Add a session

Task card

This task card discusses the following:

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.
- Some programs have special data entry fields that apply to sessions.

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 submitted in the reporting period 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, select the **Add a session** 

tile**.**
3. From the home screen, select the **Find a case** 

tile..

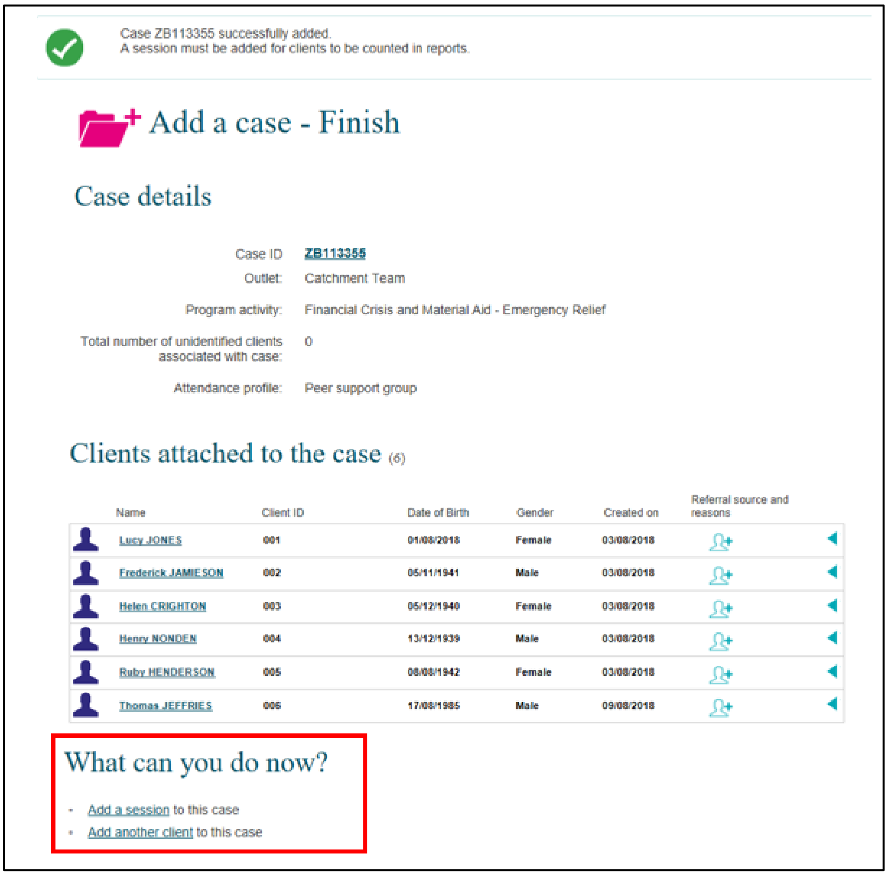
Note: All three methods will direct you to the **Add a session – session details** screen. Refer to Figure 5.

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 to Figure 1.

Figure 1 – "What can you do now?"

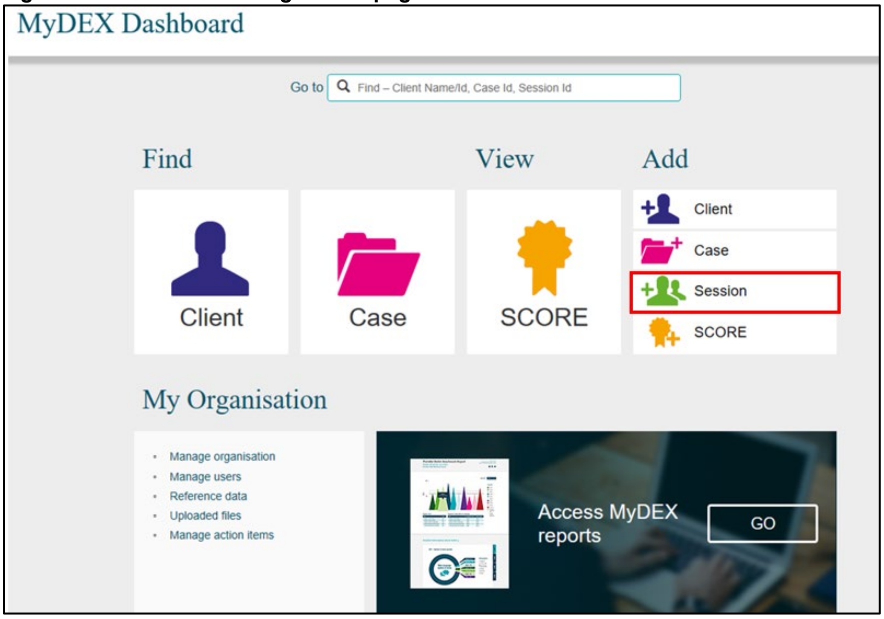


Method 2 – From Add a session

At the Data Exchange web-based portal home page select the **Add a session** tile 

under the **Add** menu. Refer to Figure 2.

Figure 2 – The Data Exchange home page – Add a session action tile

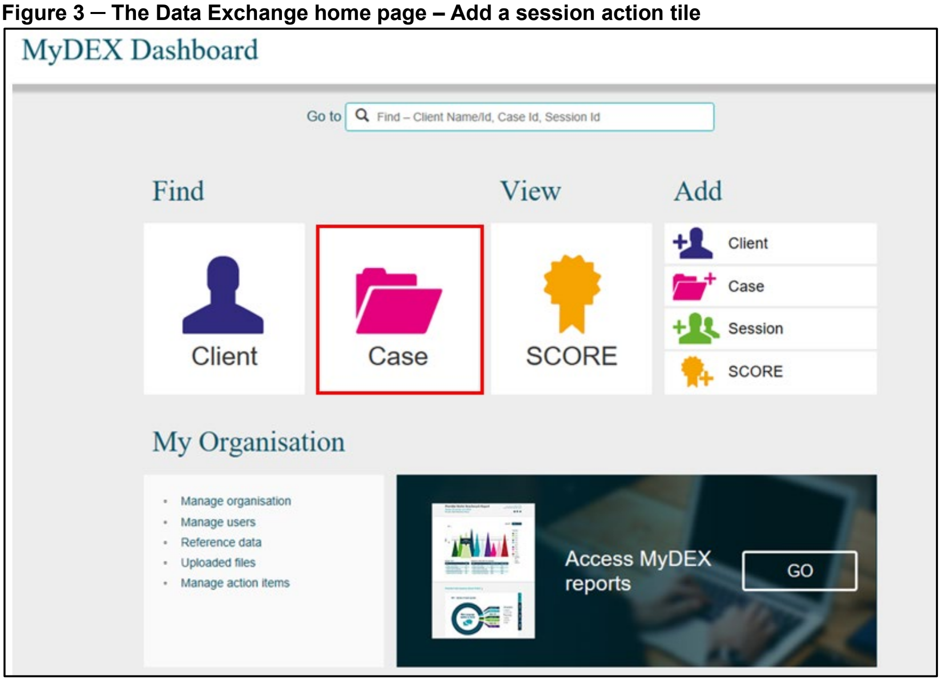


Method 3 – From Find a case

At the Data Exchange web-based portal home page select the **Find a case action** tile 

under the **Find** menu. Refer to Figure 3.

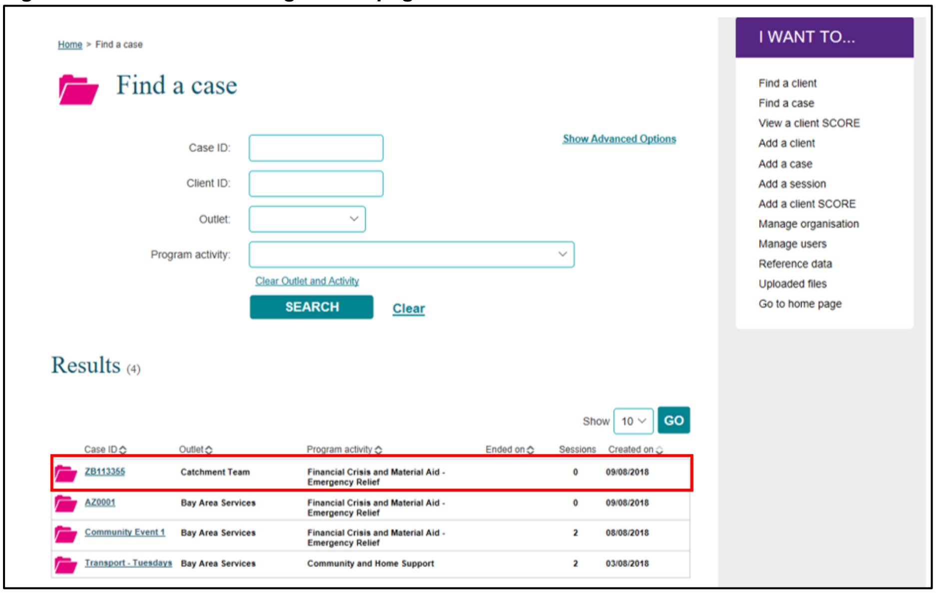
Figure 3 – The Data Exchange home page – Add a session action tile



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

Select the **case hyperlink** to add a session to the case.

