	Limited opportunities for cognitive therapy
Open	Client Advocacy Issue	NDAP	09-Jun-2020	Meg Ryan	Seeking assistance with Centrelink entitlements
Open	Client Advocacy Issue	NDIS Appeals	05-Jun-2020	Meg Ryan	Limited opportunities for Cognitive Therapy
Open	Client Advocacy Issue	NDAP	05-Jun-2020	Tom Hanks	Transport to outpatient care facility
Open	Client Advocacy Issue	NDAP	28-May-2020	Meryl Streep	Home modifications - requiring assistance to organise ne
Open	Client Advocacy Issue	NDAP	27-May-2020	Meryl Streep	Advocacy support - Needing assistance to arrange cleanin
Open	Citizen Advocacy Relati...	Disability Roya...	25-May-2020	Meryl Streep	CVS relationship approved
Open	Client Advocacy Issue	NDAP	23-May-2020	Meryl Streep	Ongoing financial abuse issue - Requesting legal assistan
Open	Client Advocacy Issue	NDAP	07-Feb-2020	Meryl Streep	Financial abuse

Client Advocacy Issue: Transport to outpatient care facility

Status: Open ([click here to describe the current status of the activity](#))

Details | Consent/Privacy | File Notes | Stats

Activity ID: 229

Title: Transport to outpatient care facility

Funding Source: NDAP

Employee: Tom Hanks

Date Opened: 5-Jun-2020

[Add New Contact](#) [Edit Contacts and Details](#)

Contacts for Transport to outpatient care facility

(no contacts)

You can:

- [View/edit activities](#)
- Create [activity-specific contacts](#)
- [Update activity status](#) (e.g. close a record)
- [View/edit file notes](#)
- [Enter/edit statistics](#)
- [Print client summaries](#)

2.3.2.1 View/Edit activities

The top panel of the Service history tab lists the activities recorded for the selected client. By selecting a record in the list of activities, the bottom panel will be populated with data applicable to that activity.

Donald Bradman

Client Details **Service History** All File Notes Consent and Privacy Record - None Recorded

Status	Activity	Funding	Opened	Employee	Title
[-] Status Group: Open					
Open	Client Advocacy Is...	NDAP	28-May-2020	Meryl Streep	Home modifications -
Open	Client Advocacy Is...	NDAP	27-May-2020	Meryl Streep	Advocacy support - Ne
Open	Citizen Advocacy ...	Disability Roy...	25-May-2020	Meryl Streep	CVS relationship appro
Open	Client Advocacy Is...	NDAP	23-May-2020	Meryl Streep	Ongoing financial abu
Open	Client Advocacy Is...	NDAP	07-Feb-2020	Meryl Streep	Financial abuse

Client Advocacy Issue: Ongoing financial abuse issue - Requesting legal assistance

Status: Open ([click here to describe the current status of the activity](#))

Details Consent/Privacy File Notes Stats

Activity ID: 227

Title: Ongoing financial abuse issue - Requesting legal assistance

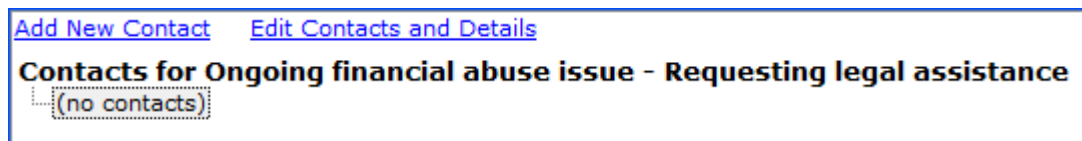
Funding Source: NDAP

From the Details tab you can use the hyperlinks to add or edit data.

2.3.2.2 Activity-specific contacts

As well as contacts that are applicable to a client, you may have contacts that are applicable to just one activity for a client. For example, if a client has a fellow resident approach you on their behalf as someone able to substantiate your client's claims, you may like to enter that person as a contact, against the activity rather than against the client.

This can be achieved in the Details tab of the Service History tab, using the hyperlinks provided for the issue:



The process for entering contacts against activities is exactly the same as described for [Adding/Editing client contacts & details](#).

2.3.2.3 Update activity status

The Status field on the Details tab of the Manage Clients screen, is a key piece of data. By changing an activity's status, you can keep track of what activities require further action.

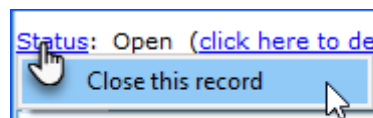
When you first create an activity record, its status is 'Open', which ensures the activity will be listed in your "Current activities" lists, and that the client in question will be listed in your "Current clients" lists.



You can also optionally add a more detailed description of the status using the "click here to describe the current status of the activity" hyperlink.

(click here to describe the current status of the activity)

To change the status of an activity, click on the Status hyperlink, then select Close this Record -



When you close an activity, you are effectively telling Ivo that you have done all that can be done for this activity, and Ivo will check that all necessary statistical reporting items have been completed for the activity. If not, you will need to complete all fields on the form in order to completely close the record.

All the mandatory details that must be filled in before the activity record can be closed are displayed in the yellow box. You will be able to complete all the missing fields in the Close Record window, complete all the statistics that are coloured red, as well as adding a file note to the record which can be done by clicking the 'create at least 1 file note' link in the yellow box.

(Note, the statistics that must be completed will not be displayed until the 'Date Activity Ceased' value is provided).

Close 'Limited opportunities for Cognitive Therapy' for Donald Bradman

Quick Help

You need to complete all fields on this form in order to completely close the record.

If you can't complete all details now, simply click the 'Save' button to save what you have done - you can come back to it later. If you click the 'Cancel' button, all changes made since opening this form will be discarded.

