# FAQs for the System enhancements webinar held 12 April 2018

## Accessing reports

**If I am having trouble accessing the Data Exchange reports via the web-based portal. Do you recommend I speak to the DSS helpdesk or my IT vendor?**

Please contact the Data Exchange Helpdesk for assistance accessing reports.

## End case

**I was not aware that you can close cases in the Data Exchange.  Is the end date the same as a close case date?**

Case close is a new function coming in August. This is not a current ability in the Data Exchange. The Data Exchange case end date is up to the provider to determine. If you wish to align this with the real-life closure of a case, then this is certainly possible for you to do. Please note the case end date field will be optional.

**Will we be able to close cases that ended before the reporting period?**

Yes, the case close date must be later than the last conducted session date, and no later than the date you are closing the case (i.e. today's date).

**Can we go back to cases that were opened say in July 2017 and close them now?**

Yes, in your scenario you could add a closed date to your case for a date anytime between October and today.

**If I close a case and I find out that I need to edit a case, does this mean I can't edit the session inside the case?**

While a case is in closed status, it cannot be modified or have sessions added. If sessions need to be added, the case will need to be reopened.

**If I have a client who doesn't need assistance anymore and I close the case and they come back, should I open a new close or change the end date on the case?**

It is up to the provider to determine. For example, a case might have other attendees and in this scenario it might be more appropriate to start a new case if only one client is returning.

**If I put in an end date for the case by mistake can I set it back to not having an end date?**

Yes - provided the program activity is still active.

**How will this effect if I have some user doing manual data entry and they close a case and I do a XML to fix mistakes in the session?**

If the session already existed prior to the case being closed, then as long as you are still within the reporting period, you should be able to modify the session via bulk upload. Once a case has been closed then sessions with a conducted date greater than the case end date can no longer be added to the case.

It is recommended that service providers should only end date cases if they in fact have ended. If the case is still open, or possible to start up again, then we would advise not closing it.

If your organisation uses dual upload methods we would also recommend that there are strict guidelines in place within your organisation to ensure that no data is accidently overwritten or incorrectly amended and we would suggest that you speak to your IT vendor / specialist about this.

## New optional fields

**Is it possible to make any of these new values mandatory?**
At this stage, the new fields will be voluntary to reduce the amount of changes organisations have to make to their data collection processes. You are welcome to provide feedback about any future enhancements you would like to see through the Data Exchange Helpdesk.

**In regards to the new optional fields, will we be required to incorporate the fields into our CSV schemas even if there is no data to upload for these fields?**
It is recommended that yes, these fields are incorporated into any configuration in the event that you wish to report on them in the future, however we will be not mandating any of these. It is also recommended, that you download / refresh the Data Exchange Reference Data every 3 months to become aware of, and incorporate any updates to the Data Exchange.

**Just wondering how do we find out more information about the new optional item relating to service settings?**
These values are still in development. If you are interested in providing some input on what would be useful or valuable to you, please contact us at dssdataexchange.helpdesk@dss.gov.au.

## Other

**Can you please provide an update on the handshake approach?**
Unfortunately, we will not have time to cover the Handshake in today's presentation. Please refer to the Handshake – Create, accept or revoke task card under 'Training resources' on the Data Exchange website.

**I've already subscribed to the mailing list, but I never receive any of the notifications. I checked again yesterday and it said my email was already subscribed. Can you please make sure my subscription is working so I receive the specifications?**
We would suggest that you check if our updates are getting caught in your spam folder, as the subscriber emails are sometime blocked by spam filters. If you are still having issues, please contact us at dssdataexchange.helpdesk@dss.gov.au.

## SCORE and partnership approach

**Is SCORE reporting is optional, or does it form part of the Partnership Approach which is optional?**
SCORE is part of the Partnership Approach. A very small number of programs expect organisations to participate in the Partnership Approach as part of their grant agreement. If you are unsure, please contact your Funding Arrangement Manager.