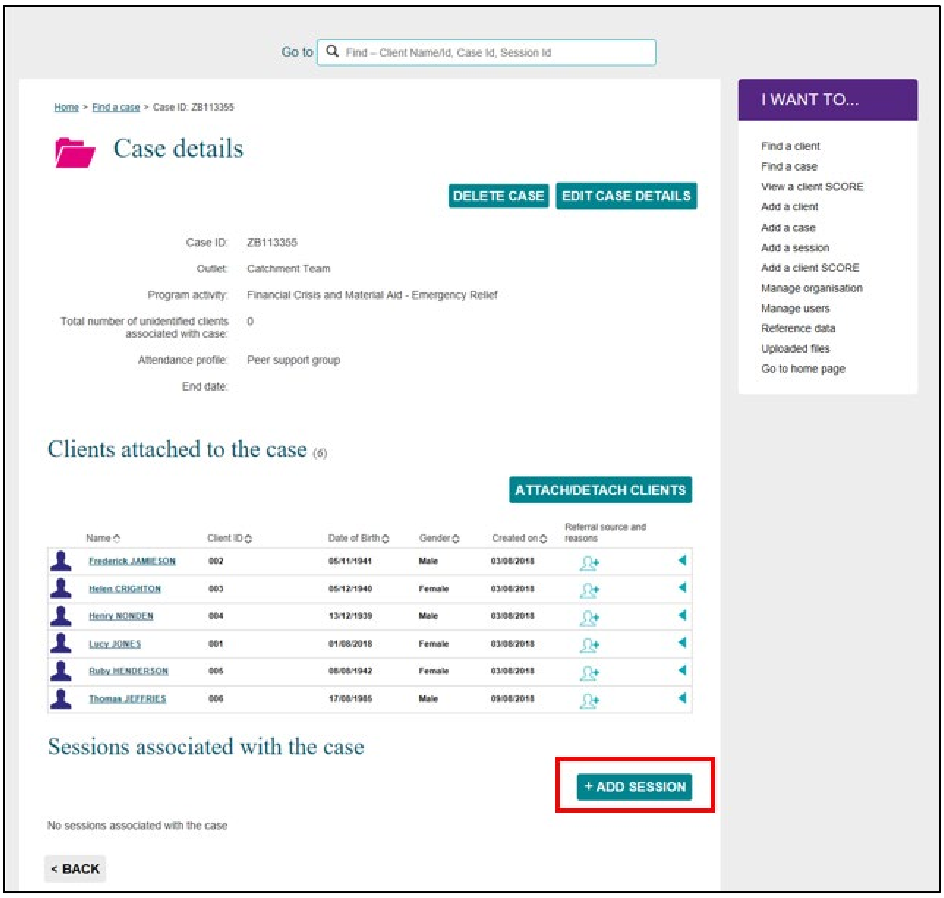
Figure 4 — The Data Exchange home page – Add a session action tile



The **Case details** screen displays. Refer to Figure 5.

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

Figure 5 – Case details – Add session button



Enter Session details

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

Figure 6 – Add a session – Session details screen

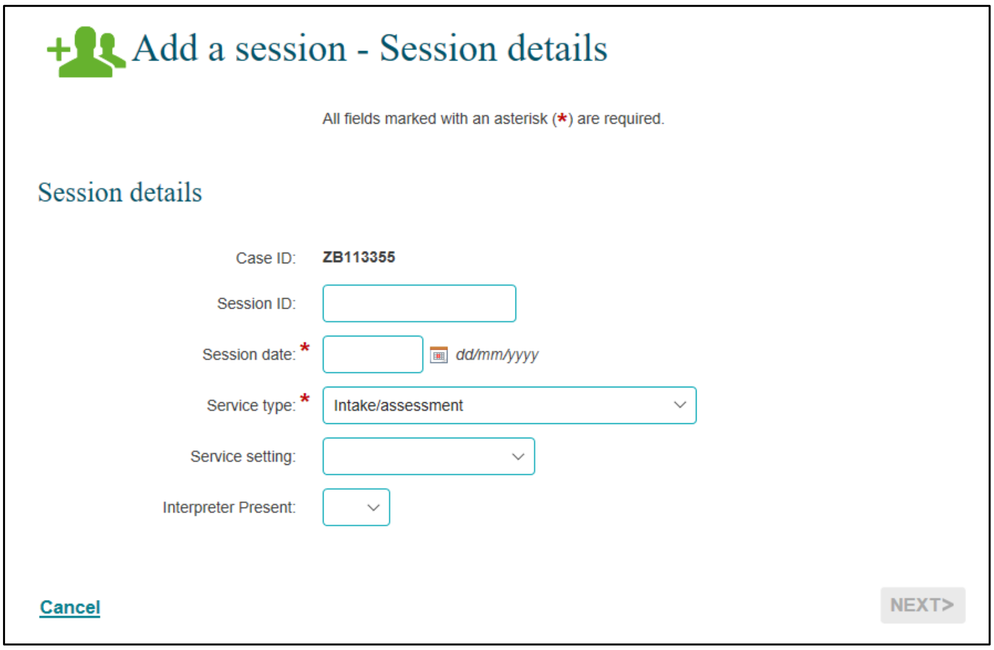


Table 1 – Session Details Field Descriptions (Refer Figure 6)

FIELD	DESCRIPTION
Case ID	This is the identifier (ID) of the case you are recording a session against.
Session ID	Enter the session ID if your organisation has a session ID system or leave it blank for auto-generation. **Note:** The use of special characters such as * & % # @ should **not** be included in the free text fields in the Data Exchange.
Session date*	Record the date the session occurred. Enter today's date or a date in the past within the reporting period. **Note:** Sessions cannot be entered for future dates or dates in a closed reporting period.
Service type*	Each session can only have one service type. Select the service type that best reflects the intent of the session. The service type choices are dependent on the program activity the case was created under and are to align with the program intent. Go to the Data Exchange program specific guidance for more information on which service types apply to each program.

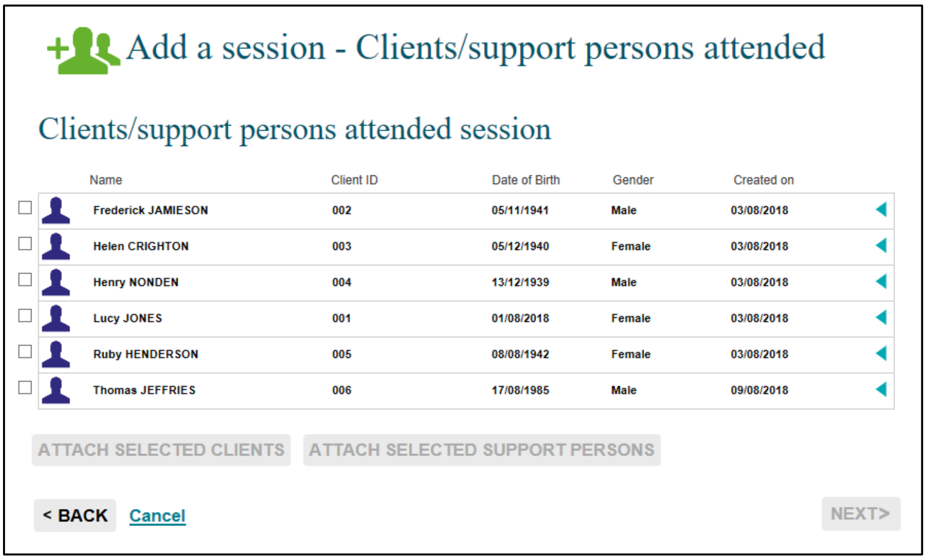
FIELD	DESCRIPTION
Service setting	Select where/how the session took place. The options are: ▪ Organisation outlet/office ▪ Client’s residence ▪ Community venue ▪ Partner organisation ▪ Telephone ▪ Digital ▪ Healthcare facility ▪ Education facility ▪ Justice facility
Interpreter Present	Enter **Yes** 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 interpreters for the hearing impaired.

