



# Settlement Engagement and Transition Support (SETS) Program Webinar – November 2020

## Transcript

### Slide 1

My name is Neil Swan. I am from the Community Grants Hub in the Department of Social Services.

#### **Acknowledgement of country:**

*“We are meeting today on many traditional lands around the country and I want to acknowledge the traditional owners of those lands and pay our respects to elders past and present.”*

You can ask written questions in the webinar control panel. We will endeavour to answer the questions when they are received however we will also allow time at the end of the presentation for further clarification if required.

All questions and responses are only visible to the individual and not to all members of the audience. A list of the common questions and answers will be uploaded to the Data Exchange website with the presentation.

### Slide 2 – Using the Webinar controls panel

Throughout the webinar, you can access the control panel by clicking on the orange arrow in top right corner.

Clicking on any of the grey ribbons will expand that area

Please ensure that your audio is muted – your microphone symbol will be red.

### Slide 3 - Using the Webinar controls panel

When the control panel has not been used for a period of time, it automatically minimises from view. To expand the panel again, simply select the orange arrow.

Also a reminder that the webinar today will be recorded and placed on the Data Exchange website under the webinar library tab in the next couple of weeks.



## Slide 4 – Agenda (4.40 minutes)

In this session we will be discussing the following topics:

- how to access and use the data exchange portal,
- capturing outcomes for the SETS activities
- accessing, navigating and filtering reports
- what the reports can tell you about your service delivery
- Time to answer questions.

## Slide 5 – Data Exchange Portal (6.30 minutes)

You should always access the portal from the Data Exchange homepage ([dex.dss.gov.au](http://dex.dss.gov.au)).

Select MyGovID Log in option

Follow the prompts to use your myGovID to log in.

You will arrive at the MyDEX Dashboard.

## Slide 6 – Inputting data process map (8.20 minutes)

These are the basic steps for capturing your clients/cases/sessions and outcomes.

The first 2 steps are interchangeable. However if the client details have not yet been captured, you should add the client first. This will make it easier to set up the cases.

I will briefly demonstrate these steps for a new client/case and session and recording an outcome shortly.

## Slide 7 – How it all fits together (9.48 minutes)

A **case** is the first step in recording service delivery information within the Data Exchange.

The case groups together all the clients who are in this case and the sessions of services as they are provided.

- The program activity is the activity that is being delivered at this location
- The Case ID allows you to name the case. Do not include any client details in the case name (this can lead to a privacy breach).
- The outlet is the location where the service is being delivered from.
- The clients who may attend the sessions are linked to the case. This will make it quicker to capture a session of service as you already have a list of clients who have registered to pick from.

The case structure or the way you set up a case is up to each service provider and can be adapted to be meaningful to staff on the ground. For this example we have used Youth group November 2020 as this case relates to a peer group who are being helped with their English skills.



Attached to the case are the session details which include

- the date the instance of service occurred,
- the type of service the participants received (called a 'service type'), and
- which clients were present on that date.

Under the partnership approach a session is where a SCORE outcome is recorded and can also include the reason for outward referral information.

### **Slide 8 – Collecting extended data (13.15 minutes)**

For program activities that require you to record individual clients, it is recommended that you collect the following extended data items, where possible:

- Month and year of first arrival in Australia
- Visa type
- Ancestry

At the case level - Referral source and reason for seeking assistance. These are where the person was referred from and why they are seeking assistance. (Referral in)

When adding a session – include the referral type and purpose. This relates to any referrals you have made for the client (Referral out)

### **Slide 9 - Partnership Approach (14.11 minutes)**

All SETS Organisations are required to participate in the partnership approach.

As part of the partnership approach, Organisations record client outcomes known as Standard Client/Community Outcomes Reporting (SCORE) reporting. The partnership approach also includes the ability to record an extended data set.

It is expected that, where practical, you collect outcomes data for 50 - 60 per cent of all participants. However, it is noted that you should do so within reason and in alignment with ethical requirements.

A client SCORE assessment is recorded at least twice – towards the beginning of the client's service delivery, during the service delivery and/or towards the end of service delivery (if fixed delivery period).

