Add a case

Task card

This task card discusses the following:

KEY HIGHLIGHTS
▪ **The case identity (ID) should not contain any personal information, such as any part of a client's first or last names, Customer Reference Numbers (CRN) or My Aged Care ID reference numbers.** ▪ A case should be created for each outlet even if the case is delivered across multiple outlets. ▪ Primary and secondary referral source and reasons can be added to a client record at any time. ▪ The use of special characters such as * & % # @ should **not** be included in the free text fields. ▪ Some programs have special data entry fields apply to cases.

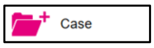
What is a case?

A **case** is the first step in recording service delivery information within the Data Exchange. A **case** reflects how you deliver a service. Depending on the nature of your program, a case may link to an individual, a couple, a family or a group of unrelated individuals.

A **case** captures:

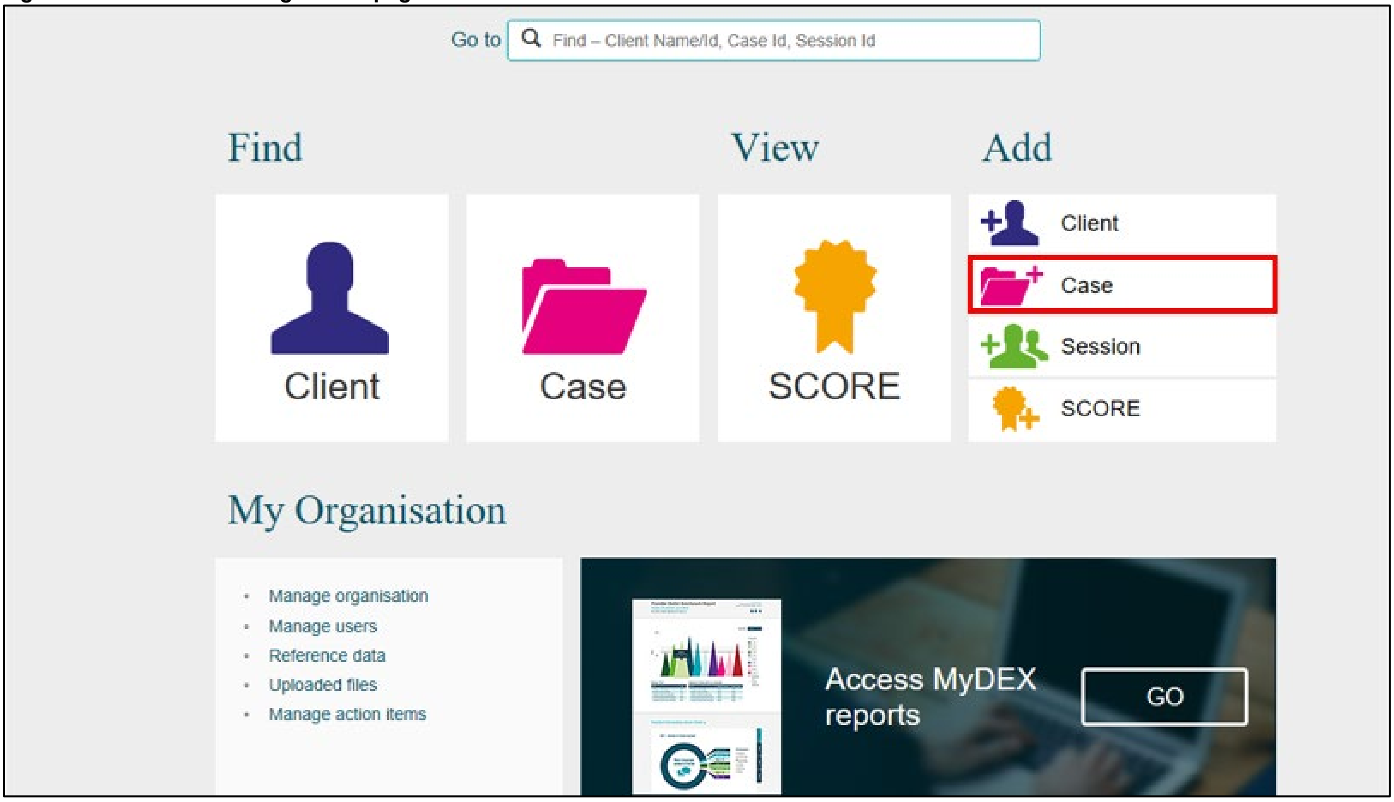
- where the service was or will be delivered
- the program activity it is funded by, and
- the client(s) who have or will attend this service.

Add a case – Case details

From the Data Exchange home page, select the **Add case** icon 

under the **Add** menu. Refer to Figure 1.

Figure 1 – The Data Exchange home page

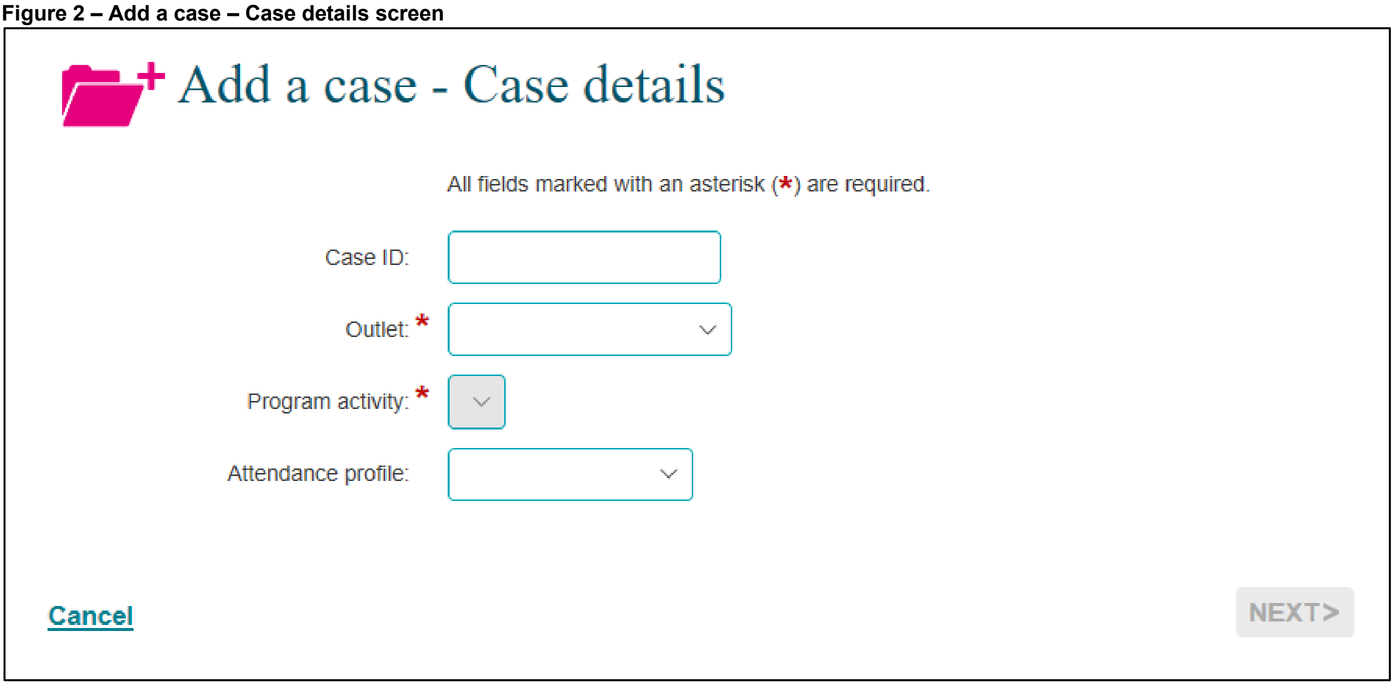


The **Add a case – Case details** screen will display. Refer to Figure 2.

Enter the case details.

