

Transcript – End of Reporting Period Webinar

Hi everyone, I would like to extend a warm welcome to you all to the end of reporting period webinar for the data exchange. My name is Neil Swan. I am with the data exchange training team and I'll be taking you through this session today.

Also joining me are Brendon and Nerissa who will be answering any questions that you may send through. This presentation will be recorded and should take about 30 minutes, including any questions that you may have.

If there are any questions that we are unable to answer during the webinar, we will provide answers after the session.

First, I'd like to acknowledge the traditional custodians of the many lands we are meeting on today and pay my respects to their elders past and present.

Throughout the webinar, remember that there is a control panel that should have appeared on your screen. Clicking on any of the grey ribbon's will expand that area.

Remember to check your sound. Your microphone/phone symbol will be red indicating that your audio is on mute. Please ensure that your audio is muted, otherwise we will hear what is happening on the other side of the microphone.

When the control panel hasn't been used for a period of time, it automatically minimises from view. To expand the panel again, simply select the orange arrow. Also a reminder that the webinar today will be recorded and placed on the data exchange website under the webinar library tab in the next couple of weeks.

Please let us know if you are having audio issues by using the Questions section in the control panel.

To check your browser access, go to the system requirements for attendees and for audio help and frequently asked questions go to the audio help and frequently asked questions section.

Let's have a quick look at what we are discussing today.

First we will look at data best practices. What are the data principles that are the foundation of good data and also look at what your data is used for.

We will take a look at what constitutes good data and poor data quality. We will also briefly look at system reopening requests and requirements for these because we are now coming up to the end of another reporting period, and finally where to get help if it is required.

We won't be discussing getting an AUSKey, applying for access or talking about how to submit data to the data exchange. If you need more information on these items, please visit the [Data Exchange](#) website, the webinar library, and training resources tab where you will be able to find information on these topics.

Let's get started with data best practices.

Quality data is built on a strong foundation of data principles.

When we talk about data principles, we are talking about data that is timely and reliable, accurate and complete.

Following these principles will provide all of us with confidence in the data and allow us to have visibility and understanding of the outcomes that are being achieved by clients; the ability to identify combinations of service that lead to the best results across programs for clients; client pathways within and across services so we can see which other services clients might be accessing and an increased understanding of the client group, demographics profile and complexities.

The Data Exchange system and supporting policies are built to support the collection of high-quality data both relating to the mandatory priority requirements dataset and the partnership approach, which includes extended demographics and client outcome data. It is important to remember that these datasets feed into the bigger picture of improving the lives and well-being of individuals and families by ensuring access to quality social services.

Data that is provided is valued by the department and has many uses. Your data:

- informs policy development through the input into evaluations for the department to get a better feel for what is happening on the ground;
- It is the main data source for the DSS annual report;
- data is used to support evaluations for government initiatives such as the Try Test and Learn program;
- in the past, the data has assisted with disaster recovery planning, such as in the event of cyclones in 2017. We use data to identify services which would be impacted by Cyclone Debbie in Queensland and those areas where they were unaffected and clients could access similar services;
- the data also highlights the breadth of client pathways across services;
- it allows us to demonstrate that funding we are providing is being used for the most effective return on investment;
- lastly, it's used by the department to provide government timely and accurate advice and information on service delivery.

The data exchange has two six-month reporting periods per year. The first spans from 1 January to 30 June and the second from 1 July to the 31 December.

Service providers can enter your data for a reporting period at any time within that reporting period.

We encourage organisations to enter data regularly as reports are refreshed each night and can assist you in monitoring service delivery. Service providers also have a 30 day closing period at the end of each reporting period to finalise and check that data. That is, 30 January and 30 July each year.

We recommend that you check your data regularly and you submit it regularly.

The Data Exchange allows organisations to enter the data as often as they wish to during the relevant reporting period. So you can enter your data daily, weekly or monthly during the reporting period. Entering data early and regularly is in your organisation's best interest as it will ensure that the data quality in your reports is optimum, up-to-date and relevant.