Where practical, you should also collect SCORE assessments periodically throughout service delivery.

Along with the priority requirements, organisations can opt into the Partnership Approach, or the extended data set, within the Data Exchange. For some programs that we have mentioned earlier – it is required.

This is a brief overview – this afternoons session will provide a more in depth discussion on this.

In exchange for opting into the Partnership Approach and providing additional outcomes focused data, organisations gain access to the community profiles and other reports, such as the ones you just saw.



Organisations that opt-in to the Partnership Approach **enter the Priority Requirements data plus an extended dataset comprising of what you can see on screen:**

- Extended client demographic details (Homeless indicator through to ancestry)
- Client needs and circumstances (reason for seeking assistance and referrals on to other services), and most importantly,
- SCORE

Benefits of participating in the partnership approach

- Ability to demonstrate the outcomes you are achieving for your clients.
- Access to a rich set of additional reports
- Access to whole of government data sets

SCORE is not so much a method for **collecting** client outcomes, but for **reporting** those outcomes in a consistent way across all the programs that use DEX.

### **Slide 10 – How does SCORE work (17.21 minutes)**

So how do you record SCORE on a practical level?

You will need to:

- Determine the way an assessment will be made – either by the client, practitioner, jointly by the client and practitioner, a support person or using an evaluation tool.
- Select the relevant domain(s) in SCORE.
- Make an initial SCORE assessment towards the beginning of a client's engagement with a service or activity on the Likert scale of 1-5.
- Make a subsequent SCORE assessment towards the end of a client's engagement with a service or activity on the Likert scale of 1-5.
- Multiple SCOREs may be recorded for long-term clients.

The difference between the initial and subsequent score assessment allows us to look at the amount of change in a client's outcome after receiving a service or participating in an activity.

Additional guidance for using SCORE with clients is found on the Data Exchange website under the Policy guidance tab.

### **Slide 11 - Settlement Engagement and Transitions Support (SETS) – Client Services (19 Minutes)**

In the case of client services where you are dealing with individuals and families for instance, you can record outcomes against any of the circumstance domains and the majority of Goals domains.



The only goal domain that may not be applicable is the “changed impact of immediate crisis” however there may be instances where this is applicable for your client/s and is still available to be selected

It is about measuring what is happening in your clients’ life and their goals.

When we look at the outcomes reports you can start to see trends across your organisation, outlets and activities to see which circumstances you may be having the biggest impact in or if the clients goals are being achieved through the delivery of your services.

### **Slide 12 - Case study one (23 minutes)**

Indra is a new humanitarian migrant who has 3 school aged children. The family are living in Dubbo NSW and are unsure of what is required to have the children attend schools in Australia.

The local organisation funded to deliver SETS has a short course available to help develop an awareness and understanding of the Australian educational system requirements including enrolment, compulsory attendance, school curriculum and other requirements of an age-based education system.

### **Slide 13 – Capturing Indra’s outcomes (24 minutes)**

Over the course of the six weeks, Indra attends the weekly sessions and hears from speakers from the Department of Education and the local primary and high schools about enrolling children and what his children can expect at school.

In this example, the goal for Indra is to improve his knowledge of the Education system.

To record the outcome of the program, an initial score is recorded at the beginning of the course – In this case, the facilitator has judged that Indra has some understanding of the requirements and is engaged with learning more.

At the end of the six weeks, Indra has a clear understanding of the requirements and feels confident he can support his children as they start at the new schools and where to get further help is required.

The facilitator can also capture any unintended outcomes such as improved family function in the Circumstances domains if they feel this is appropriate.

### **Slide 14 – Further information on SCORE (24 minutes)**

The policy section of the Data Exchange website contains further information on measuring outcomes for your organisation.

Information includes:

- SCORE at a glance
- Measuring Outcomes and
- And using score with clients



## **Slide 15 – Data Exchange portal demonstration (26.17 minutes)**

We will now have a quick demonstrate of the Data Exchange portal and how to capture cases, clients and sessions and recording an outcome for a client.

Please bear with me a moment while I switch to the data exchange environment.

### **Demonstration – (30 minutes)**

We are going to quickly jump in and add a case and a session for Indra.