Gender: Male
 Date of Birth: 1-Jan-1920 **est**
100 years old (est)

Location: KENSINGTON PARK, SA, 5068
 Country: Australia
 Language: English
 Indigenous: Neither Aboriginal or Torres Strait Islander
 Date Activity Ceased: 8-Jun-2020 (must be **5-Jun-2020** or after)
 Outcomes Achieved:
 QA Survey Sent: Yes
 Date Sent: 9-Jun-2020

You need to:

- **create at least 1 file note** for this record before you can close it. You will need to close this form (use the 'Save and Close' button so that your current changes are saved) and go to the 'File Notes' tab.
- describe the outcomes achieved
- complete all statistics that are coloured **red** (you may need to scroll down the list)

Statistics to be completed for 'Limited opportunities for Cognitive Therapy'

- Advocacy**
 - Local Government Area**
 - ☐ Add Local Government Areas here
 - ☐ Kingborough
 - ☐ Channel
 - Primary Disability**
 - ☐ Acquired Brain Injury
 - ☐ Autism Spectrum Disorder
 - ☐ Developmental Delay
 - ☐ Intellectual Disability
 - ☐ Neurological Disability
 - ☐ Physical Disability
 - ☐ Psychiatric Disability
 - ☐ Sensory and Speech
 - ☐ Specific Learning / ADD
 - ☐ Other
 - Other Significant Disabilities**
 - ☐ Acquired Brain Injury
 - ☐ Autism Spectrum Disorder
 - ☐ Developmental Delay
 - ☐ Intellectual Disability
 - ☐ Neurological Disability
 - ☐ Physical Disability
 - ☐ Psychiatric Disability
 - ☐ Sensory and Speech
 - ☐ Specific Learning / ADD
 - ☐ Other
 - ☒ None Identified
 - Outcome**
 - ☐ Resolved
 - ☐ Partial Resolution
 - ☐ No Resolution

Items in red are mandatory

- Advocacy**
 - Local Government Area**
 - Primary Disability
 - Other Significant Disabilities
 - Outcome**
 - COVID-19 Related**
 - SARS Related**

Save and Close Cancel

If you are unable to complete all the mandatory reporting items for an activity you can click the 'Save and Close' button to save any changes you have made, however the activity record will remain 'open' until you return to this screen and complete all mandatory information. Once a record has been closed, it is moved from the list of open records to the list of closed records.

Donald Bradman				
Client Details Service History All File Notes Consent and Privacy Record - None Recorded				
Status	Activity	Funding	Opened	Employee
[-] Status Group: Open				
Open	Client Advocacy Is... NDAP		28-May-2020	Meryl Streep
Open	Citizen Advocacy ... Disability Royal C...		25-May-2020	Meryl Streep
Open	Client Advocacy Is... NDAP		23-May-2020	Meryl Streep
Open	Client Advocacy Is... NDAP		07-Feb-2020	Meryl Streep
[-] Status Group: Closed				
Closed	Client Advocacy Is... NDAP		27-May-2020	Meryl Streep

2.3.2.4 View/Edit file notes

To view file notes relating to a particular activity, click on the activity record and then the File Notes tab -

Donald Bradman

Client Details | Service History | All File Notes | Consent and Privacy Record - None Recorded

Status	Activity	Funding	Opened	Employee	Title
Status Group: Open					
Open	Client Advocacy Is...	NDAP	28-May-2020	Meryl Streep	Home modifications - requ
Open	Client Advocacy Is...	NDAP	23-May-2020	Meryl Streep	Ongoing financial abuse iss
Open	Client Advocacy Is...	NDAP	07-Feb-2020	Meryl Streep	Financial abuse
Open	Citizen Advocacy R...	Disability ...	25-May-2020	Meryl Streep	CVS relationship approved
Status Group: Closed					
Closed	Client Advocacy Is...	NDAP	27-May-2020	Meryl Streep	Advocacy support - Needin

Client Advocacy Issue: Financial abuse

Status: Open ([click here to describe the current status of the activity](#))

Details | Consent/Privacy | **File Notes** | Stats

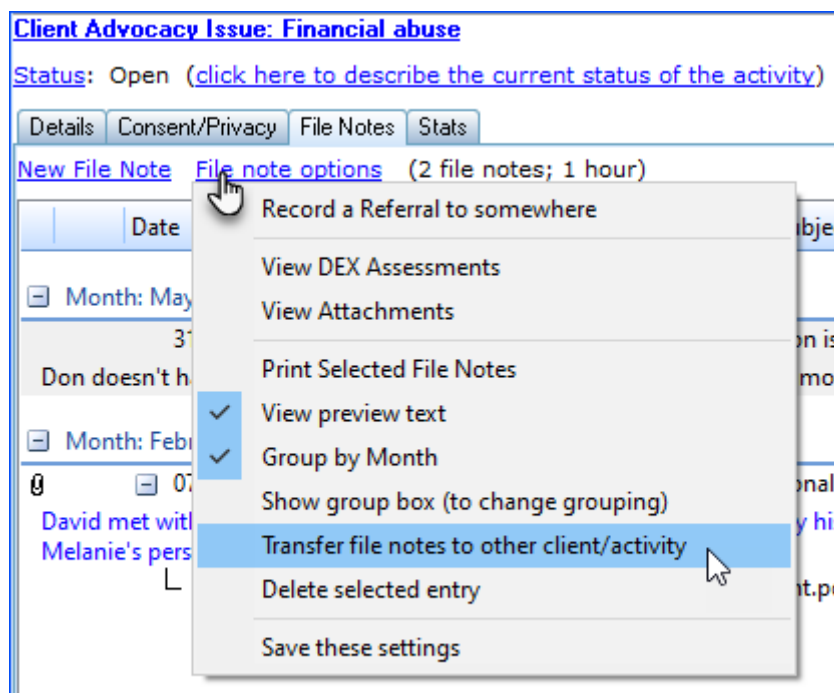
[New File Note](#) | [File note options](#) (2 file notes; 1 hour)

Date	Duration	Who	Subject
Month: May 2020			
31-May-2020 01:13 PM	0.75	Meryl Streep	Don is requiring a new ramp for ac Don doesn't have adequate access to his house currently and requires a mobility access ramp to both his
Month: February 2020			
07-Feb-2020 12:03 PM	0.25	Meryl Streep	Donald's son David has provided a David met with me to discuss what he felt were obvious actions taken by his sister, Melanie to exploit the Melanie's personal account. DonaldBradman_Ban... DonaldBradman_BankStatement.pdf

