Appendix 1: CRM Flowchart:

This flowchart is to help you navigate through the CRM when you are logging interactions. It will also help you to remember what questions you need to ask the enquirers to be able to fully complete the record. All interactions with enquirers need to be entered onto the CRM using the **Interactions** menu. Upon opening the CRM, you should log in at the Interactions menu. If not please bookmark the following link and use it to access the CRM: CRM - Interactions
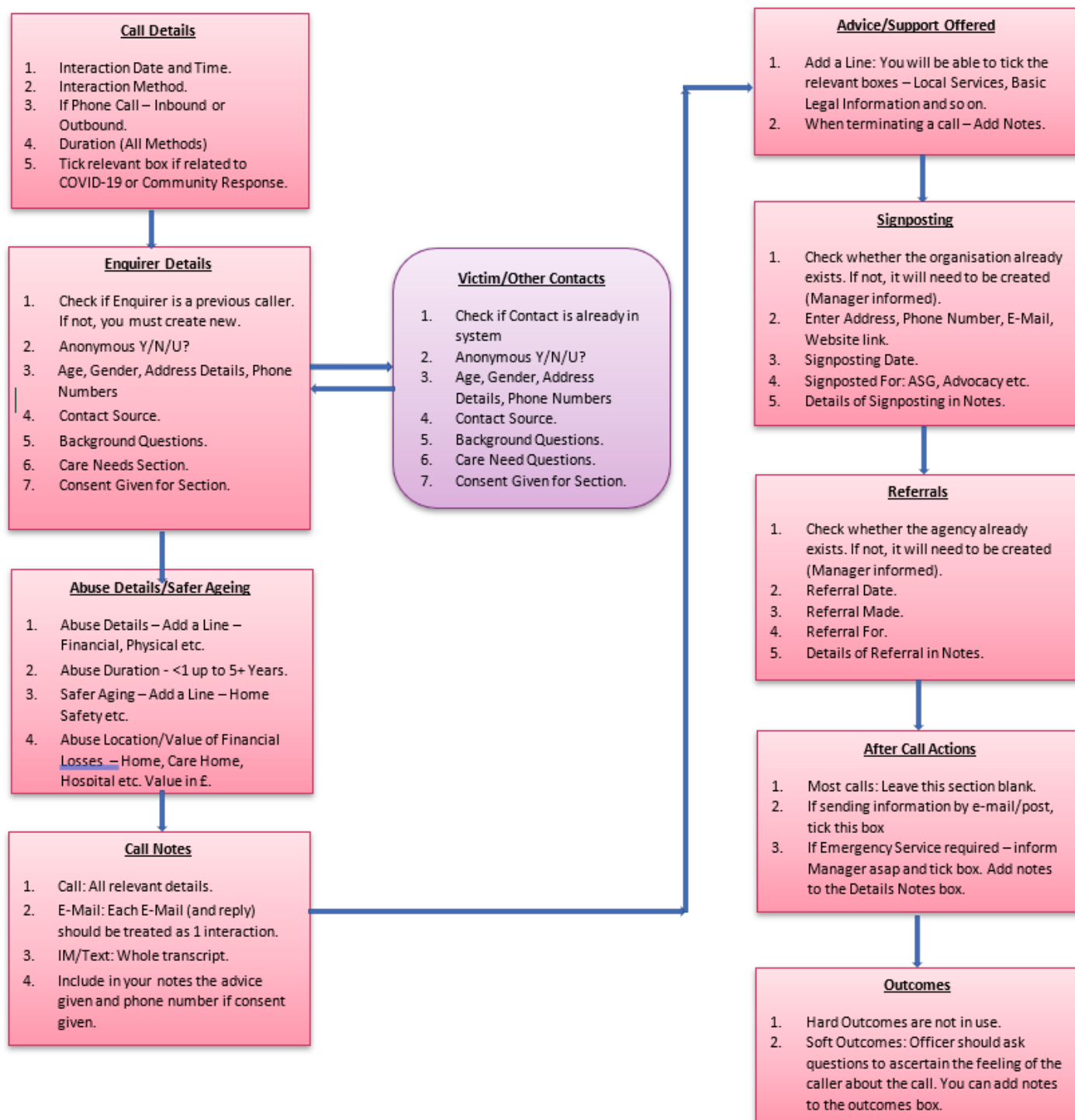
Call Details

1. Interaction Date and Time.
2. Interaction Method.
3. If Phone Call – Inbound or Outbound.
4. Duration (All Methods)
5. Tick relevant box if related to COVID-19 or Community Response.

Enquirer Details

1. Check if Enquirer is a previous caller. If not, you must create new.
2. Anonymous Y/N/U?
3. Age, Gender, Address Details, Phone Numbers
4. Contact Source.
5. Background Questions.
6. Care Needs Section.
7. Consent Given for Section.

Victim/Other Contacts

1. Check if Contact is already in system
2. Anonymous Y/N/U?
3. Age, Gender, Address Details, Phone Numbers
4. Contact Source.
5. Background Questions.
6. Care Need Questions.
7. Consent Given for Section.

Abuse Details/Safer Ageing

1. Abuse Details – Add a Line – Financial, Physical etc.
2. Abuse Duration - <1 up to 5+ Years.
3. Safer Aging – Add a Line – Home Safety etc.
4. Abuse Location/Value of Financial Losses – Home, Care Home, Hospital etc. Value in £.

Call Notes

1. Call: All relevant details.
2. E-Mail: Each E-Mail (and reply) should be treated as 1 interaction.
3. IM/Text: Whole transcript.
4. Include in your notes the advice given and phone number if consent given.

Advice/Support Offered

1. Add a Line: You will be able to tick the relevant boxes – Local Services, Basic Legal Information and so on.
2. When terminating a call – Add Notes.

Signposting

1. Check whether the organisation already exists. If not, it will need to be created (Manager informed).
2. Enter Address, Phone Number, E-Mail, Website link.
3. Signposting Date.
4. Signposted For: ASG, Advocacy etc.
5. Details of Signposting in Notes.

Referrals

1. Check whether the agency already exists. If not, it will need to be created (Manager informed).
2. Referral Date.
3. Referral Made.
4. Referral For.
5. Details of Referral in Notes.

After Call Actions

1. Most calls: Leave this section blank.
2. If sending information by e-mail/post, tick this box
3. If Emergency Service required – inform Manager asap and tick box. Add notes to the Details Notes box.

Outcomes

1. Hard Outcomes are not in use.
2. Soft Outcomes: Officer should ask questions to ascertain the feeling of the caller about the call. You can add notes to the outcomes box.

Figure 45: CRM Flowchart