Transcript for System enhancements webinar held 12 April 2018

Welcome to this Data Exchange system enhancements information session.

My name is Rose Pearson and I'm a trainer with the Data Exchange team and I'll be taking you through this session today.

Joining us today to answer any questions that you may have on the system enhancements that you will see or are coming up or on the Data Exchange in general are James, Andrew and Brendon. So please send those questions through, they are ready and waiting to assist you.

Before we get started, I'd like to acknowledge the traditional owners on whose lands we meet today. We pay our respects to their elders past and present.

Just a reminder on how to use the control pane during the webinar. For some of you who may be the first time you've joined us or you may not have been with us for a while. You will see that on the right hand side of the screen there is a control panel, but you will also note your audio has been muted. That's so we don't hear any noise coming through from your side there from your office or where you are.

If I could ensure your microphone or even your phones are on silent so that audio doesn't come through to disturb the webinar. However, in those sections there you can see you can type your questions in and we will send them through and they will come to our team. We also have a hand out of the presentation there for you to retrieve if you would like as well. If you do have any issues in grabbing that hand out please let us know because we can send it to you after this presentation as well.

If after a while you haven't used the control panel it will actually collapse on you however don't be alarmed what you can do is select the orange arrow at the top and it will reappear for you to continue on entering any questions and the like.

Now we are just going to have a look at the agenda and what we're going to look at today. We will have a quick overview of the Data Exchange, so very briefly why we are making these changes to the data exchange portal there.

We are going to look at what we are changing? So we are looking at the fields that have been amended fields and also some new fields. Now this is not an exhaustive list of everything that's coming up but it's a bit of a sample for you and so you have a bit of a sense of what's happening in the data exchange space. And to make you really excited about the changes cos they are going to be a great benefit to you and your organisations.

We will look at the system process, so the next steps after we have this webinar today. What are the next steps and what will happen. And again where you can get more assistance and advice where you need that. So the webinar should take around 45 minutes and we will have question time at the end where we will keep the webinar open for you to send through any of those questions.

Again any questions we don't get to today or we do actually need to investigate we will get back to you on those as well. And we will endeavour as well to record this and put it on our website under the webinar library tab in the coming weeks.

Ok so what we might do is get started and we'll go through. So when we think about why we are doing these changes. So these changes will occur in August and these enhancements are designed to provide an improved experience for data exchange portal, and the system enhancements that we are proposing, along with the principles of the data exchange.

So at the moment some processes such as adding score for a client requires a lot of clicks to different pages. The system enhancements will see the creation of hub pages where different processes can be accessed via that page thus reducing red tape.

Also when we think about the shift of focus of reporting from outputs to outcomes some of the changes will make it easier to not only record SCORE for clients but also very quickly see which clients do and do not have score recorded.

We are also introducing a range of new voluntary fields to capture greater detail around service delivery and outcomes so these changes will make it easier to manage program performance, because client information can be easily recorded and updated.

So we will take a look at what we are changing, so we are changing some of the portal's look and feel.

So there are going to be changes to the appearance, colour and icons. We will be adding an "auto-complete" functionality for address fields in the portal and this again will reduce key strokes.

There are also changes to the Home page screen, which I think you will be very excited about as we are introducing easier ways to record SCORE in the data exchange

Please note too, that these look and feel changes will only impact organisations using the web based portal.

So let's take a look at some of those changes.

Actually I might just recap, so let me rewind and I want to actually address some of those other fields there before we look at some of the changes. They will primarily affect portal users and data administrators. So they are going to deployed in August and they relate to voluntary fields of information only. There are no changes to the mandatory data items.

Providers undertaking bulk file upload and system-to-system methods of transmission should engage with their third party vendors soon, as the new configuration will be ready to test in the staging environment later this month. And that is something we really do encourage to let your IT vendors know these changes are coming so that they have that on their radar.

Now once the enhancements to the web based portal have been implemented and tested we will be delivering another webinar to conduct a live demonstration in our training data base.

For this webinar today we are going to be using screen shots to demonstrate the current and future look of the changes.

So lets go through some of these now.

Ok and as I mentioned earlier we are going to be looking at some of the icons, they are going to be indicating some of the completion statuses of certain records and it will be easier to identity. We have got some additional options to looking at the home page. You will be very excited when you see what the future home page has and will look like, and as I mentioned we will be looking at autocomplete address fields. And easier ways to record score.

So at the moment you should be seeing on your screen what the current homepage view looks like. Where we have our find a client and find a case. Then we have the details for add a client, case and session.

Lets look at what the future homepage will look like. Firstly you'll notice that there will be a search bar at the top of this page which will provide an alternate and more convenient way to search for cases, clients and sessions.

