



## Find and edit a session

### Task card

This task card discusses the following:

- [Information on updating sessions](#)
- [Find a Session](#)
  - [Method 1 – From the Go to field](#)
  - [Method 2 – From the Find Case button](#)
- [Results section](#)
- [Edit a Session](#)

### KEY HIGHLIGHTS

- At least one session must be recorded during a reporting period for the session and associated clients to be counted in reports.
- A session can be updated any time only during the relevant reporting period.
- The use of special characters such as \* & % # @ should **not** be included in the free text fields as they are used as search functions in the Data Exchange.

### Information on updating sessions

A session records what service was delivered on a particular date within a reporting period, the type of service delivered and which clients attended. Sessions are a critical part of the service record of a service provider and drive the reporting function of the Data Exchange.

At least **one session** must be recorded as occurring within a reporting period for the session and associated clients to be counted in reports.

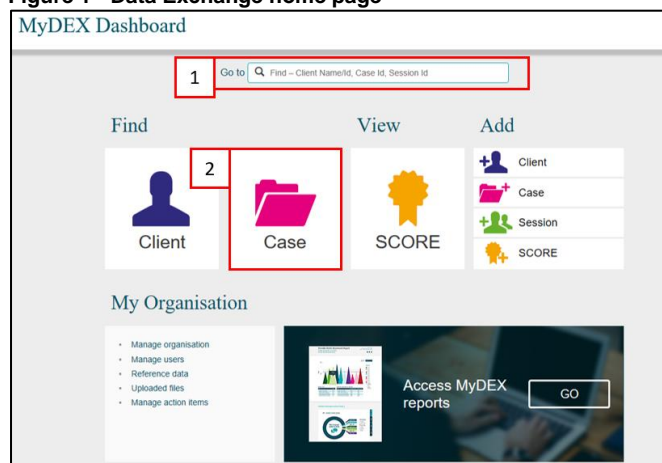
### Find a session

There are a number of ways to find an existing session. Refer Figure 1.

Go to the Data Exchange home page and either:

1. Enter information in the **Go to** field
2. Select the **Find Case** action tile

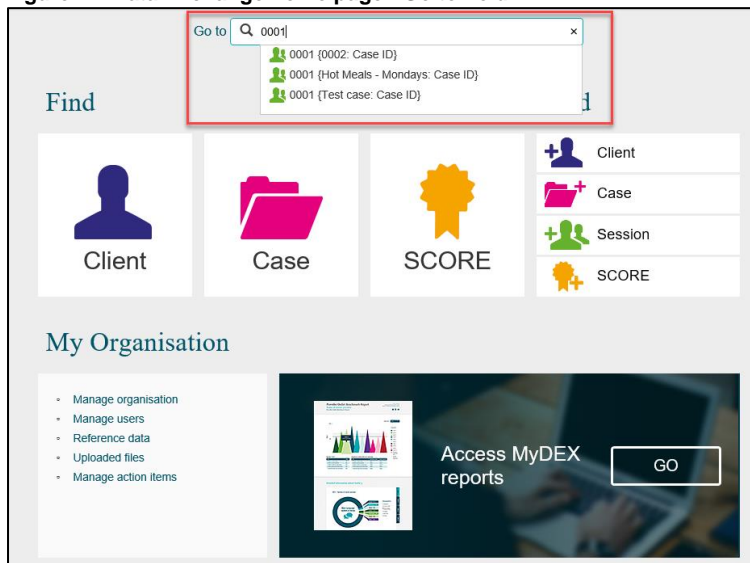
Figure 1 - Data Exchange home page



## Method 1 – From the Go to field

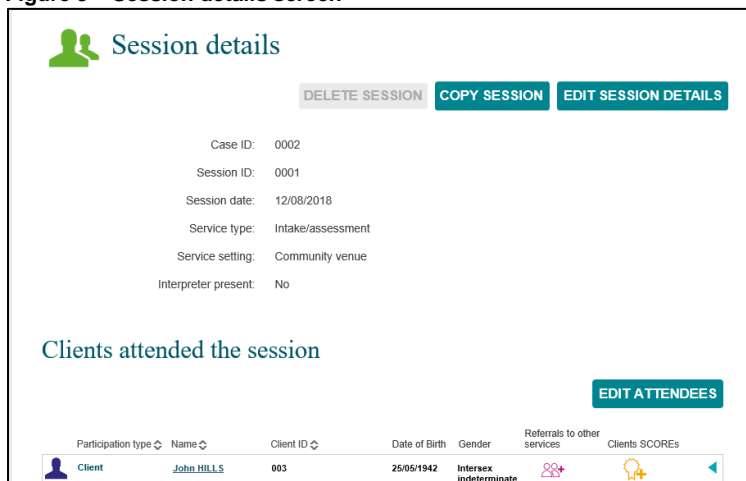
Start typing the session ID (this could be numerical or alphabetical) in the **Go to** field  
The field will provide a drop down list to select the required session. Refer Figure 2.

Figure 2 – Data Exchange home page - Go to field



The **Session details** screen will display. Refer Figure 3.