* Mandatory Fields

Once completed, please select **NEXT**.

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

Figure 7 – Add a session – Clients/support persons attended screen



Add clients and support persons to the session

The **Add a session – Client/support persons attended** screen will display all the clients linked with the case.

When creating a session, only clients **who attend the session** are to be recorded.

Table 2 – Client and support persons definitions. Refer Figure 7.

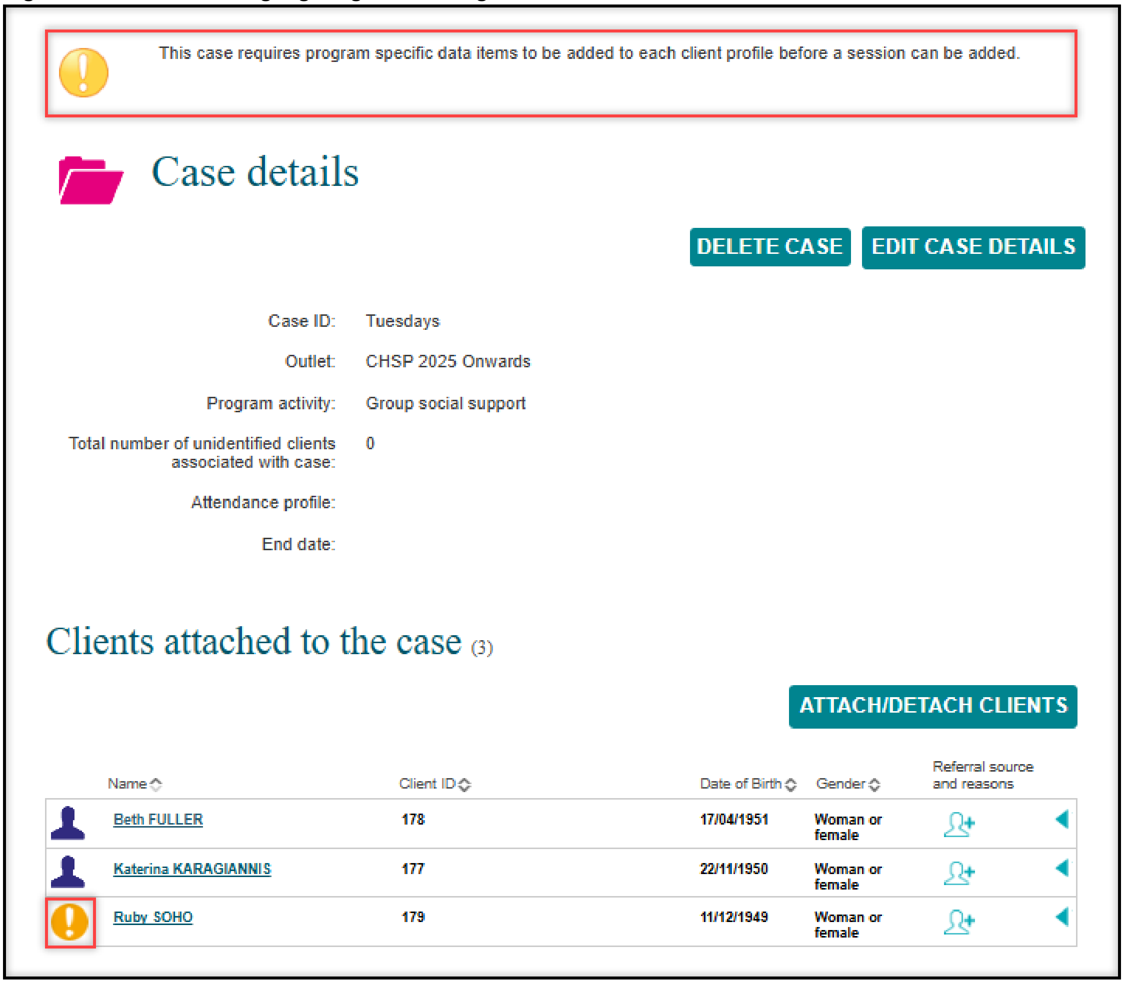
TERM	DEFINITION
Client	Is an individual who receives a service as part of a funded activity that is expected to lead to a measurable outcome.
Support persons	Persons who may be present at a service who do not meet the definition of a client. These could include carers of clients and family members such as young children.

TERM	DEFINITION
	There is no requirement to record the details of support persons, however you can record participants as 'support persons' to provide details of session attendees.

To add a support person, you must **first** create a client record in the Data Exchange and then add a support person at the session level.

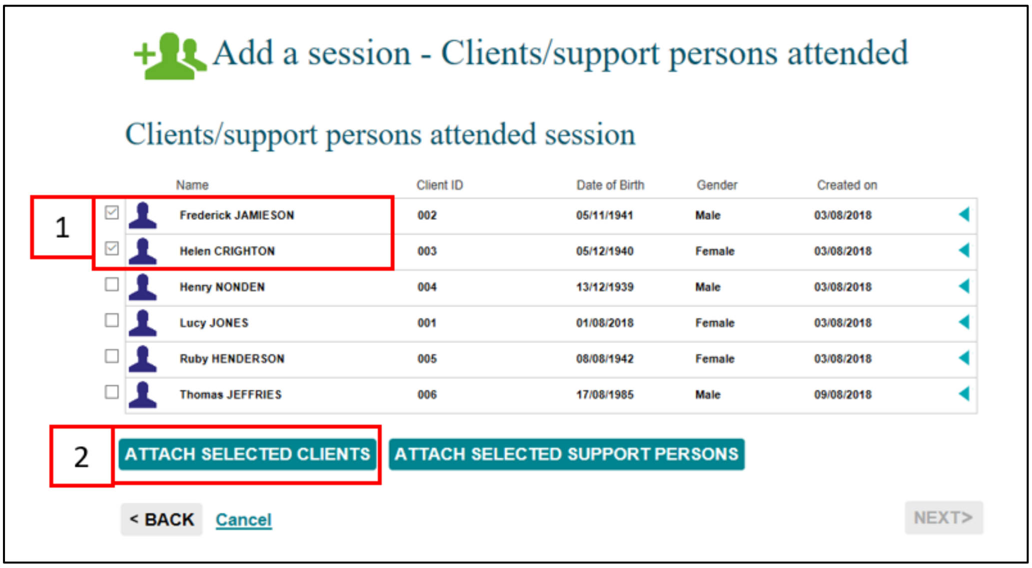
Note: if you are creating a session for the Community and Home Support program you must complete the client details that display the **Warning** icon **before** you can attach the client to a session. Refer to Figure 8.

Figure 8 – Case details highlighting the warning icon for client



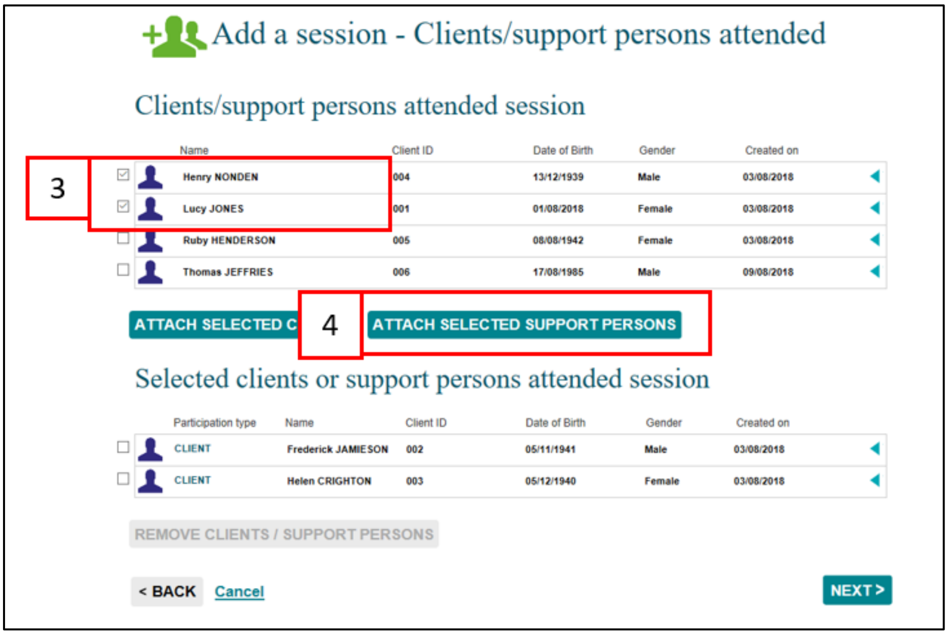
1. Select client(s) you wish to add to the session using the **tick box** next to the client record
2. Select the **ATTACH SELECTED CLIENTS** button. Refer to Figure 9.

