**聖雅各福群會 St. James' Settlement**
**FYP Second Meeting Summary (20th Sept, 2012)**
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## Part 1: P&G (Program and Group 活動/小組計劃及報告excel)
- fill in before (planning part) and after (reporting part) every activity starts
- estimate the cost, session periods, number of participants

Reasons for using the web-based system:
1. School Social Workers need to send the form via fax, difficult to edit it if changes are required
2. Waste paper (lots of attachments)
3. Waste time as the data is calculated manually

Clarifications:
★ Current system NIS (for admin use):
- activity application, but it may have duplicated data
- print receipts
- get attendance list for activity
- contain records for attended volunteers for each activity
- check if there are still some available quotas for applying that activity
- case management (open case for each person)
- generate <span style="color:red">J2 report</span> for Social Welfare Department

\* will have a new system soon
- for generating reports for Social Welfare Department

★ IOU: Accounting term, SSW: School Social Worker, CSSA: 綜援 Comprehensive Social Security Assistance, KM: Knowledge Management (Useful references for other colleagues), C&Y: Children & Youth, SPCC: St. Paul's Co-educational College, SMCC: another school name

Input:
- online P&G form with required attachments
e.g. P005-外出活動安全檢查清單 for outdoor activities
(contents of attachments are ignored for FYP implementation)

User: Social Worker


## Part 2: Case Statistics
**Major Task: Building information for J2, E1 and School Reports**

## Three input files (Raw data) to Admin Staff:

Implementation methods:
1. Import excel files to the new system (User: admin staff)
2. All excel files change to an online form (User: all colleagues)

**(1) Excel File S005: Service Recipients**
**(Quarterly Record of Service Recipients Served per Worker)**
Use in J2 report
1季見3次 = 1 record per month?
Admin staff double check the correctness of input data (e.g. name, program code)

**Active case**
Social workers have a record for each active client:
1. Case
2. Activities that the client participated
(admin staff check manually to see whether the client attended the activity)

**Case system**
Client of the case (sorted manually according to the names by admin staff)
If the client name is appeared in both case and activity checklists,
randomly delete one record to eliminate duplicated data. (Each client count only once)
=> may delete data wrongly (e.g. 2 clients with the same name)
* should give each client an unique ID number instead of using name for identification

If the social worker doesn't have enough number of required cases,
friendly reminder is needed.
=> in order to meet the requirements of Social Welfare Department

**(2) Excel File S002: Enquiry Data Input Form**
Use in school report
- 1 form per month
- does not include case enquiry
- one enquiry per entry / row (can have multiple records for the same client)

**(3) Excel File S001: Case Activities Recording form**
Use in J2 report
- Only cares about the number of case activities per day but not the content

