# Table of Contents

Login Screen...........................................................................................................................................page 3
Using the portal for the first time.................................................................................................................page 4
Home Page..................................................................................................................................................page 5
My Clients Page.......................................................................................................................................page 6
Client Page................................................................................................................................................page 7
Lodging a Session.................................................................................................................................page 8
Lodging a Report Writing Session............................................................................................................page 9
View Payment Information.......................................................................................................................page 10
Submitting a Client Report.....................................................................................................................page 12
Submitting a Client Related Request.......................................................................................................page 14
Submitting a General Request................................................................................................................page 16
Changing Practice and Availability Details.............................................................................................page 18
Changing Profile Details.........................................................................................................................page 21
Login Screen

- Approved Counsellors will be able to access the Approved Counselling Portal through this direct link https://vsconnect.force.com/counsellors/s/login/.

- Please make sure when you are accessing the portal you are using the most up to date versions of the following web browsers: Google Chrome, Safari, Mozilla Firefox, Internet Explorer or Microsoft Edge.
Using the portal for the first time

- For existing Approved Counsellors registering to use the portal for the first time, follow these steps.

1. On the login screen, click ‘Not a member?’

2. Enter the following details:
   a. First Name
   b. Surname
   c. Email
   d. Approved Counsellor Number

   *Please use the email address you have registered with Victims Services*

3. You will receive an email, click on the link in the email and set your password.

4. You can login to the portal with your username and password.

   *Your user name will be your email address*
Home Page

- You can navigate the portal using the different portal tabs on the top of the screen.

Below is a summary of each tabs function:

- **My Practice & Availabilities** - View and edit your practices addresses, practice hours and availabilities
- **My Clients** - View Victims Services clients assigned to you, lodge sessions completed with these client, submit client reports and make client specific requests to the Approved Counselling Programs team
- **My Sessions** - View sessions with clients which you have already lodged with Victims Services. Lodging a session with a client will automatically generate an invoice item.
- **My Reports** - View the client reports you have submitted to Victims Services
- **My Request** - View requests you have lodged with Victims Services, including: requests for additional hours (replacing over 22 hour reports), delivering case management and a change of counsellor
- **My Invoices** - View your Invoices and their status
My Clients Page

- In the **My Clients** section, you can view all your assigned clients, the total hours approved for each client, the total hours each client has remaining, and the number of no shows for each client.

- Click on the claim item number to access the client page.
On the **Client Page** you can lodge and view **Client Reports**, **Sessions** and **Requests** for that client.
Lodging a Session

1. Select a client on the My Clients page by clicking on the Claim Item Number:

2. Go to the Sessions section and click New.

3. Enter the Service Type.
   For counselling sessions the service type will be ‘standard counselling’.

4. Enter the session start time and end time.

5. Tick the session acknowledgement.

6. Click Save.
Lodging a Report Writing Session

1. Select a client on the My Clients page by clicking on the Claim Item Number:

2. Go to the Sessions section and click New.

3. Enter the Service Type.

4. Enter the Report Type.

5. Enter the session start time and end time.

6. Tick the session acknowledgement.

7. Click Save.
View Payment Information

- When you submit a session this will automatically generate an invoice item for payment. You can view payment information for that session by following the steps below:

1. Click on a session on the Sessions section on the My Clients page.

2. In the session screen click on the Invoice Item.

   *Please note that an Invoice Item will not be created for a session until the Initial Report for the client has been submitted and approved.

3. In the invoice item screen you can see payment information.
*Invoice items will be collated into an invoice every week on Friday. This invoice will go to the accounts team for payment.

4. You can access the full Invoice by clicking the Invoice field when viewing an invoice item.

5. In the invoice you can see the status and invoice items included in the invoice.

6. You can also view all your Invoices in the My Invoices tab.

7. By default this page will show you the most recently viewed invoices first. You can change the list view from ‘Recently Viewed’ to ‘My Invoices’ to view all your invoices.
Submitting a Client Report

1. Select a client on the My Clients page by clicking on the Claim Item Number:

2. Go to the Client Reports section and click New.

3. Select the type of report and click Next.
   
   Note that you will no longer submit over 22 hour reports. These are now processed as a request for additional hours.

4. Enter the details of the report and click Save.
5. The new report will now appear under the Client Reports section in a **draft** status.

6. To edit or submit report, click the **report name**.

7. To edit the report before submitting click the **Edit** button.

8. To submit for approval click the **Submit for Approval** button.

9. Add any approval comments (this is optional), then click **Submit**.

10. The Report will now be submitted.
Submitting a Client Related Request

- You can submit a client related request such as requesting additional hours, alternate service, case management and change of counsellor by following the steps below.

- You will not be able to submit a session for alternate services or case management until you have submitted a request to provide these services and the request has been approved. If your request is approved you will be able to lodge sessions related to those requests.

1. Select a client on the **My Clients** page by clicking on the **Claim Item Number**:

2. Go to the **Requests** section and click **New**.

3. Select the **Type of Request**.

4. Click **Next**.
5. A new screen will open depending on the type of request selected.

6. Enter any required and relevant information.

7. Click **Save**.

8. The new request will appear under the **Request Section**.

9. To submit the request for approval, click on the **Request Case Number**.

10. Click the **Submit for Approval**.

11. The Request will now be submitted.
Submitting a General Request

- You can submit general requests such as change of bank details, change of name, update of qualification or a general inquiry to the Approved Counselling Programs team by following the steps below.

1. Go to the My Requests Tab.

2. Click New.

3. Select the Type of Request.

4. Click Next.
5. A new screen will open depending on the type of request selected.

6. Enter any required and relevant information.

7. Click **Save**.

8. The new request will appear under the **Request Section**.

9. To submit the request for approval, click on the **Request Case Number**.

10. Click the **Submit for Approval**.

11. The Request will now be submitted.
Changing Practice and Availability Details

1. Go to the My Practice and Availability Tab.

2. To edit the availability of the practice click the Availability Name.

3. Click Edit.
4. Enter/change any relevant details.

5. Click Save.

6. The availability will now be updated.

1. To edit the practice details, click the Practice Name.
2. Click Edit.

3. Enter/change any relevant details.

4. Click Save.

5. The practice details will now be updated.
Changing Profile Details

1. Click on the circle icon in the top right of the screen and click on My Profile.

2. Click Edit to edit any details.