

# Data Exchange

# Add a session

## Task card

This task card discusses the following:

- What is a session?
- Add a session
  - Method 1 From Add a case
  - Method 2 From Add a session
  - Method 3 From Find a case
- Enter session details
- Add clients and support persons to the session
- Add a session Finish
- Copy a session
- <u>Record Referrals to other services</u>
- Special data entry fields

## **KEY HIGHLIGHTS**

- A session must be created within the relevant reporting period for it to be counted in reports.
- Attendees to a session can be either a client or a support person.
- Referrals to other services can only be added to a client during the relevant reporting period.
- The use of special characters such as \* & % # @ should **not** be included in the free text fields.
- Some programs have special data entry fields that apply to sessions.

## What is a session?

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 an organisation and drive the reporting function of the Data Exchange. They must be submitted in the reporting period they occurred. They cannot be reported in a different reporting period.

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

## Add a session

There are three different methods to add a session.

- 1. At the case creation point where a session is immediately added to a new case.
- 2. From the home screen, **Add a Session**
- 3. From the home screen, **Find a Case**

Note: All three methods will direct you to the Add a session - session details screen. Refer to Figure 5.

## Method 1 – From Add a new case

Add a new **Case** – refer to the <u>Add a case</u> taskcard.

Select <u>Add a session to this case</u> hyperlink under the **What can you do now?** heading. Refer to Figure 1. Figure 1 – "What can you do now?"

		- Finish	l				
e details							
с	ase ID	ZB113355					
	Outlet:	Catchment Tea	m				
Program a	activity:	Financial Crisis	and Material Aid	- Emergency R	lelief		
		0					
Attendance	profile:	Peer support gr	oup				
Name	Client i	D	Date of Birth	Gender	Created on	Referral source and reasons	
Lucy JONES	001		01/08/2018	Female	03/08/2018	<u>£</u> +	
			05/11/1941	Male	03/08/2018	£	•
Frederick JAMIESON	002						
Frederick JAMIESON	002		05/12/1940	Female	03/08/2018	<u>_</u> 2+	•
			05/12/1940 13/12/1939	Female Male	03/08/2018	요 <del>+</del> 요 <del>+</del>	•
Helen CRIGHTON	003					-	
Helen CRIGHTON	003		13/12/1939	Male	03/08/2018	<u></u> £t	•
	C Program a number of unidentified associated with Attendance nts attached Name	Case ID Outlet: Program activity: number of unidentified clients associated with case: Attendance profile: nts attached to t	Case ID ZB113355 Outlet: Catchment Teal Program activity: Financial Crisis number of unidentified clients associated with case: Attendance profile: Peer support gr Attendance to the case (construction)	Case ID ZB113355 Outlet: Catchment Team Program activity: Financial Crisis and Material Aid number of unidentified clients associated with case: Attendance profile: Peer support group Attendance to the case (6) Name Client ID Date of Birth	Case ID ZE113355 Outlet: Catchment Team Program activity: Financial Crisis and Material Aid - Emergency R number of unidentified clients 0 associated with case: Attendance profile: Peer support group Ints attached to the case (6) Name Client ID Date of Birth Gender	Case ID ZB113355 Outlet: Catchment Team Program activity: Financial Crisis and Material Aid - Emergency Relief number of unidentified clients 0 associated with case: Attendance profile: Peer support group Attendance brofile: Peer support group Mame Client ID Date of Birth Gender Created on	Case ID ZE113355 Outlet: Catchment Team Program activity: Financial Crisis and Material Aid - Emergency Relief number of unidentified clients 0 associated with case: Attendance profile: Peer support group mts attached to the case (6) Name Client ID Date of Birth Gender Created on Referral source and reasons

## Method 2 – From Add a session

+ Session At the Data Exchange web-based portal home page select under the Add menu. Refer to Figure 2.



## Figure 2 – The Data Exchange home page – Add a session action tile

#### Method 3 – From Find a case

under the **Find** menu. Refer to Figure 3. At the Data Exchange web-based portal home page select



Figure 3 – The Data Exchange home page – Add a session action tile

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

Select the **case hyperlink** to add a session to the case.