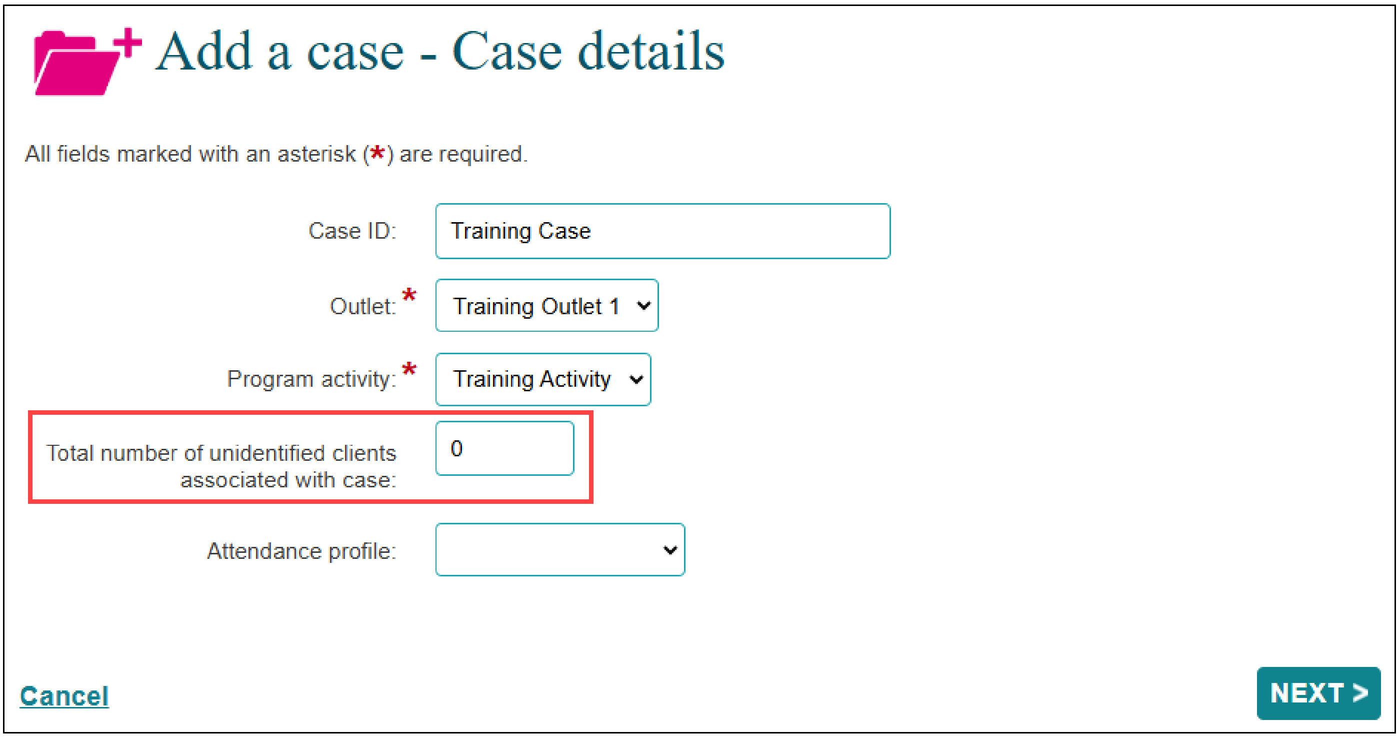
Fields marked with an * are mandatory and must be completed before you can move to the next screen.

Figure 2 – Add a case – Case details screen



Note: The **Total number of unidentified clients associated with case** field will only display on the **Add a case – Case details** screen once a program activity is selected. Refer to Figure 3.

Figure 3 – Total number of unidentified clients associated with case field



Do not enter any personal information into the Case ID field, such as first or last names, Customer Reference Numbers (CRN) or My Aged Care ID reference numbers.

Table 1 – Case details field descriptions (Refer Figures 2 and 3)

FIELD	DESCRIPTION
Case ID	Enter the **Case ID** or leave it blank for numerical auto-generation. **Note:** The use of Special characters such as * & % # @ should **not** be included in the free text fields.
Outlet*	Select the **Outlet** where the service is delivered. If a case is delivered across multiple locations, a separate case should be created for each outlet. You will only see outlets within your organisation to which your Data Exchange Organisation Administrator has provided you access.
Program activity*	Select the **Program activity** that the service is delivered under. If a client is receiving a service from multiple programs, then separate cases will need to be created for each program activity. **Note:** Refer to page 8 for additional details for sub-contractors and consortia arrangements.
Total number of unidentified clients associated with case	Organisations are strongly encouraged to create individual client records for as many of their clients as possible. If it is impractical to collect information about individual participants, for example in community outreach activities where many members of the general public may participate, the aggregate number of unidentified clients is recorded. For example, if you expect 150 people to attend the event over the life of the case you would enter 150 in this field. The field should not be used to 'bulk report' services to individuals or small groups where it is possible to collect the details of each individual client. For group activities where a combination of clients and unidentified persons are expected to attend, enter in the expected number of unidentified persons only. You can then add the clients that are recorded in the Data Exchange in the next page. **Note:** If the number of actual attendees at the session is greater than the number of expected attendees recorded against the case, you must edit the case record and increase the number of clients expected to attend before recording the session.
Attendance profile	Select the relationship between the clients attached to the case. If there is only one client attached to the case, then no option would be selected. The options are: • Family • Community event • Peer support group • Couple • Cohabitants

Once completed, please select **NEXT**.

Add a case – Attach clients

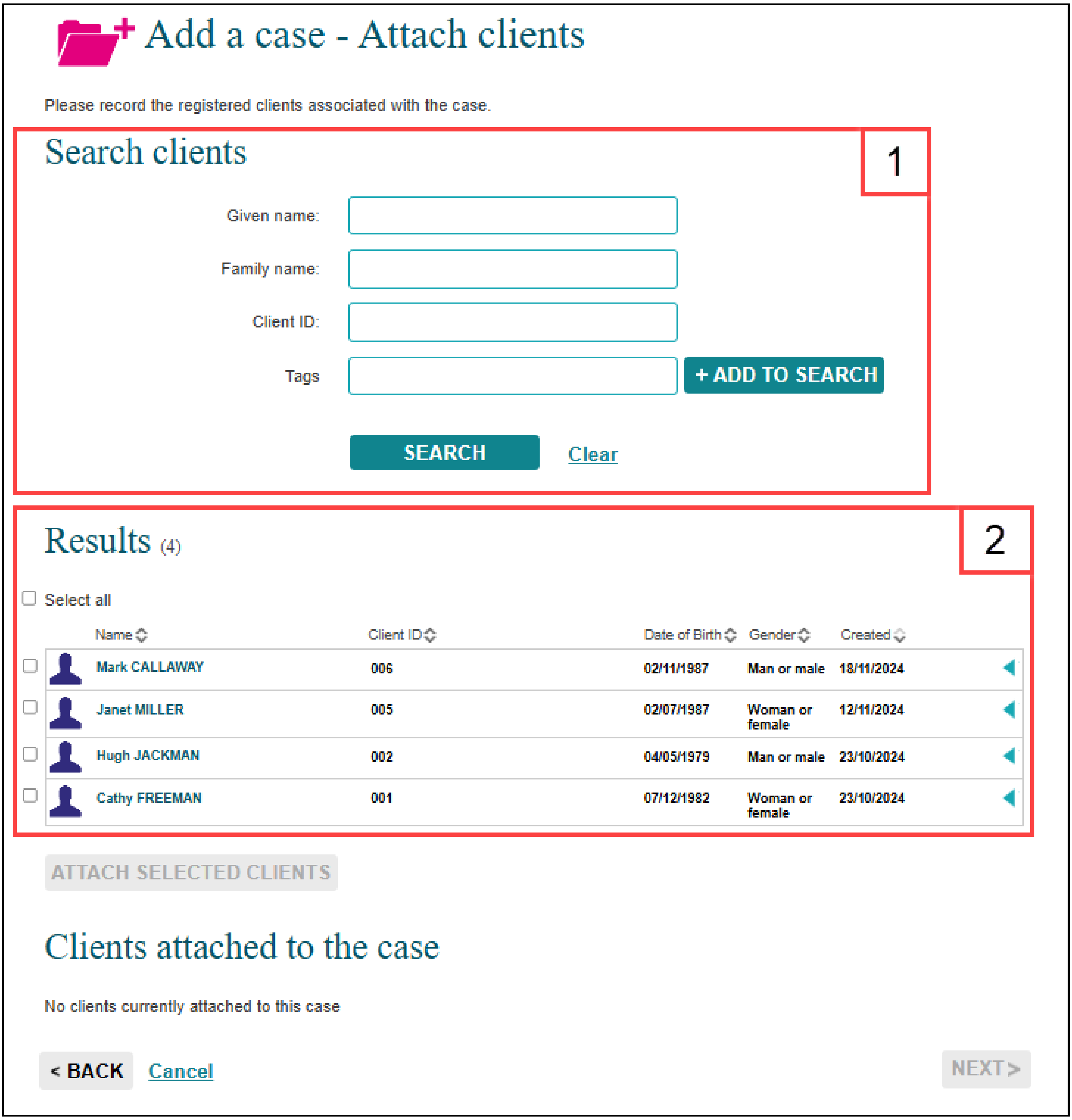
The **Add a case – Attach clients** screen will display.

Attach the relevant client(s) to the case. Refer to Figure 4.

To do this use the:

1. **Search clients** field at the top of the screen, or the
2. **Results** section.