## Output files (Reports):
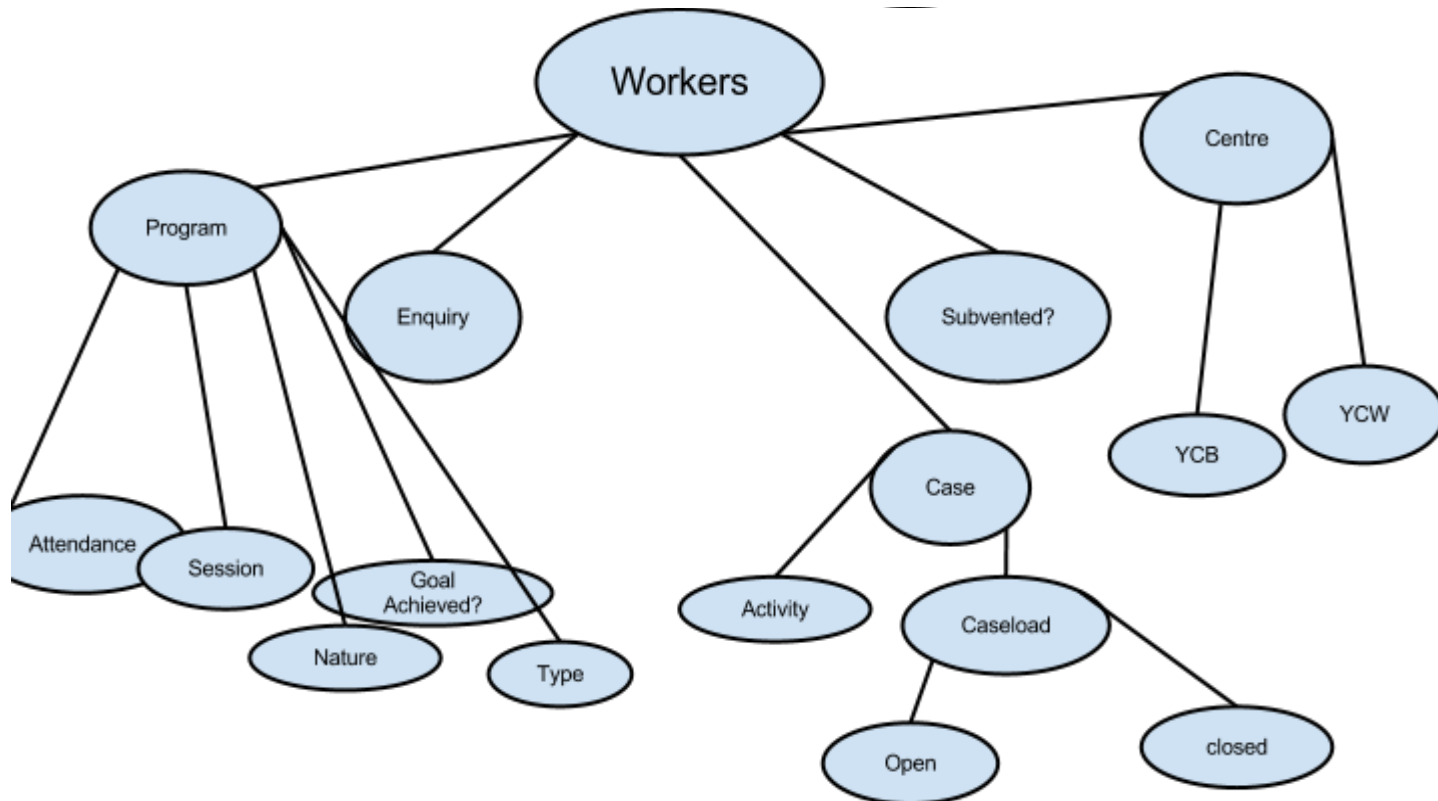**(1) Excel File School Report: School Social Work Service Monthly Report**
A. Caseload
B. Copy from another excel file
C. Activity organised by School Social Worker / Centre
D. Get the number from Enquiry Data Input Form

**横表 (reference for colleagues) ★ File name?**

**直表 (for school report)** ★ File name?
- summary

**Chart drawn by PT (for clarifications):**



Consider per social worker:
1. Case
1.1 Activity
1.2 Caseload (Use in J2 report)
- doesn't consider contents of the cases, only calculate number of cases
e.g. new cases, old cases, transferred cases

2. Enquiry

3. Program (organized by the social worker, use in P&G Form)
- count it to the person in charge only, not count for PW, support (協助工作人員)
3.1 Attendance: count for all attended social workers including support
3.2 Sessions : periods for activity
3.3 Nature (checkboxes in P&G form, 01-05)
3.4 Goal Achieved or not (85% = achieved)
- % is calculated by formula provided, using the data from caseload