To add a case, we can either find the case or add the case, if we have not already got a case setup.

I have set up a case called kid's school, so I am going to click on Find a Case. I am going to select the SETS Activity Outlet and the Client Services.

We have already had one session of service on the ninth of November.

I have added three clients. One client has Name Hidden in the client name field. This indicates that the client has not given consent for their information to be recorded in the Data Exchange. To find that client in the future we need to use the client ID.

Add another client, we would attach the client at the top, if we had a new person come along, or we can add a session, or we can even copy the session.

I am going to copy the session very quickly.

Session ID I will leave blank and it will automatically generate a session ID for me.

This session type was Education and Skills training is appropriate for an education type session.

You will see that there are the other types of sessions that we could have had with this client or with this group of clients. Next, it was run at the outlet or office.

At this session, we are going to say that Quinn and Indra turned up. These are from the other session that we copied. We are going to actually remove one person who did not show up for this session.

You will also notice, there is a small blue arrow on the right-hand side, which just gives us the clients basic details that are mandatory to capture for every client.

To add an outcome score for these clients or one of these clients, you have to do it from the Session Details section.

You will notice for these two clients, these two little icons. The one on the left is to add a referral. So, if you have referred Indra to another service, you can add the details here, but we are just going to concentrate on SCORE for sake of expedience.

I have clicked on Add Client Score and I am going to select a goal score. You then have to click show domains to get the list to come up.

We will say that the change knowledge and skills, we are going to report that they are progressing.





These descriptions do not always fit what is happening with the goal itself. You can record a one is no progress and five is they have learnt everything you can teach them.

Now that we have added Indra's score, you will notice that the little icon is now filled in, meaning that you have captured something, you can actually look at what you captured.

Here is the domain, and here is the SCORE. If you have entered it incorrectly, you can edit it or you can actually delete if it is wrong altogether and you want to start again.

If we add one for Quinn, I will choose a circumstance domain.

The other thing I did miss, the assessed by, a lot of people get stuck on a score directly, and validated outcomes tools.

I do not believe we have any validated outcome tools for the SETS services. You could check against the matrix on the website, there are 11 tools currently validated for use, and they are mainly in the Families and Communities services section.

When it says scored directly by the client, that is where the client has said, "I do not have any knowledge about the subject, or my family functioning is really poor." If it is scored directly by the practitioner, that is where they have told you some information, and then you have turned around and determined "I think they are at about a two" based on the information they have told you.

You could do it jointly. You could say to the client "OK, on the scale of 1 to 5, how are you feeling today?" or "where do you think you see it?"

A support person can also provide that level of detail for you to be able to record it from a support person. You will notice that this field is not a mandatory field. It does not have to be collected. It is up to your organization. If you wish to have something that can be compared to, say, well, our practitioners, are scoring people at twos and the individuals themselves scoring themselves at threes or fours. What is happening in that space to have a look at and just ask some other questions?

Also, the part I did want to point out is the definition of client scores. If you click on that, it pops up, and it actually tells you what a score of 1 to 5 is, for each of the categories. That is a lot handier than actually using the little mini description up the top here.

That can be a really good guide to start with, but if you want that more detailed description, click on the definitions page and you can open up a little bit more specific definition, for the SCORE that you are writing against.

In this case, I am going to say that Indra's mental health well-being and self-care is being negatively impacted by his lack of knowledge.

Since he has come to two sessions, we are going to say that he is somewhere in the middle ground at the moment, and then hopefully by the end, you will be at five, and that is all you have to do.

The system works on the basis of, this score was recorded on the 24th for a session. It will take that score and measure it against previously recorded scores for that client and say, this was the overall change.



If you went from a two to a five. SCORE has increased of three, it is a positive outcome of three. It aggregates it up with all your other scores that you have recorded and it will send those through and when we have a look at the report, you will be able to see them in the reports, about how it is aggregated up, and not detailed.

If you want to have a look at the details for your client, you can do it here, or you can actually click on Indra's name and that will take you to his client record and you can view client SCORE from this page.

We can see that we did not record a score for the first session. You might like to go back and do that to be able to get the outcomes measurement happening.