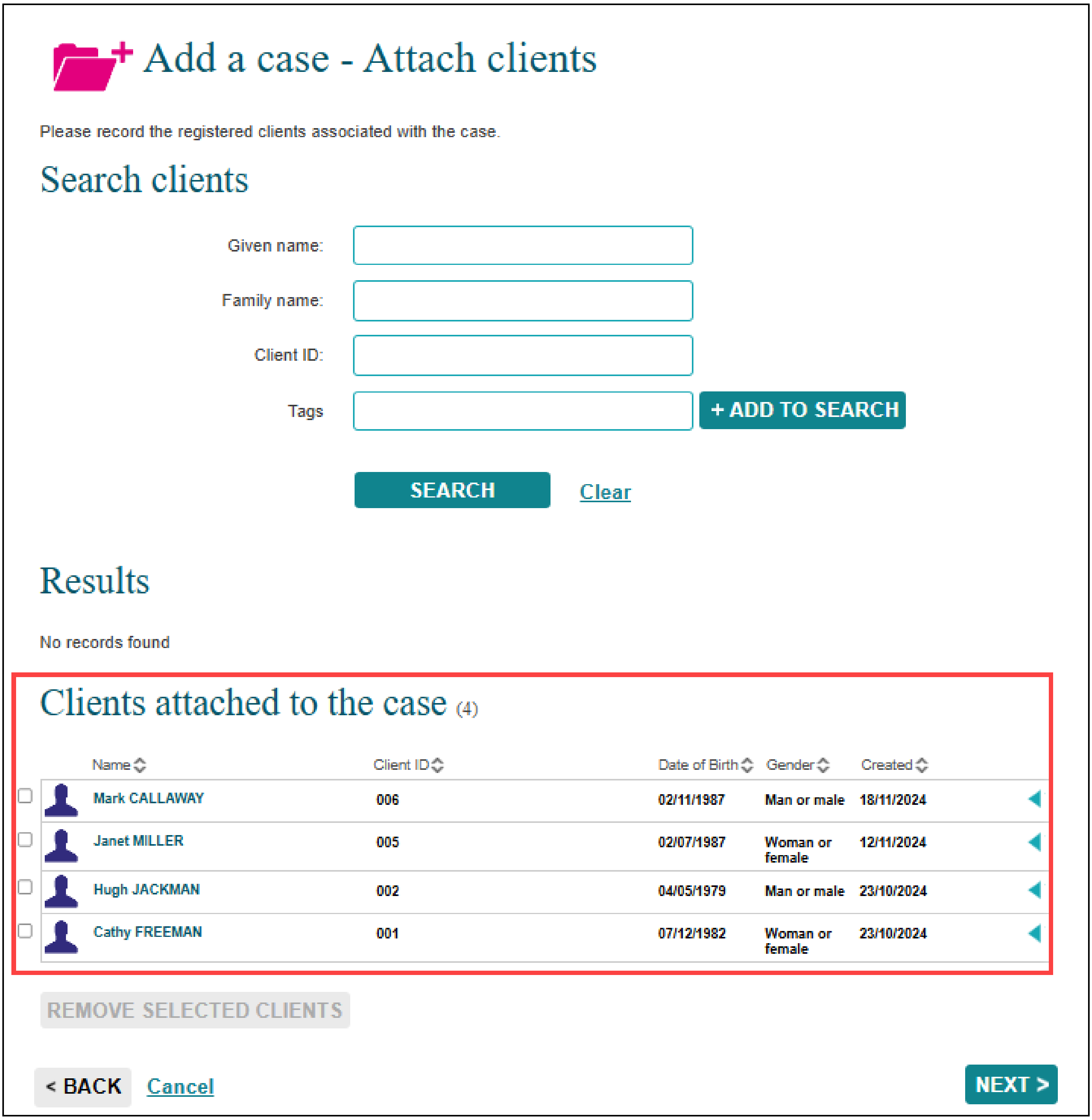
Figure 4 – Add a case – Attach clients screen



The order of the **Results** section can be changed by clicking on the relevant heading title such as **Name**, **Client ID**, **Date of Birth**, **Gender** or **Created on**.

The selected clients will display under the **Clients attached to the case** heading. Refer to Figure 5.

Figure 5 – Clients attached to the case field



Associate clients with the case by selecting the **tick box** next to the relevant client's name.
Select **ATTACH SELECTED CLIENTS.**

Select **NEXT**.

Add a case – Review

The **Add a case – Review** screen displays and allows you to review and edit the details of the case you have entered. Refer to Figure 6.

Figure 6 – **Add a case – Review screen**

Select **<BACK** to edit the details or **Cancel** to stop the process and remove the case.

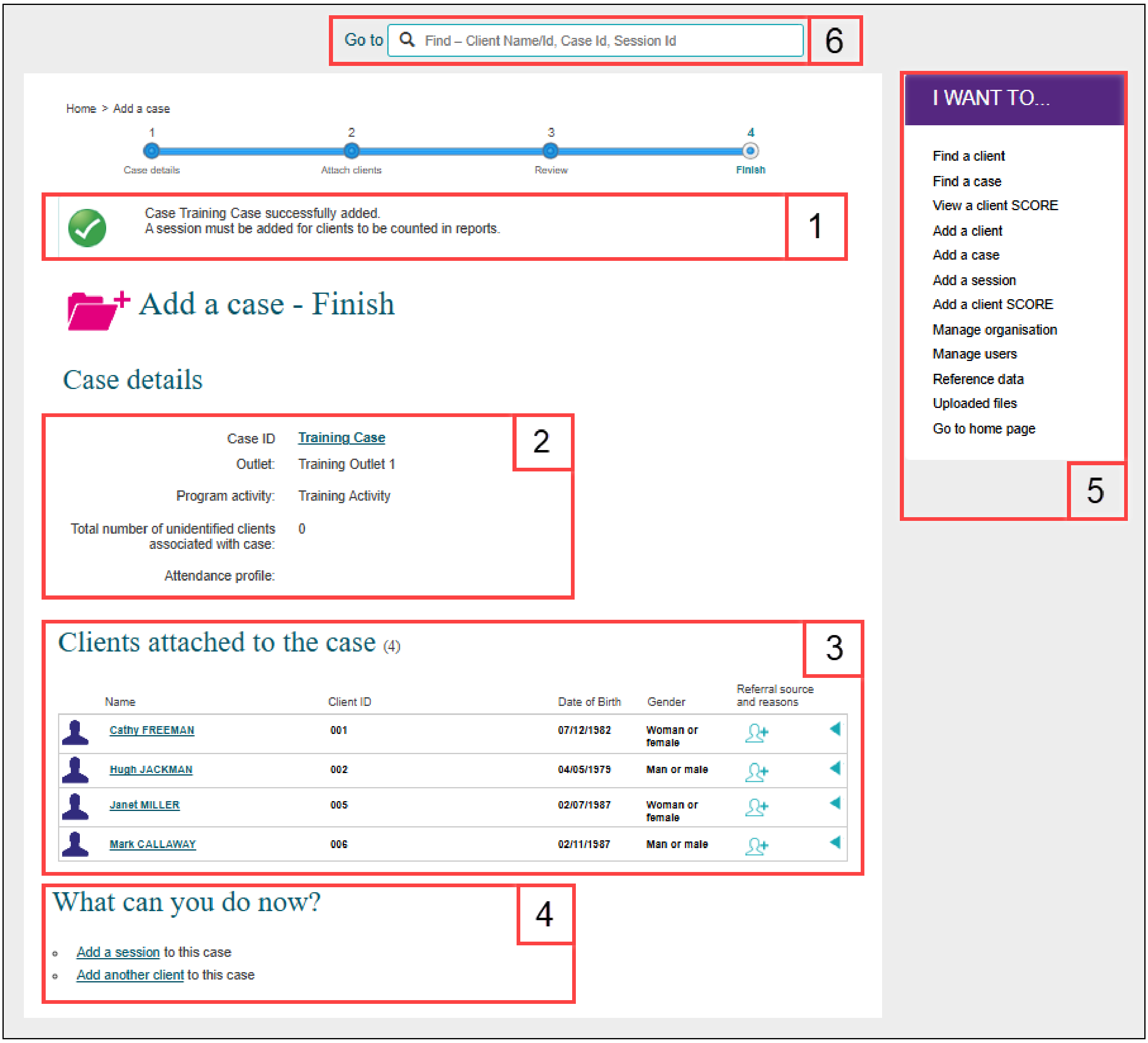
If the details are correct, select **SUBMIT.**

Add a case – Finish

The **Add a case – Finish** screen will display with the following. Refer to Figure 7.

1. A message box to advise the successful creation of the case and that a session must be added for the clients to be counted in reports.
2. A summary of the case you have created. If you did not enter your own case ID, a **Case ID** will automatically be created.
3. A listing of the clients that are attached to the case.
4. **What can you do now?** section where you can **Add a session** to the case of **Add another client** to the case.
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.

Figure 7 – Add a case – Finish screen

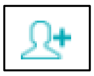


Referrals to other services and Exit reason

You can add **Referral source and reasons** and an **Exit reason** to the clients attached to this case. Refer to Figures 7 and 10.

Table 2 – Icon descriptions for Referral source and reasons (Refer Figures 6 and 9)

ICON	DESCRIPTION
	This icon indicates that a referral source and reasons can be added for this client for this case. **Note:** Refer to page 9 for additional information for the Commonwealth Home Support Program (CHSP).
	This icon indicates that no further referral source and reasons can be added for this client for this case.

Select the **Add Referral source and reasons** icon  found next to the relevant client.

The **Edit referral source and reasons** screen will display. Refer to Figure 8.