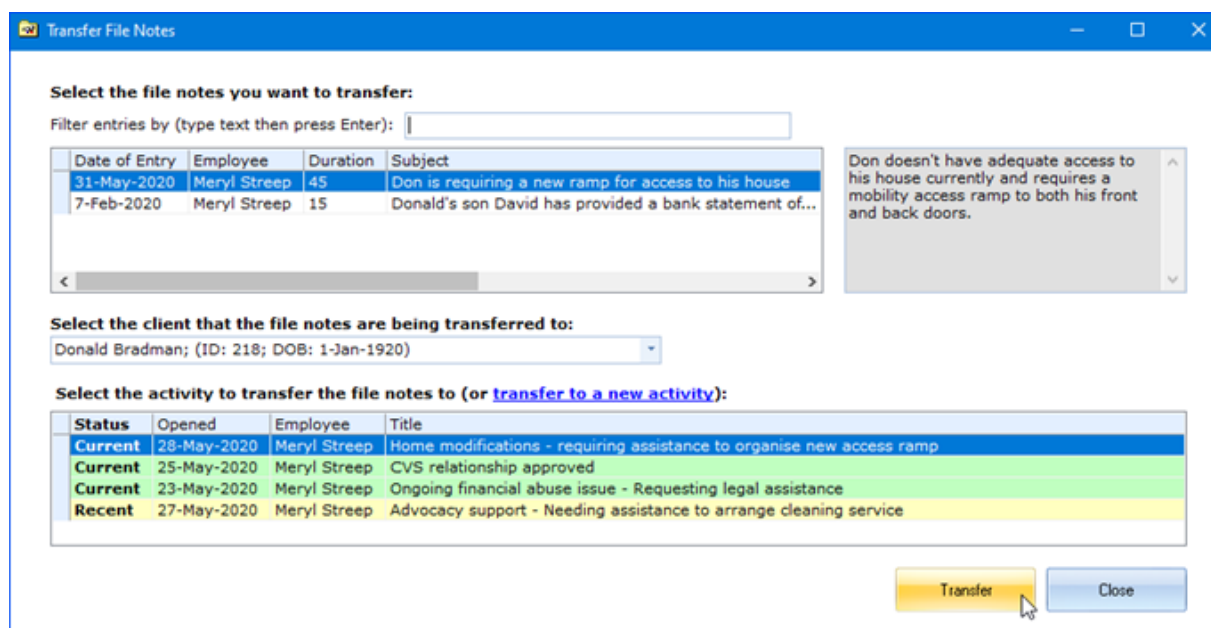
In this example, the selected issue regarding "Financial abuse", has two file notes attached. You may notice that the first file note is about requiring a residential access ramp. It seems we've mistakenly attached this file note to the wrong activity.

There are two ways of correcting this mistake (and of making other such changes to file notes).

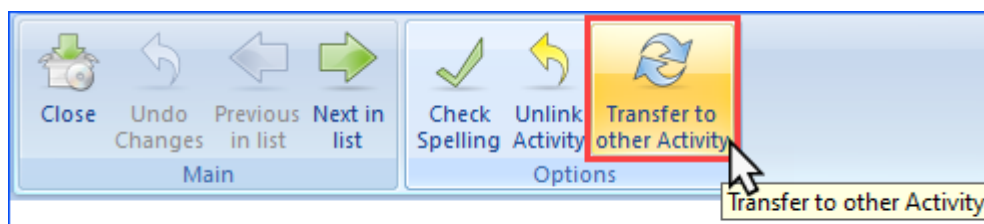
The first is to use the File note options hyperlink:



In the Transfer File Notes window, select the file note(s) you want to transfer. The client that the file note currently belongs to will be automatically selected, but this can be changed if necessary. Click on the activity to which you want it transferred (note that, should it be necessary, there is also the option - via the hyperlink - to transfer the file note to a new activity).



The second method is to double-click the file note record you want to transfer, and then in the edit file note window, use the 'Transfer to other activity' button:



You can also view all file notes across all activities in order to gain an overall picture of client interaction. This is achieved in the All File Notes tab;

Donald Bradman

Client Details

Service History

All File Notes

Consent and Privacy Record - None Recorded

New File Note

File note options

(7 file notes; 4.92 hours)

	Date	Duration	Who	Activity	Subject
	05-Jun-2020 10:00 ...	1	Tom Hanks	Transportation to outpatient c...	Don requires assistance with arrang
	09-Jun-2020 11:00 ...	0.83	Meg Ryan	Seeking assistance with Centr...	Seeking assistance with Centrelink
	31-May-2020 01:1...	0.75	Meryl Streep	Financial abuse	Don is requiring a new ramp for acc
	26-May-2020 02:0...	0.58	Meryl Streep	Financial abuse	Don is unable to afford groceries
8	07-Feb-2020 12:03...	0.25	Meryl Streep	Financial abuse	Donald's son David has provided a
1	25-May-2020 10:0...	1	Meryl Streep	CVS relationship approved	Meeting about advocacy support
	23-May-2020 09:0...	0.5	Meryl Streep	Advocacy support - Needing ...	Don is needing to have a weekly cle

There are also various options to provide different levels of detail in the file note lists. The File Note Options hyperlink handles a variety of extra tasks. The View preview text option toggles the file note view to include or hide the first few lines of the file note;

Donald Bradman

Client Details Service History All File Notes Consent and Privacy Record - No

New File Note **File note options** (4 file notes; 2.5 hours)

- Record a Referral to somewhere
- View DEX Assessments
- View Attachments
- Print Selected File Notes
- View preview text**
- Group by Month
- ☒ Show group box (to change grouping)
- Transfer file notes to other client/activity
- Delete selected entry
- Save these settings

Select the 'View preview text' option to display more file note detail.

Let the cursor rest over text to activate the full text 'tooltip'.