Figure 9 – Add a session – Clients selected



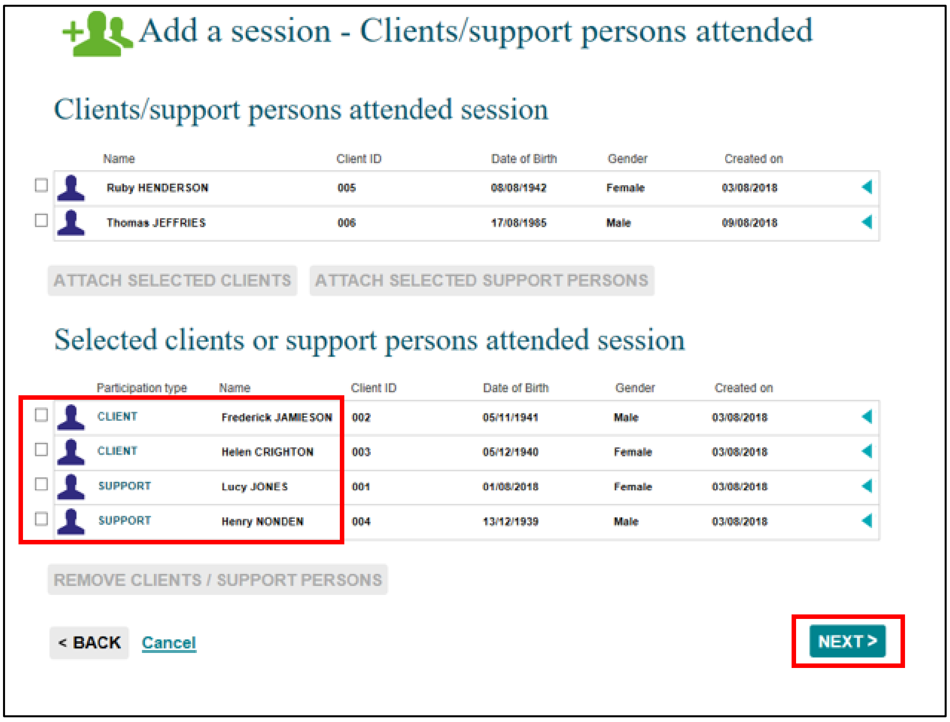
3. Select support persons (if any) you wish to add to the session using the **tick box** to the session.
4. Select ATTACH SELECTED CLIENTS. Refer to Figure 10.

Figure 10 – Add a session – Support persons selected



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 to Figure 11.

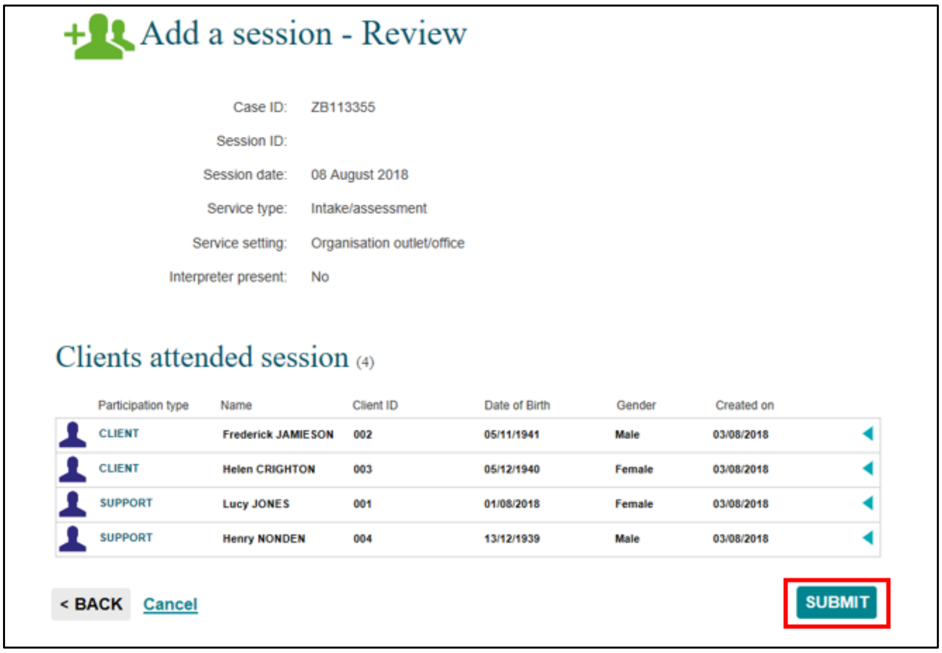
Figure 11 — Client participation type



Select **NEXT>**

The **Add a session – Review** screen will display. Refer to Figure 12.

Figure 12 – Add a session – 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**

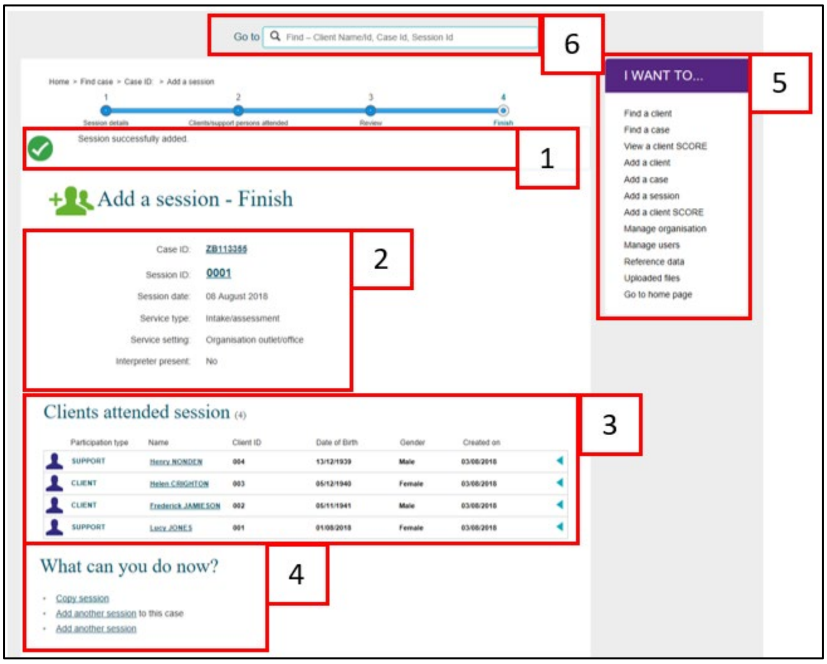
Add a session – Finish

The **Add a session – Finish** screen will display with the following. Refer to 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 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 to 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.

Figure 13 – Add a session – Finish screen



The **What can you do now?** field provides hyperlinks for you to copy and add more sessions. Refer to Figure 13 (No. 4). Table 3 provides descriptions of these options.

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

FIELD	DESCRIPTION
Copy a session	Select the hyperlink to copy the last session created for the case.
Add another session to the case	Select the hyperlink to add another session to the same case.
Add another session	Select the hyperlink to add a session to a different case.