Figure 8 – Edit referral source and reasons screen

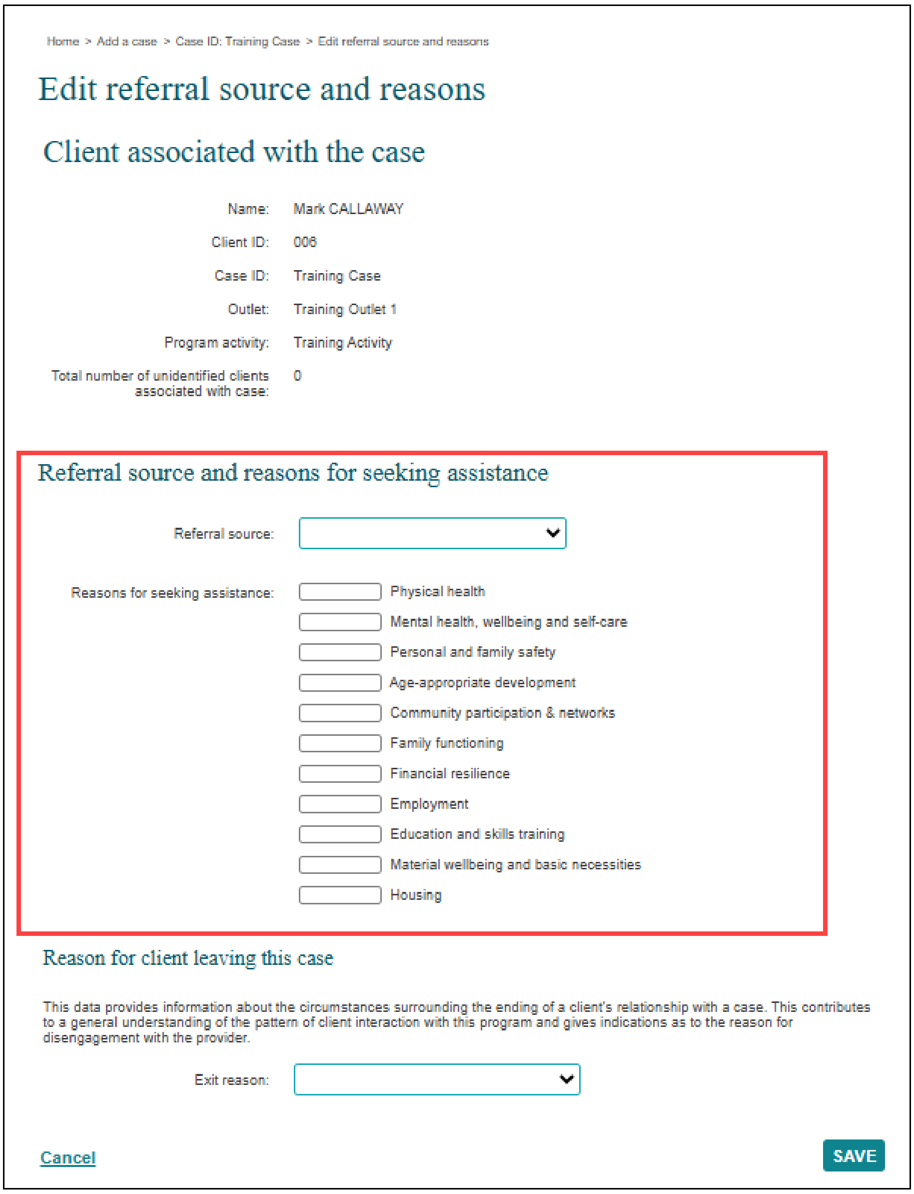
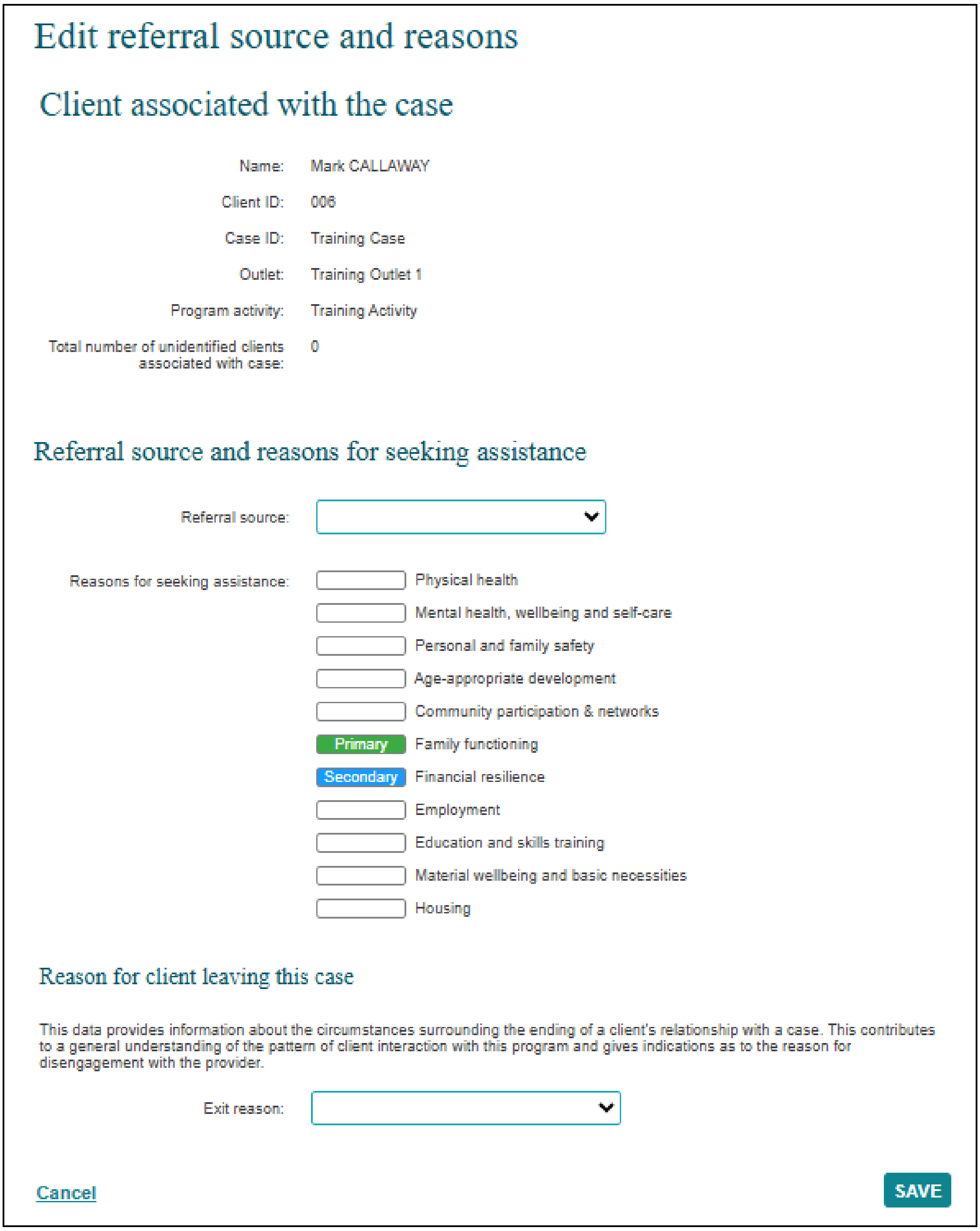


Table 3 –Field descriptions for the Edit referral source and reasons screen (Refer Figures 7 and 8)

FIELD	DESCRIPTION
Referral source	Select the appropriate referral source for the client.
Reasons for seeking assistance	Select the appropriate reason for seeking assistance. One primary reason can be selected. More than one secondary reason can be selected.

Select the relevant **Referral source** and **Reasons for seeking assistance**. Refer to Figure 9.

Figure 9 – Edit referral source and reasons screen



Select **SAVE**.

The **Case details** screen will display.

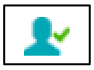
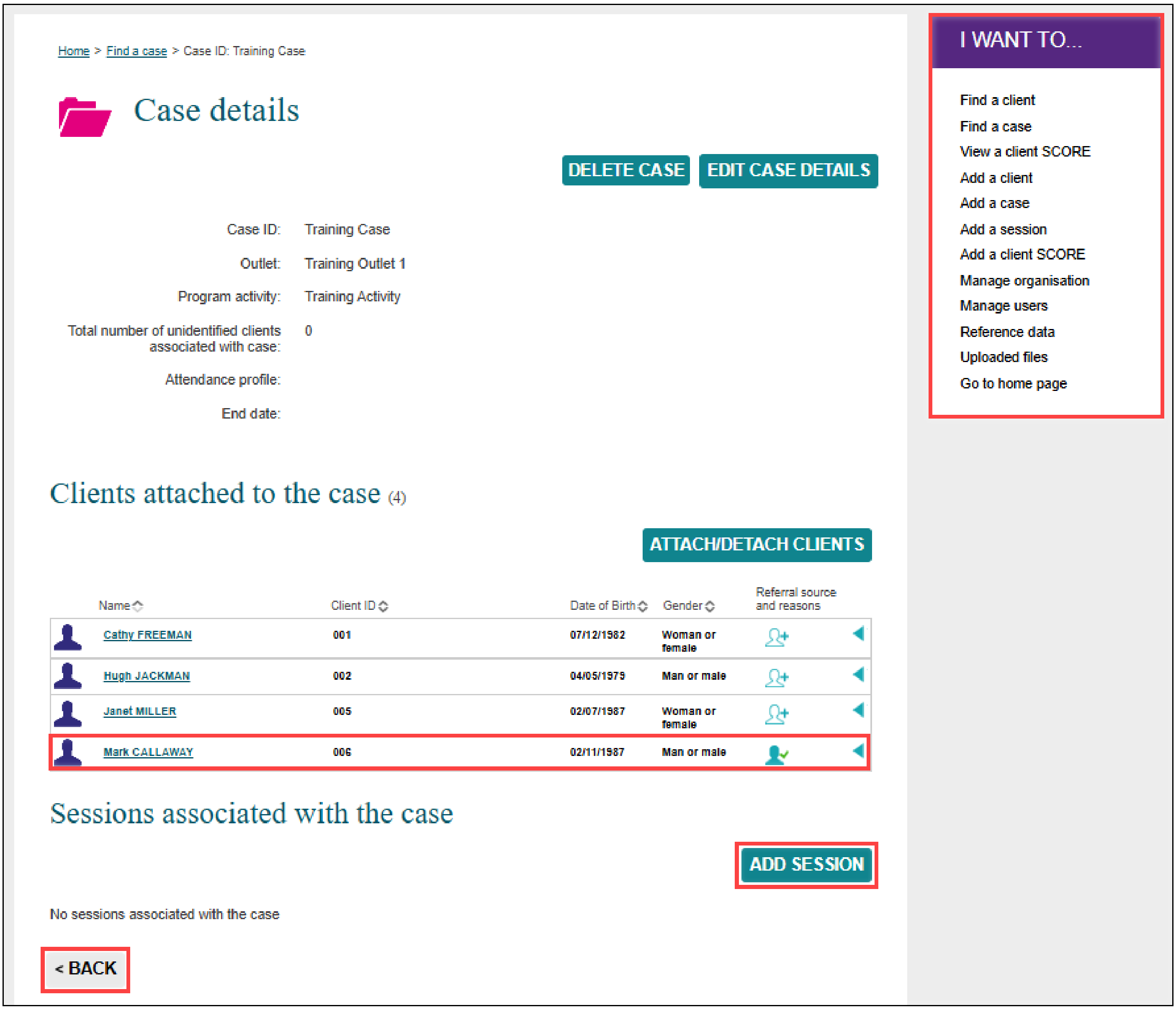
The **Referral source and reasons** icon will display as . Refer to Figure 10.