Figure 4 – The Data Exchange home page – Add a session action tile

Home > Find a case Find Find a	Case ID: Client ID: Client ID: Client ID: Client ID: Client Clien	vallet and Activity SEARCH Clear	Show Advanced Options	Find a client Find a case View a client SCORE Add a client Add a case Add a case Add a case Add a client SCORE Manage organisation Manage organisation Manage organisation Go to home page
Results (4)				
	Outlet☆	Program activity ↔	Show 10 V GO	
Case ID ¢	Outlet 🔿 Catchment Team	Program activity O Financial Crisis and Material Ald - Emergency Relief	Show         10 ~         GO           Ended on ()         Sessions         Created on ()           0         09/09/2019	
Case ID 🔿		Financial Crisis and Material Aid -	Ended on 🗢 Sessions Created on 🤤	
Case ID O	Catchment Team	Financial Crisis and Material Aid - Emergency Relief Financial Crisis and Material Aid -	Ended on the Sessions Created on the Osio8/2018	

The **Case details** screen displays. Refer to Figure 5.

Select the **+ADD SESSION** button under **Sessions associated with the case** heading. Refer to Figure 5. Figure 5 – Case details – Add session button

ome >	Find a case > Case ID:	ZB113355						I WANT TO
	Case de	etails		DE	LETE CASE	EDIT CASE DE	TAILS	Find a client Find a case View a client SCORE Add a client
		Case ID: ZB11335	55					Add a case Add a session
		Outlet: Catchme	ent Team					Add a client SCORE
	Program	activity: Financia	Crisis and Material Aid	- Emergency F	Relief			Manage organisation
Total	number of unidentifie	d clients 0						Manage users Reference data
	associated wi	ith case:						Uploaded files
	Attendance	e profile: Peer sup	oport group					Go to home page
	F	od date:						
lie	ents attache	<sup>nd date:</sup> d to the ca	SC (6)		ATTA	CH/DETACH CLIE	ENTS	
	ents attache	d to the ca				Referral source and	ENTS	
,	ents attache	d to the ca	Date of Birth Ç	Gender Q	Created on 🗘	Referral source and reasons	ENTS	
	ents attache Name © Tendenick JAMILEON	d to the ca		Gender 🗘 Male		Referral source and reasons		
	ents attache	d to the ca	Date of Birth © 06/11/1941	Male	Created on O	Referral source and reasons		
	ents attache Name © Tendenick JAMIE SON Helen, CRIGHTON	Client ID ©	Date of Birth Q 66/11/1941 66/12/1940	Male Female	Created on © 03/06/2018 03/06/2018	Referral source and reasons		
	nts attache	d to the car Client ID 0 002 003 004	Date of Birth © 06/11/1941 05/12/1940 13/12/1939	Male Female Male	Created on © 03/05/2015 03/05/2015 03/05/2015	Referral source and reasons	en TS	
	Name © Enderick JAME SON Helen CHIGHTON Henry NORDEN Lacy JONES	d to the ca	Date of Birth © 66/13/1941 06/12/1940 13/12/1939 01/08/2018	Male Female Male Female	Created on 03/06/2018 03/06/2018 03/06/2018 03/06/2018	Referral source and reasons <u>A</u> + <u>A</u> + <u>A</u> + <u>A</u> +	en TS	

## **Enter Session details**

The **Add a Session** – **session details** screen will display. Refer to Figure 6 and Table 1 for more information on the fields.