4. Centre

4.1 YCB (Causeway Bay)
4.2 YCW (Chai Wan)
OR: OutReach 外展
IT: Integrated Team (J2 report)
Independent School (E1 report)
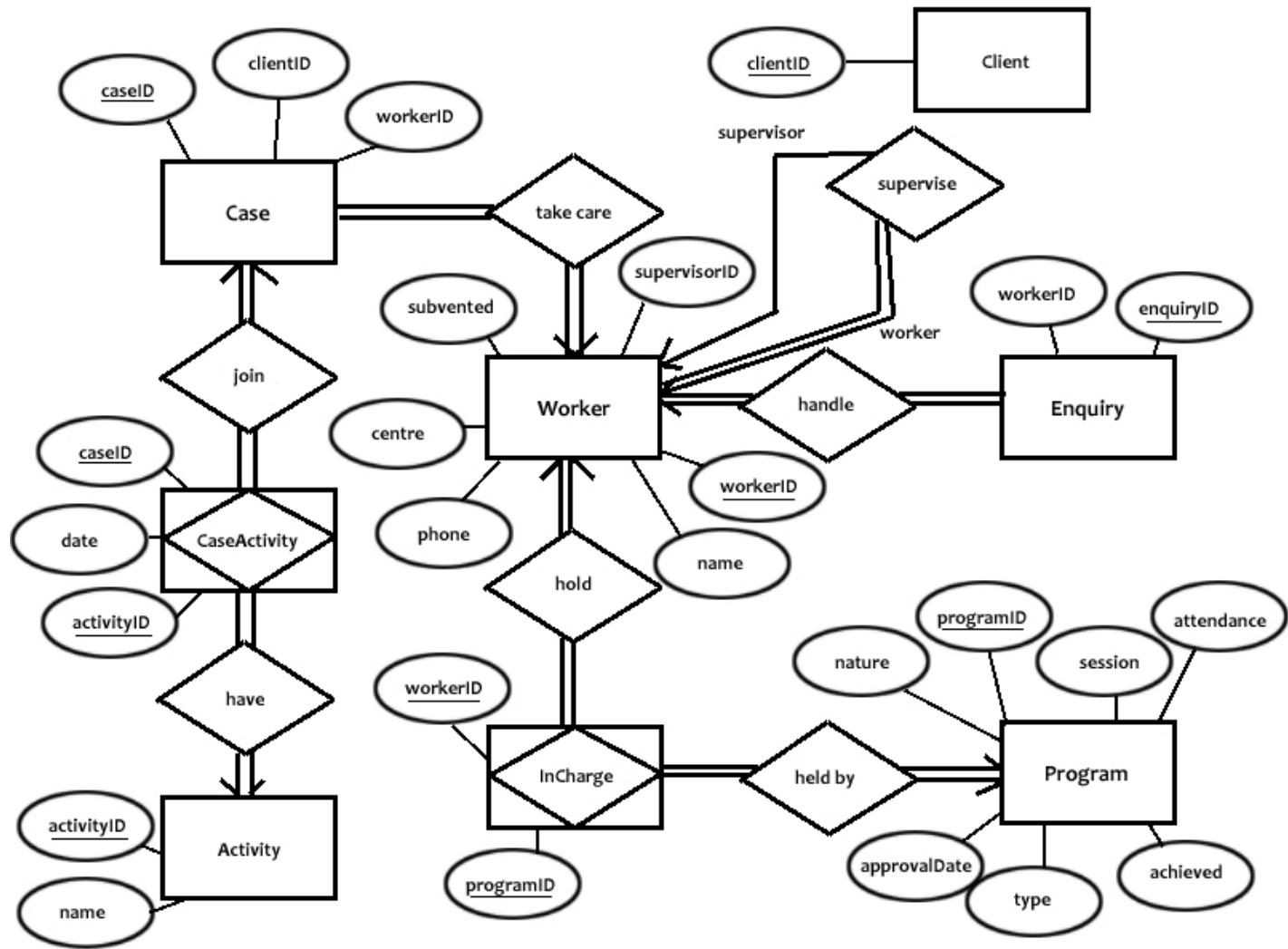
5. Subvented? (受社署資助)
If yes
=> E1 and J2 Reports for Social Welfare Department
If no
=> no records for E1 and J2 Reports

**Temporary Entity Relation Diagram (ERD) (According to the above chart) :**

**Temporary Class Diagram**