Figure 10 – Edit referral source and reasons screen



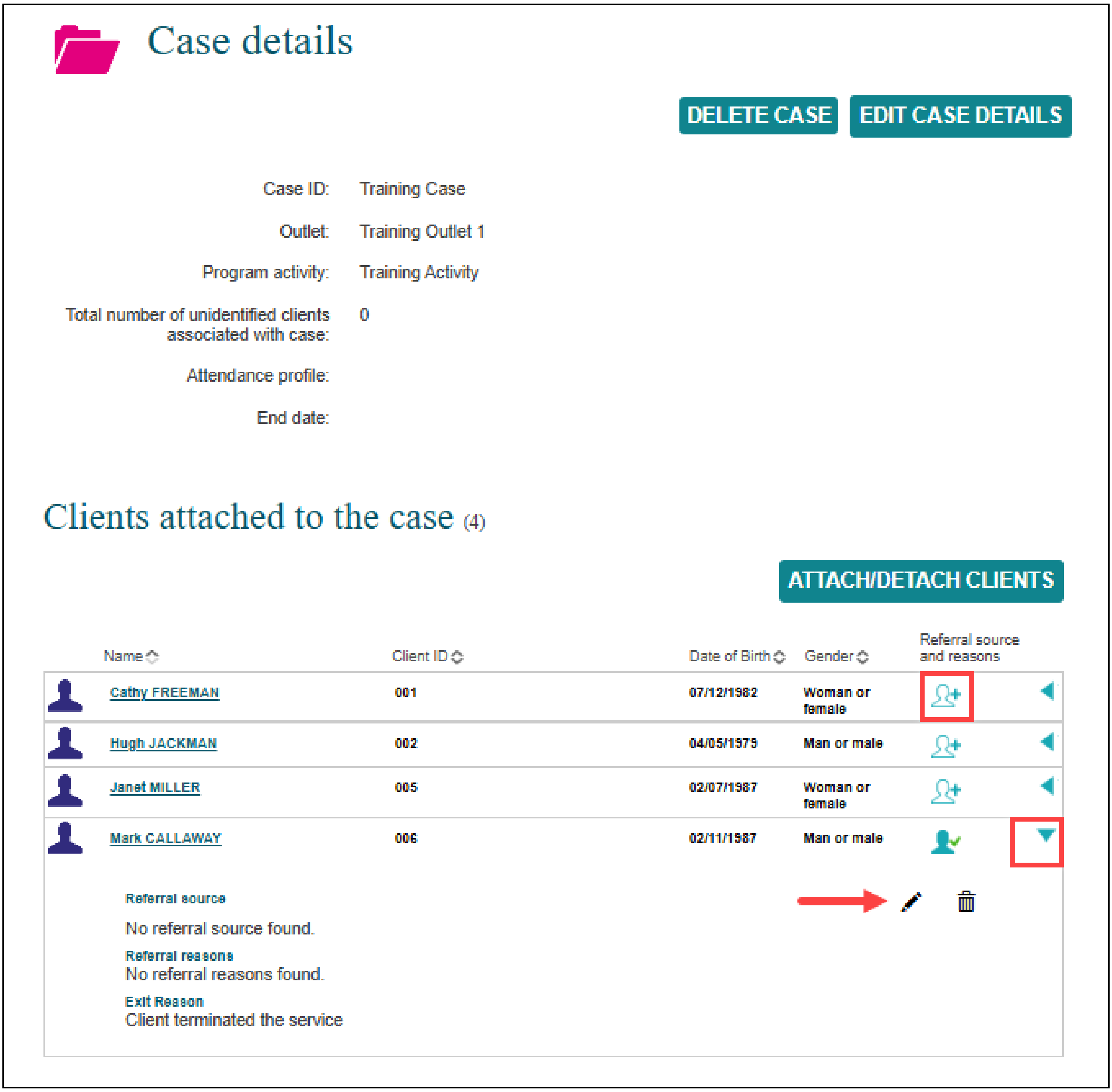
Select **+ADD SESSION** to add a session to the case.

Select **<BACK** to go to the **Find a case** screen, or the **I want to…** box where you can complete other tasks.

Exiting a client from a case

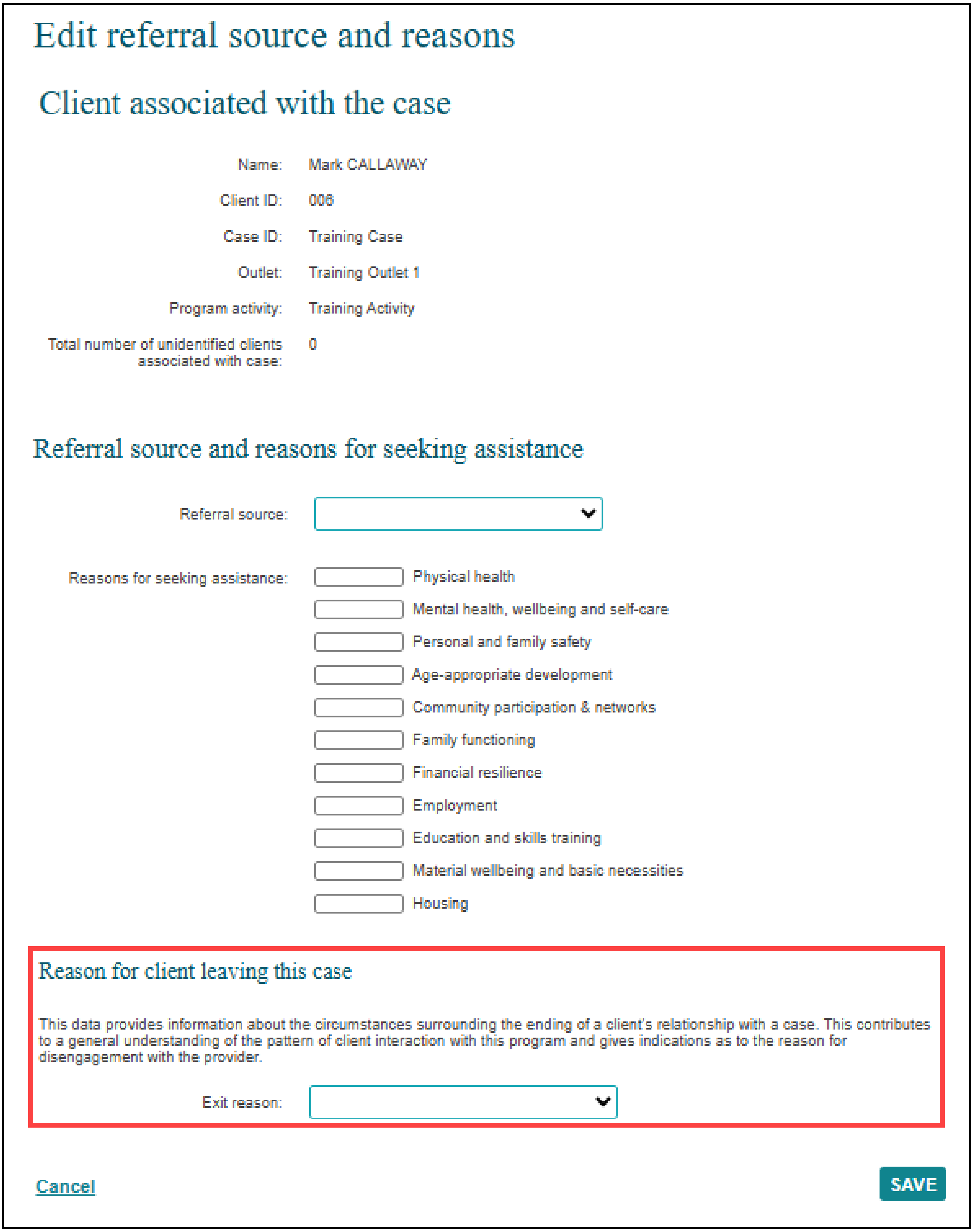
To record a client has exited from a case, open the existing case record.
If a client does not have any referrals recorded, select the blank Referral source and reasons icon.
If a client has any referrals recorded, select the triangle at right of Referral source and reasons icon and then select the 'edit' button. See figure 11.

