Data Exchange

For technical support, contact the Data Exchange help desk by email dssdataexchange.helpdesk@dss.gov.au or on 1800 020 283

Add a client
Scripting for the Data Exchange

Welcome to the Data Exchange training module – Add a client.

Take the time to familiarise yourself with the navigation guide, then select Next.

The following is navigation information for non-mouse users:

- The space bar is similar to the play/pause button and will play or pause the presentation.
- The left arrow is similar to the back and previous buttons and will go to the previous screen.
- The right arrow is similar to the forward and next buttons and will go to the next screen.
- The tab button will allow you to move through to the different elements on a page and using tab then the enter button will access information within those elements.
- The esc button is similar to the exit button and will exit out of the presentation.
- The end button is similar to the skip button and will skip a section of the presentation.

Before we get started though, let's look at what constitutes a client.

In the Data Exchange the term client is defined as an "individual who receives a service as part of a funded activity that is expected to lead to a measureable individual outcome".

Select an image to find out more about who is a client, then select Next.

Image 1

A woman attends a budgeting course to improve her money management.

As she is the person who receives the skills training she is regarded as the client and is recorded in the Data Exchange as such.

She is then attached to a case and the dates she receives the training are recorded as sessions which are then included in reporting.

Image 2

A couple is having relationship difficulties and seek counselling. As both are receiving a service and will achieve an outcome from that service, they are recorded as clients in the Data Exchange.

Image 3

A couple attends counselling with their two children present in the room during the session. As the parents receive the service and will achieve an outcome from that service, they are recorded as clients in the Data Exchange. The children are not recorded in the Data Exchange as they did not personally receive a service on this occasion.

Find out what these common terms and words mean in the Data Exchange by selecting the term. Please refer to the Protocols document for further information.

- **SLK**
  A client's name, date of birth and gender are turned into an algorithm called a Statistical Linkage Key or SLK. This SLK jumbles the information into a 14 character string of numbers and letters.

This means that the client's personal information is de-identified and is never visible to the Department.

- **Pseudonym**

  Where a client chooses not to disclose their real name, the service provider should indicate that a pseudonym is being used and record a pseudonym that ideally can be used again if the client returns for other services.

- **Tags**

  Tags can be added by an organisation and attached to a client's record. They are like filters and can be used as an additional way to group and search for clients in that organisation.

- **Consent to collect and store personal information**

  For service providers who are using the Data Exchange like a client management system, they must obtain consent from the client to store their personal information in the Data Exchange.

  If consent is not obtained then the box must be un-ticked.

- **Consent for future contact**

  Clients must be asked if they wish to participate in routine future surveys, research and evaluations.

  The Department is interested in commissioning client research (such as surveys) to better understand client needs and opportunities to improve service delivery outcomes.

  Client participation in the survey is voluntary.

- **Address**

  You can enter in the full address of the client, or only the mandatory fields of Suburb, State and Postcode.

  If you have a client who is homeless or who lives at a sensitive location such as a refuge you would only enter in the suburb, state and postcode that the client most identifies with or where the administrative centre of the staff providing the service are located at.

- **CALD**

  Cultural and Linguistic Diversity or CALD is recorded via collecting a client's Country of Birth and Main Language Spoken at Home.

  This information is of particular importance to ensure CALD clients and communities have appropriate access to funded services.

- **Indigenous status**

  A client's Indigenous status is recorded because it provides an important understanding of whether Indigenous clients are accessing services.

  If a client self identifies as being of Aboriginal and/or Torres Strait Islander origin, this should be recorded.

- **Disability**

  A client's disabilities and/or impairments are recorded because it provides an important understanding of whether clients with a disability or impairment are accessing services.

  When recording data about disability, clients should be allowed to self-identify with more than one disability group (for example physical/diverse and intellectual/learning).

  The disability groupings are intellectual/learning, psychiatric, sensory/speech and physical/diverse.

Within the Data Exchange, a client record only needs to be created once within an organisation.

To add a new client record, select Add Client in the Data Exchange home page.

The first screen, Add a client - Client details, captures information required to create a statistical linkage key, which is an algorithm that uses parts of a client's given name, family name, date of birth and gender, and it creates a de-identified client record.

The task bar highlighted shows your progress through the creation process.

Any field that has a red asterisk beside it is a required field.

The first field, Client ID, is an optional field. If you have your own client ID numbering system, you can put in your own client ID, remembering not to include any information such as the client's name or Customer Reference Number (CRN) that could identify the client. Otherwise leave this field blank and a client ID will be created at the end of this process.

Next, enter a client's given name and family name.

If the client wished to use a pseudonym, select Name provided is a pseudonym, otherwise leave this field blank.

Then enter the client's date of birth; this should be in a day, month and year format. This can be manually typed in or you can use the calendar function.

