Add a session

Task card
This task card discusses the following:

- **What is a session?**
- **Add a session**
  - Method 1 – From Add a case
  - Method 2 – From Add a session
  - Method 3 – From Find a case
- **Enter session details**
- **Add clients and support persons to the session**
- **Add a session – Finish**
- **Copy a session**
- **Record Referrals to other services**
- **Special data entry fields**

### KEY HIGHLIGHTS

- A session must be created within the relevant reporting period for it to be counted in reports.
- Attendees to a session can be either a client or a support person.
- Referrals to other services can only be added to a client during the relevant reporting period.
- The use of special characters such as * & % # @ should **not** be included in the free text fields as they are used as search functions in the Data Exchange.

### What is a session?

A **session** records:

- What service was delivered on a particular date within a reporting period
- The type of service delivered, and
- Which clients attended.

Sessions are a critical part of the service record of an organisation and drive the reporting function of the Data Exchange. They must be reported in the reporting period that they occurred. They cannot be reported in a different reporting period.

At least **one session** must be recorded as occurring within a reporting period for the case and associated clients to be **counted** in reports.

### Add a session

There are three different methods to add a session.

1. At the case creation point where a session is immediately added to a new case.
2. From the home screen, **Add a session**.
3. From the home screen, **Find a Case**.

**Note:** All three methods will direct you to the **Add a session – session details** screen. Refer Figure 5.
Method 1 – From Add a new case
Add a new Case – refer to the Add a case taskcard.
Select Add a session to this case hyperlink under the What can you do now? heading. Refer Figure 1.

Figure 1 – “What can you do now?”

Method 2 – From Add a session
At the Data Exchange web-based portal home page select under the Add menu. Refer Figure 2.

Figure 2 – The Data Exchange home page – Add a session action tile
Method 3 – From Find a case

At the Data Exchange web-based portal home page select under the Find menu. Refer Figure 3.

Figure 3 - The Data Exchange home page – Add a session action tile

The Find a case screen will display. Refer Figure 4.

Select the case hyperlink to which you wish to add a session to.

Figure 4 - The Data Exchange home page – Add a session action tile
The **Case details** screen displays. Refer Figure 5.

Select the **+ADD SESSION** button under **Sessions associated with the case** heading. Refer Figure 5.

**Figure 5 – Case details – Add session button**

![Add Session Button](image)

**Enter Session details**

The **Add a session - session details** screen will display. Refer Figure 6 and Table 1 for more information on the fields.

**Figure 6 - Add A Session - Session Details Screen**

![Session Details](image)
Table 1 - Session Details Field Descriptions (Refer Figure 6)

<table>
<thead>
<tr>
<th>FIELD</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Case ID</td>
<td>This is the ID of the case that you are recording a session against.</td>
</tr>
<tr>
<td>Session ID</td>
<td>Enter the session ID if your organisation has a session identification system, or leave it blank for auto-generation.</td>
</tr>
<tr>
<td><strong>Note:</strong></td>
<td>The use of Special characters such as * &amp; % # @ should <strong>not</strong> be included in the free text fields as they are used as search functions in the Data Exchange.</td>
</tr>
<tr>
<td>Session date</td>
<td>Record the date the session occurred. Enter today’s date or a date in the past with the reporting period.</td>
</tr>
<tr>
<td><strong>Note:</strong></td>
<td>Sessions cannot be entered for future dates or dates in a closed reporting period.</td>
</tr>
<tr>
<td>Service type</td>
<td>Each session can only have one service type. Select the service type that best reflects the intent of the session.</td>
</tr>
<tr>
<td><strong>Note:</strong></td>
<td>The service type choices are dependent on the program activity the case was created under and are to align with the program intent.</td>
</tr>
<tr>
<td><strong>Refer to the Data Exchange Protocols</strong></td>
<td>for more information on program specific service types.</td>
</tr>
<tr>
<td>Service setting</td>
<td>Select where / how the session took place. The options are:</td>
</tr>
<tr>
<td></td>
<td>• Organisation outlet / office</td>
</tr>
<tr>
<td></td>
<td>• Clients residence</td>
</tr>
<tr>
<td></td>
<td>• Community venue</td>
</tr>
<tr>
<td></td>
<td>• Partner organisation</td>
</tr>
<tr>
<td></td>
<td>• Telephone</td>
</tr>
<tr>
<td></td>
<td>• Digital</td>
</tr>
<tr>
<td></td>
<td>• Healthcare facility</td>
</tr>
<tr>
<td></td>
<td>• Education facility</td>
</tr>
<tr>
<td></td>
<td>• Justice facility</td>
</tr>
<tr>
<td>Interpreter Present</td>
<td>Enter <strong>Yes</strong> if an interpreter was present. This includes a professional interpreter, a bilingual support person or a bilingual staff member who interprets for a client. This also includes Auslan or other sign language interpreter for the hearing impaired.</td>
</tr>
</tbody>
</table>