Figure 11 **– Edit referral source and reasons screen**



The **Edit referral source and reasons** screen will display. Refer to Figure 12.

Figure 12 – Edit referral source and reasons screen



Select the exit reason from the **Reason for client leaving this case** drop down list.

Select **SAVE**.

Special Data Entry Fields

Additional information for sub-contracted or consortia arrangements

Sub-contracted or consortia arrangement

If you are delivering a program activity under a **sub-contracted** or **consortia arrangement:**

Select the **Program activity** which shows the delivery partner’s name in brackets. Refer to Figure 13.

For example:

Figure 13 – Program activity showing as a sub-contracted or consortia arrangement

If you are directly funded to deliver the program activity only the name of the program activity will be shown. Refer to Figure 14.

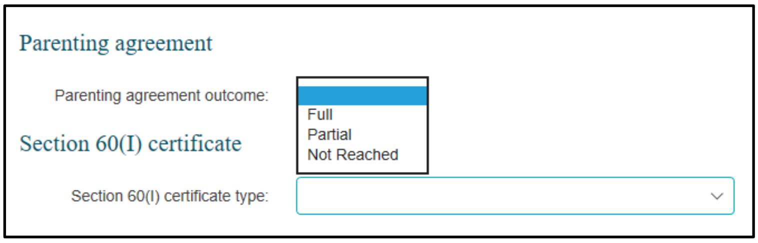
Figure 14 – Program activity delivered by directly funded organisation

Additional fields for the Family Law Services program case

Parenting agreement outcome

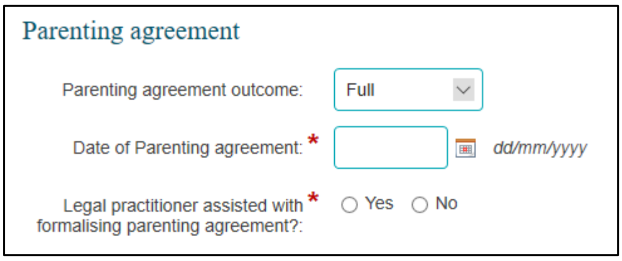
This field applies to all Family Law Services programs, except the Children's Contact Services and Supporting Children after Seperation program activities. The Parenting Agreement Field has three options to select from. Refer to Figure 15.

Figure 15 – Parenting Agreement Outcome options



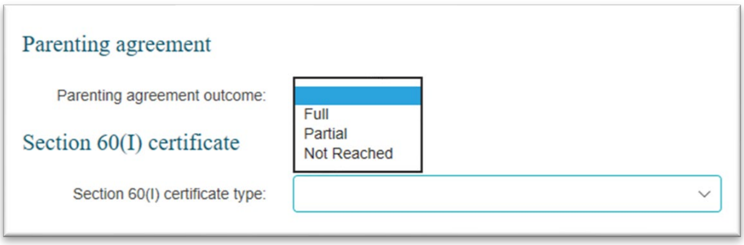
Once a Parenting agreement option is selected additional fields display. Refer to Figure 16.

Figure 16 – Parenting Agreement additional fields



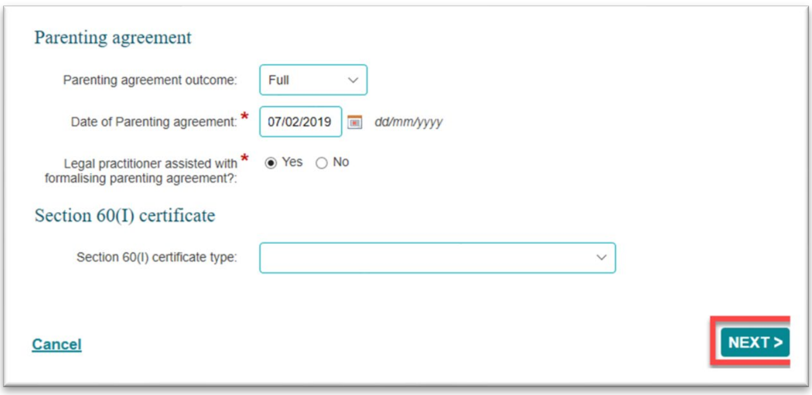
If you mistakenly select a value for the Parenting agreement outcome a blank value can be selected, cancelling out the incorrectly input value. Refer to Figure 17.

Figure 17 – Selecting a blank Parenting Agreement outcome



Once the fields are completed the next button can be selected to move to the next screen. Refer to Figure 18.

Figure 18 – Select the next button

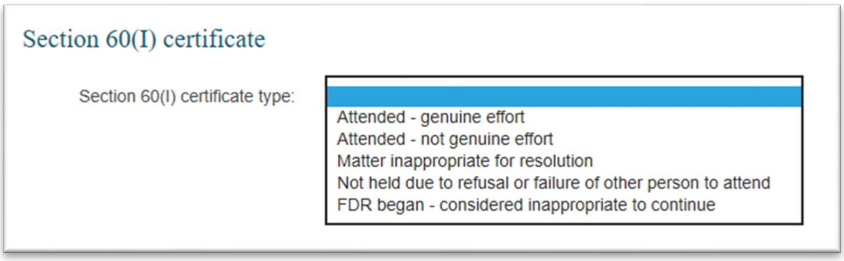


These fields can be completed at the time of creating the case, or at a later stage through the edit case process.

Section 60(I) certificate type

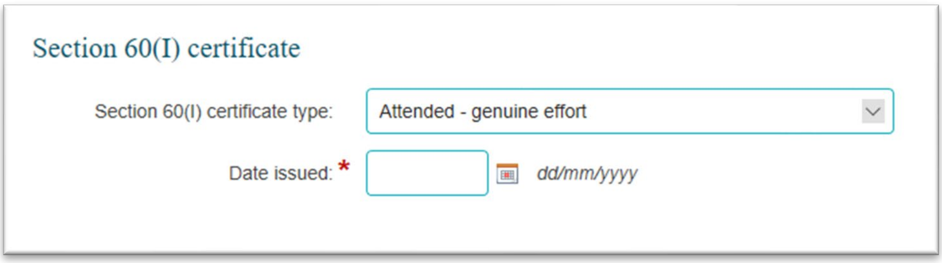
This field applies to all Family Law Services programs, except the Children's Contact Services and Supporting Children after Seperation program activities. This field applies to relevant organisations delivering these services. The Section 60(I) certificate type field has five options to select from. Refer to Figure 19.

Figure 19 – Section 60(I) certificate type options



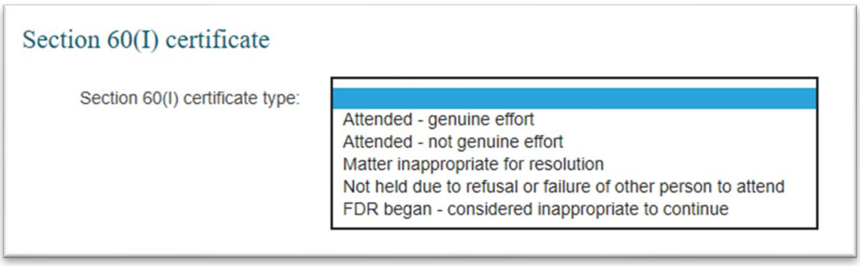
Once a Section 60(I) certificate type option is selected, an additional field displays. Refer to Figure 20.

Figure 20 – Section 60(I) certificate type additional fields



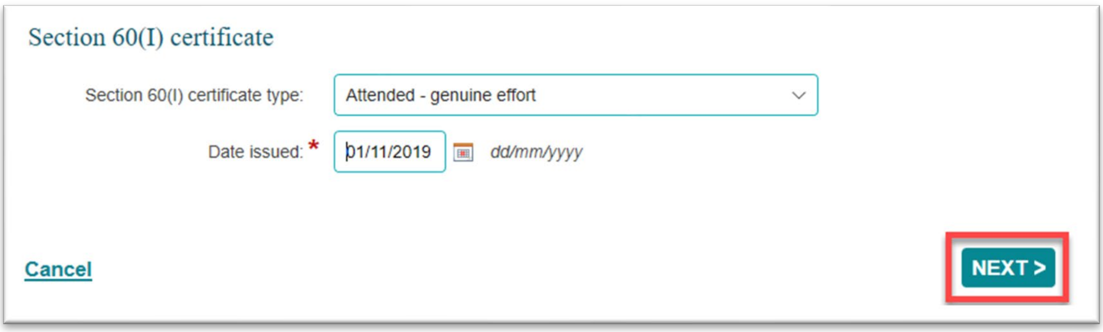
If you mistakenly select a value for the Section 60(I) ceritifcate type, a blank value may be selected, cancelling out the incorrectly input value. Refer to Figure 21.

Figure 21 – Selecting a blank Section 60(I) certificate type



Once the fields are completed the next button can be selected to move to the next screen. Refer to Figure 22.