Copy a session

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

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

Figure 14 – Copy session hyperlink

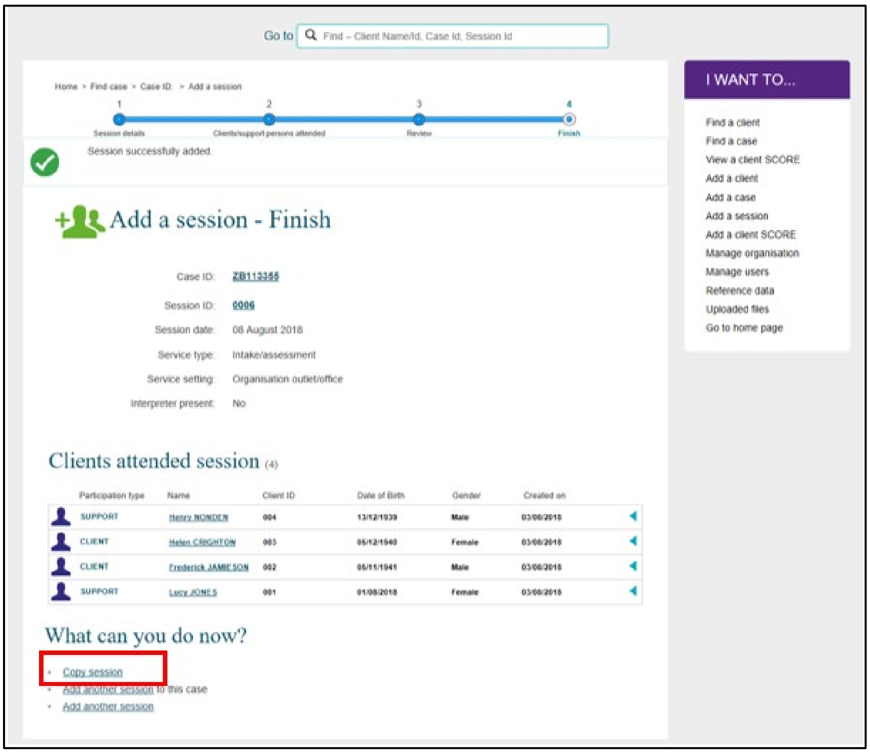
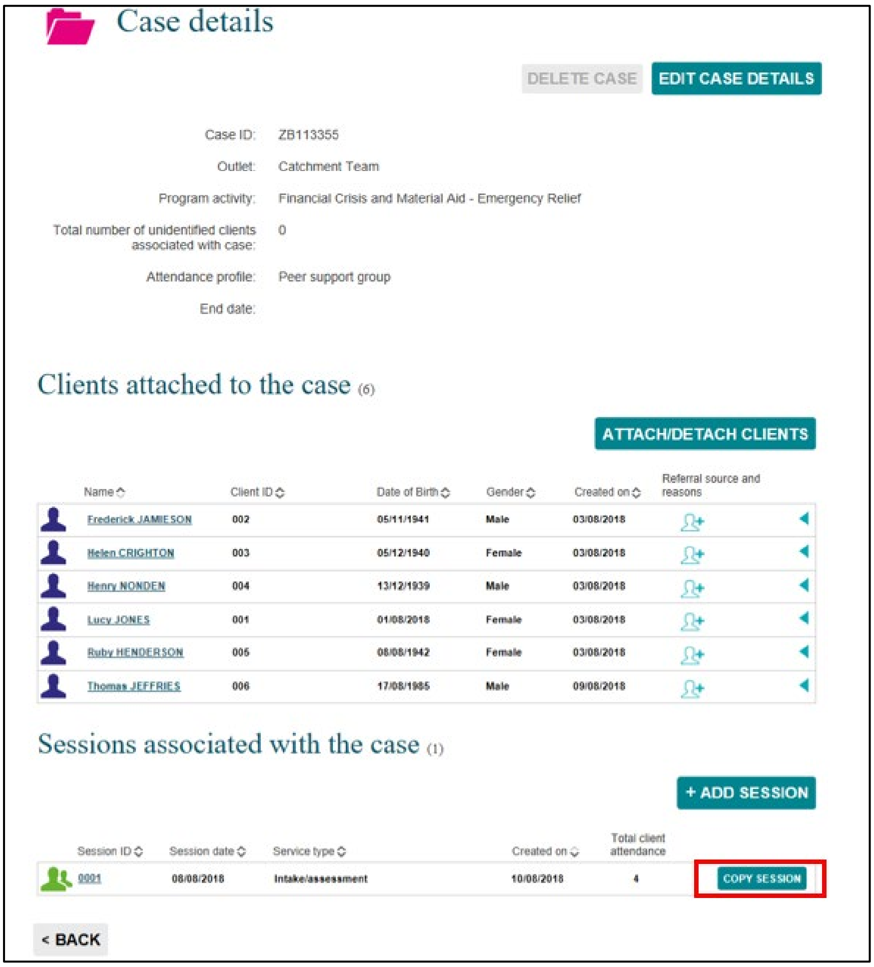
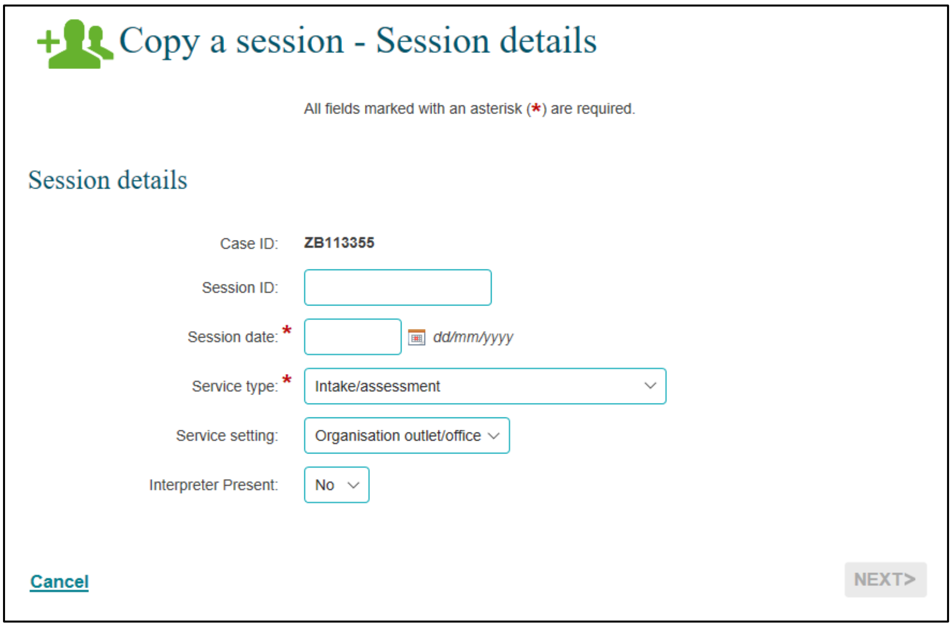


Figure 15 – Copy session button



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

Figure 16 – Copy session – Session details screen

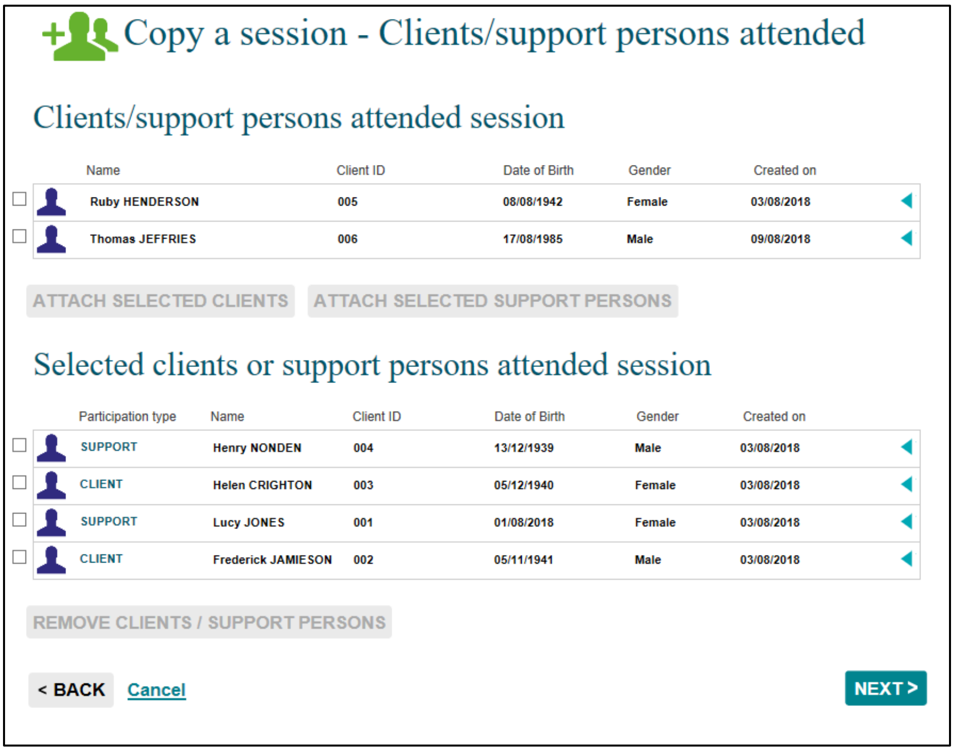


Complete the details as required.

Select **NEXT>**.

The **Copy a session – Clients/support persons attended** screen displays. Refer to Figure 17.