Secondly you will notice that the Add client and case icons which currently are teal and light blue will be the same colours. So clients will be purpose and cases will be hot pink, and they will provide consistency in the icons.

A new feature to the homepage will be the inclusion of an Add SCORE tile and a View SCORE tile field. So you don't need to access a client record, go in find a client and then go that way you can actually access it from the home page.

So we might look at the future search bar and you will see that on the screen there. So what you can do is enter either a case, client or session id.

In this example I have entered a session id and a drop down box has displayed with the different sessions and cases that contain that number in their ID.

I would then select the session I was wanting to locate and update.

And that information would display on the screen and I would update it accordingly.

Now as a reminder, this is something you will see here on this screen, is that you cannot update a session if it is outside of that reporting period. So if the reporting period has closed you cant update it and so there is an information icon bar up the top there. But it will actually allow you to do this if its within the reporting period to updated those details very easily. And that Edit session details button will actually be green so it will be accessible.

Now we will move to the current find a case page, where there's some changes here as well. So this is what it looks like at the moment. And in the red box there you have the search options for created from and to and search cases created by me. Now that will change, and we will display that on the screen in a moment. You can see those two search options are removed from this field here so what you will need to do is select the show advanced options button. And those different search options will display on that page there as you can see. Now what we have included though is the option to search any ended or expired cases.

So this will be really good as there might be some instance in your organisations that you do have cases where you close and you will be able to search for those if you want to. Now if you only want to find current cases that are open you would leave that unchecked.

Now to update the end date in the data exchange and therefore case details. What you need to do is you would find your case. you would select the Edit case details button. And you would populate the end date there, now you can either type that in manually in the date or use the calendar function to populate that field and you would then save the record. And then when you come back to the case details screen it will show there now as an end date listed in that case information.

Now you would have also noticed on that screen there, there is also an attendance profile field so that's something that's new. So this is actually going to provide options to show the relationship between the clients within a case. The information in there for those fields are still being considered but you might have cases where there's family members, or there's support networks or friends that there the relationship of the attendees within that case, but you will notice it is not a mandatory field there.

We then come to our future auto address function, so this is really good so when your typing in the residential address of the client. You can start typing and a drop down list will display is shown here on the screen. And then you can make the most relevant selection there for the address.

It will then auto populate the rest of those fields so you don't have to continue typing. If the address isn't in the drop down you would then go ahead and enter it in manually. You can also if you prefer to just enter in the suburb/ town, state and postcode, which are the mandatory fields for client addresses. You can just go in and start entering Greenway and it will provide you those options to select from the drop down menu list which is the relevant suburb, state and postcode. So that's a really good function, now also to the auto address feature is also being considered for outlets and that feature is currently being developed. So that will be exciting when it is tested and approved.

Now on the screen here we have the unidentified clients associated with the case field in the case, so this is another change. So at the moment it will auto populate to zero, and what you would do if I go onto the next screen you would then have to enter in another figure there at the add a session field so that figure does display.

So what is going to happen in the future is that if you put in zero in your case level for unidentified clients because you know the clients that will be attending the case. That that particular number of unidentified clients that attended a session will not display because it has already been pre-set for zero for the case. However it will display if you have got a figure in that particular field, if your doing a community group session for example and you've got a figure in that field and it will present in the session are for you to put in the numbers. As you can see with the next screen there.

One of the other changes we have is the relation to the manage organisation page. This is a page the data exchange administrator has got access to and its where they would to set up their organisation and create the outlets, and attach their program activities to outlets. So what you can see now on the screen is the program activities, at the moment this is what the screen looks like now, but in the future well have that there will be able to have a status of expired, active and ended by leave. You will be ensuring you have connected to the outlet by only active particular programs. And that's a really good feature you can search there.

Now as we mentioned before one of the exciting future additions will be the add and view score tiles on the homepage. So what we might do is have a look at some of the changes that relate to those cos it will make it easier to go and record some of those outcomes for your clients. Now this is what the future add score page will look like, now you will notice this has an activity, now this is a mandatory field the reason that this exists is that you will have to select an activity a client has attended that your wanting to record the score against. This will actually narrow down the search field for you so there is not a lot of records that need to be searched to actually locate your client. So it filters it for you so it's a really good step. You will also notice the bottom half of the screen of find a client has been greyed out. So its not accessible to enter any information at this point, once though you have entered your activity and in this example we have used reconnect. That find a client field becomes open and you be able to search the client.