* Mandatory Fields

Once completed, please select **NEXT**.
The **Add a session – Client/support persons attended** screen will display. Refer Figure 7 for more information). Definitions of client and support persons are included in Table 2.

<table>
<thead>
<tr>
<th>TERM</th>
<th>DEFINITION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Client</td>
<td>Is defined as an individual who received a service as part of a funded activity that is expected to lead to a measurable individual outcome.</td>
</tr>
<tr>
<td>Support persons</td>
<td>Persons who may be present at a service who do not meet the definition of a client. These could include carers of clients and family members such as young children. Although there is no requirement to record the details of support persons, organisations may wish to record participants as ‘support persons’.</td>
</tr>
</tbody>
</table>

To add a support person, a client record **first** needs to be created in the Data Exchange and then they can be selected as a support person attendee.

**Note:** if you are creating a session for the Community and Home Support program you must complete the client details that display the 🚫 icon **before** you can attach the client to a session. Refer Figure 8.
1. Select client(s) you wish to add to the session using the **tick box** next to the client record
2. Select the **ATTACH SELECTED CLIENTS** button. Refer Figure 9.

Figure 9 - Add a session – Clients selected

3. Select support persons (if any) you wish to add to the session using the **tick box** to the session.
4. Select **ATTACH SELECTED CLIENTS**. Refer Figure 10.
The client(s) and support person(s) selected will display under the **Selected clients or support persons attended session** heading with their relevant **Participation type**. Refer Figure 11.

**Figure 10 - Add a session – Support persons selected**

**Figure 11 - Client participation type**

Select **NEXT>**

The **Add a session – Review** screen will display. Refer Figure 12.
Select [BACK] to edit the details or [Cancel] to stop the process and remove the case.
If the details are correct, select [SUBMIT].

Add a session – Finish
The Add a session – Finish screen will display with the following. Refer Figure 13.
1. A message box to advise the successful creation of the session.
2. A summary of the session you have created. If you did not enter your own session ID, a Session ID will automatically be created.
3. A listing of the clients that have been attached to the session.
4. What can you do now? section where you can Copy session, Add another session to the case and Add another session. Refer Table 3.
5. I want to… box where you can complete other tasks.
6. Go to… search field where you can search for clients, cases and sessions.
The **What can you do now?** field provides hyperlinks for you to copy and add more sessions. Refer Figure 13 (No. 4). Table 3 provides descriptions of these options.

Table 3 – What can you do now? section (Refer Figure 13 item 4)

<table>
<thead>
<tr>
<th>FIELD</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Copy a session</td>
<td>Select the hyperlink to copy the last session created for the case.</td>
</tr>
<tr>
<td>Add another session to the case</td>
<td>Select the hyperlink to add another session to the same case.</td>
</tr>
<tr>
<td>Add another session</td>
<td>Select the hyperlink to add a session to a different case.</td>
</tr>
</tbody>
</table>

**Copy a session**

There are a number of ways that you can copy a session.

1. Select the **Copy session** hyperlink found on the **Add a session – Finish** screen. Refer Figure 14.
2. Select the **COPY SESSION** button found on the Case details screen, after you have searched for your case. Refer Figure 15.

**Figure 14 – Copy session hyperlink**
Figure 15 – Copy session button

The Copy a session – Session details screen will display. Refer Figure 16.

Figure 16 – Copy session – Session details screen

Complete the details as required.
Select NEXT>.

The Copy a session – Clients/support persons attended screen displays. Refer Figure 17.
Select the clients that attended the session.

- If the same clients attended from the session that you have copied, select **NEXT >**.
- Remove the clients that didn’t attend this new session by selecting the **tick box** next to their name. Refer Figure 18.

**Figure 18 – Selecting clients that did not attend the session**

Select the **REMOVE CLIENTS / SUPPORT PERSONS** button.