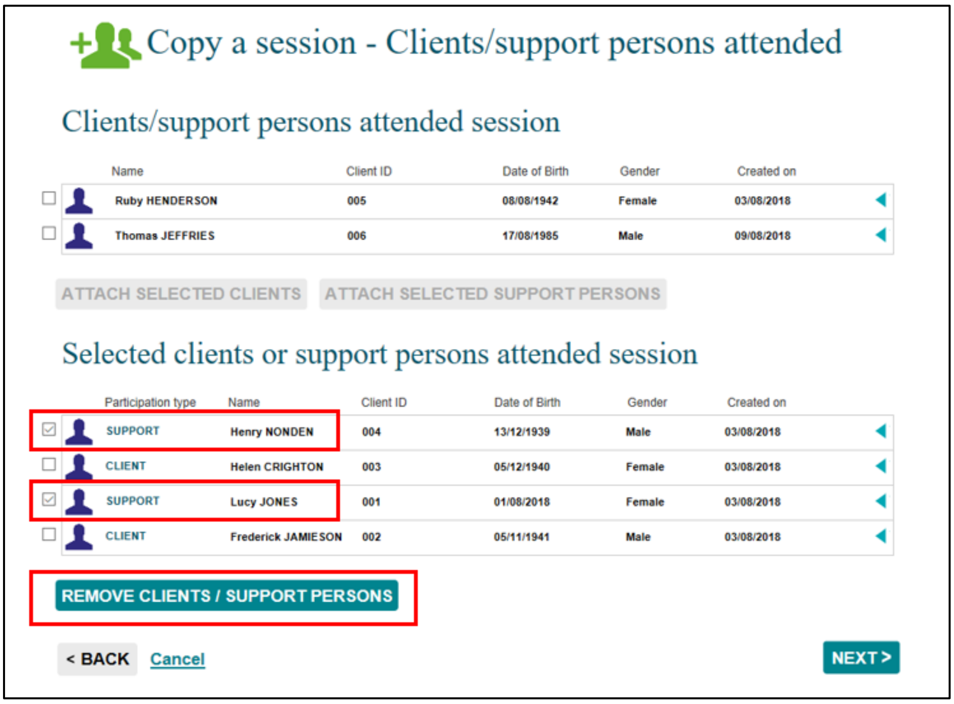
Figure 17 – Copy a session – Clients/support persons attended screen



Select the clients that attended the session.

- If the same clients attended from the session 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 to Figure 18.

Figure 18 – Selecting clients that did not attend the session



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

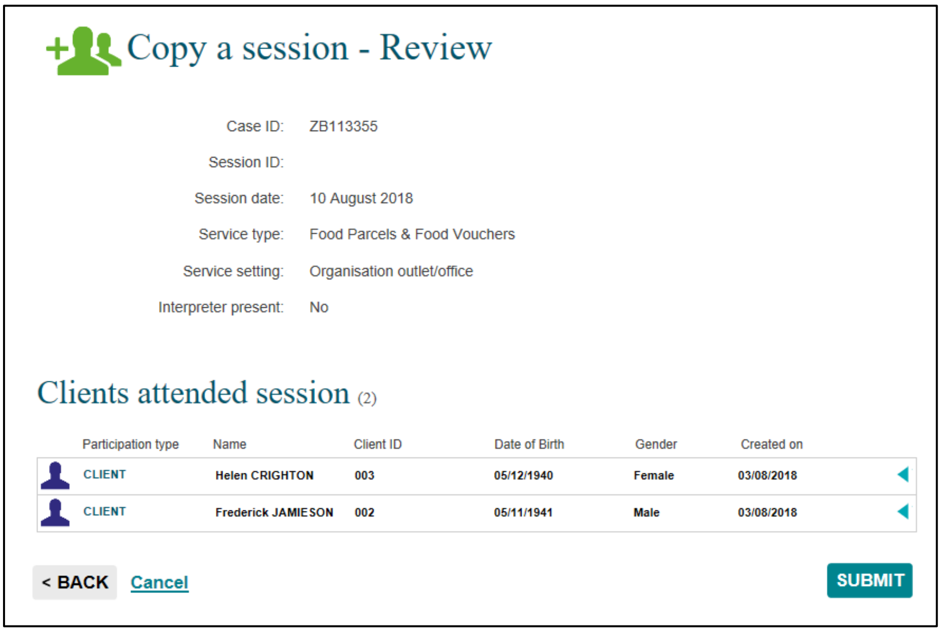
The selected clients will move back to the **Clients/support persons attended session** heading. The clients that did attend the session will remain under the **Selected clients or support persons attended session** heading. Refer to Figure 19**.**

Figure 19 – Removal of clients from created session

Select **NEXT>**.

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

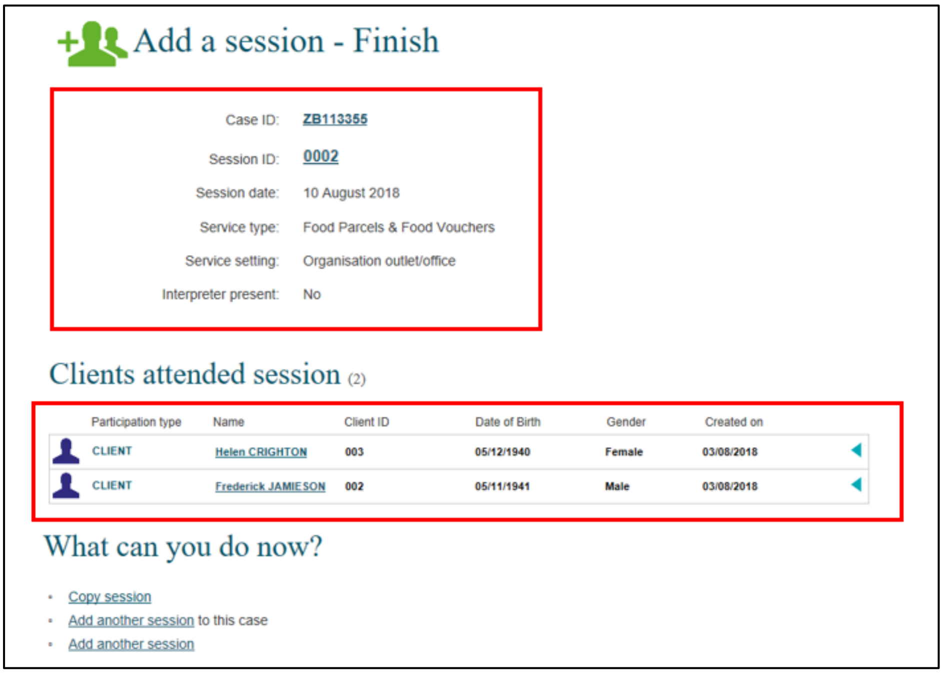
Figure 20 – Copy a session Review screen



Select **SUBMIT>**.

The **Add a session – Finish** screen will display. Refer to Figure 21.

Figure 21 – Add a session – Finish screen



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 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 to Figure 22
2. Select the **Session ID** number hyperlink found in the **Case details** screen after you have searched for the relevant case. Refer to Figure 23.

