Data Exchange

Data Exchange 101 - Introduction

November 2018
<table>
<thead>
<tr>
<th>Agenda</th>
</tr>
</thead>
<tbody>
<tr>
<td>What is the Data Exchange?</td>
</tr>
<tr>
<td>Priority requirements data items</td>
</tr>
<tr>
<td>Partnership approach data items</td>
</tr>
<tr>
<td>Where to get help</td>
</tr>
</tbody>
</table>
What is the Data Exchange?
Principles of the Data Exchange

Reduce red tape
- Reduction in amount of required data items
- Standard reporting periods
- Standard reporting method

Outputs vs outcomes
- Capture outputs of clients, cases and sessions
- Capture impact of services on clients

Collaboration
- Improves services
- Allows for innovation and growth

Manage performance
- Improves service delivery
- Improves program policy
Standard Data Exchange KPI’s

1. Number of clients assisted
2. Number of events / service instances delivered
3. Percentage of participants from priority target groups
4. Percentage of clients achieving individual goals related to independence, participation and well-being
5. Percentage of clients achieving improved independence, participation and well-being

Measured using benchmarking, comparing your achievement against similar service providers delivering comparable services, using characteristics defined in the Data Exchange Protocols.
# Data Exchange snapshot

As at November 2018:

<table>
<thead>
<tr>
<th>Icon</th>
<th>Count</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>🔄</td>
<td>2,500+</td>
<td>Organisations currently registered in the Data Exchange</td>
</tr>
<tr>
<td>👀</td>
<td>13,000+</td>
<td>Users currently registered in the Data Exchange</td>
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<tr>
<td>💼🔗</td>
<td>Over 80+ million</td>
<td>Sessions of service to clients and communities since July 2014</td>
</tr>
<tr>
<td>🔊</td>
<td>65+</td>
<td>Programs currently reporting via the Data Exchange</td>
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What do we use the data for?

- Informs
- Reports
- Supports
- Recovery planning
- Client pathways
- Return on investment
- Information for government
Data sets of the Data Exchange

Priority requirements

A minimum data set that all organisation’s must report regardless of the program delivered

Captured through:
- Clients
- Cases
- Sessions

Partnership approach

An extended data set that:
- Organisation’s can choose to report
- Some programs are required to report these items
- Access to more reports

Captured through:
- SCORE (outcomes)
- Extended demographics
- Client needs and circumstances
- Referral information
Reporting Periods

- Data must be finalised by the end of each 6 monthly period.
- Organisations are strongly encouraged to submit and check data regularly.
Getting started
Getting started process map

Access Training Material
- Data Exchange website
  - Quick Start Guide
  - Task cards
  - eLearning modules
  - Protocols
  - Appendix B

Apply for AUSkey
- Two types: Administrator and Standard
- Have at least two AUSkey holders in your organisation
- For more information – abr.gov.au

Decide Upload Method
- System to system
- Bulk file upload
- Web-based portal
- Can change upload method at any time

Determine organisation / outlets / users
- Create outlet/s and attach relevant program activities
- Set up users – attach to outlet/s and program/s relevant to each user

Input Data
- Input regularly
- Check data quality regularly
- Data is available in reports the next day
Access training materials

Data Exchange

About  Policy Guidance  IT Access  Training resources  Self-Service Reports  Helpdesk  Log in

Discover how the Data Exchange works to help organisations achieve stronger community outcomes

WEBINAR LIBRARY

LOG IN
FIND TRAINING
SUBSCRIBE
CONTACT US
FEEDBACK

PLAY VIDEO
Apply for an AUSkey

Is a secure login that identifies you when you use participating government online services.

Administrator AUSkey
- Usually CFO of an organisation is the first person that registers for an AUSkey in the organisation
- Manage all AUSkeys linked to the ABN of your organisation including the setting up of Standard AUSkeys
- Manage your own AUSkey

Standard AUSkey
- Manage your own AUSkey
- Obtain additional AUSkeys for you to use on other computers

Refer to the AUSkey Registration Guide and AUSkey website
Upload Options

There are 3 ways to submit data:

1. System-to-system transfer
2. Bulk file upload
3. Web-based portal

Upload methods can be changed at any time.

More information can be found in the Upload methods task card.

Technical Specifications can be found on the Data Exchange Website

The Data Exchange Helpdesk can assist with technical questions and a test environment.
Data Exchange User roles

- Data Exchange Organisation Administrator
- Organisation Editor
- Organisation View only
Set up organisation, outlets and users

The Data Exchange Organisation administrator is responsible for the setup of the:

### Organisation
- Update of partnership approach status
- Update the organisation’s trading name

### Outlets
- Create and submit the outlet/s to Helpdesk
- Can take up to 5 business days to be approved
- Cannot have multiple outlets with the same address
- Once approved must attach the relevant activities to each outlet

### Users
- Must have their own AUSkeys
- Emails must match those connected to their AUSkeys
- Must be attached to relevant outlet/s and program/s to enter and view data
Inputting Data
Data Exchange web-based portal