If your organisation is only entering data every two to three months, the question to ask is if this frequency of upload is providing your organisation and the Department a true indication of what is happening with your clients and services. Entering data regularly will ensure that you are meeting your grant agreement milestones and KPI requirements. It will also ensure that you avoid delays with the data being submitted on time to the data exchange as sometimes, increased traffic may result in slower than average performance.

Submitting data regularly will allow you enough time to not only check the quality of your data, but enough time to fix your data if you have found errors in the uploaded data.

If your data is not submitted and accepted to the data exchange before the reporting period cut-off date, you will not be able to enter it at a later stage. Your data will not count and your organisation and the department will miss out on this valuable information.

So what do we mean by good and poor quality data?

There are a number of data items collected as part of your funding agreement obligations that influence if your data is of good quality or not. These items relate both to client details, and details of your organisation and the services provided. Good quality data will correctly identify the client each time that they access services, and provide a clear picture of the services they are accessing. Common areas of concern and ways to improve data capture are outlined in the document included in the handouts for this webinar.

Individual client details create an accurate statistical linkage key or SLK. We are able to gain insights into individual outcomes and pathways with an accurate SLK. Client details can be updated at any time across reporting periods. If the recorded client details - name, date of birth and gender - are incomplete or incorrect. The SLK will be invalid and client details cannot be matched when they return or move between services and it gets harder to follow a client's journey over time.

Use of pseudonyms should only be used where a client chooses not to disclose their real name to a service. The exact same pseudonyms should be used each time for data to be captured. A high-level use of pseudonyms increases the risk of recording mismatched or poor quality client data, which in turn limits insights and understanding of client pathways. Incorrect pseudonym use often comes from a poor understanding of client consent.

Unidentified or group clients should only be recorded when clients are attending a large group or community event, where it is not practical to collect individual details and there is no ongoing client relationship. Where clients are known to the service, but individual details are not recorded, there is a lost opportunity to capture demographic and score outcomes information for those clients.

The date of birth is part of the SLK and enables data analysis of target age groups. Clients age will automatically adjust and display correctly for each session attended. If not realistic, an estimated date of birth can sometimes result in errors with corresponding risk of misinterpretation of service delivery for target groups. Large numbers of incorrect dates of birth can skew the data for an entire program.

Where correct client demographic and other extended data is available, reports will contain rich information on client profiles and target groups.

Demographic data includes gender, cultural and linguistic diversity, disability and indigenous status. Missing, "not stated" or incorrect demographic data is a lost opportunity to gain insight about client profiles, making it hard to demonstrate the intended target groups are being reached, and increasing risk of not focusing services appropriately.

Support persons - correctly identifying support persons allows an ability to distinguish between clients and support persons in reports. If clients are incorrectly reported as support persons, or vice versa this leads to a flawed understanding of service delivery. It also impacts the usefulness of insights that can be gained from reports.

Other details that are important for good quality data.

Session details - correct capture of session details such as dates, service type and clients attending, provides information about services delivered. Reports are driven by session data linked to client data. A lack of consistency and regularity in session reporting will lead to discrepancies between the reality of services delivered, and data reflected in reports. If no clients are linked to sessions, no information on the sessions will appear in the reports.

Cases - When correctly labelled and used, cases allow service providers to efficiently link sessions and clients in ways which are useful to the service delivery model. Poor naming conventions for cases make them less practical and efficient. In some instances, poorly named cases increase the risk of re-identifying clients such as using clients name or a reference number in the case names.

Correctly set up and named outlets provide valuable data on where services are located and can show the service footprint where clients come from to access your services. Where not all outlets are recorded or where duplicated incorrect address or post code are provided, it becomes difficult to understand where services have been delivered.

The standard client outcomes report or SCoRE data, is invaluable in measuring the impact funded services have on clients lives and on the communities over time. This data is growing in size and complexity and is already proving vital for in-depth evaluation and planning of program activities. If the pre-and post-score information is not paired correctly, you can't determine whether anything has changed for the client as a result of the services received. Errors include selecting a different outcome domain for the pre-and post-score assessments or recording a pre-score for satisfaction.