Figure 22 – Select the next button



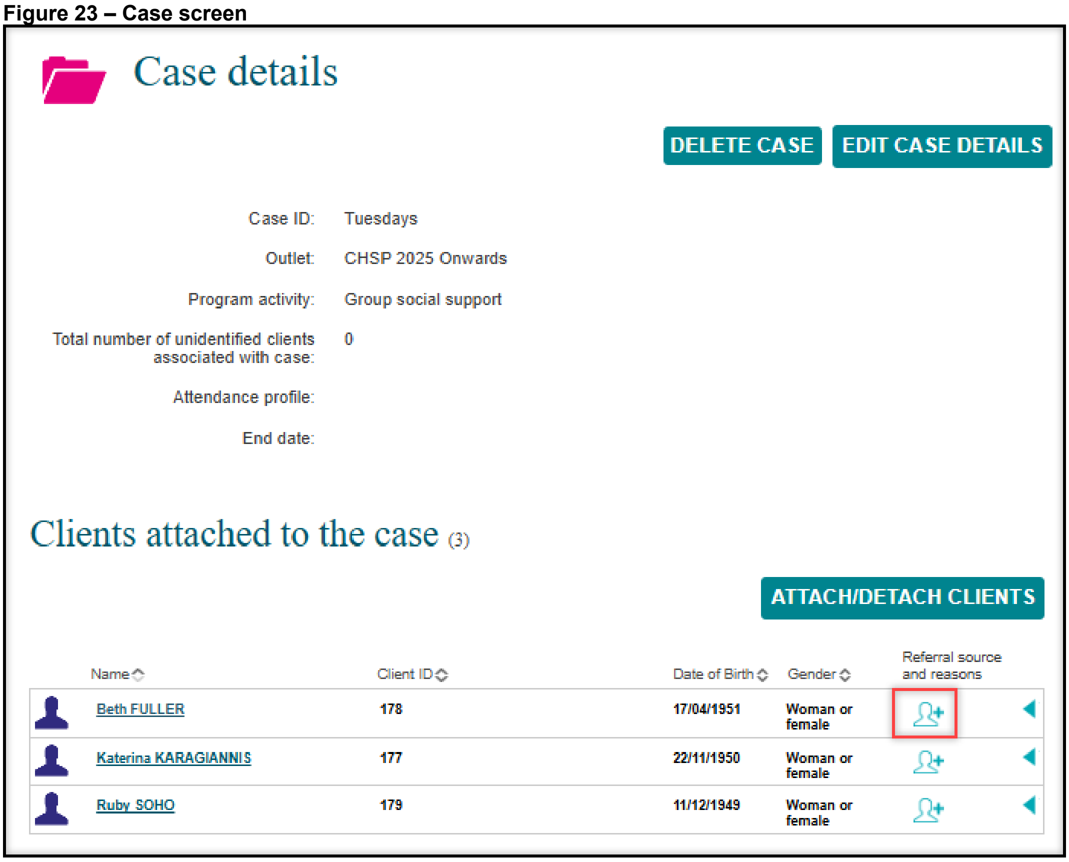
These fields can be completed at the time of creating the case, or at a later stage through the edit case process.

Additional fields for Commonwealth Home Support Program (CHSP) case

Referral source and reasons

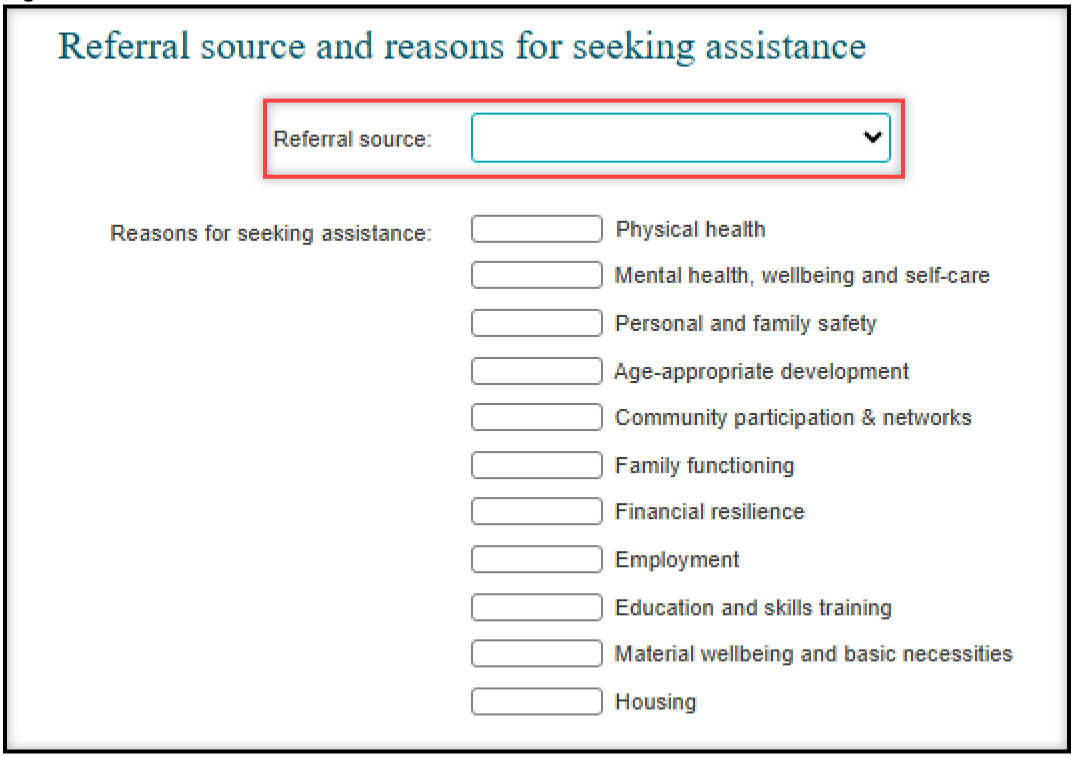
Extra **referral sources and reasons** are available for CHSP. To record a client's referral source and reason, open the existing **case** record and select the **Referral source and reasons** icon. Refer to Figure 23.

Figure 23 – Case screen



The **Edit referral source and reason** screen will display. Refer to Figure 24.

Figure 24 – Edit referral source and reasons screen



Select from the **Referral source** and the **Reasons for seeking assistance** drop down list the applicable source and reason. Refer to Figure 15.

Select **SAVE**.

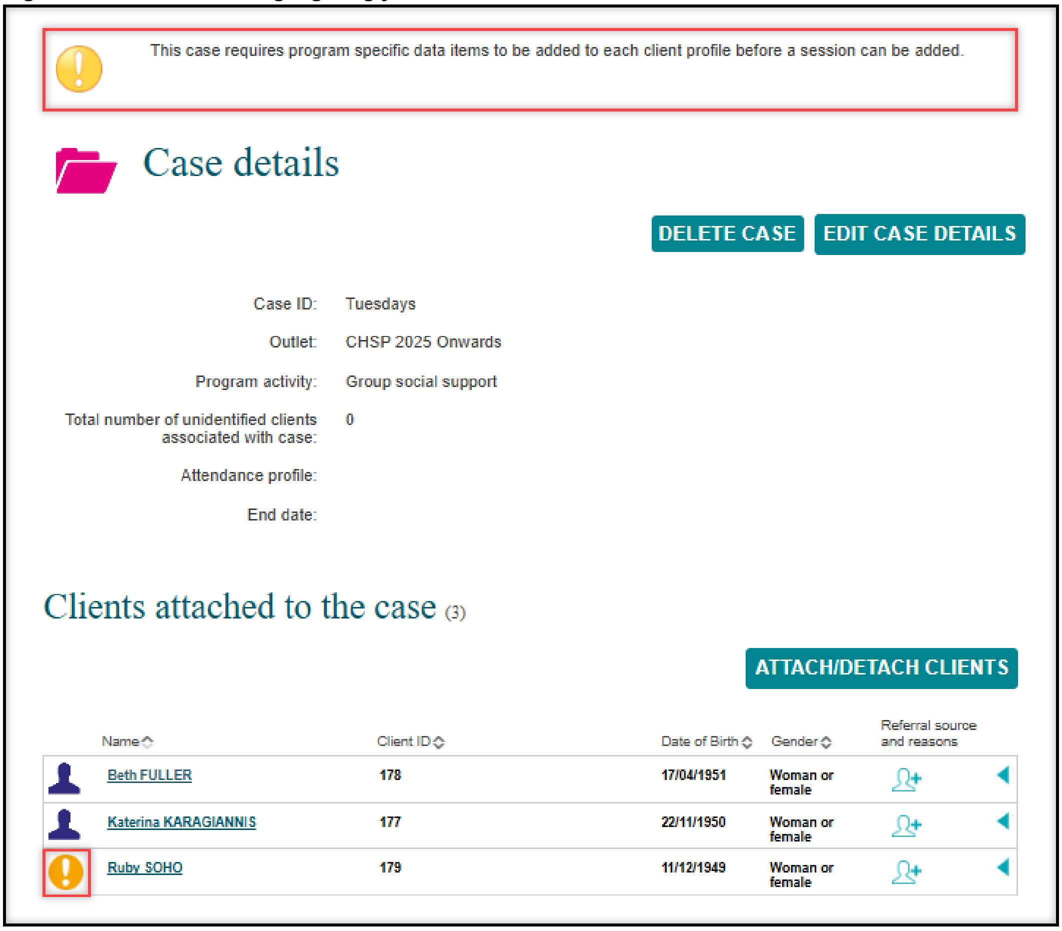
Extra Client profile information

CHSP specific client profile data requirements will only appear if a client is attached to a case that has a CHSP specific program activity.