Date	Duration	Who	Activity	Subject
05-Jun-2020 10:00 ... 1		Tom Hanks	Transportation to outp...	Don requires assistance with
Spoke with Don about his requirements for transport service to the outpatient care facility he will need to attend twice a week for 6 requiring transport to rehabilitation facility once he begins treatment for post op rehab.				
09-Jun-2020 11:00 ... 0.83		Meg Ryan	Seeking assistance with Centrelink entitlements	Cent
Spoke to Don about what he needs to do before he can talk to Centrelink about pensioner payments. He will need to arrange birth certificate from last employer.				
31-May-2020 01:1... 0.75		Meryl Streep	Financial abuse	Don is requiring a new ramp
Don doesn't have adequate access to his house currently and requires a mobility access ramp to both his front and back doors.				

When looking through file notes there is a useful "Text Filter" tool to make it easier to find what you're looking for. Type the text or word you are searching for in the Text Filter field and Ivo will start searching through the file notes based on the letters typed in the field.

Client Advocacy Issue: Financial abuse

Status: Open (click here to describe the current status of the activity)

Details Consent/Privacy File Notes Stats

New File Note **File note options** (2 file notes; 0.83 hours --- results are filtered -

Text filter: Go

Date	Duration	Who	Subject
------	----------	-----	---------

2.3.2.5 Enter/Edit statistics

It's unlikely that your organisation will continue to receive funding if your funding bodies can't ascertain that the funds that they're providing you with are making a positive difference. 'Evidence-based planning' requires evidence, and if you can't provide it, you run the very real risk of being under-funded or de-funded.

So, unfortunately, you have to do statistics. Yes, really. But don't worry, Ivo makes it as easy as possible.

Note that stats are completely configurable on an organisation-by-organisation basis. So while organisations which are funded by the same bodies will have lots of similarities between their statistical items, an organisation is also able to customise their stats to capture information that is meaningful and important to that organisation (rather than just the funding bodies). So, in short, what you see here may not be what you see on your own stats screen.

Click on the Stats tab -

Client Advocacy Issue: [Advocacy Issue Title]

Status: Open ([click here to describe the current status of the activity](#))

Details Consent/Privacy File Notes **Stats**

Statistics to be completed for '[Advocacy Issue Title]'

☐ NDAP

- ☐ Local Government Area
 - ☐ Metropolitan Adelaide
 - ☐ Eyre Peninsula
 - ☐ Central Region
 - ☐ Southern and Hills Region
 - ☐ Murray Mallee
 - ☐ South East
 - ☐ Outback
- ☐ Cultural Background
 - ☐ Aboriginal and/or Torres Strait Islander
 - ☐ Culturally and Linguistically Diverse
 - ☐ English Speaking Background
 - ☐ Other / Undisclosed
- ☐ Primary Disability
 - ☐ Acquired Brain Injury
 - ☐ Autism Spectrum Disorder
 - ☐ Developmental Delay
 - ☐ Intellectual Disability

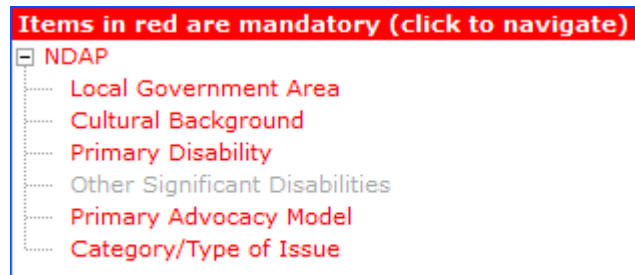
The plus symbol indicates there are sub-items that need to be addressed, if this option is selected

Option buttons - only one group can be selected at any one time

Checkbox group allows multiple selections, must select at least one

To complete the statistics, it's just a case of running down the list and choosing the appropriate response. Once you have completed one of the questions in the view, you can use your mouse's scroll wheel (if you have one) to scroll down the list of stats.

On the right side of the stats screen is the list of mandatory items that must be answered -



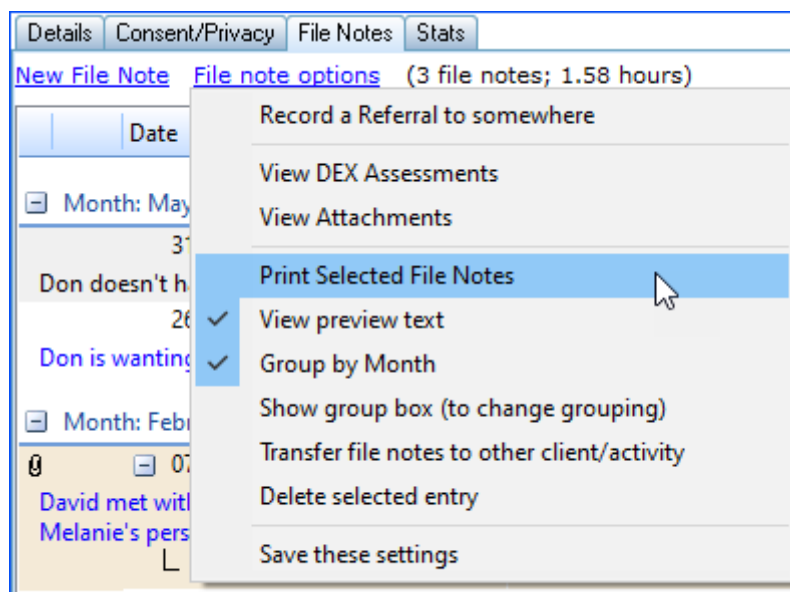
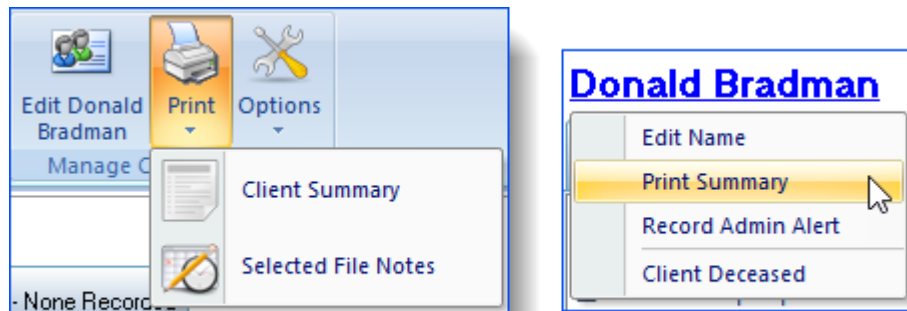
You can click on these to navigate to the particular item. Lastly, as you answer each stat item it will be greyed out in this list.