Before the end of the reporting period check the following information; that your outlets are recorded correctly and have appropriate data recorded against them; if using the bulk upload or system to system transfer, ensure data is being uploaded regularly and use the data quality reports available through the data exchange portal to look for

incomplete or inconsistent data. With anything, we want to make sure that we are hitting the mark in regards to not only submitting data regularly and on time, but also that we are submitting quality data.

The data quality report can be accessed from the MyDEX dashboard in the bottom right-hand corner of the screen.

There are a number of reports available to organisations.

All organisations have access to two standard reports. The organisation overview report provides a summary view of an organisation and service delivery, including service types, outlets, sessions, attendants and client demographics. For CHSP, this report also provides a count of outputs for quantity hours, cost and client contributions.

The organisation data quality report highlights key areas of data quality and assists organisations to improve and maintain data quality, leading to a better understanding of services being delivered. The report shows data quality changing over time and across outlets. The report also provides detailed listings of clients and session records with quality concerns to assist your organisation to improve the data.

The next reports are available to those organisations that have opted into the partnership approach.

The resource planning report provides a sophisticated overview of the trends in service delivery to assist your organisation in business planning and demonstrates to the funding agencies the peaks in service delivery.

Service footprint report shows how clients are engaging the services in a map form. We have made this available at the program level and in an aggregated format.

The client outcomes report shows in an aggregated view, the clients journey within a score domain such as satisfaction, goals and circumstances within your organisation.

Community profile report offers key measures that can assist profiling of your community. This report has a wealth of data in one accessible report. You can explore a selection of topics at national, state or local level. The data will come from a variety of datasets such as the national census, administrative and survey datasets.

More information on these reports is available from the Data Exchange website system.

Re-opening requests.

We've had a look at the data practices and also some data quality issues, so we will now have a look at the process if your organisation needs more time to get your data uploaded.

System reopening requests, previously called extension requests, to submit data after the closing of a reporting period are only approved to organisations who have exceptional circumstances. Reasons that will be considered to have the database reopened include unforeseeable events such as a declared natural disaster or catastrophe such as a cyclone or a building fire that has destroyed your infrastructure and records; verified data exchange system failure or difficulties due to remote location such as a satellite uplink failure or infrastructure damage due to seasonal conditions.

Reasons not considered exceptional circumstances include situations such as problems accessing the data exchange due to not having AUSkey access, outlets not set up yet or incorrectly set up; staff going on leave or leaving the organisation; your data not working or not working correctly on the last day of the reporting period or thinking that the close off date for the extra 30 days at the end of a recording period is actually 31 January.

If you're unsure of the end date for the two reporting periods, please revisit the data exchange website. These dates remain the same every year.

Submitting a system reopening request involves the following:

- make sure that you discuss the requirement with your funding arrangement manager;
- submit the current extension request form from the Data Exchange website. If an old form is submitted, it will be returned to your funding arrangement manager;

- ensure that you have your correct organisation name and ID. If you're unsure of these details, they can be found in the manage organisation/organisation details section of the data exchange portal and in your funding agreement documents;
- select the relevant program activities that you are seeking extension for and note that there is a limit of 15 program activities per extension request; enter a valid reason and provide an explanation of what has occurred; and
- continue to work on getting your data in on time.

The delegate will consider your extension request, but the submission of the request doesn't guarantee its approval. The vast majority requests are not approved because they do not represent exceptional circumstances.

As always there are a number of channels to get help if you need assistance with either improving your data or that it is submitted on time.

Your first point of contact should be with your funding arrangement manager, who will be able to assist you in providing guidance on issues regarding data entry, staff absences, or grant variations. They will also be able to discuss with you any milestone and KPI concerns that you may have.

Your IT vendor/specialist should be contacted if you are having issues with system-to-system or bulk upload and there are issues or errors in your data. They will need to review the coding used to extract the data from your customer management system to the data exchange.

You may also need to speak to our helpdesk. They will be able to assist with your other technical issues and provide you with sandpit environment login so your IT vendor specialists can test the programs that they have designed.

There is also of course the Data Exchange website, [DSS.dex.gov.au](https://dss.dex.gov.au), where you will find a wealth of training and policy support material and strongly encourage you subscribe to the website so that you do not miss out on latest information. The data quality FAQ sheet has also been included in this presentation.