Once a client has added to the Data Exchange and attached to a CHSP specific program activity case, a **yellow exclamation mark** will display next to their name indicating that extra client profile information needs to be added for this client. Refer to Figure 25.

Select the **client's name** next to the **yellow exclamation mark**.

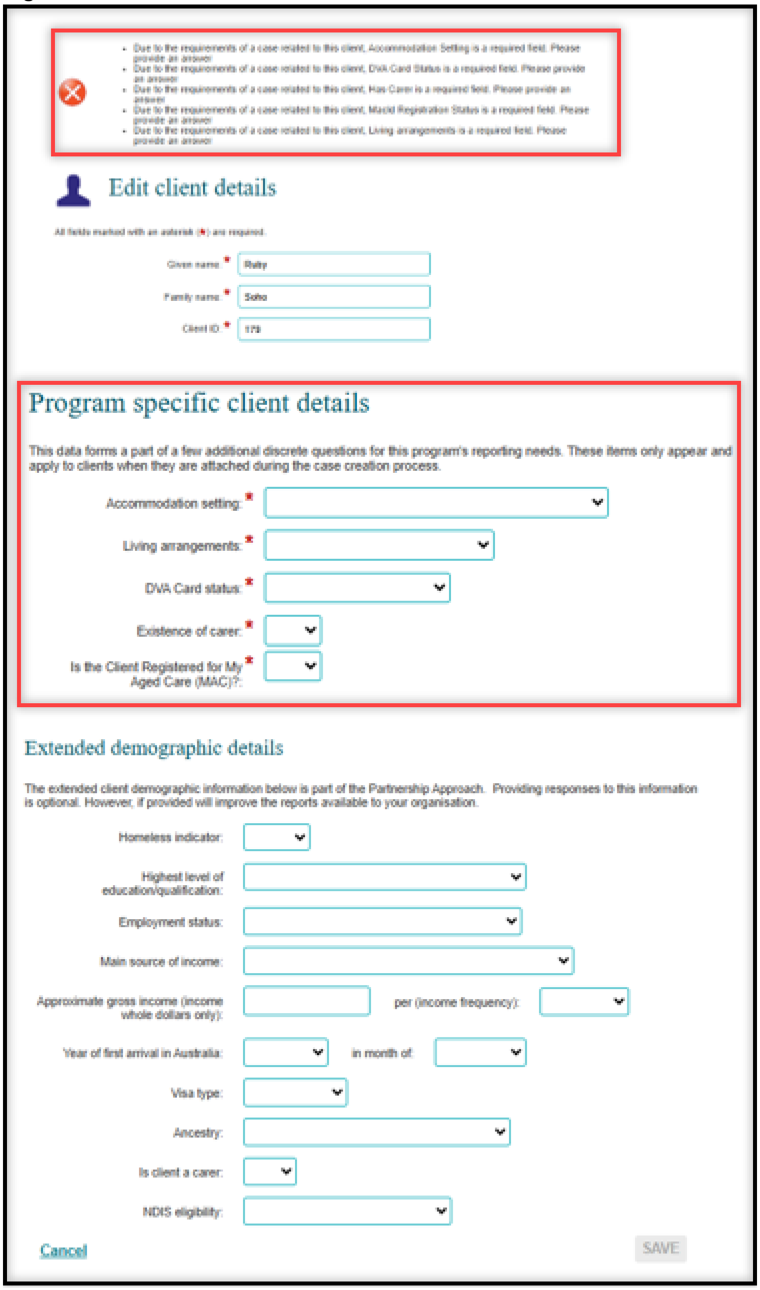
Figure 25 – Case screen highlighting yellow exclamation mark



The **Edit client details** screen will display with the items that need to be completed. Refer to Figure 26.

Scroll to the **Program specific client details** section.

Figure 26 – Edit client details screen



All the fields in the **Program specific client details** section are **mandatory.** Refer to Table 2

Table 2 – Descriptions for CHSP program specific client details fields (Refer Figure 17)

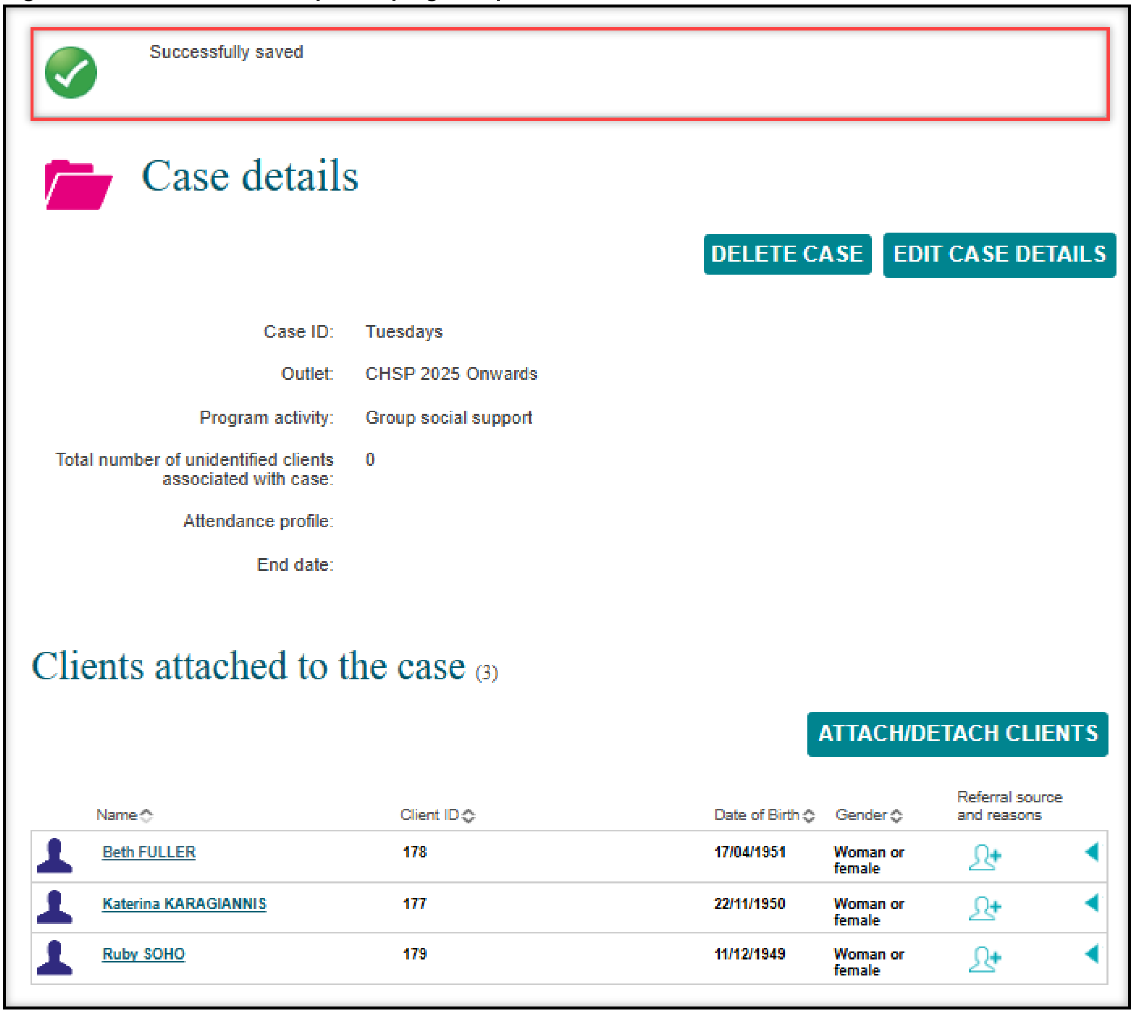
FIELD	DESCRIPTION
Accommodation setting	Select the **Accommodation setting** that best describes the client's current status.
Living arrangements	Select the **Living arrangement** that best describes the client's current status. If the client lives with others who are not accessing a service with your organisation they should be recorded as their current living arrangement status. **Example 1:** A client attends a session alone and they reside with their partner; the Living arrangement selected is 'Couple'.

FIELD	DESCRIPTION
	Example 2: A client attends a session alone and they reside with a relative such as their 40-year-old child; the Living arrangement selected is 'Group (related adults)'. **Example 3:** A client attends a session alone and they reside with non-related adults; the Living arrangement selected is Group (unrelated adults).
DVA Card status	Select the Department of Veteran Affairs (DVA) card that the client recieves.
Existence of carer	Select **Yes** or **No**.
Is the client registered for My Aged Care (MAC)?	Select **Yes** or **No**.
Enter MAC ID	Enter the MAC ID in the correct for format (ACNNNNNNNN)

Select **SAVE**.

Once the information is added, the green exclamation mark a **Successfully saved** message will display. Refer to Figure 27.

Figure 27 – Case screen with updated program specific client data



You can find more information on outlets, clients, cases, and sessions on the Data Exchange Protocols and the Training page.

For system support, email the Data Exchange Helpdesk or use our online contact form.