If a client does not know their date of birth or does not wish to reveal their date of birth for personal reasons, you have to estimate their age, so select Estimated date of birth. This allows you to put in a year that corresponds to the estimated age of the client. For example, if the client thinks that they are in their 70's, put in the year that would correspond to their estimated age.

In this example however the date of birth has been provided.

Next select the gender that the client identifies as. Click on the dropdown arrow to select.

This could be male, female, intersex/indeterminate or not stated/inadequately described. In this example we have selected male.

The next field is the tags field. Tags are optional and are like filters and can be used by an organisation as an additional way to group and search for clients.

This field is not pre populated and it is up to each organisation to create these if they wish to. As you can see there have been some tags already created by this organisation. You can add as many tags as you wish.

To create a new tag, type in the tag name, in this example it is over65 (please note that the system will not allow spaces when you type the details in). Then select Add.

The tag has now been added to this client.

There are two consent questions.

The first is around identifying that you have consent from the client for your organisation to collect and use personal information and store this information in the Data Exchange; and the second should be asked of all clients around whether they would consent for further contact for survey, research or evaluation purposes.

You can deselect either of these if they are not agreed on by the client.

Then, select the Next button. At this stage the Data Exchange will check if your client already exists.

As you can see, the task bar has progressed to Residential details.

The next piece of information required is a client's residential address. Wherever possible this should be a full residential address. In this example we are entering a street address. The fields' Suburb, State and Postcode are mandatory for all clients.

By selecting Next, a system called IQ office will validate that the address is a correct combination. If these details are incorrect, a list of alternatives will appear on the screen.

We are now up to client demographic details. This screen captures information about clients which is deemed to be essential for all programmes and activities within the Department.

The first two fields, Country of birth and Main language spoken at home are used in conjunction to look at whether or not a client is from a culturally and linguistically diverse background.

For country of birth you have the option to either use the drop down scroll or you can start to type in the first few letters of the country and you will be taken to the correct part of the list.

It is the same for selecting the main language at home.

In this example the client has identified as being from Australia with English as the main language spoken at home.

Next, we record whether or not a client identifies as being from an Aboriginal or Torres Strait Islander background. In this example it is No.

The final question asks whether a client identifies as having any impairments, conditions or disabilities. This can be multi-select if a client has more than one impairment, condition or disability. A medical certificate is not required from the client.

In this example the client has identified themselves as having autism. As defined by the Australian Institute of Health and Welfare this would be recorded as intellectual/learning. Detailed definitions and examples on these conditions can be found in the Protocols document.

Select Next.

We are now at the client review screen. You can review the personal and consent details. Scroll down to review the residential and demographic details.

If you want to make changes to these details, select the Back button to go to the previous screens. Or, if you do not wish to create this client, select Cancel and this will take you out of the process without creating the client.

If you are satisfied with the information entered, select Submit to create the client.

We are now at the client finish screen. The task bar at the top of the page is showing that the process is finished. There is a message box advising that the creation has been successful. You will also notice that a client ID has been provided to our new client

Please note: a client record must be attached to a case and at least one session for it to be included in reports.

This now concludes adding a client.

Partnership Approach

If your organisation has opted-in into the Partnership Approach additional information can be entered for extended demographic details when you see this banner. Select the Extended Demographic details button to view how this is done.

If you do not want to view this demonstration, select the Skip button.

Let's have a look at these optional fields for the Partnership Approach.

As you can see none of these fields have a red asterisk next to them so they are not required fields.

These fields can be recorded either on their own or they can all be completed. These details will be more or less relevant, depending on what type of programme you're delivering.

The first field is a Homeless indicator which is either a yes or no.

The next field is Household composition – select from the drop down list the household composition based on the client's circumstances.

The third field is the Main income source – again we would select the main income source from the drop down list based on the client's circumstances.

We then come to Income frequency – again selecting based on the client's circumstances and if this field is completed you must also complete the next field which is the income amount.

Record the income amount in whole dollars only.

After this is the Month of first arrival in Australia.

Select the month from the drop down list.

If you have selected the Month of first arrival in Australia, you must also complete the Year of arrival in Australia – and again select the year from the drop down list.

Next is the Visa type – select from the drop down list whichever visa type is most appropriate for the client.

And finally we can record Ancestry. This is also a drop down list and it is listed based on the geographical area on which a group originated, developed or settled from.

For this example we are going to record Household composition. Once the details have been entered select Save.

This will return you to the Client profile screen. From here you can select the Home button to return you to the home page.

This concludes adding the Partnership Approach information.

There is a wealth of information and support material available to assist you in using the Data Exchange effectively. These include the Data Exchange website, the Protocols document, task cards along with other eLearning modules and Helpdesk.

Select the icons below to access these.

Thank you for viewing this information, select Exit to close this module.