



# FEDERATION OF COMMUNITY LEGAL CENTRES VIC

## DATA ENTRY GUIDE VICTORIA

### WELCOME TO THE DATA ENTRY GUIDE FOR COMMUNITY LEGAL CENTRES OF VICTORIA

#### **PURPOSE** TO ASSIST VICTORIAN CLC USERS TO ENTER CONSISTENT, ACCURATE AND COMPLETE DATA FOR SERVICES TO INDIVIDUALS.

This quick reference guide has been designed to support users when entering client and service data relating to their legal and non-legal work. It focuses on **Service Types** and **Minimum Data Entry** and can be used in conjunction with the *CLCA Data Consistency Guide*. This Guide is based on and aligned to the *National Legal Assistance Data Standards Manual (DSM)*.

#### **VARIATION**

Scenario 21 - "Advice provided for 2 legal problem types across 2 law types (i.e. Civil, Criminal, Family) OR where there is 2 different "other parties"

**Reason:** It is broadly accepted by Victorian CLCs that matters across two areas of Law can have different "other parties", different outcomes and different funding streams. This rule is designed to:

- » Mitigate the risk of missing a party in a conflict check
- » Capture separate services where the solicitor's advice is in relation to two different legal issues for which the Centre is funded from two different funding streams
- » Provide the ability to analyse service outcomes by each law type (matter)



THE FEDERATION ACKNOWLEDGES THE TRADITIONAL ABORIGINAL OWNERS OF COUNTRY AND WE PAY OUR RESPECTS TO ELDERS PAST, PRESENT AND EMERGING. WE RECOGNISE THEIR CONTINUING CONNECTION TO LAND, WATER AND COMMUNITY. SOVEREIGNTY WAS NEVER CEDED.

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# SERVICE TYPES

PROVIDES GUIDANCE ON SELECTING THE APPROPRIATE SERVICE TYPE AND SERVICE COUNT WHEN ENTERING DATA RELATED TO SERVICES PROVIDED TO AN INDIVIDUAL SERVICE USER

## HOW IT WORKS

The Guide provides a 3 step process to identify and enter the most appropriately aligned service. The scenarios are grouped by service types to assist in easily identifying the most suitable scenario. The most prominent scenarios for each service type is listed first. Each service category and type is colour coded and colour shading is applied to service 'counts' to help identify single vs multiple count scenarios. An step-by-step example has been provided based on the below case study. **Case study:** "A service user has recently separated from her husband. She has bad debts due to putting her name on a personal loan her ex-husband took out. These debts are incurring interest that she cannot pay. A lawyer provides advice both in person and in writing in relation to both problems".

**Step 1:** User selects a service type most closely aligned to the service provisioned based on the service definition. **Case study:** Select service type Legal Advice as "lawyer provides advice"

**Step 2:** User identifies the service type scenario most closely aligned to the service being provisioned.

**Case study:** Select Scenario

"21: Advice provided for 2 legal problem types across 2 law types (i.e. Civil, Criminal, Family) OR where there is 2 different "other parties"

**Step 3:** User enters the corresponding service type and service count based on the selected scenario.

**Case study:** 'Enter 2' Legal Advice Services (1 Family and 1 Civil Law Type) as per the corresponding service count

NOTE: PROVIDING AN ADVICE USING TWO METHODS (AS IN THIS CASE VERBAL AND WRITTEN) DOES NOT INFLUENCE THE RESULT OF TWO SERVICE COUNTS - REFER SCENARIO 17

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# MINIMUM DATA ENTRY

GUIDANCE TO ENSURE ALL REQUIRED SERVICE RELATED DATA IS ENTERED TO SUPPORT A CONSISTENT AND VALUABLE NATIONAL AND CLC DATASET.

## HOW IT WORKS

The Guide provides a 3 step process to assist users to enter all the pertinent data fields related to the selected Service Type. In addition Service Types and data fields are aligned to high and low level service categories.