That is a really good way also to follow up and see if you have recorded them. There is also a report that shows you which clients do not have a score outcome recorded, which we can have a look at.

I might take a five minute break to read through some more questions that have come through.

There was a question about creating a community score for a group of clients.

If we go back to our session where we added the SCORE, you will notice down the bottom, there is an add Community SCORE button.

This works pretty much exactly the same way as the normal client scores. You can get your definitions here about what has happened. There are only four to choose from in this case.

At the second session of service that was delivered, there is limited change at the moment. The participants might not be interacting that much, except with yourselves. Then as you progress, this might change, and you might see a significant change or an improvement over time.

Again, that button only comes up once you have added the session of service.

## **Slide 16 – Data Exchange Reports (58 minutes)**

On the MyDEX dashboard select the Go button in the bottom right corner to access the reports.

## **Slide 17 - Available Reports**

All organisations have access to these two standard reports:

- Organisation Overview
- Organisation Data Quality

The next lot of reports are available to those organisations that have opted into the partnership approach.

- Resource Planning
- Service Footprint Report
- Client Outcomes Report
- Community Outcomes report
- Community profile

## **Slide 18 – What does each report tell you (1 hour)**





All organisations have access to these two standard reports:

## Organisation Overview

- provides a summary view of an organisations' service delivery including:
  - service types,
  - outlets,
  - session attendance and
  - client demographics.

## Organisation Data Quality

- Highlights key data quality to assist Organisations to improve and/or maintain data quality leading to a better understanding of the services being delivered.
- The report shows data quality changing over time and across outlets.
- The report provides detailed lists of client and session records with data quality concerns to help locate the relevant record to improve the data.

**The next lot of reports are available to those organisations that have opted into the partnership approach.**

## Client Outcomes Report

- This report shows, in an aggregate view, the overall performance of the organisation in achieving outcomes.
- It can be filtered to provide information on each outlet, each activity your organisation delivers and each SCORE domain (Satisfaction, Goals and Circumstances) within an organisation.

## Community Outcomes report

- Similar to the client outcomes report but shows the outcomes from Community Score domains.

## Resource Planning

- report provides a sophisticated overview of the trends in service delivery to assist organisations in business planning and demonstrates to funding agencies the peaks in service delivery.

## Service Footprint Report

- shows how clients are engaging with services in map form, which we have made available at program activity level, in aggregate form.

## Community profile



- This report offers key measures that can inform the profile of the community from external sources such as the ABS and other government departments.
- The data will come from a variety of data sets such as; the national Census, administrative and survey datasets.
- You can explore a selection of topics at a national, state or local level.

## Slide 19 - Report demonstration – (1 hour 11 minutes)

I am going to give you a demonstration of the data quality report.

I am going to show you how to bookmark particular filters, and add a filter report to find what you need.

The functionality is the same across all of the reports, and I should just quickly run through. You will normally come up with two streams, one will be standard report, and that will just give you access to the organization, Data Quality Overview reports.

Underneath that will be a partnership report tab. That will give you access to these other six reports, service footprint, resource planning to client outcomes, and there are actually two community profiles reports. One, for the 2011 census data, and one for the 2016 census data.

You want to go to our report. Click on the icon.

OK, once we get to the report, these reports will all look the same as I said, that will always come up with this page.

We are in the organization data quality report.

There are three icons at the top - sheets, bookmarks, and stories.

Stories, act like a PowerPoint presentation for you.

Bookmarks, you can actually bookmark, most commonly use filters, etcetera, that you can go straight to the information that you need. And the Sheets, the one that is actually currently selected sets out what information is displayed in this report.

This is the data quality report, not the organization report.

All Reports will have a user guide at the start and an information page at the end. In some instances, the user guide will also include filters that you can select straight up.

Basically, the user guide tells you what the purpose of the report is, any key terms, which will be found in the information page, on this report. Any help and guidance, it will take you back to the data Exchange task cards page; what the release of the report was, and when the data was extracted from the data exchange.

Normally, the Data exchange reports refresh every day, and that date will appear here for when it was last updated. I believe it also now includes a time stamp against it, it will tell you that it was 8:43PM on the 23rd of November, for instance.