**How often are / should SCORES be added?**
We recommend SCOREs are recorded somewhere towards the beginning of service delivery and sometime towards the end of service delivery in order to capture a "pre" and "post" comparison for the client and activity. However, you are welcome to collect SCORE assessments at more regular intervals if the client is with you and you have time to collect the updated assessment, or you wish to capture small changes.

**When you speak of the SCORE Activity field is mandatory does that mean it is mandatory for system-to-system upload, or is it only mandatory in terms of a search function in DEX?**
There will not be any changes to recording SCORE for system-to-system (not including reference data). Those 'mandatory' fields are mandatory in context to the SCORE record being added, not that SCORE is mandatory to do.

If you are recording SCORE, please note that there are minor changes being made to the SCORE domains as part of the August enhancements. Organisations using system-to-system to report SCORE will need to download / refresh the Data Exchange Reference Data to incorporate these changes.

**The change to Employment Education and Training into two domains. Does this means there will be 11 domains not the current 10? This is important for system- to-system modifications.**
Yes, this will introduce a new domain, bringing the total to 11. SCORE domains are reference data meaning that the configuration for recording SCORE via API will not change, but that there are new reference data items that will need to be incorporated if applicable. It is recommended that DEX reference data is downloaded every 3 months to keep abreast of these changes and develop for if necessary.

**How do you know if your organisation uses the score system?**
Please have a discussion with your managers if you are unsure whether your organisation uses SCORE. Organisations can opt-in to the Partnership Approach in the Data Exchange web-based portal by changing the radio buttons to 'Yes' for the relevant program/s in the 'Manage Organisation' section. The Create and manage outlets task card provides further information on this process. If you are still uncertain then your Funding Arrangement Manager will be able to advise you if your organisation has opted-in.

**For SCORE, will there be a field to record the assessment method/tool used, or just one to indicate who did the assessment "Assessed by'?**
There will only be one new field. The values are still being developed with consultations, and may include whether an assessment tool has been used or whether SCORE was used by the practitioner, client or jointly. If you have any feedback on this field please feel free to send your comments through to the Helpdesk. Further information about this field will be provided closer to release.

## Technical specifications

**Will the updated technical specifications contain a shortcut list summarising the changes? It is quite laborious for vendors to go through and compare the two documents side by side. A list of the changes would be very much appreciated.**
The Technical Specifications include a 'version history' on page 2 - updates and additions to Technical Specifications are covered in this table.

**When will technical specifications be provided so we can ensure our systems are sending the right data when the new features are live?**
The technical specifications for system-to-system and bulk upload are now available on the Data Exchange website.

We recommend subscribing to the Data Exchange mailing list to receive further advice on updates as they occur.

**Do organisations need to make IT changes to see the new changes?**
All additions are optional, so there is no mandate to have to develop for, or record these. However if you wish to use these new Data Exchange fields, or use any of the current optional fields that are changing (such as SCORE) then yes - you will need to incorporate and configure to be able to do so. The updated Tech Specs are now available, and changes implemented in Data Exchange Staging to assist you with this work.

## Upload method

**How do I access the DEX reference data?**

Your Data Exchange Organisation Administrator will be able to access these for you. Go to Manage organisation section on the portal home page > select the Reference data hyperlink > you will find files for schema and reference data located there. Download these and then send them to your IT vendor / specialist. The Upload methods task card on the Data Exchange website > Training resources tab provides further information.

**Are the name changes of any impact on the bulk upload?**

The 'optional' homelessness field at client extended demographics is now a string data type, instead of Boolean. If you wish to record homelessness values, you will need to adjust for this. As it is an optional field, if you are not planning to record this, then there should be no change required. We would still recommend catering for this change of data type in case you did want to record this field either now or in the future.

**We are also wondering if the total group client numbers for a case can be automatically updated when you add more unidentified clients to a session in that case?**

This has been explored, however, system restrictions (specifically to other allowed upload methods) will not allow for this at this time. Future abilities continue to be explored and tested.

**Organiser note:** The System enhancements webinar is now available for viewing and can be found on the Data Exchange website under the Webinar library tab.