Figure 6 – Add a session – Session details screen

+ Add a session	on - Session details
	All fields marked with an asterisk (*) are required.
Session details	
Case ID:	ZB113355
Session ID:	
Session date: *	dd/mm/yyyy
Service type: *	Intake/assessment ~
Service setting:	~
Interpreter Present:	
Cancel	NEXT>

#### Table 1 – Session Details Field Descriptions (Refer Figure 6)

FIELD	DESCRIPTION
Case ID	This is the identifier (ID) of the case you are recording a session against.
Session ID	Enter the session ID if your organisation has a session ID system, or leave it blank for auto-generation.
Session ID	<b>Note:</b> The use of special characters such as * & % # @ should <b>not</b> be included in the free text fields in the Data Exchange.
Session date*	Record the date the session occurred. Enter today's date or a date in the past within the reporting period.
	Note: Sessions cannot be entered for future dates or dates in a closed reporting period.
	Each session can only have one service type.
	Select the service type that best reflects the intent of the session.
Service type*	The service type choices are dependent on the program activity the case was created under and are to align with the program intent.
	Go to the Data Exchange program specific guidance for more information on which service types apply to each program.

FIELD	DESCRIPTION
Service setting	<ul> <li>Select where/how the session took place. The options are:</li> <li>Organisation outlet/office</li> <li>Client's residence</li> <li>Community venue</li> <li>Partner organisation</li> <li>Telephone</li> <li>Digital</li> <li>Healthcare facility</li> <li>Education facility</li> <li>Justice facility</li> </ul>
Interpreter Present	Enter <b>Yes</b> if an interpreter was present. This includes a professional interpreter, a bilingual support person or a bilingual staff member who interprets for a client. This also includes Auslan or other sign language interpreters for the hearing impaired.

\* Mandatory Fields

Once completed, please select NEXT.

The **Add a session – Client/support persons attended** screen will display. Refer to Figure 7 for more information). Definitions of client and support persons are included in Table 2.

Figure 7 – Add a session –	. Cliente/sunnort nore	one attended ecreen
- i iguie i – Auu a session –	· onema/support pera	sons allended screen

	+ Add a session of the second			persons	s attended	
	Name	Client ID	Date of Birth	Gender	Created on	
	Frederick JAMIESON	002	05/11/1941	Male	03/08/2018	<
	Helen CRIGHTON	003	05/12/1940	Female	03/08/2018	<
		004	13/12/1939	Male	03/08/2018	<
	Lucy JONES	001	01/08/2018	Female	03/08/2018	<
	Ruby HENDERSON	005	08/08/1942	Female	03/08/2018	<
	Thomas JEFFRIES	006	17/08/1985	Male	09/08/2018	<
P	ATTACH SELECTED CLIENTS	ATTACH SELE	ECTED SUPPORT PE	RSONS		
·	< BACK <u>Cancel</u>					NEXT>

## Add clients and support persons to the session

The **Add a session – Client/support persons attended** screen will display all the clients linked with the case.

When creating a session, only clients who attend the session are to be recorded.

Table 2 – Client and support persons definitions. Refer Figure 7.

TERM	DEFINITION
Client	Is an individual who receives a service as part of a funded activity that is expected to lead to a measurable outcome.
Support persons	Persons who may be present at a service who do not meet the definition of a client. These could include carers of clients and family members such as young children. There is no requirement to record the details of support persons, however you can record participants as 'support persons' to provide details of session attendees.

To add a support person, you must **first** create a client record in the Data Exchange and then add a support person at the session level.

Note: if you are creating a session for the Community and Home Support program you must complete the

client details that display the 🛃 icon **before** you can attach the client to a session. Refer to Figure 8.