If it does not say that, you may need to have a look at what cookies you have got or the history of your computer to make sure there is nothing cached in there that is causing you to see data.

If you have not subscribed, subscribe to our website and if there is an outage for some reason, you will get a notification through that, to say there has been an outage, and that data is not up to date, like, it should be.

If we click on bookmark Icon at the top of the page, any bookmarks that I have saved for this organization and for this report would show up here.

This icon shows you which sheets are available. I find this the easiest to navigate because if I click on the drop-down box, the sheets come up again, and I can visually see which ones are available to me. You can also navigate with the Forward and the Back button in the top right-hand corner.

That will then take you just straight to the next sheet. As it says, it says, it is taking us to the next sheet which is Data Quality health check.

If you have a look at app Sheets here, I am going to jump over to the Information page. This is really useful if you are wondering how information is recorded or aggregated and what the counting rules are. This sheet will give you that information.

So, for instance, if we want to know information about Sessions, cases and clients I have clicked on the Word session on the left-hand side. Little boxes have come up at the top, and this is how we start to filter information. Most of the information is clickable, or filterable. So, feel free to click on them and see what happens.

Any filter that we apply appears in this top line. You can delete them by clicking the Clear all option and clear all of them. So, if you have multiple filters selected, and want to clear them all, you can just do it all in one hit.

You can go back a step. If you have added a filter that you do not want, but you want all the rest of them, you can just select them.

You can also do a search of the data, I am not going to go into the detailed functionality, just in the interests of time.

On the information page, you can find that glossary of terms really handy for data quality report.

So, this is where it shows you, the data quality over for the last six months, and it gives you the percentage with a low SLK. Low SLK's are generated because of pseudonyms; estimated dates of birth, where the date of birth is encoded as 01/01/1974 for instance. It is an indicator of is there something that we need to check that might need to provide our staff a little bit more detail about capturing information.

As we move through the reports, it will give you more detail as to why that number has come up. So, down the bottom here, we can see percentage with an estimated date of birth, missing first, and last names. Now, this used to occur when first and last name was not a mandatory field. If you have a client who only has one name like Cher, you put Cher in as the first and last name in the data exchange, and that will fix that problem and clients with a pseudonym.



You will see here that you have every outlet that you have in your organization and this organizations called their outlets 10, 46, 55 and 53. It will tell you how many clients were entered in the last six months.

The percentage with a low quality SLK entered in the last six months.

If you need to know details for outlet 10, you have had 11. I am going to add that as a filter for Outlet 10.

Actually, I am going to move right over to the Unidentified Client details.

The not stated details for these clients at Outlet 10. This is the field that you will look at to find out who the actual client is. As you will see, no names. If you typed, If you had to put the clients name in there, in the client ID, in the data exchange, their name will appear in this list.

The department still will not see that detail because we actually put over a dummy client ID over every client now so that we cannot see what you have input but your staff can see that.

The reason why I keep stressing this is if a client comes into your service in Dubbo and does not want anybody else to know they have been to your service, and they might have a family member who works in your Mudgee office. You have unticked the (consent) box so that they are nameless and becomes hidden in the system but if you have typed their name as a client ID, that family member in that other outlet could look up their name using the client ID that would breach that person's privacy.

OK, you can use this client ID back in the Data Exchange portal to search for the client, and then to fix the details that are recorded.

There is a field that says, for disability, for instance, that instead of using not stated or inadequately described, tick No if the client does not identify as being disabled in any way and it is really how the client identifies.

I have got two filters now. As Client ID, 11 of 765, if I remove that filter and the outlet filter, all our clients have come back for this organization and it will tell you in red colour which fields are missing for that particular client.

In the case of Client 4041 gender, indigenous status, and disability status, is not stated. You might want to go back and have a look at those clients and see if you can improve that information.

This information flows through into the organization Overview report and other reports for the demographic details. If you are having a lot of not stated or adequately described, and your target audience for your services are female. You might not be able to then turn around with hand on heart and say, with any certainty females in our service if you are a domestic violence shelter and that can be important for reporting purposes.