These are here to provide users with assistance in how these can be used for meaningful report groupings.

These groupings are not data entry fields in CLASS.

**Step 1:** User identifies the Service Category based on the Service Type Guide for the service provisioned

**Step 2:** User ensures entry of all data fields corresponding to that Service Category for National and CLC minimum data requirements

NOTE: USERS (CLCS) WILL FIND DATA ENTRY FORMS SIMPLIFIED AND DATA ENTRY MORE ACCURATE IF THEIR ADMINISTRATORS HIDE ALL FIELDS NOT MENTIONED IN THIS GUIDE.

NOTE: USERS SHOULD CREATE THEIR OWN CUSTOM FIELDS TO CAPTURE INDIVIDUAL CLC SPECIFIC DATA REQUIREMENTS SUCH AS EVALUATION PROJECTS AND SERVICE OUTCOMES.

## KEY REFERENCES

**CLCA Data Consistency Guide** Detailed service definitions, counting rules, case studies and data field definitions (<https://naclc.info/DataGuide>)

**Reporting Data Definitions** How to interpret data fields and counts in reports - online guide here (<https://naclc.info/class/reporting-and-accountability>)

**Managing Custom Fields** Introduction on creating custom fields and modifying or hiding existing fields - CLASS video here (<http://confluence.classhelpdesk.org.au/display/CM/Custom+Fields>)

# SERVICE TYPES

DISCRETE LEGAL SERVICES THE PROVISION OF UNBUNDLED, DISCRETE, LEGAL SERVICES TO INDIVIDUAL SERVICES USERS		
Service Type and Definition	Scenario	Count
<p><b>Information:</b> Provision of general application information to a Service User about the law, legal systems and processes or legal and other support services to assist in the resolution of legal and related problems.</p>	1: Information is provided for 1 or more legal problems in 1 session	Enter 1
	2: Information is provided by 1 or more methods at the same time (i.e. phone, followed by email)	Enter 1
	3: Information provided in the course of providing another client service (i.e. Legal Advice, Duty Lawyer)	-
	4: Admin tasks (i.e. booking appointments)	-
<p><b>Referral (Simple):</b> A Service Provider determines that a Service User can be assisted by another individual/s or organisation/s and provides the User with the contact details to those services.</p>	5: Referral/s to an external individual/s or organisation/s for 1 Service User	Enter 1
	6: Referrals within Representation Services	-
	7: Internal referrals within same independent organisation	-
	8: Incoming referrals	-
<p><b>Referral (Facilitated):</b> A Service Provider determines that a Service User can be assisted by another individual or organisation and directly assists the User to make contact with the 3rd party (whether legal or non-legal).</p>	9: Facilitating referral/s to an external individual/s or organisation/s for 1 Service User	Enter 1
	10: Making an appointment on behalf of a Service User	Enter 1
	11: Contacting the target service to check a Service User's eligibility and service availability	Enter 1
	12: Attending the target service with a Service User providing background information or a professional assessment	Enter 1
	13: Referrals within Representation Services	-
	14: Internal referrals within same independent organisation	-
	15: Incoming referrals	-