#### Figure 8 – Case details highlighting the warning icon for client

Case de							
				DEI	ETE CASE	EDIT CASE DET	AILS
Ca	ise ID: 000	2					
	Outlet: Bay	Area Service	5				
Program a	ctivity: Car	e Relationship	s and Carer Su	pport			
Attendance	profile: Fam	nity					
End	date:						
					ATTAC		NTS
Name 🔿	Client ID 🗘	t	Date of Birth 🗘	Gender 🗘	Created on 🗘	reasons	
Dion LICRITON	007	0	37/09/2000	Male	13/08/2018	<u>&amp;</u> +	•
Thomas JEFFRIES	005		17/08/1985	Male	09/08/2018	<u>£</u> +	•
ions associated with the		th the c	ase			+ ADD SESS	SION
	Program a number of unidentified associated with Attendance ; Enc onts attached Name © Dion LICRITON Thomas JEFFRIES	Program activity: Carr number of unidentified clients 0 Attendance profile: Farr End date: The stattached to the Name ☆ Client ID ¢ Dien.LICRITON 007 Thomas JEFFRIES 006	Program activity:       Care Relationship         number of unidentified clients associated with case:       0         Attendance profile:       Family         End date:       Family         ents attached to the case (2)         Name ◊       Client ID ◊       It         Dien LICEITON       007       00         Thomas JEFFRIES       006       10	Program activity:       Care Relationships and Carer Su         number of unidentified clients       0         Attendance profile:       Family         End date:       0         Ints attached to the case (2)         Name        Client ID        Date of Birth          Don LICETON       007       0709/2000	Program activity:       Care Relationships and Carer Support         number of unidentified clients associated with case:       0         Attendance profile:       Family         End date:       Family         End date:       Date of Birth ©         Mame ©       Client ID ©       Date of Birth ©         Name ©       Client ID ©       Date of Birth ©         Dien LICRITON       007       07/09/2000       Male         Thomas JEFFRIES       006       17/08/1985       Male	Program activity:       Care Relationships and Carer Support         number of unidentified clients associated with case:       0         Attendance profile:       Family         End date:       Family         End date:       End date:         Attendance to the case (2)       Client ID \u03c6         Name \u03c6       Client ID \u03c6       Date of Bith \u03c6       Gender \u03c6       Created on \u03c6         Name \u03c6       Client ID \u03c6       Date of Bith \u03c6       Gender \u03c6       Created on \u03c6         Dion LLCRITON       007       07/09/2000       Male       13/08/2018         Thomas JEFFRIES       006       17/08/1985       Male       08/08/2018	Program activity:       Care Relationships and Carer Support         number of unidentified clients:       0         Attendance profile:       Family         End date:       Family         End date:       End date:         Attendance profile:       Family         End date:       End date:         Name ©       Client ID ©       Date of Birth ©       Gender ©       Created on ©       Referral source and reasons         Name ©       Client ID ©       Of 07/09/2000       Male       13/06/2018       Deteometers         Thomas JEFFRIES       006       17/06/1985       Male       05/05/2018       Deteometers         Scions associated with the case       End       End<

- 1. Select client(s) you wish to add to the session using the **tick box** next to the client record
- 2. Select the ATTACH SELECTED CLIENTS button. Refer to Figure 9.

Figure 9 – Add a session – Clients selected

	+ Add a sessio			persons	attended	
	Name	Client ID	Date of Birth	Gender	Created on	
1	Frederick JAMIESON	002	05/11/1941	Male	03/08/2018	<
-	Helen CRIGHTON	003	05/12/1940	Female	03/08/2018	•
	Henry NONDEN	004	13/12/1939	Male	03/08/2018	•
	Lucy JONES	001	01/08/2018	Female	03/08/2018	•
	Ruby HENDERSON	005	08/08/1942	Female	03/08/2018	•
	Thomas JEFFRIES	006	17/08/1985	Male	09/08/2018	•
2	ATTACH SELECTED CLIENTS	ATTACH SELECTE	) SUPPORT PE	RSONS		NEXT>

- 3. Select support persons (if any) you wish to add to the session using the **tick box** to the session.
- 4. Select ATTACH SELECTED CLIENTS. Refer to Figure 10.

Figure 10 – Add a session – Support persons selected

			1		d session			
_		Name		Client ID	Date of Birth	Gender	Created on	
3		Henry NONDEN		004	13/12/1939	Male	03/08/2018	•
-	🛛 👤	Lucy JONES		001	01/08/2018	Female	03/08/2018	<ul> <li>▲</li> </ul>
		Ruby HENDERSON		005	08/08/1942	Female	03/08/2018	•
		Thomas JEFFRIES		006	17/08/1985	Male	09/08/2018	•
	ATT	ACH SELECTE		TACH SELEC	TED SUPPORT PI	ERSONS		
					Date of Birth		Created on	
		lected clie	ents or supp	oort perso	ons attended	l session		•
		lected clie Participation type	ents or supp	Client ID	Date of Birth	l session	Created on	4

The client(s) and support person(s) selected will display under the **Selected clients or support persons attended session** heading with their relevant **Participation type**. Refer to Figure 11.