Now, I was going to show you a bookmark. I am going to get back to our data quality overview report.

I just want to know, every month I need to provide my boss the numbers for the ACT and New South Wales, because that is all they want to see. To filter by the ACT and New South Wales, I literally just clicked in one of the bar charts and just selected ACT and New South Wales.

If I want to add further or take away from those, I can click on the filter box at the top of the page and untick, and I might want ACT and Queensland instead.



As I do these filters, the changes will actually happen live in front of you and it will change all of the data that is available under this report.

Every month, my boss says, I want ACT and Queensland figures for every half year. You are going to create a bookmark. Click on the bookmark icon, up in the top right-hand corner, create a new bookmark, type in what the bookmark is for.

So, monthly, SLK stats. Use the little green tick and this is now your bookmark. If you need to edit it, you can do so by clicking on the edit button. To get out of that screen, you can either select bookmarks up top again to hide them or if I am in there, I can simply click anywhere else on the screen.

OK, I have got my two outlets that I need to filter every month. I have just removed them.

I am just going to get back to where we come in and now retrieve that bookmark.

Next time I come in, click the bookmark icon and select the bookmark that we just created. That will automatically apply the two filters or the filter that we had applied for those two states and change all the data.

### **Visualisation of Data (1 hour 24 minutes)**

We also might want to see what the data looks like behind one of the graphs.

I will open up the organization overview report.

I have come in here, and I have gone, "oh, where is my monthly bookmark?" Well, that bookmark was only created in the data quality report. It does not flow through to all of the reports.

These are all report bookmarks that we have set up during training sessions, and they only apply to the organization overview report. That is because there are all different fields that you can filter by, one bookmark will not necessarily work in another report. You have to set them up for each report separately.

For this organization, for the last three years that we have got data for, this is all our clients, the number of cases, number of Sessions, individual clients, group client, support persons that have come to this service providers outlets for these activities, these activities will normally be SETS.

The outlets will be named as per your organization as set those up and of course, your organization name will come up here.

In this case, we just want to have a look at 2017/18. If I select 2017/18 up here, and select the green box, that will apply the filter.

It also indicates, as a little drill down dimension box here, indicates that there are other drill down fields underneath that 2017/18, and that would be the two reporting periods for that financial year.

I am just going to click, select the 1 January to the 30th of June 2018.

I have also selected, if your organization does other funding, delivers other services, which many organizations do and you have access to all of the data you might like to filter by the activity that you deliver. This is breaking it down by the filters that are applied.





You will notice here, that these numbers may not add up to the total top.

This is because it will count the session but the clients, and the cases may be overlapping clients. That is because the client might go to a number of different sessions across three outlets, and they will be counted each time for the breakdown of outlets.

This report is the one that I want every six months to have a look at. I am going to create a new bookmark for it. You can also put in which filters, if you used those details. It will come up down the bottom.

Just clear that, just make sure it is working OK. OK, so there is our full filters that we want to apply to this data.

Now I want to extract that data. All the data in the data exchange is extractable into an Excel format.

I right click and a number of options come up. The export option is under the three little dots at the top of the menu and follow the bouncing ball basically.

If you want to export it as an image, if it is a graph, for instance and you want to export it as an image, you can do that. It can be exported to a PDF so no one else can play with it, and you can put it into a format that do not get to or you can export the data as an Excel spreadsheet.

Again, you just follow the prompts as they come up, and it will open it up in Excel for you. Here is the data.

These filters, having been applied, as we move through the reports, again, you will see that, OK, this organizations outlets, and for this financial year, has these service types.

If you do not like the look of that graph, you can also change it by again, right clicking and going to the three little bars on the side here.

This is called the Visualization menu and you can change how it sorts the information. So, it could move information around, if you do not like that, you can just discard it and it will go back to the basic present format.

We can change how the report looks, depending on the report. You might have two options or four options and you can also change the colour in a limited way. As you can see, if you do not like these, you can discard them.

When you exit this report, they will reset back to the default format. You will have to change that each time. Unfortunately, they do not stick for you.