<p><b>Legal Advice:</b> A Legal Advice Service is the provision of fact-specific legal advice to a Service User in response to a request for assistance to resolve specific legal problems.</p> <p><i>Important Note: Reviewing a client's documents and researching the law to prepare legal advice for the client is all part of a Legal Advice, regardless of the length of time spent or complexity of the legal matters, so long as it does not involve any interaction with a third party or preparing documents for a client to use in legal proceedings. In CLASS, these activities can be recorded in the Legal Advice as Actions.</i></p>	16: Advice provided for 1 or more legal problem types within the same law type (i.e. Civil, Criminal, Family)	Enter 1
	17: Advice provided by 1 or more methods (i.e. in person, confirmed by letter the next day)	Enter 1
	18: Advice provided due to subsequent contact by Service User (same or new problem or day)	Enter 1
	19: Advice provided to a self representing party	Enter 1
	20: Advice provided where the Service Provider subsequently takes carriage of the matter in an representative capacity	Enter 1
	21: Advice provided for 2 legal problem types across 2 law types (i.e. Civil, Criminal, Family) OR where there is 2 different "other parties"	Enter 2
	22: Advice provided by 2 lawyers	Enter 2
	23: Advice provided as part of a Representation Service	-
	<p><b>Legal Task:</b> A Legal Task is where a Service Provider completes a discrete, clearly-defined, one off piece of legal work to assist a Service User in their own efforts to resolve a legal problem or particular stage of a problem, with no commitment to support the Service User beyond the completion of that piece of work. The two main types of work in a Legal Task are:</p> <ul style="list-style-type: none"> <li>Reviewing or preparing particular documents for a Service User to use in their legal proceedings</li> <li>A limited instance of interacting with a third party to help progress a Service User's legal matter.</li> </ul> <p>A Legal Task can include multiple activities to finalise the piece of work and should be captured as Actions in CLASS.</p>	24: Assistance with a Legal Task to resolve a matter (i.e. draft letter and make phone call)
25: Assistance with a legal task due to subsequent contact by Service user after the initial task is completed (same or new problem)		Enter 1
26: Assistance with a legal task following a Legal Advice (same or different matter)		Enter 1
27: Assistance with a legal task where the Service Provider subsequently takes carriage of the matter in a representative capacity		Enter 1
28: Assistance provided to a self representing party		Enter 1
29: Assistance with a discrete legal task that spans more than 1 day ("closed date" is the date of service)		Enter 1
30: Assistance provided as part of a Representation Service		-
<p><b>Duty Lawyer:</b> Duty Lawyer Services are legal services provided by a duty lawyer to a Service User at a court or tribunal.</p>	31: Any legal assistance (Legal Advice, Legal Task, Court/Tribunal, Dispute Resolution or other) provided by a Duty Lawyer	Enter 1
	32: Legal assistance provided by a Duty Lawyer due to subsequent contact by Service user (same legal problem different day, or a new legal problem same or different day)	Enter 1
	33: Legal assistance provided by a Duty Lawyer who subsequently takes carriage of the matter in an representative capacity	Enter 1
	34: Legal assistance provided by a Duty Lawyer to subsequent contact by Service user (same lawyer, legal problem and day)	-