The selected clients will move back to the **Clients/support persons attended session** heading. The clients that did attend the session will remain under the **Selected clients or support persons attended session** heading. Refer Figure 19.
Select **NEXT>**.

The **Copy a session – Review** screen will display. Refer Figure 20.

**Figure 20 – Copy a session – Review screen**

Select **SUBMIT>**.

The **Add a session – Finish** screen will display. Refer Figure 21.
Record Referrals to other services
You can add Referrals to other services to the clients attached to this session.

There are a number of ways that you can add Referrals to other services:
1. Select the Session ID number hyperlink found in the Add a session – Finish screen after you have created a new session. Refer Figure 22
2. Select the Session ID number hyperlink found in the Case details screen after you have searched for the relevant case. Refer Figure 23.

Figure 22 – Add a session – Finish screen Session ID link
The **Session details** screen displays. Refer Figure 24. Table 4 includes descriptions of the icons on this screen.

Select ![clients icon](image) found next to the relevant client.

**Figure 24 – Session details screen**
Table 4 – Icon descriptions for Referrals to other services (Refer Figure 24)

<table>
<thead>
<tr>
<th>ICON</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>📌</td>
<td>This icon indicates a referrals for other services can be added for this client for this case.</td>
</tr>
<tr>
<td>🌟</td>
<td>This icon indicates a referrals for other services has been added for this client’s record summary attached to a session. One internal and one external referral type can be added per client per session.</td>
</tr>
<tr>
<td>🌟🌟</td>
<td>This icon indicates the full quota of referrals to other sources has been added to a client's record summary attached to a session.</td>
</tr>
</tbody>
</table>

The **Add referral to other services** screen displays. Refer Figure 25.

**Figure 25 – Add referral to other services screen**

The **Add referral to other services** screen displays. Refer Figure 25.

**Session details**

- Case ID: ZB113355
- Session ID: 0001
- Session date: 06 August 2018
- Service type: Initial assessment

**Referral to other services**

- Client: Frederick JAMESON
- Client ID: 002
- Referral type: *
- Referral purpose(s): *(Age-appropriate development)*
  - Community participation and networks
  - Employment
  - Education and skills training
  - Family functioning
  - Housing
  - Material wellbeing and basic necessities
  - Mental health wellbeing and self-care
  - Financial resilience
  - Personal and family safety
  - Physical health
  - Support to caring role
  - Other

[Cancel Clear SAVE]
Select the relevant **Referral type** and **Referral purpose(s)**. Refer Figure 25. Table 5 provides descriptions for the referral type and purpose.

### Table 5 – Field descriptions for the Add referral to other services screen (Refer Figure 25)

<table>
<thead>
<tr>
<th>FIELD</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Referral type</td>
<td>Select the appropriate referral type for the client. This can be internal or external.</td>
</tr>
<tr>
<td>Referral purpose(s)</td>
<td>Select the appropriate reason for referral to other services. More than one can be selected.</td>
</tr>
</tbody>
</table>

Select **SAVE**.

The **Session details** screen will display.

The **Referrals to other services** icon will display as [person]. Refer Figure 26.

![Session details screen](image)

**Figure 26 – Session details screen – Added referral to other services**
Select \( \text{砚} \) to view the referral(s) created for the client. Refer Figure 27.

\textbf{Figure 27 – Amending Referral to other services items}

Select \( \text{砚} \) to edit the referral. Select \( \text{砚} \) to delete the referral. Select \( \text{砚} \) to collapse the field. Select \( \text{砚} \) to go to the \textbf{Case details} screen, or the \textbf{I want to…} box where you can complete other tasks. Refer Figure 26.

\section*{Special Data Entry fields}

Some programs have special data entry fields display when a session is created under that program activity. Please refer to the \textbf{Data Exchange Protocols}, Program specific mandatory client fields section and the \textbf{Add a case} task card, Special Data Entry Fields section for more information.

More information regarding Commonwealth Home Support Programme (CHSP) counting rules in sessions can be found in \textbf{Appendix B of the Data Exchange Protocols}. Information on the \textbf{CHSP Organisation overview report} is available on the Department of Health website.

More information on outlets, clients, cases and sessions can be found in the \textbf{Data Exchange Protocols} and the \textbf{Training resources} tab.

For technical support; contact the Data Exchange Helpdesk by email \texttt{dssdataexchange.helpdesk@dss.gov.au} or on 1800 020 283 between 08.30am - 5.30pm (AEST/AEDT) Monday to Friday.