Figure 22 – Add a session – Finish screen Session ID link

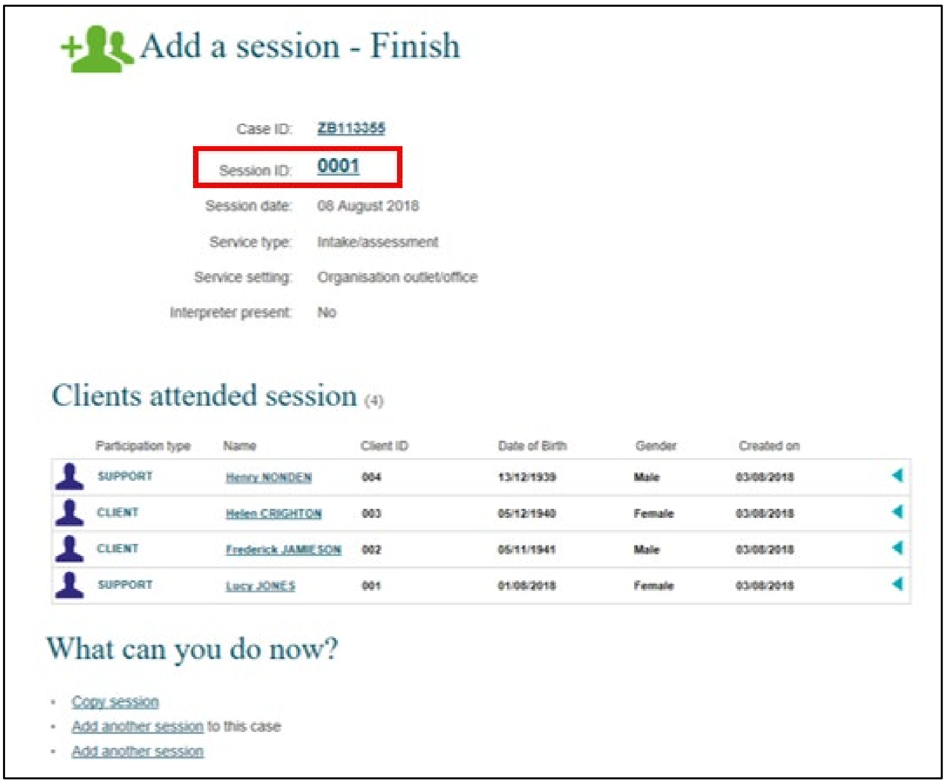
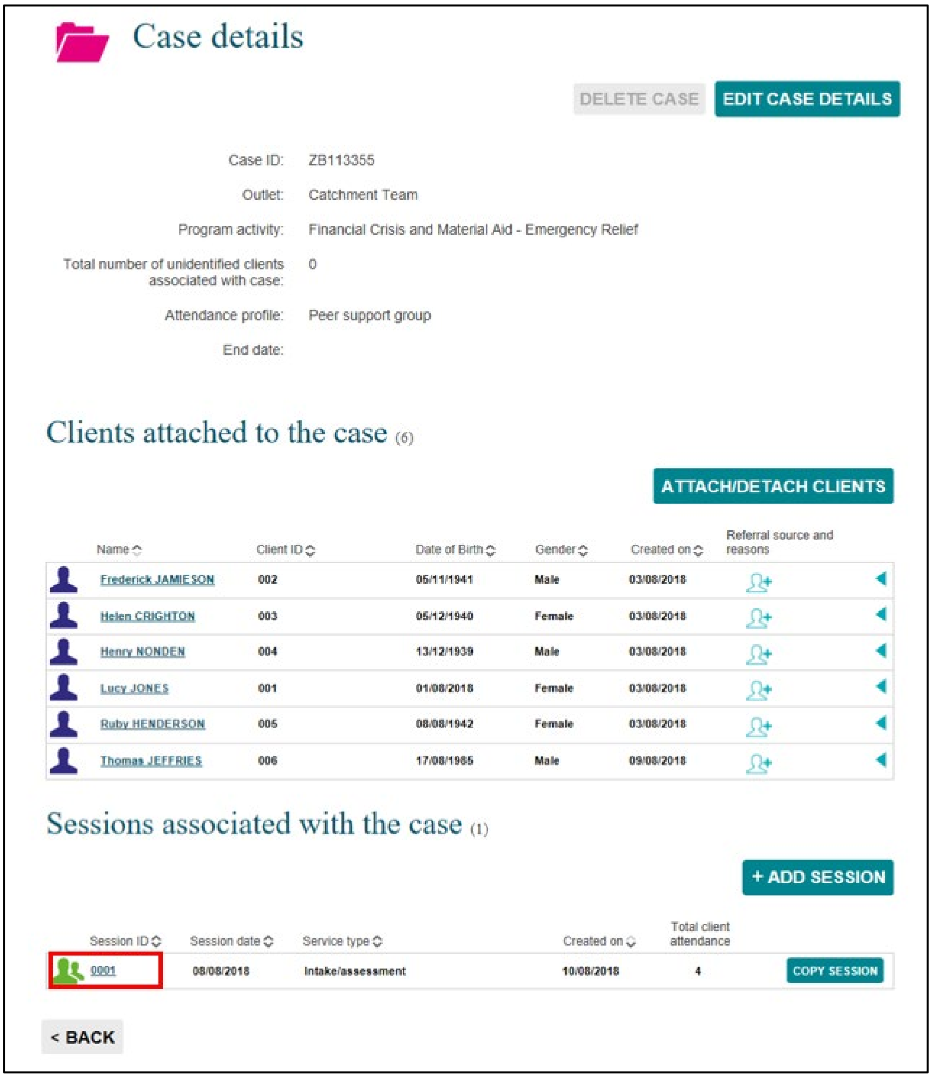


Figure 23 – Case details screen Session ID link



The **Session details** screen displays. Refer to Figure 24. Table 4 includes descriptions of the icons on this screen.

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

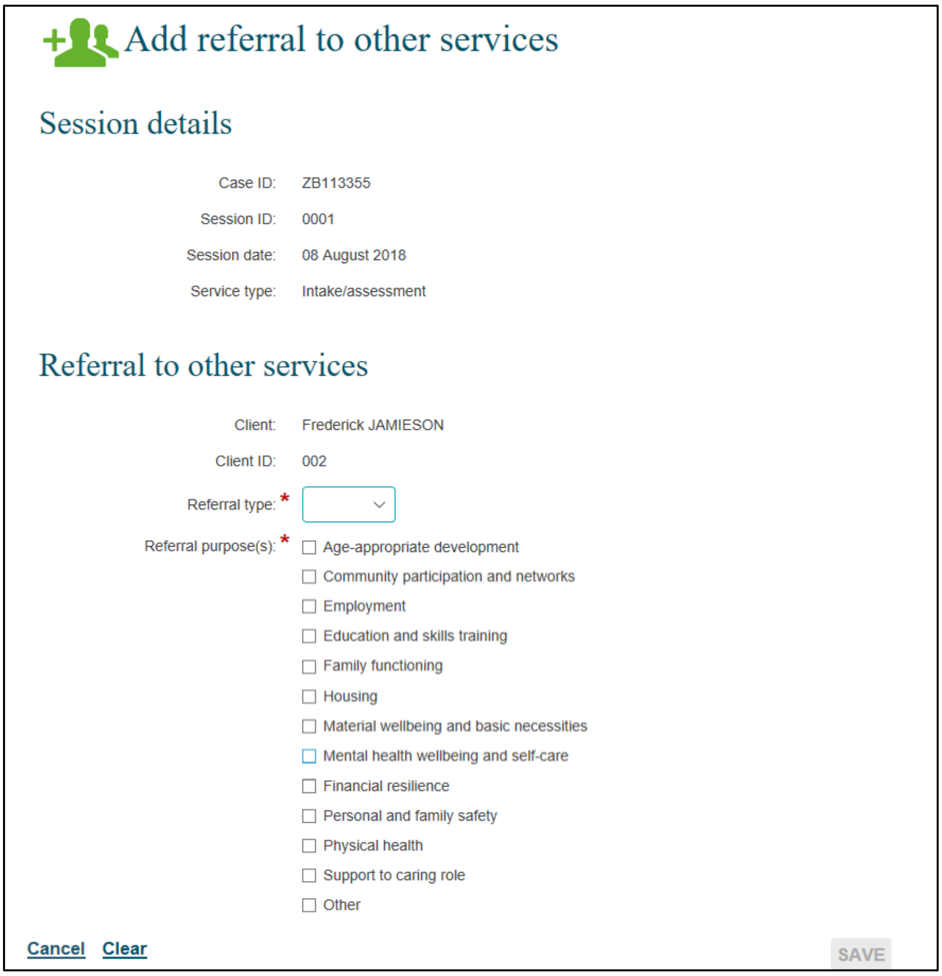
Figure 24 – Session details screen

Table 4 – Icon descriptions for Referrals to other services (Refer Figure 24)

ICON	DESCRIPTION
	This icon indicates a referral for other services can be added for this client for this case.
	This icon indicates a referral for other services can be 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.
	This icon indicates the full quota of referrals to other sources is added to a client's record summary, attached to a session.

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

Figure 25 – Add referral to other services screen



Add referral to other services

Session details

Case ID: ZB113355

Session ID: 0001

Session date: 08 August 2018

Service type: Intake/assessment

Referral to other services

Client: Frederick JAMIESON

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 to Figure 25. Table 5 has descriptions for the referral type and purpose.

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

FIELD	DESCRIPTION
Referral type	Select the appropriate referral type for the client. This can be internal or external.
Referral purpose(s)	Select the appropriate reason for referral to other services (including own services). More than one can be selected.

Select **SAVE**.

The **Session details** screen will display.