A great feature we have here too is partial name searching so you can type in some of the name or the details and the system will find the records for you with those names or number in them. And you would then select the relevant client. Once select relevant record, you would then select the search button and your client details will display there on the page and you can actually go in to that client record and add the score there. And we can see that there on the page. And obviously you can see there we have also got that greyed out find a session area, so you will need to select the assessment type there and in this example we are using circumstances, goals and satisfaction. That is one of the choices we have. Now the community score isn’t there as we are recording score to an individual and not a group.

Now if we go to the future add a score. What you can do is search for your session ID and you would find the record. You would select the hyperlink there and then the add a score client details page will display.

And you would actually record the score outcomes there. Now what you will notice that there is going to be and **assessed by** field as well. So this is a new feature. So the options in this field to advise how the assessment was made so was it made by the client, the practitioner, if it was a joint assessment or was an evaluation tool was used. So again this field is still under development at the moment, and it is an optional field but it just provides a bit more insight into what is happening there with your client and how those score assessments or outcome assessment are being made. Once you completed all those details you come to the finish page. Now from this page what is really good is you can either select the client ID to go in and make some more changes, or add another score for this client and activity or another score for another client down at the selection at the bottom of the page. So you don’t have to leave certain pages and certain areas to do things. We’re creating those hub pages as I mentioned before.

The view score activity there, or the view score tile once you go in again it is the same layout as the add a score as in you have to select the activity first so it narrows down and filters those clients accordingly. So in this example we’ve got children and parent support services, it does then display with a list of clients and their IDs and names. And what is really great too about this screen is that you can see here there is a column titled score present. Now where you can see the score icons so that means there is a score recorded there, where you have the blank spaces obviously there is no score recorded.

So very quickly you can manipulate or you can actually use these little filter arrows and you can see which clients need to have a score recorded against them. So it just makes managing your client list and who has a score and who needs to have a score recorded very easy.

A new feature we have which I absolutely love is that these icons that are developed that you can see under the client scores column here in red. That’s going to make it easier for you to identify what clients need a score, so for example when we look at that first one there where its just an outline. That means there is no score included for that client in that session so a score would need to be added. The second one here where it is coloured yellow means there is at least one score and there is the opportunity to continue to add another score for this client. Now that third icon that is greyed at the moment, now the colour of the icon is likely to change but the purpose of the icon is to indicate no further scores can be recorded for this client in this session. So if the client then attends another session you could then record a score to see their progress on the outcomes they are achieving. Now as I mentioned earlier these changes are under development and being tested, and once released in August we will conduct another webinar using that live training database.

So we are going to look at now the additional optional fields. So listed on the screen are some of the additional fields that we will be adding to the data exchange. Please note that all of these additional fields will be optional, and you will not be required to report them if you don't want to. So there's no changes again, we must stress to the mandatory priority requirement data items.

Now these additional optional items have been added to provide further context and background on your clients. The last two listed here are dealing with relationship between clients within a case and how score assessments are made. We have actually looked at them in the previous section so we wont touch on those again. But lets continue and we will have a look at some of these optional fields.

So currently in the extended demographics page you have these particular fields, so you have homeless indicator, main source of income, income frequency, approximate gross income, month of first arrival in Australia, year of first arrival in Australia, visa type, and ancestry. If we click over to the next page.

These are the different fields which have had been amended or are new. So you can see here we have got homeless indicator, highest level of education, and employment status, is the client a carer, and NDIS eligibility. So we will just have a look at these in a bit more depth.

So we have Homeless indicator and what has been added and what has been added into there is now an at risk selection. So this will be beneficial at capturing clients that are at risk of becoming homeless. So if your organisation is delivering a program and you capture that information you might be able to refer this client either internally or externally to another organisation to ensure that this doesn't occur.

Now the following new fields have been added to the extended demographics page and they include:

- Highest level of education / qualification and
- Employment status

Now these fields have been requested by program policy areas as they feel that they will greatly enhance the data already collected and provide further background information on clients.

Also we have the new fields of

- Is the client a carer
- Along with a field for those organisations delivering NDIS programs

Now again a reminder that these fields are **all voluntary** so you would only record information against them if they were **relevant** to your organisation and to the program that you were delivering. However, I am sure that you can see the benefits of collecting and recording this information.

Now on the screen we will actually look at some of the changes that are going to be happening to the SCORE domains, so we are going to look at circumstances, goals and community:

- First of all, when we think about the Age-appropriate development there's a change to the description to that particular score area so its not going to be specific to children it will also include any aged client. Because these domains work across or apply across a wide range of program not just programs that focus on children.
- We will also separate education and employment to make them separate domains to reflect the two distinct outcome areas that need to be independently reported on

- Material wellbeing the name change there to include ‘basic necessities’ so focusing not only on the immediate lack of money but also those basic items needed for day to day living
- Money management will go through a change – to financial resilience as money management implies that clients facing financial hardship were not good at managing their money - which may not be the case.

