Web-based portal enhancements

As at 7 August 2017

Information sheet

Purpose
The following enhancements to the Data Exchange web-based portal will make the system easier to use, minimise duplication and greatly improve search functions. In addition, there are updates to lists of values, additional attendance and SCORE features.

Outlet search option within ‘Manage Org’ screen
The ability to search for and filter an organisation’s outlets has been added to the ‘Manage Organisation’ screen. This will allow providers to search for or filter created outlets by Outlet Name, Address, State and Program Activity. Providers can use as many or as few of the filters to return results as required, which will also include outlets at any status, including those that may not have a program activity attached.

Outlet Name and Address duplication restrictions
In an effort to improve the quality of Data Exchange outlets, Organisation administrators will no longer be able to create or edit outlets that have an identical name and locality (Suburb, State, Postcode combination) as an existing outlet for their organisation.

If an organisation attempts to create or edit a duplicate outlet, an error will display advising the user to modify either the outlet name or address before being able to proceed with the Outlet creation or update.

If an outlet is created or updated with an identical name or locality, a warning message will display advising that a duplicate outlet may already exist, and to check any existing outlets before continuing.

Note: This is only a warning to encourage review of existing outlets, and will not prevent providers from proceeding with creating or editing their outlet.

Program date changes will now automatically be reflected in outlet activities
The Data Exchange is now able to identify any date changes to a provider’s Program activities and automatically apply the updates to your outlet activity dates as well. This automated process alleviates the need for Organisation administrators to manually change outlet dates when an extension to funding has been granted. For example, if a Program activity was extended for six months, the date change would automatically update at both the organisation and outlet level for that program.

If you have a delivery partner, or are a delivery partner, the date changes of the lead organisation’s program will also display against, and automatically update the delivery partner’s program and outlet activities in the Data Exchange.

Note: Date changes will only take effect on outlets that already have a matching end date to the program activity. For example, if the program activity ends on 31/12/2017 but the outlet activity end date reflects 30/11/2017, the date will not change on the outlet in the event of an extension. However, if the outlet activity end date matches the program end date at 31/12/2017, then the outlet end date will update to reflect the extension.
**Update to ‘Languages’, ‘Ancestry’ and ‘Country of Birth’ list of values**
Language, Ancestry and Country of Birth values have been updated to reflect the 2016 statistical classifications from the Australian Bureau of Statistics (ABS).

These are very minor changes, and are unlikely to affect many users. Nevertheless, providers are encouraged to review the changes and if necessary, reconcile the new values with their own systems.

For more information on the classifications, or a list of values, please visit the ABS website at the below links.

**Note:** The Data Exchange takes it values from Table 1.3 of each data file.

- **Country of Birth**
  - ‘Standard Classification of Countries’

- **Languages**
  - ‘Standard Classification of Languages’

- **Ancestry**
  - ‘Australian Standard Classification of Cultural and Ethnic Groups’

**Partial searching ability**
Partial searching is now available on some screens, including ‘Find a Client’, ‘Find a Case’, ‘Attach/Detach Case Clients’ and ‘Manage Organisation’. This enhancement allows providers to search for a client, case or outlet record by only typing part of a name or ID instead of the exact details to return desired results.

**Additional search ability at ‘Find a Case’ screen**
Providers will now have the option to search for case records either by outlet or program activity in the first instance. Currently, an outlet was required to be chosen before a list of selectable program activities would become available.

The functionality is designed to allow providers to select a program activity and return all cases delivering that program activity, or subsequently narrow the search further by also selecting an outlet.

**Note:** Original functionality of selecting an outlet first is still available.

**Session attendance and Client SCORE features added to ‘Find a Client’ and ‘Client Profile’ screens**
Two new screens have been added for providers to preview Sessions attended, and SCOREs assessments at the client level. These changes have been made to improve navigation and provide an easier insight into services a client has received and who have assessments that have been recorded.

The ‘Client Profile’ screen now shows a list of sessions that each client has attended including information such as Session ID, Case ID, Session date, Service type and Participation type. The Session ID and Case ID are hyperlinks that will navigate users to those pages. An option to export a list of sessions for a client per case is also available.

Client SCOREs (if present) are now displayed on a new screen that lists a full overview of assessments a client has received. It will display the assessment type, the domain and SCORE ratings as recorded. At least one SCORE must be entered against a client in order for it to be displayed at this screen.

**Note:** Organisation Editors and Viewers will only be able to view SCORE information for outlets and program activities they have access to.