If you have questions about the definitions of the statistical items, these are best answered by your manager to ensure an organisation-wide approach to consistent reporting.

It is of course likely that you will only be able to answer all the statistics questions when the activity is considered ready to be closed, so you can partially complete statistics and they will be retained in that state for completion at a later date - these are considered 'records with incomplete data' and will be displayed on the [Check Data](#) screen as such.

2.3.2.6 Printing client summaries

It's great having all your data in one central repository. But sometimes you still need a hard copy! From within the Manage Clients screen it's a simple process to print a client summary or file notes.



Note that you can only print file notes when you have actually selected some from the File Notes tab.

Also see the section on [The Dashboard Screen](#) for information about printing a list of all your current clients or activities.

2.4 File Notes

Most activities involve more than what gets recorded when the activity is first created. You usually need to enter extra data at a later date, such as what you've told a client, what they've asked of you, a note of what services were delivered during Education Sessions, etc.

Once you're familiar with creating file notes via the client record, check out [the calendar](#) - which provides a date and time oriented method of creating file notes.

2.4.1 Creating a new file note for an existing Activity

You can create a new file note from either the 'Service History' or 'All File Notes' tab of the Manage Clients screen. Select an existing activity from the list of activities, then select the File note's tab and click on the New File Note hyperlink.

The screenshot shows the 'All File Notes' tab in the Manage Clients screen. The 'Status Group: Open' is selected. The 'Systemic Issue: Limited opportunities for' is displayed. The 'Status: Open' is shown with a link to describe the status. The 'Details' tab is selected, and the 'New File Note' link is highlighted with a red box. The 'File note options' link and '(0 file)' are also visible.

The New File Note window will open.

The screenshot shows the 'New file note for Donald Bradman - NDIS eligibility criteria' window. The 'File Note Details' section includes the following fields:

- Linked Activity: Donald Bradman - NDIS eligibility criteria
- Employee: Meg Ryan
- Date: * (Date must be 27-Jul-2020 or after (which is the date the record was opened))
- Start Time: *
- Duration: * hours * minutes
- DEX Service Type: *
- Subject: *

The 'Notes' tab is selected, and the 'Attachments' tab is also visible. The 'Notes' field is empty. At the bottom, there are buttons for 'Check Spelling', 'Save and Close', and 'Cancel'.

If you add a file note via the All File Notes tab, you will need to tell Ivo which activity the file note belongs to. This is done in the bottom half of the file note window.

New File Note

File Note Details:

Employee: Meg Ryan

Date: *

Start Time: *

Duration: * hours * minutes

Subject: *

Notes Attachments

Select the activity for Donald Bradman that this file note applies to -

Choose existing activity or Create new activity

Status	Funding	Activity	Employee	Opened	Title
Current	NDAP	Client Advocacy Issue	Meryl Streep	07-Feb-2020	Financial abuse
Current	NDAP	Client Advocacy Issue	Meryl Streep	23-May-2020	Ongoing financial abuse issue - Requesting legal assistance
Current	NDAP	Client Advocacy Issue	Meryl Streep	27-May-2020	Advocacy support - Needing assistance to arrange cleaning ser...
Current	NDAP	Client Advocacy Issue	Meryl Streep	28-May-2020	Home modifications - requiring assistance to organise new acc...
Current	NDIS Appeals	Client Advocacy Issue	Meg Ryan	05-Jun-2020	Limited opportunities for Cognitive Therapy
Current	NDAP	Client Advocacy Issue	Tom Hanks	05-Jun-2020	Transport to outpatient care facility
Current	NDAP	Client Advocacy Issue	Meg Ryan	09-Jun-2020	Seeking assistance with Centrelink entitlements
Current	NDAP	Systemic Issue	Meg Ryan	10-Jun-2020	Limited opportunities for cognitive therapy
Current	NDIS Appeals	Client Advocacy Issue	Meg Ryan	23-Jul-2020	Blah
Current	NDAP	Client Advocacy Issue	Meg Ryan	24-Jul-2020	DRC Submission
Current	NDIS Appeals	Client Advocacy Issue	Meg Ryan	27-Jul-2020	NDIS eligibility criteria

☒ This file note relates to a specific client and activity

☒ Check Spelling

Save and Close Cancel

You can attach electronic files to the file note in the 'Attachments' tab.

Notes Attachments

[Attach files](#)

File Description

Open

Look in: Client Documents

Name

PDF DonaldBradman_BankStatement

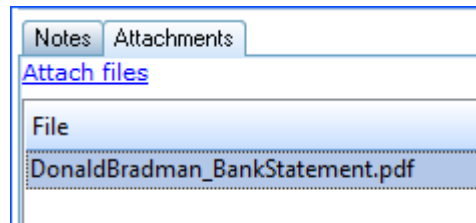
File name: DonaldBradman_BankStatement

Files of type:

☐ Open as read-only

Open Cancel

Attached files are shown on the "Attachments" tab:



2.5 The Calendar

The Calendar is simply another way of creating and viewing file notes. There is no difference between a file note created via the Manage Clients screen and a file note created in the Calendar - once again, the way you create and view these records is purely down to personal preference.

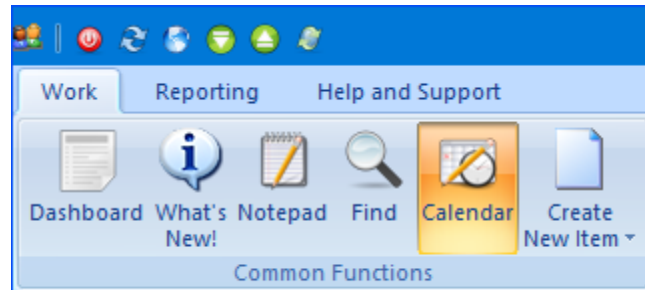
If you link a file note in the Calendar to a particular Advocacy record, the file note will also be visible from the Manage Clients screen (which provides a neat view of all the file notes relating to a particular entity or activity record, whereas the Calendar shows all File notes in a time period).