#### Figure 11 – Client participation type

1	Name		Client ID	Date of Birth	Gender	Created on	
1	Ruby HENDERS		005	08/08/1942	Female Male	03/08/2018	-
AT	TACH SELECT	ED CLIENTS AT	TTACH SELEC	TED SUPPORT PE	ERSONS		
c	1 . 1 1	. ,					
Se	elected cl	ients or supp	port perso	ons attended	1 session		
_	Participation type	Name	Client ID	Date of Birth	Gender	Created on	
1	CLIENT	Frederick JAMIESON	002	05/11/1941	Male	03/08/2018	•
1	CLIENT	Helen CRIGHTON	003	05/12/1940	Female	03/08/2018	•
-	SUPPORT	Lucy JONES	001	01/08/2018	Female	03/08/2018	•
1				1211211222	Male	03/08/2018	•
1	SUPPORT	Henry NONDEN	004	13/12/1939			

#### Select NEXT>

The Add a session – Review screen will display. Refer to Figure 12.

#### Figure 12 – Add a session – Review screen

		Case ID:	ZB113355				
		Session ID:					
	:	Session date:	08 August 2018				
		Service type:	Intake/assessment				
	Se	ervice setting:	Organisation outlet/offic	ce			
	Interp	reter present:	No				
01		1 1	•				
Cli	Participation type	nded sess	Client ID	Date of Birth	Gender	Created on	
Cli			Client ID	Date of Birth	Gender Male	Created on 03/08/2018	4
Cli	Participation type	Name	Client ID SON 002				•
	Participation type	Name Frederick JAMIE	Client ID SON 002	05/11/1941	Male	03/08/2018	< <

Select **BACK** to edit the details or **Cancel** to stop the process and remove the case.

If the details are correct, select SUBMIT

### Add a session – Finish

The Add a session - Finish screen will display with the following. Refer to Figure 13.

- 1. A message box to advise the successful creation of the session.
- 2. A summary of the session you have created. If you did not enter your own session ID, a **Session ID** will automatically be created.
- 3. A listing of the clients attached to the session.

- 4. What can you do now? section where you can Copy session, Add another session to the case and Add another session. Refer to Table 3.
- 5. I want to... box where you can complete other tasks.
- 6. Go to... search field where you can search for clients, cases and sessions.



Figure 13 – Add a session – Finish screen

The **What can you do now?** field provides hyperlinks for you to copy and add more sessions. Refer to Figure 13 (No. 4). Table 3 provides descriptions of these options.

Table 3 – What can you do now? section (Refer Figure 13 item 4)

FIELD	DESCRIPTION
Copy a session	Select the hyperlink to copy the last session created for the case.
Add another session to the case	Select the hyperlink to add another session to the same case.
Add another session	Select the hyperlink to add a session to a different case.

## Copy a session

There are a number of ways you can copy a session.

- 1. Select the <u>Copy session</u> hyperlink found on the **Add a session Finish** screen. Refer to Figure 14.
- Select the COPY SESSION button found on the Case details screen, after you have searched for your case. Refer to Figure 15.