MyDEX Dashboard

Find
- Client
- Case

View
- SCORE

Add
- Client
- Case
- Session
- SCORE

My Organisation
- Manage organisation
- Manage users
- Reference data
- Uploaded files
- Manage action items

Access MyDEX reports

GO
<table>
<thead>
<tr>
<th>Data Exchange term</th>
<th>Data Exchange Definition</th>
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<tbody>
<tr>
<td>Outlet</td>
<td>The location where the service is delivered from or where the administrative office where the staff are travelling from to deliver services.</td>
</tr>
<tr>
<td>Case</td>
<td>A case captures one or more instances of service delivery that is expected to lead to a distinct outcome. A case contains session and client information.</td>
</tr>
<tr>
<td>Session</td>
<td>A session is an individual instance or episode of service, stored within a case.</td>
</tr>
<tr>
<td>Program activity</td>
<td>The activity that an organisation is funded to deliver.</td>
</tr>
<tr>
<td>Service type</td>
<td>Reflects the nature of service delivery in that particular session. Different service types are associated with different funded activities or programs.</td>
</tr>
<tr>
<td>Individual Client</td>
<td>Individual who receives a service as part of a funded activity that is expected to lead to a measurable outcome and whose details are registered in the Data Exchange.</td>
</tr>
<tr>
<td>Support person</td>
<td>Provides support and assistance to a client at a session.</td>
</tr>
<tr>
<td>Unidentified ‘group’ client</td>
<td>An individual who receives a service as part of a funded activity that is expected to lead to a measurable outcome and whose details are not registered in the Data Exchange.</td>
</tr>
<tr>
<td>SCORE</td>
<td>Reports the outcomes clients are achieving by accessing a funded service.</td>
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</table>
Priority requirements data items
Who is a client?

In the Data Exchange, a client is defined as an individual who receives a service as part of a funded activity that is expected to lead to a measurable outcome.

- First name
- Last name
- Date of Birth
- Gender
- Residential Address
- Cultural and Linguistic Diversity
- Indigenous status
- Disability status
- Consent to store client information in the Data Exchange
- Consent to participate in client research

Statistical Linkage Key (SLK)
What if we cannot collect client details?
Unidentified ‘group’ clients
What is a case?

A case is like a container that holds relevant and required information. For the Data Exchange a case holds:

- Outlet the service is being delivered from
- Program activity being delivered
- Client accessing the service
- Session or instance of service for that activity
What is a session?

- A session is an individual instance or episode of service, stored within a case. A case can include more than one session.
- A session must be recorded within the relevant reporting period for it to display in reports.
- A session can only have one service type reported against it.
- Service types differ from program to program.

A session includes:

- Date session occurred
- Clients that attended
- Service types
How it all fits together

OUTLET: Tuggeranong Outlet 1

ACTIVITY: Financial Counselling and Capability

CLIENTS: Chloe, Gillian, Jennifer, Jo, Terrence and Samantha

CASE ID: Education and skills training May 2018

Session 1
Date: 01/05/2018
Service Type: Intake and assessment
Clients: Chloe, Gillian, Jennifer, Jo, Terrence and Samantha

Session 2
Date: 08/05/2018
Service Type: Education and Skills training
Clients: Chloe, Gillian, Jennifer

Session 3
Date: 15/05/2018
Service Type: Education and Skills training
Clients: Chloe
Process map to input data through the Portal

Add / Find a client
- Priority requirements
- Extended demographics
- Add / Find a Case
  - Outlet
  - Program activity
  - Attach client/s
- Create a session
  - Service type
  - Date occurred / delivered
  - Attach relevant client/s from the Case
- Add SCORE
  - Add SCORE (outcomes)
  - Record when there is a change
- Review the Data
  - Organisation Overview Report
  - Organisation Data Quality Report
Partnership approach data items
Partnership approach data items

**Extended Client demographic detail**
- Homeless indicator
- Household composition
- Highest level of education / qualification
- Employment status
- Main source of Income
- Approximate gross income
- Income frequency

**Month / Year of first arrival in Australia**
**Visa Type and Ancestry**
**Is client a carer**
**NDIS eligibility**

**Client needs and referral reasons**
- Primary / Secondary reasons for seeking assistance
- Referral Type (Internal or External)
- Referral Purposes
- Service setting
- Attendance profile