Similarly, file notes created elsewhere are viewable and editable from the Calendar.

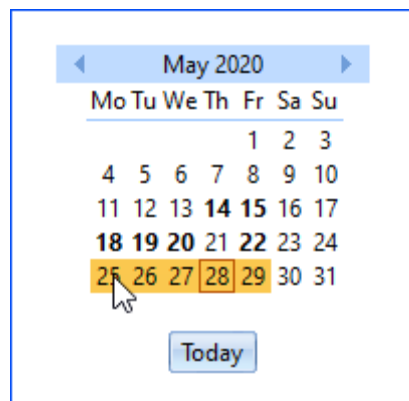
This section describes how to create file notes in the Calendar.

2.5.1 Creating file notes from the Calendar

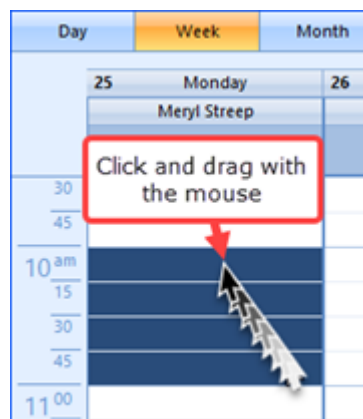
Click the Calendar button on the toolbar to open the screen.



If you wanted to make a one hour meeting record from 10am to 11am on the morning of Wednesday, May 25th, you would locate that date in the quick calendar view:



Click and drag the mouse to highlight the timeslot for which you want to create an entry, and



then simply start typing the subject of the record. Ivo will capture your input as a new file note for that timeslot.

The New file note window appears - note that the Date, Time and Duration fields are already completed according to the selection you made in the Calendar.

The top half of the screen is devoted to recording information about the file note itself, while the bottom half of the screen is devoted to linking the file note to an activity record.

New File Note

File Note Details:

Employee: Meg Ryan

Date: 19-Oct-2020

Start Time: 10:00 AM

Duration: 0 hours 30 minutes

Subject: Phone call from....

Notes Attachments

Search for any client here: [Create New](#) [Choose existing activity](#) or [Create new activity](#)

or select a client of:

Meg Ryan

Other records

My Current Clients

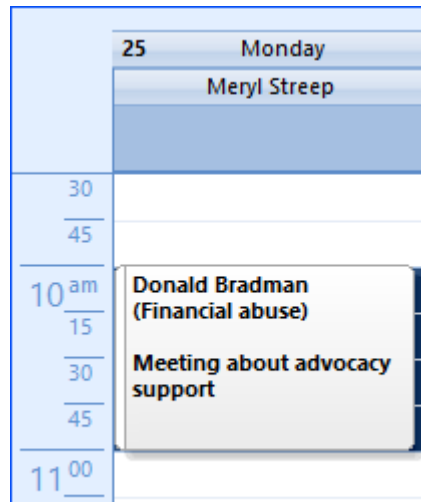
- 1024
- Antonio Banderas
- Barbara Streisand
- Brad Pitt
- Cyndi Lauper
- Donald Bradman

☒ This file note relates to a specific client and activity

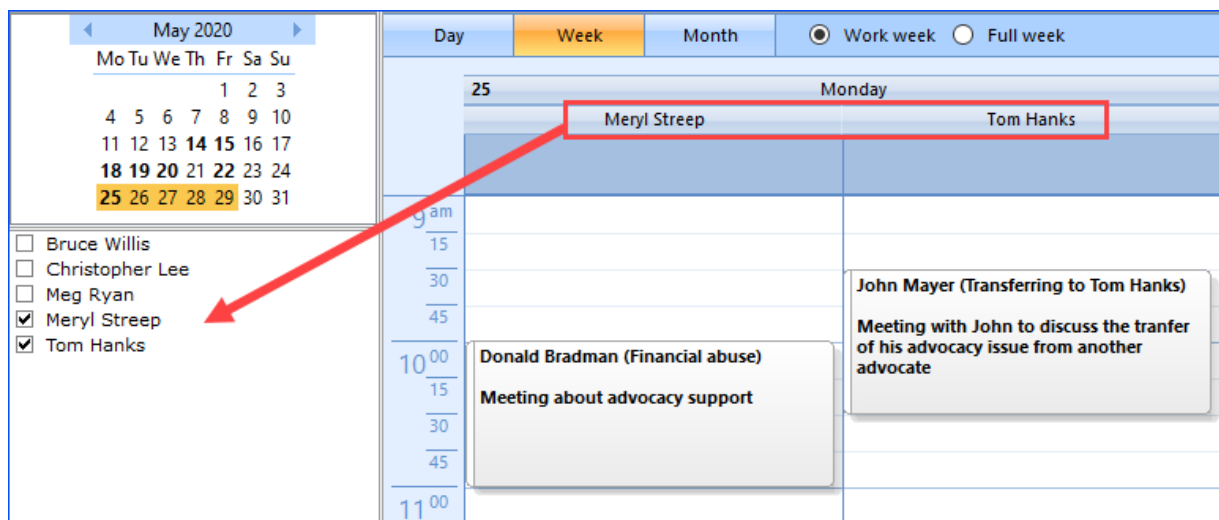
[Check Spelling](#) [Save and Close](#) [Cancel](#)

Note that the checkbox at the very bottom of the screen, as seen above in the red box, determines whether the file note must be attached to an activity record or not. If this checkbox is cleared, the lower half of the screen is removed from view allowing you to add an "unlinked" entry to your calendar. This could be used to add your lunch hour, or a non-work related event, for example.

Once you save the new file note, it appears in the calendar view. Note that the subject of the record, together with the issue to which it has been linked, appears in the view, and other staff can view this information.