As you hover over a data point, the information should appear for you. It does not look like it is going to in my test environment anymore but if I click on it anyway, the information will come up that is being shown in that graphic.

Also, if you click anywhere, and I left clicking just anywhere. There is a little lasso icon. This is really handy. If you are looking at maps, which are available in the data exchange, you can actually select that. Draw a circle does not have to be exact by the way. You can see that it just has to touch the data points, we will just select these as a filter.



So, up here, we now have Service types four of them out of 34 that were available, and these are the four that have been selected. If I just want to look at those four types of service types. I can just filter by that.

Again, the filters come through this as clients and support persons sessions by service type.

So, for activity 25, these are your service types.

Quick question on exporting. Yes, it has always been possible to export data from the Data Exchange into Excel.

In this case, if we wanted to take a photo of that, we can take a snapshot and put it into our snapshot library. I will call it the service type number, by activity 25, just so we know what it is and save it. That snapshot can be used if you want to make use of the story function in the data exchange to do a presentation for you, or for management, or whoever.

To get out of this screen, we can just click the Close full screen button. This is in the Exploration menu. You can also take a snapshot from here. If you need to export the graph itself, just export it as an image, and then it will give you the details of how you are going to export it.

As I said, feel free to play around as much as you like in these reports. You cannot break the information in there, because it just feeds straight out of the data warehouse that we have. Just clicking across quickly through the other pages, or the other sheets in this report.

Client demographics breaks down into age groups. If you select one of the age groups, for instance, it will break it down into the individual ages. This works on any of the graphs.

So, for graphs, like clients by country of birth, if you wish to go in-depth. It will give you the top 10 for this organization, and the top 10 down the bottom in a graph, in a chart form. But if I want to see the next top 10, just click on Other, filter by that and then it will give you the next top 10, and so on, and so on, and so on, down through. We have gotten down to one client from each of these countries and, again, you can just keep filtering down as far as you would like to go, until it stops saying other. That is as far as I can go, because there is no point any further.

If I want to know, for instance, these eight individuals from these countries, I can apply that filter and here is the overall details for those clients.

Outlet State sheet breaks it down, as I said, by state. As it indicates, we do not have a state filter. So, they are only delivering in New South Wales.

That is just a brief overview of the organization Data quality and the Organization Overview report.

## **Client Outcomes reports (1 hour 37 minutes)**

I am now going to jump into the Client Outcomes report. Again, it will look really familiar to you, hopefully.

This report has a filters page separate from the other sheets. As I said, sometimes, the filters sheet will be in with the User Guide. Other times, it will be separated out.

I am just going to click on it to show you what you can filter by. So, you can filter by any of these fields.



Activity, Program, Delivery org, reporting period, client type, whether an individual, support person, or a group client. You should not find any group clients in here, because this is for individuals only.

Group clients will come under the Client Outcomes Group, Community Score Report, and you would be able to go in there and have a look.

For this organization, I have not applied any filters to this organization for date or activity. This is just saying that for all of the data that we have score on, they have been 14,293 clients with a Session of service, 5252 of those have been scored twice.

This means they have an initial and a subsequent score recorded for them in the same domain under circumstances, goals or satisfaction.

That is important because we cannot measure an age appropriate development rating against family improvement, for instance. They have to be on the same domain.

There is 2916 with a partial assessed score. That means they have had one score recorded at the moment, and it is waiting on that second one, to be able to then measure the outcome.

On the right-hand side, circumstances, number of clients assessed 4045 circumstance domains, 3244 for goals domains, 2919, for satisfaction. If you add those three numbers together, they come up to about 10000. That is 5000 more than we have got over here. And, again, it is because people have multiple SCOREs recorded for them. They might have some circumstance domains recorded, and they may have goals domains. This is breaking down the individual client numbers. This is an aggregated of unique clients.

Down the bottom, you can see, all of the reporting periods are listed here that we have the data for this data set.

For instance, if you recorded a SCORE for Indra in the example from before, before the 31st July 2017 and then you recorded one on in March 2018, it will still measure it. It will just take the last one that was recorded, regardless of the reporting period, and the next one that was recorded unless you filter by that reporting period.