Figure 14 – Copy session hyperlink

	1	e ID: > Add a session	2	3		4		
	Session delaits	Charteland	port persons attended	Revie		Finish		Find a client
	Session succes		deve beneves manually					Find a case View a client SCORE
								Add a client
								Add a case
÷	Add Add	a session	- Finish					Add a session
-	_							Add a client SCORE Manage organisation
		Case ID: ZB	13355					Manage users
								Reference data
		Session ID: 000						Uploaded files
		Session date: 08 /	August 2018					Go to home page
		Service type: Inta	ke/assessment					
	S	ervice setting: Org	anisation outlet/office	e				
	Interp	oreter present: No						
li	ients atter	nded sessio	n (4)					
	Participation type		Client ID	Date of Birth	Gender	Created on		
	SUPPORT	Name Name NONDEN	004	13/12/1939	Male	03/06/2015	4	
	CLIENT	Helen CRIGHTON	003	05/12/1940	Female	03/08/2018	-	
-	CLIENT	Frederick JAMIE SON	002	05/11/1941	Male	03/08/2018	-	
	SUPPORT	Lucy JONES	001	01/08/2018	Female	03/06/2018		
•	and out	LIGE CORES		01002010	T KITGER	0.000.0010		
ī		Purea ob u						
1	at can up							
e Vh	at can yo							

#### Figure 15 – Copy session button

				DEI	LETE CASE	EDIT CASE DET	AILS
Ca	ase ID:	ZB113355					
	Outlet:	Catchment Tea	am				
Program a	ctivity:	Financial Crisis	s and Material Aid	- Emergency R	Relief		
Total number of unidentified associated with		0					
Attendance p	profile:	Peer support g	roup				
End	d date:						
Name 🔿	Client I	00	Date of Birth 🗘	Gender 🗢	Created on \$	Referral source and reasons	
Name 🔶	Client I	D¢	Date of Birth 🗢	Gender≎ Male	Created on \$ 03/08/2018		•
		D≎				reasons	•
Erederick JAMIESON Helen CRIGHTON Henry NONDEN	002	D≎	05/11/1941	Male	03/08/2018	reasons	• • •
Erederick JAMIESON Helen CRIGHTON Henry NONDEN	002 003	D¢	05/11/1941 05/12/1940	Male Female	03/08/2018	reasons <u>م</u> +	
Erederick JAMIESON Helen CRIGHTON Henry NONDEN	002 003 004	D≎	05/11/1941 05/12/1940 13/12/1939	Male Female Male	03/08/2018 03/08/2018 03/08/2018	reasons	
Frederick JAMIESON Helen CRIGHTON Henry NONDEN Lucy JONES	002 003 004 001	D¢	05/11/1941 05/12/1940 13/12/1939 01/08/2018	Male Female Male Female	03/08/2018 03/08/2018 03/08/2018 03/08/2018	reasons	
Erederick JAMESON Helen, CRIGHTON Henry NONDEN Lucy JONES Ruby HENDERSON	002 003 004 001 005 006		05/11/1941 05/12/1940 13/12/1939 01/08/2018 08/08/1942 17/08/1985	Maie Female Maie Female Female	03/08/2018 03/08/2018 03/08/2018 03/08/2018 03/08/2018 09/08/2018	reasons	

The Copy a session – Session details screen will display. Refer to Figure 16.

+ Copy a sessi	ion - Session details
	All fields marked with an asterisk (*) are required.
Session details	
Case ID:	ZB113355
Session ID:	
Session date: *	iiii dd/mm/yyyy
Service type: *	Intake/assessment ~
Service setting:	Organisation outlet/office $\sim$
Interpreter Present:	No v
Cancel	NEXT>

Complete the details as required.

## Select NEXT>

The Copy a session - Clients/support persons attended screen displays. Refer to Figure 17.

Figure 17 – Copy a session – Clients/support persons attended screen

	Name	1	Client ID	Date of Birth	Gender	Created on	
L	Ruby HENDERSON	<b>i</b> (	005	08/08/1942	Female	03/08/2018	•
1	Thomas JEFFRIES	i i	006	17/08/1985	Male	09/08/2018	
	ACH SELECTER	ents or supp		IED SUPPORT PI		L Created on	
	lected clie	ents or supp	oort perso	ns attended	l session		
	Participation type	ents or supp	Oort perso	Date of Birth	l session	Created on	
	Participation type SUPPORT	ents or supp Name Henry NONDEN	Client ID 004	Date of Birth	d session Gender Male	Created on 03/08/2018	

Select the clients that attended the session.

- If the same clients attended from the session you have copied, select NEXT>.
- Remove the clients that didn't attend this new session by selecting the **tick box** next to their name. Refer to Figure 18.