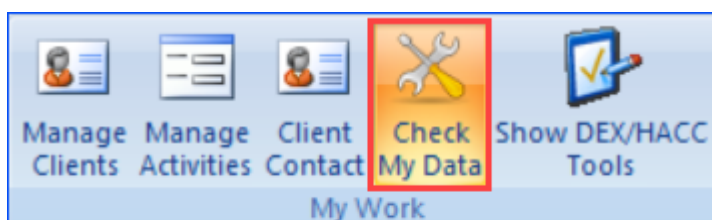
You can plan around the activities of other advocates by turning on their calendar view in addition to your own:



To edit Calendar records, just double click on them! (Please note that you can't edit the file notes of other staff).

2.6 Check Data

The Check My Data function automatically runs at the beginning of each month, however you can run it manually whenever you like.



Typically you will leave all the settings at their defaults, and click the Check Data button to run it.

Check Data - Settings	Check Data - Results	Update Workload Scores		
Start Date: 1-Jan-2020	Activity: All			
End Date: 1-Jul-2020	Funding: All			
<div>Check Data</div>				
What To Check: (Select All / None) <table border="1" style="width: 100%;"> <tr> <td style="vertical-align: top;"> <ul style="list-style-type: none"> <input checked="" type="checkbox"/> Missing Date of Birth <input checked="" type="checkbox"/> Missing Gender <input checked="" type="checkbox"/> Missing Region <input checked="" type="checkbox"/> Missing Location <input checked="" type="checkbox"/> Missing Country, Language, Indigenous Status <input checked="" type="checkbox"/> File notes before date opened <input checked="" type="checkbox"/> File notes after date closed <input checked="" type="checkbox"/> No file notes for more than 30 days <input checked="" type="checkbox"/> No file note in period <input checked="" type="checkbox"/> Education - Date of Session <input checked="" type="checkbox"/> Record closed, but Date Closed not specified <input checked="" type="checkbox"/> Incomplete Statistics <input checked="" type="checkbox"/> Missing Funding Source <input checked="" type="checkbox"/> NDAP Primary Disability Stats </td> <td style="vertical-align: top; background-color: #e6f2ff;"> Tick the items that you want to check Untick the items that you don't want to check (this might make the function run faster). </td> </tr> </table>			<ul style="list-style-type: none"> <input checked="" type="checkbox"/> Missing Date of Birth <input checked="" type="checkbox"/> Missing Gender <input checked="" type="checkbox"/> Missing Region <input checked="" type="checkbox"/> Missing Location <input checked="" type="checkbox"/> Missing Country, Language, Indigenous Status <input checked="" type="checkbox"/> File notes before date opened <input checked="" type="checkbox"/> File notes after date closed <input checked="" type="checkbox"/> No file notes for more than 30 days <input checked="" type="checkbox"/> No file note in period <input checked="" type="checkbox"/> Education - Date of Session <input checked="" type="checkbox"/> Record closed, but Date Closed not specified <input checked="" type="checkbox"/> Incomplete Statistics <input checked="" type="checkbox"/> Missing Funding Source <input checked="" type="checkbox"/> NDAP Primary Disability Stats 	Tick the items that you want to check Untick the items that you don't want to check (this might make the function run faster).
<ul style="list-style-type: none"> <input checked="" type="checkbox"/> Missing Date of Birth <input checked="" type="checkbox"/> Missing Gender <input checked="" type="checkbox"/> Missing Region <input checked="" type="checkbox"/> Missing Location <input checked="" type="checkbox"/> Missing Country, Language, Indigenous Status <input checked="" type="checkbox"/> File notes before date opened <input checked="" type="checkbox"/> File notes after date closed <input checked="" type="checkbox"/> No file notes for more than 30 days <input checked="" type="checkbox"/> No file note in period <input checked="" type="checkbox"/> Education - Date of Session <input checked="" type="checkbox"/> Record closed, but Date Closed not specified <input checked="" type="checkbox"/> Incomplete Statistics <input checked="" type="checkbox"/> Missing Funding Source <input checked="" type="checkbox"/> NDAP Primary Disability Stats 	Tick the items that you want to check Untick the items that you don't want to check (this might make the function run faster).			

Ivo checks all your data and then switches to the Results tab. You can click on the little plus symbol to the left of the Activity result, then click a client record to display it on the right side of the screen. The yellow box at the bottom left corner tells you everything Ivo has found in relation to this record and you can do anything it highlights, from this screen.

The screenshot displays the Ivo software interface. At the top, there are three tabs: "Check Data - Settings", "Check Data - Results", and "Update Workload Scores". The "Check Data - Results" tab is active.

On the left side, there is a tree view under "Client Advocacy Issue". The selected item is "Donald Bradman - Home modifications - requiring assistance to organise new access ramp". Below this, there are other categories like "General Activity", "Waiting List Record", and "Inquiry".

The main area on the right shows the details for "Donald Bradman - Admin Alert!". The status is "Open". Below this, there are tabs for "Client Details", "Service Details", "File Notes", and "Stats". The "Client Details" tab is active.

The "Client Details" tab shows the following information:

- Entity ID: 218
- Client Code: [blank]
- Also Known As: [blank]
- Gender: Male
- Date of Birth: 1-Jan-1920 (100 years old; estimated)
- Location: KENSINGTON PARK, SA, 5068
- Cultural Background: Aboriginal or Torres Strait Islander
- Country of Birth: Australia
- Main Language at Home: English
- Indigenous Status: Neither Aboriginal or Torres Strait Islander
- Household Composition: [blank]
- Accommodation Type: [blank]
- DVA Card Status: [blank]
- Homeless Indicator: [blank]
- NDIS Eligibility: [blank]
- Client Synopsis: [blank]

At the bottom left, there is a yellow box with the following text:

Donald Bradman - Home modifications - requiring assistance to organise new access ramp

Status: Open
Date of Last Action: 9-Jul-2020

You need to:

- make sure the date the record opened is **before** the first file note
- there has not been a file note added to this record for **3 month(s)**! Add a file note or close the record.
- complete the statistics

10₂₄

software for people who help people

Support

3 Support

This section takes you through the process of obtaining support for Ivo, for instance when you need to report an issue such as an error, request assistance for how to use a function or learn about more advanced features such as reporting or queries.