If we now look at the goals area there we are changing that one there, changed confidence to make own decisions, the name change will be Empowerment, choice and control to make own decisions. So this change extends to the existing domain to explicitly reference assisting clients to exercise choice and control and take empowerment of their personal situation.

There will also be some changes to the community SCORE to help reduce instances of group reporting and improve data quality. So you can see that there is going to be name changes to two of the domains there so group/ community knowledge, skills, attitudes and behaviours and also the other one will be community structures will be changed to community infrastructure and networks. And there will also be a new domain titled social cohesion.

So this is where the funded activity is seeking to work in the community to promote a sense of belonging and inclusion in Australian society to improve social cohesion and community harmony for targeted clients and communities.

So the screen here we have got all four areas of score and the different domains listed in blue you will be able to see the ones that are being changed. Just selected there, just makes it easier so you can see those are the ones being changed. And also that one for community, under social cohesion is the new domain for community.

So these changes will only affect organisations in the partnership approach who are reporting SCORE.

If you’re not in the partnership approach these changes don’t affect you. And we will certainly be updating the literature we have of the protocols and appendix B to reflect these changes as well.

So we will have a look there at the changes which we look at today about the translation matrix.

The translation matrix was originally developed in 2015 to help organisations convert results from commonly used outcomes measurement tools into SCORE. The translation matrix includes the nine tools that are commonly used by the Department.

In December 2017, all organisations were invited to complete a short survey about their use of the translation matrix and their use of evaluation clinical tools. We received about 40 responses which was really encouraging.

We recently contracted a consultant with outcomes reporting expertise to review the Translation Matrix. We are currently working through this review, including feedback from the survey. More information will be provided once the review has been completed.

But we are also developing more guidance for organisations to assist them in translating the tools that they currently use and also how to map the outcomes that your organisation desires to SCORE if you don’t use a clinical evaluation tool.

This information will be available in the future and we will certainly let everyone know when it becomes available.

So what we would like is for you to provide some feedback on the tools that your organisation might use and if they map back to SCORE. You can provide this feedback at the end of the webinar today in the Your experience today survey that you receive after the webinar. We appreciate your input and feedback that you provide and we do take this on board, so please complete this question if relevant to your organisation if you are reporting SCORE outcomes.

So on the screen here we have got information here about the system enhancement process so the data exchange are making changes to the file upload schema and Web Services Description language to support the new changes.

Now these updated technical specifications documents will be available on our website under the IT Access tab in late April 2018.

You will be able to test the changes in the staging environment from late April. So to do that to get access to the staging environment you would be need to contact our Helpdesk and they will be able to provide you with access.

If you use third party software, please be sure to contact your IT vendor or specialist as soon as possible to review and implement the necessary changes. That way you can get in early and do your testing and have everything ready so you don't have any errors in your data as it comes across.

The changes will be released and made live in the portal in August 2018, and Organisations will be advised of these changes via the Latest updates section on the data exchange website homepage

So there coming up on the screen are some specific details of our website address, and also the helpdesk contact phone number and email. We do encourage everyone to subscribe to keep up to date about what's happening around the data exchange space.

What we also have for you today is, for those of you attending that do record outcomes measurements for their clients, what we would like to direct your attention to a short survey that we have put together to gather your feedback on this.

The survey will be open until mid May and we would love to grab your feedback and comments.

That's the address there down the bottom via survey monkey, (https://www.surveymonkey.com/r/2CNT9WY) you can type that address into your search engine and it will load the survey for you. We will also send out the link to everybody after this webinar so you can access it there, it's a very short survey but it will just provide information to how you feel about how your measuring outcomes measurements and how that can be improved.

Ok so we have come to the end of our webinar today.

What we will leave the webinar open for 10 minutes for anyone who would like to send their questions through to our team to respond to.

For those of you leaving us now I would like to thank you all for your attendance and participation today.

We've gone through a lot of the changes, but there are still many more coming through, so this was as I said just a bit of sampler for you and we will have another webinar once those changes are live and we can go through and step through using the training database, and go in adding clients, adding SCORE everything else like that so you can see how that all works. But I really do hope you get a sense of the excitement we have of these changes and how it is going to be making using the portal a lot easier. For you and to record those outcomes as well. Now the webinar will be recorded and we will get it to the webinar library, as well don't forget the handout if you are having any issues in retrieving that hand out please let us know and we can send that to you and any questions which you have which we don't get to today obviously during while this webinar is open we will definitely reply to you after it is closed.

So we would like to thank you, and it was great having you with us and all those questions we can see them coming through so your definitely keeping Andrew, James and Brendon very busy so that's terrific, we will catch you next time, thank you.