**Assessed by:**
SCORE directly:
- Client / practitioner / joint / support person

Validated outcomes tool:
- Client / practitioner / joint / support person

**SCORE**

Standard Client/Community Outcomes Reporting

- Circumstances
- Goals
- Satisfaction
- Community
## SCORE domains summary

<table>
<thead>
<tr>
<th>CIRCUMSTANCES</th>
<th>GOALS</th>
<th>SATISFACTION</th>
<th>COMMUNITY</th>
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<tbody>
<tr>
<td>- Age-appropriate development</td>
<td>- Changed behaviours</td>
<td>- I am better able to deal with issues that I sought help with</td>
<td>- Community infrastructure and networks</td>
</tr>
<tr>
<td>- Community participation &amp; networks</td>
<td>- Changed impact of immediate crisis</td>
<td>- I am satisfied with the services I have received</td>
<td>- Group / community knowledge, skills, attitudes and behaviours</td>
</tr>
<tr>
<td>- Education &amp; skills training</td>
<td>- Changed knowledge &amp; access to information</td>
<td>- The service listened to me and understood my issues</td>
<td>- Organisational knowledge, skills &amp; practices</td>
</tr>
<tr>
<td>- Employment</td>
<td>- Changed skills</td>
<td></td>
<td>- Social cohesion</td>
</tr>
<tr>
<td>- Family functioning</td>
<td>- Empowerment, choice and control to make own decisions</td>
<td></td>
<td></td>
</tr>
<tr>
<td>- Financial resilience</td>
<td>- Engagement with relevant support services</td>
<td></td>
<td></td>
</tr>
<tr>
<td>- Housing</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>- Material wellbeing &amp; basic necessities</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>- Mental health, wellbeing &amp; self-care</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>- Personal &amp; family safety</td>
<td></td>
<td></td>
<td></td>
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<tr>
<td>- Physical health</td>
<td></td>
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How does SCORE work?

**Tool:**
- Evaluation tool
- Directly into SCORE

**Assessed by:**
- Client
- Practitioner
- Joint
- Support person

**Initial SCORE**
- Circumstances
  - 1 to 5 rating against relevant domain
  - e.g. Family functioning
- The difference over time is the outcome achieved

**Subsequent SCORE**
- Circumstances
  - 1 to 5 rating against relevant domain
  - e.g. Family functioning
- outcome achieved
SCORE timing examples

1 session

6 week program

1 year program
# Client Circumstance SCORE

<table>
<thead>
<tr>
<th>SCORE circumstance domain</th>
<th>1: Very poor</th>
<th>2: Poor</th>
<th>3: Moderate</th>
<th>4: Good</th>
<th>5: Very good</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Community participation &amp; networks</strong></td>
<td>I feel very isolated. I have very little contact with friends, family or other people; feel isolated or connected; and the amount of support you receive from others.</td>
<td>I feel fairly isolated. I have little contact with friends, family, or people in the community and have little support.</td>
<td>I feel somewhat connected. I have some contact with friends, family, or people in the community and I have some support.</td>
<td>I feel fairly connected. I have a reasonable amount of contact with friends, family, or people in the community and I have great support.</td>
<td>I feel very connected. I have a lot of contact with friends or family, or people in the community and I have great support.</td>
</tr>
<tr>
<td><strong>Family functioning</strong></td>
<td>I have a lot of difficulty and conflict with my family and this has a profound negative impact on my daily life.</td>
<td>I have some difficulty and conflict with my family and this has a negative impact on my daily life.</td>
<td>Sometimes I do not get along with or communicate well with my family and this occasionally impacts negatively on my daily life.</td>
<td>I get along with and communicate adequately well with my family and this rarely impacts negatively on my daily life.</td>
<td>I get along and communicate very well with my family and this has positive impacts on my daily life.</td>
</tr>
</tbody>
</table>
### Client Goal SCORE

<table>
<thead>
<tr>
<th>SCORE goal domain</th>
<th>1: No progress in achieving goals</th>
<th>2: Limited progress to date in achieving knowledge goals—but emerging engagement</th>
<th>3: Limited progress to date in achieving knowledge goals—but strong engagement</th>
<th>4: Moderate progress to date in achieving knowledge goals</th>
<th>5: Goals fully achieved</th>
</tr>
</thead>
<tbody>
<tr>
<td>Changed knowledge and access to information</td>
<td>No progress in increasing awareness and knowledge in areas relevant to clients’ needs and circumstance</td>
<td>Limited progress to date in achieving knowledge goals—but emerging engagement</td>
<td>Limited progress to date in achieving knowledge goals—but strong engagement</td>
<td>Moderate progress to date in achieving knowledge goals</td>
<td>Full achievement of goals related to increasing awareness and knowledge in areas relevant to client’s needs and circumstance</td>
</tr>
<tr>
<td>Changed skills</td>
<td>No progress in increasing skills in areas relevant to clients’ needs and circumstance</td>
<td>Limited progress to date in achieving skills goals—but emerging engagement</td>
<td>Limited progress to date in achieving skills goals—but strong engagement</td>
<td>Moderate progress to date in achieving skills goals</td>
<td>Full achievement of goals related to increasing skills in areas relevant to client’s needs and circumstance</td>
</tr>
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For more information

Assistance:
- Data Exchange website: [https://www.dex.dss.gov.au](https://www.dex.dss.gov.au)
- **Subscribe** to keep up to date on alerts, upcoming **training** and important updates
- Data Exchange Helpdesk: 1800 020 283 or [dssdataexchange.helpdesk@dss.gov.au](mailto:dssdataexchange.helpdesk@dss.gov.au)