## REPRESENTATION SERVICES WHERE A SERVICE PROVIDER TAKES CARRIAGE OF A MATTER IN AN ONGOING, REPRESENTATIVE CAPACITY

Service Type and Definition	Scenario	Count
<b>Court Tribunal:</b> A Court/Tribunal Representation Service is where a Centre provides ongoing representation for a matter that has commenced in a court, tribunal or inquiry, where the Centre provides legal representation to the Service user and takes carriage of the matter in an ongoing, representative capacity. "Commenced" in this context means the matter has been filed in court, lodged in a Tribunal, or accepted for inquiry by a forum such as a Royal Commission.	<b>35:</b> Service provided in relation to an ongoing representation for any matter before a court, tribunal or inquiry to progress the determination of the Service User's legal proceedings	Enter 1
	<b>36:</b> Court/tribunal service provided for 1 or more legal problem types within the same law type (i.e. Civil, Criminal, Family)	Enter 1
	<b>37:</b> Court/tribunal service provided to an existing Representation Service User which can not be finalised in the same court proceeding	Enter 1
	<b>38:</b> Court/tribunal service provided for 2 legal problem types (2 ongoing matters) across 2 law types (i.e. Civil, Criminal, Family)	Enter 2
	<b>39:</b> A pre-existing Other Rep service where it is now determined the matter will proceed to court, tribunal or inquiry	Adjust existing
<b>Other Representation:</b> Where the Service Provider takes carriage of a matter in an ongoing, representative capacity, but due to the nature of the matter it does not proceed to a court, tribunal or inquiry, or is not required to appear before a court, tribunal or inquiry.	<b>40:</b> Service provided in relation to an ongoing representation for any matter to progress the determination of the Service User's legal proceedings, where it does not proceed to or is not required to appear before court, tribunal or inquiry	Enter 1
	<b>41:</b> Other Rep service provided for 1 or more legal problem types within the same law type (i.e. Civil, Criminal, Family)	Enter 1
	<b>42:</b> Other Rep service provided for 2 legal problem types (2 ongoing matters) across 2 law types (i.e. Civil, Criminal, Family)	Enter 2
<b>Dispute Resolution:</b> This service is the legal representation of a Service User in a Facilitated Resolution Process, or an alternative dispute resolution process. A Dispute Resolution Service includes preparation for, and representation at, a Facilitated Resolution Process. It also includes the work involved in recording agreement following a Facilitated Resolution Process.	<b>43:</b> A pre-existing Court/Tribunal Rep service where it is now determined the matter will not proceed to court, tribunal or inquiry	Adjust existing
	<b>44:</b> Service provided in relation to an ongoing representation for any matter to progress the determination of the Service User's legal proceedings in a Facilitated Resolution Process, or an alternative dispute resolution process	Enter 1
	<b>45:</b> Dispute Resolution service provided for 1 or more legal problem types within the same law type (i.e. Civil, Criminal, Family)	Enter 1
	<b>46:</b> Dispute Resolution service provided to represent a Service User attending a Facilitated Resolution Process	Enter 1
	<b>47:</b> Any court/tribunal based alternative dispute resolution services undertaken in relation to a Court/Tribunal Service	Enter 1
	<b>48:</b> Dispute Resolution service provided to represent two parties (Service Users) attending a Facilitated Resolution Process	Enter 2
<b>49:</b> Assistance provided to self-representing parties preparing to attend Facilitated Resolution Processes	Enter As Appropriate	

## FACILITATED RESOLUTION PROCESS INCLUDES SPECIFIC PROCESSES AIMED AT RESOLVING DISPUTES WITHOUT GOING TO COURT.

<b>Facilitated Resolution Process:</b> This service is where a Service Provider conducts an activity (i.e. conference) to assist the parties to resolve or narrow issues in dispute without going to court. Generally this will involve a screening process and the provision of an independent, suitably qualified professional to facilitate resolution of the issues in dispute.	<b>50:</b> All Activities undertaken as part of one Facilitated Resolution Process service i.e. 2 screening processes and 1 conference	Enter 1
	<b>51:</b> Service provided to organise a Facilitated Resolution Process (i.e. screening process) but no FRP is conducted	Enter 1

## NON LEGAL SUPPORT SERVICES PROVISION OF DISCRETE AND ONGOING NON-LEGAL SERVICES TO INDIVIDUAL SERVICE USERS

<b>Non Legal Support Discrete:</b> This Service is provided by an appropriately qualified or experienced person to a Service User only once in response to a request for assistance to resolve specific, non-legal problems. Examples include general counselling, financial counselling, trauma-informed counselling, Aboriginal and Torres Strait Islander community liaison, and mental health assessments and support.	<b>52:</b> Discrete NL support service provided to a Service User for non-legal support	Enter 1
	<b>53:</b> NL support service is provided by 1 or more methods at the same time (i.e. phone, followed by mail letter)	Enter 1
	<b>54:</b> NL support service is provided to a Service User in the course of providing another legal service	Enter 1
	<b>55:</b> NL support service is provided to a Service User by two separate counsellors	Enter 2
<b>Non Legal Support Ongoing:</b> This Service is provided by an appropriately qualified or experienced person to a Service User in an ongoing capacity in response to a request for assistance to resolve specific, non-legal problems. Examples include general counselling, financial counselling, trauma-informed counselling, Aboriginal and Torres Strait Islander community liaison, and mental health assessments & support.	<b>56:</b> Ongoing support service to a Service User for non-legal support	Enter 1
	<b>57:</b> All NL support services provided in relation to resolving the Service Users specific non legal problem	Enter 1
	<b>58:</b> NL ongoing support service is provided to a Service User in the course of providing another legal service	Enter 1
	<b>59:</b> NL support service is provided to a Service User by two separate counsellors	Enter 2