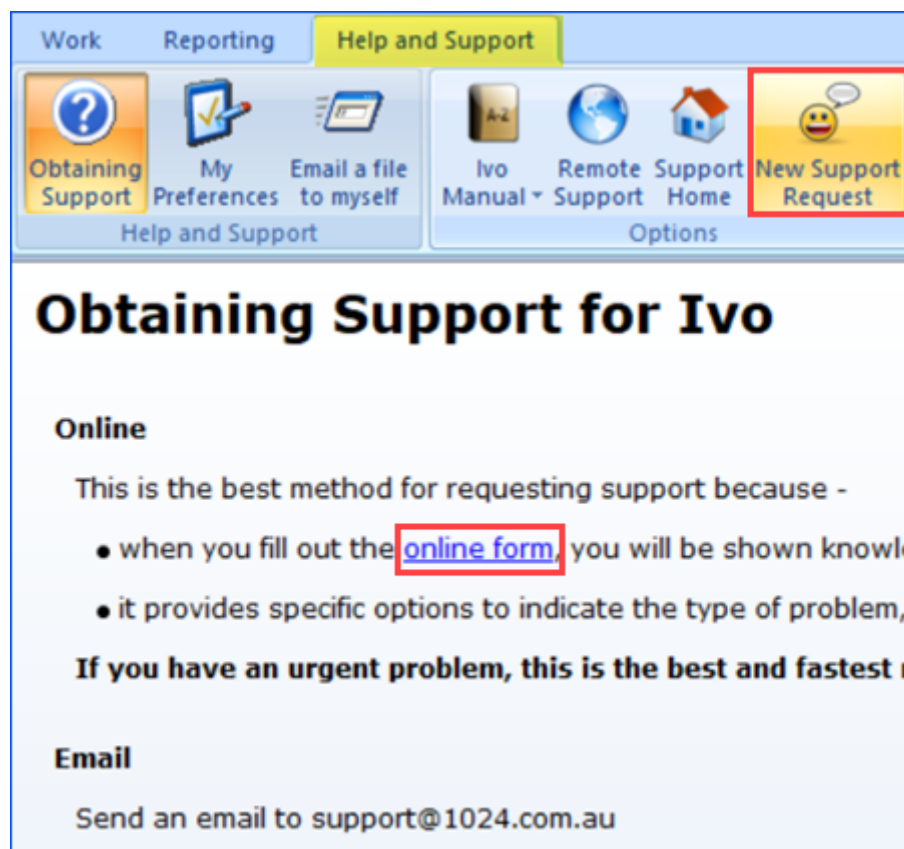
3.1 DIY support

If you're a DIY kind of person, you may be able to solve your own query just by referring to the [online Helpdesk](#).

3.2 How to request support

If you need to request support for Ivo, please note the following general guidelines:

1. For larger organisations (and sometimes for smaller ones too) we recommend that one person per organisation is the designated "go to" person for Ivo issues. Please be sure to make an effort to identify and contact that person before contacting 1024 direct - this saves everyone time.
2. Please make contact for support through the following avenues:
 - Submitting a ticket which can be accessed via the 'Online Form' link or 'New Support Request' button in the Help and Support tab in Ivo
 - Email: support@1024.com.au - By sending an email to 1024 support, you will be sent an auto-generated email that your request has been submitted and someone will be in contact with you shortly.
 - Phone: 1300 92 40 10 - By phoning us, you will be answered by a support person who will assist you with your request.



3. Please provide as much detail as possible!

"Please help, Ivo isn't working" tells us nothing about the nature of your problem and makes it impossible to prioritise meaningfully. It makes the resolution much easier if you can tell us things like:

- In what area of Ivo were you working?
- What exactly were you doing? E.g. "I clicked on the 'Gender' drop down arrow and picked 'female', then clicked 'Save and Close'"
- What happened? If you saw an error message, what was that message? Please see the information below on taking a 'screen print'.
- Have you ever seen this problem before or has it only just started happening?
- Has anything else on your computer or network changed, to your knowledge?
- In addition to these kinds of questions, the designated Ivo support contact in your organisation may also have some 'self-help' questions to run through.

Taking a screen print

Most keyboards on PCs have a 'Print Screen' button. It's usually (but not always) located in the top row of keys, and the label is sometimes abbreviated to something like "PrtScr". It may even be incorporated in one of your function keys (e.g. a key labelled F12). To take a Screen Print, press the Control key (CTRL) and Print Screen key (PRTSCR) at the same time, this will capture the screen and copy it to the Clipboard. To access the Clipboard, press the Windows logo key + "V" key together and the clipboard will show up on the bottom right corner of your screen.

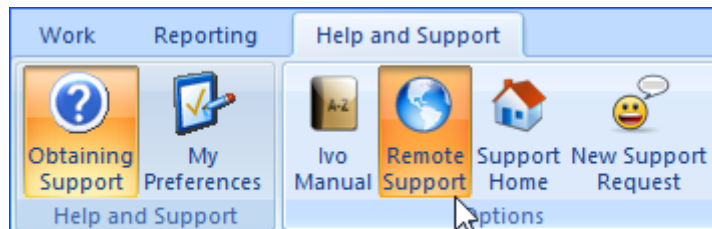
It's worth finding your Print Screen key, as it can be very useful. Tapping it results in a "screenshot" - a capture of the entire screen, rather like a photo of everything on your screen at the time you used the Print Screen key. The capture is conveniently and automatically stored on the clipboard, which you can then use to paste into an email or a document (see the section on [clipboard functions](#) for more information on using the clipboard).

Another useful screen capturing tool is Snipping Tool, a built-in Windows desktop app that can be located in the Windows menu.

So, if you receive an error message in Ivo, or if something just doesn't look right, you can very easily capture what you see by using the Print Screen keyboard button. It makes reporting the error easier for you, and gives us vital information as well.

3.3 Remote Support

Ivo features an inbuilt remote support tool which allows 1024 staff to access your computer remotely to troubleshoot problems or provide demonstrations or training. Note, we are not able to access your computer without your knowledge.



If you've never seen remote support in action before, you may find the experience a little unsettling as you sit back and watch as an unseen person moves your mouse pointer around the screen. However, this is a powerful tool, and if it's ever needed we will talk you through the process.

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