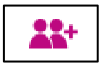
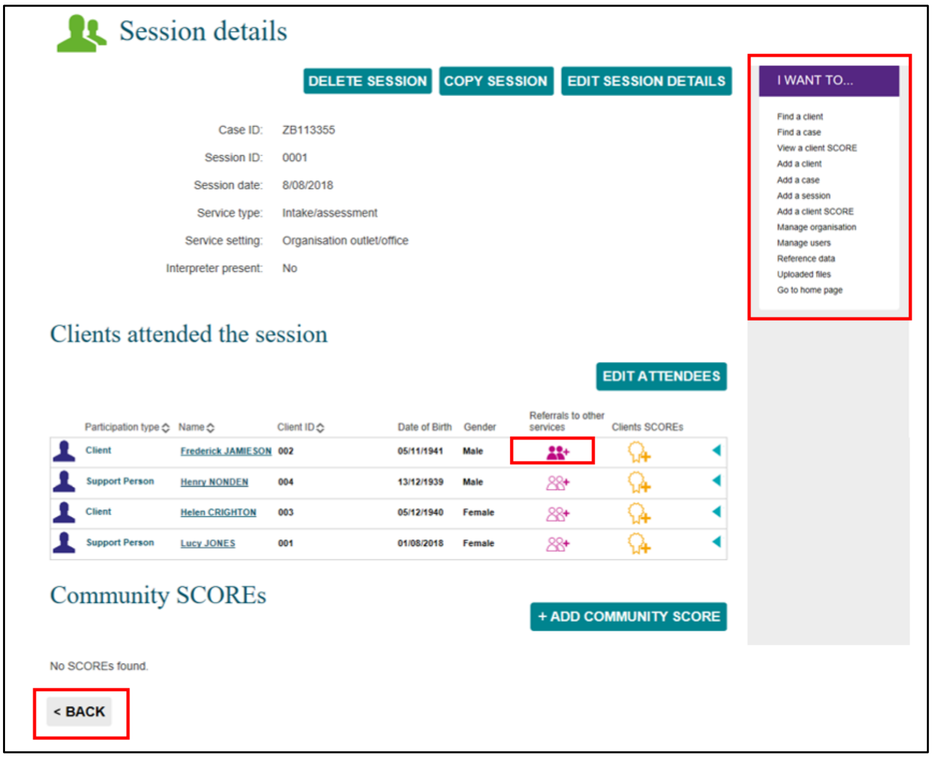
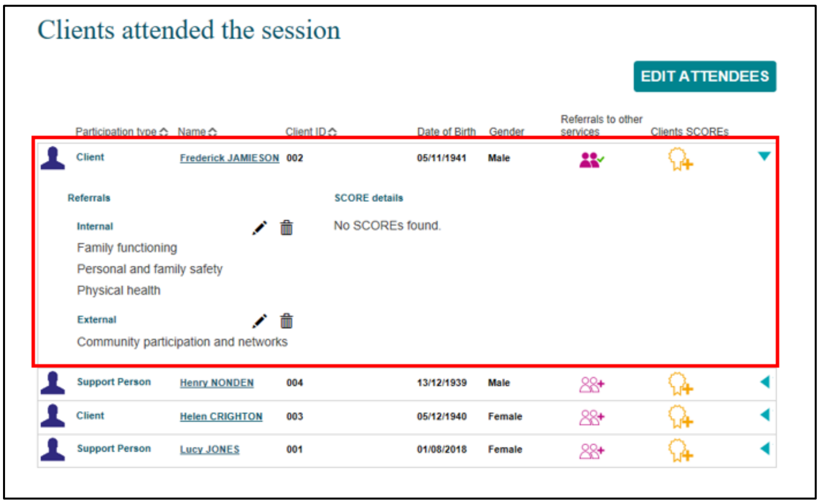
The **Referrals to other services** icon will display as the **Referrals to other services** icon . Refer to Figure 26.

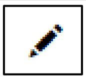
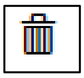
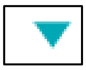
Figure 26 – Session details screen – Added referral to other services



Select the **Expand** button  to view the referral(s) created for the client. Refer to Figure 27.

Figure 27 – Amending Referral to other services items



Select the **Edit** icon  to edit the referral. Select the **Delete** icon  to delete the referral. Select the **Collapse** button  to collapse the field.

Select **<BACK** to go to the **Case details** screen, or the **I want to…** box where you can complete other tasks. Refer to Figure 26.

Special Data Entry fields

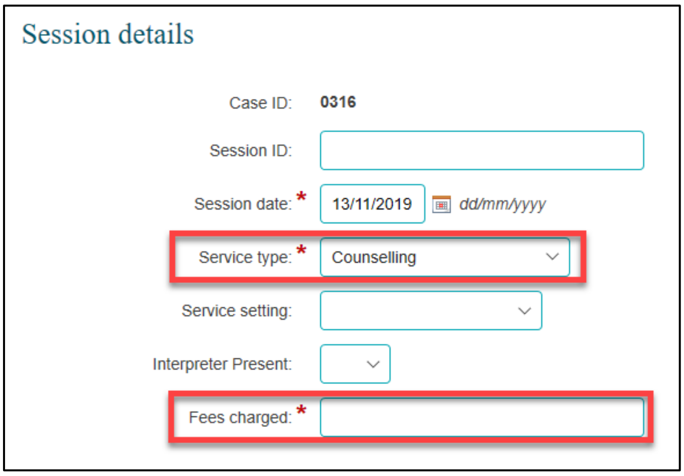
Some programs have special data entry fields display when a session is created for the program activity. Go to the Data Exchange Protocols, program specific guidelines and the Add a case task card, Special Data Entry Fields for more information.

Additional field for Family Law Services programs

Fees charged

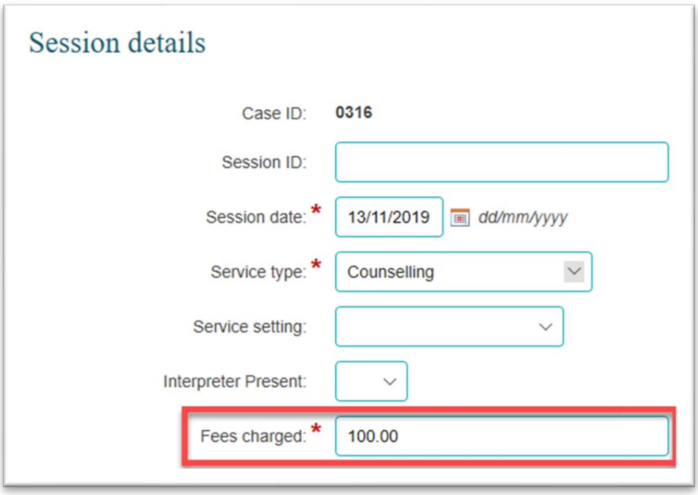
This field applies to all Family Law Services programs from February 2020. Once a service type is selected for the session, the mandatory Fees charged field will appear. Refer to Figure 28.

Figure 28 – Selecting a Session type and Fees charged field appearing



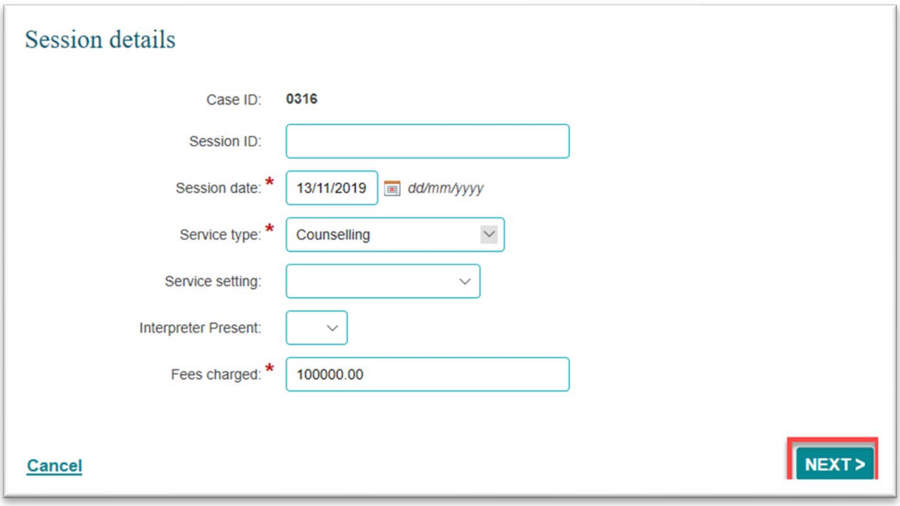
The Fees charged field is a numerical field. Fees charged can contain up to six digits before the decimal point and two digits after the decimal point. If no fee is charged, you need to enter a 0 (zero) amount in this field to be able to continue entering data. Refer to Figure 29.

Figure 29 – Populating the Fees charged field



Once the field is completed the next button can be selected to move to the next screen. Refer to Figure 30.

Figure 30 – Select the next button



Additional fields for Commonwealth Home Support Program (CHSP) cases

Please refer to the Department of Health, Disability and Ageing's CHSP Data Exchange Guide for a complete list of CHSP specific session fields.

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.