If I just pick one reporting period, you will notice all my data changed and that would mean they would need to have two sessions of service recorded to be counted in this number of clients assessed field up top here, because they must both be then recorded in that reporting period, because that is the filter that is applied.

If I select two periods, again you will see here, these are the clients that have had two sessions of service across those two periods of reporting.

This is the overview sheet, and it breaks it down into circumstances, goals and satisfaction.

It will also give you the client demographics for that information. We will have a look at circumstances change in score.

We have gone over the change in score over time. This is simply breaking it down just for circumstanced scores.



Again, it is just looking at it as the title says, over the different reporting periods for the percentage of clients with an overall positive outcome across outlets. It is saying 82% and this will only be able to measure those clients who have had a pre and a post or an initial and the subsequent score.

If you want to have a look at the spread for each domain, you can select the filter and that will change a little bubble graph over here on the right-hand side which sets out the outlets. These are measuring outlets, and the positive change, if I click on it, 98.5 per cent had a positive outcome from this outlet 15.

I am just going to clear those, and as you see as I clear filters, add filters, the data changes.

If I actually applied a filter for physical health, and went to the next sheet, there is no data. That is because this outcome domain does not apply to a goal.

Goals only have six domains, and physical health is not one of them. If you see something come up like that, just check the filters that you have applied, and clear them.

Again, just showing you over time what is happening for these clients, at a high level and for outlets and for each activity.

If I want to select via activity 44, it is been 1579 clients assist. Number of completed pair domains, 3192. That means that for goals, these 1579 clients, might have been rated across a number of the goals. Clients with a positive outcome is 71.2 per cent.

If I left click and select the lasso, and I just want to have a look at these outlets, I can simply filter by those outlets. See where, which outlets might be doing better, or not quite as well, so that you can either talk to them or find out what they are doing really well in those outlets that are doing really well.

Client Demographics sheet, you can see the breakdown of clients, so that you can have a look and see where clients, who clients are, which area they fit into.

If you would like any more information on the various reports, there is information on the Data Exchange website. You can just go in and have a look at the reports and have a play around with the filters, see what happens to the data as you are looking at it. You cannot break it.

## Slide 20

The outcomes report provides part of the outcomes story. This helps us to understand what impact services and policy are making for clients. From the Client outcomes report – filtered by age and demographics.

## Slide 21 – Keys points on reports (1 hour 50 Minutes)

- The reports are updated overnight.
- At times this may not occur due to a variety of reasons. It is always worth checking the date the report was last updated at the top of the report screen
- Data that you record is the data that you will see it is only as accurate as you make it. Try to reduce the instances on not stated if appropriate as these are missed opportunities to collect and record information. The data quality report is useful in identify clients who have “Not stated” data.



- A session must be recorded within the reporting period for it to display in reports. If you create clients and cases but no sessions – the case and client will not be counted in the reports. Once a reporting period is closed you cannot enter or amend any session details for that period.
- You can update and amend client and case information though.
- You will only see information for the outlets and programs that you have been attached too in the Data Exchange by your organisation administrator
- Check your data quality regularly – use the data quality report to check and maintain your data. The data that you record is the data that you will see. Try to reduce the instances of not stated if appropriate as these are missed opportunities to collect and record information. The data quality report is useful in identify clients who have “Not stated” data.
- Remember that you can update your client records at any time, that includes first and last name, gender, indigenous or disability status, address and country of birth and main language spoken at home – these are not restricted to reporting periods
- You can only update session information such as when it was held, what activity was delivered at the session and who attended during the relevant reporting period – when that reporting period is closed it is too late.
- You cannot break the reports so go in and explore

## **Slide 22 – Question Time (1 hour 51 minutes)**

I would like to thank you for your attendance and participation.

This concludes our session today.

We are leaving the webinar open for another 10 minutes for you to ask further questions if required.

If you do not have any further questions you can exit the webinar otherwise I will be switching the audio off and

Thank you once again and enjoy the rest of your day.

## **Slide 23 – Support Contacts (1 hour 53 minutes)**

You can find support material on the Data Exchange website

- The Data Exchange Protocols;
- Webinars;
- Task cards; and
- Helpdesk details for more support.