Figure 3 – Session details screen



Refer to the [Edit a session](#) details in this task card for further instructions.

## Method 2 – from the Find a Case button

The **Find a case** screen will display. Refer Figure 4.

Find your session by selecting the corresponding case

Figure 4 – Find a case screen

Home > Find a case

### Find a case

Case ID:  [Show Advanced Options](#)

Client ID:

Outlet:

Program activity:

[Clear Outlet and Activity](#)

**SEARCH** [Clear](#)

Results (4)

Show  **GO**

Case ID	Outlet	Program activity	Ended on	Sessions	Created on
0002	Bay Community Centre	Reconnect		3	13/08/2018
Transport - Wednesdays	Bay Community Centre	Community and Home Support		0	08/08/2018
Hot Meals - Mondays	Bay Community Centre	Community and Home Support		4	25/07/2018
Test case	Bay Community Centre	Reconnect		1	06/07/2018

## Results section

The most recently created cases will display in the **Results** section. Refer Figure 5.

1. Select **GO** to change the amount of records displayed on the screen. The options are 10, 20 and 50.
2. Click on the heading hyperlinks of Case ID, Outlet, etc. to filter columns from ascending to descending order and visa-versa either alphabetically or numerically.
3. Click on the case hyperlink to select the case.

Figure 5 – Results section

Results (3)

Show  **GO** 1

Case ID	Outlet	Program activity	Ended on	Sessions	Created on
Transport - Tuesdays	Bay Area Services	Community and Home Support		1	03/08/2018
Community Event 1	Bay Area Services	Financial Crisis and Material Aid - Emergency Relief		2	08/08/2018
0001	Bay Area Services	Financial Crisis and Material Aid - Emergency Relief		0	09/08/2018

Select the relevant case hyperlink and the **Case details** screen will display. Refer Figure 6.

Figure 6 – Case details screen

**Case details**

DELETE CASE EDIT CASE DETAILS

Case ID: Community Event 1  
Outlet: Bay Area Services  
Program activity: Financial Crisis and Material Aid - Emergency Relief  
Total number of unidentified clients associated with case: 250  
Attendance profile: Community event  
End date:

Clients attached to the case (3)

ATTACH/DETACH CLIENTS

Name	Client ID	Date of Birth	Gender	Created on	Referral source and reasons
Helen CRIGHTON	003	05/12/1940	Female	03/08/2018	
Henry WONDEN	004	13/12/1939	Male	03/08/2018	
Ruby HENDERSON	005	05/08/1942	Female	03/08/2018	

Sessions associated with the case (2)

+ ADD SESSION

Session ID	Session date	Service type	Created on	Total client attendance	
0002	05/08/2018	Material Goods	05/08/2018	2	COPY SESSION
0001	21/07/2018	Food Parcels & Food Vouchers	05/08/2018	150	COPY SESSION

< BACK

Select the relevant session hyperlink and session details will display. Refer Figure 7.

Figure 7 – Session screen

Sessions associated with the case (4)

+ ADD SESSION

Session ID	Session date	Service type	Created on	Total client attendance	
0004	14/08/2018	General House Cleaning	15/08/2018	1	COPY SESSION
0003	02/08/2018	Self-Care Aids	10/08/2018	1	COPY SESSION
0002	01/08/2018	General House Cleaning	10/08/2018	1	COPY SESSION
0001	05/08/2018	General House Cleaning	08/08/2018	1	COPY SESSION

< BACK

Refer to the [Edit a session](#) details in this task card for further instructions.

## Edit a session

There are a number of ways to edit an existing session. Refer Figure 8.

1. Delete a session

**NOTE:** you can only delete a session that is in the current reporting period.

2. Copy a session
3. Edit a session

**NOTE:** The use of Special characters such as \* & % # @ should **not** be included in the free text fields as they are used as search functions in the Data Exchange.

4. Edit Attendees

Figure 8 – Session details screen

Home > Find case > Case ID: Hot Meals - Mondays > Session ID: 0004

### Session details

1 DELETED SESSION 2 COPY SESSION 3 EDIT SESSION DETAILS

Case ID: Hot Meals - Mondays  
Session ID: 0004  
Session date: 14/08/2018  
Service type: General House Cleaning  
Service setting: Organisation outlet/office  
Interpreter present:  
Fees charged: \$0.00

#### Amount of assistance provided

Hours: 1  
Minutes: 0

#### Clients attended the session

4 EDIT ATTENDEES

Participation type	Name	Client ID	Date of Birth	Gender	Referrals to other services	Clients SCOREs
Client	Mandy FRANKS	002	25/05/1941	Female		

#### Community SCOREs

+ ADD COMMUNITY SCORE

More information on outlets, clients, cases and sessions can be found in the [Data Exchange Protocols](#) and the [Training resources](#) tab.

For technical support; contact the Data Exchange Helpdesk by email [dssdataexchange.helpdesk@dss.gov.au](mailto:dssdataexchange.helpdesk@dss.gov.au) or on 1800 020 283 between 08.30am - 5.30pm (AEST/AEDT) Monday to Friday.