# MINIMUM DATA ENTRY

SERVICE GROUPINGS			NATIONAL DATA		CLC DATA	
<i>Service Category (High)</i>	<i>Service Category (Low)</i>	<i>Service Type</i>	<i>Service Data</i>	<i>Client Data</i>	<i>Service Data</i>	<i>Client Data</i>
<b>DISCRETE ASSISTANCE</b>	<b>General</b>	<b>Information</b>	Date of Service			
		<b>Referral</b>	Date of Service		Referral From	
					Referral To (Simple or Facilitated)	
	<b>Legal</b>	<b>Legal Advice</b>	Funding Category	Name	Problem Type	C.O.B.
			Assigned to (Service Provider)	Location	Primary Law Type	Main Language
			Date of Service	Age	Family Violence Indicator	English Proficiency
				Gender	Disability Status	Homelessness Status
				ATSI Status	Financial Disadvantage Indicator	Employment Status
				Office (Service Provider) Location	Income Level	
				Outreach (Location Category)*	Custody Status	
				Service Delivery Mode	Centerlink Status	
				Estimated Time Spent		
				Interpreter Used		
			Additional (Other) Party Type			
			Additional (Other) Party Person Type			
			Service Results**			
			<b>Legal Task</b>	As per Legal Advice Closed Date	As per Legal Advice	As per Legal Advice
		<b>Duty Lawyer</b>	As per Legal Advice Activity Type	As per Legal Advice	As per Legal Advice Court/Tribunal Type	As per Legal Advice
	<b>Non Legal</b>	<b>Non Legal Support Discrete</b>	As per Legal Advice	As per Legal Advice	As per Legal Advice	As per Legal Advice
			Support (Activity) Type			
<b>Non Legal Support Ongoing</b>		As per Legal Advice	As per Legal Advice	As per Legal Advice	As per Legal Advice	
		Closed Date				
		Support (Activity) Type				
<b>ONGOING ASSISTANCE</b>	<b>Representation</b>	<b>Court Tribunal Other Representation Dispute Resolution</b>	Open Date	Name	Problem Type	C.O.B.
			Closed Date	Location	Other Party Type	Main Language
			Assigned to (Service Provider)	Age	Hearing Type	English Proficiency
			Funding Category	Gender	Estimated Time Spent	Homelessness Status
			Family Violence Indicator	ATSI Status	Court/Tribunal Type	Employment Status
			Disability Status		Interpreter Used	Income Level
			Financial Disadvantage Indicator			Custody Status
			Primary Law Type			Centerlink Status
			Office (Service) Location			
			Outreach (Location Category)			
			Service Delivery Mode			
			Service Results			
			<b>FACILITATED RESOLUTION PROCESS</b>	<b>Facilitated Resolution Process</b>	<b>Facilitated Resolution Process</b>	Funding Category
Assigned to (Service Provider)		Primary Law Type				Main Language
Date of Service		Additional Party Type				Homelessness Status
Closed Date		Additional Party Person Type				Employment Status
Facilitation (Activity) Type		Family Violence Indicator				Income Level
Outcome (Service Results)		Disability Status				Custody Status
		Financial Disadvantage Indicator				Centerlink Status
		Office (Service) Location				
		Outreach (Location Category)				
		Service Delivery Mode				

\* OUTREACH SERVICES ONLY \*\* CURRENTLY UNAVAILABLE IN CLASS FOR DISCRETE SERVICES

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the heart of a movement for justice.*