	Name		Client ID	Date of Birth	Gender	Created on	
1	Ruby HENDERSON	4	005	08/08/1942	Female	03/08/2018	<
1	Thomas JEFFRIES		006	17/08/1985	Male	09/08/2018	<
	Participation type	ents or sup	Client ID	Date of Birth	l session	Created on	
	elected clie	ents or sup	port perso	ons attended	l session		•
	Participation type	ents or sup	Client ID	Date of Birth	l session	Created on	•
	Participation type	Name Henry NONDEN	Client ID	Date of Birth 13/12/1939	d session Gender Male	Created on 03/08/2018	< < <

Select the REMOVE CLIENTS / SUPPORT PERSONS button.

The selected clients will move back to the **Clients/support persons attended session** heading. The clients that did attend the session will remain under the **Selected clients or support persons attended session** heading. Refer to Figure 19.

Figure 19 – Removal of clients from created session

-	Name		lient ID	Date of Birth	Gender	Created on	
<b>ا ا</b>	Henry NONDEN	00	)4	13/12/1939	Male	03/08/2018	•
	Lucy JONES	00	)1	01/08/2018	Female	03/08/2018	•
-1	Ruby HENDERSON	N 00	)5	08/08/1942	Female	03/08/2018	
	Thomas JEFFRIES	5 00	06	17/08/1985	Male	09/08/2018	<
	ACH SELECTE	D CLIENTS ATT		TED SUPPORT P		L	
	lected clie	ents or supp	ort perso	ons attended	d session		
						Created on 03/08/2018	

Select NEXT>.

The Copy a session – Review screen will display. Refer to Figure 20.

Clients atte	nded ses	sion (2)			
Inte	rpreter present:	No			
	Service setting:	Organisation outlet/o	office		
	Service type:	Food Parcels & Foo	d Vouchers		
	Session date:	10 August 2018			
	Session ID:				
	Case ID:	ZB113355			

## Select SUBMIT>.

The Add a session - Finish screen will display. Refer to Figure 21.

Figure 21 – Add a session – Finish screen

	Case ID:	ZB113355				
	Session ID:	0002				
	Session date:	10 August 2018				
	Service type:	Food Parcels & Food	d Vouchers			
:	Service setting:	Organisation outlet/o	office			
Inter						
ients atte	nded ses	No sion (2)				
			Date of Birth	Gender	Created on	
ients atte	nded ses	Client ID	Date of Birth 05/12/1940	Gender Female	Created on 03/06/2018	•
ients atte	nded ses	Client ID Client ID CON 003				4

## **Record Referrals to other services**

You can add Referrals to other services to the clients attached to this session.

There are a number of ways you can add Referrals to other services:

- 1. Select the **Session ID** number hyperlink found in the **Add a session Finish** screen after you have created a new session. Refer to Figure 22
- 2. Select the **Session ID** number hyperlink found in the **Case details** screen after you have searched for the relevant case. Refer to Figure 23.

	0	Case ID:	ZB113355					
	Ses	ssion ID:	0001					
	Sessi	ion date:	08 August 2	018				
	Servi	rice type:	Intake/asser	isment				
	Service	e setting:	Organisation	outiet/office				
	Interpreter		No					
	interpreter	present.	140					
	interpreter	present	NO					
Clianta								
Clients a								
Clients a	attende	ed sess		0 0	late of Birth	Gender	Created on	
	attende	ed sess	SiON (4) Client	-	late of Birth 3/12/1939	Gender Male	Created on 0309/2018	
Participato	n type Nar He	ed sess	Client	1				
Participato	n type Nar He He	ed sess	Client (4) Client 004 28 003	1	3/12/1939	Male	03/05/2018	
Participato	n type Nar His His Em	ed sess me my NONDEN then CRIGHTS	Client (4) Client 004 28 003	1	3/12/1939 5/12/1940	Male Female	03/08/2018 03/08/2018	
Participation SUPPORT CLIENT	n type Nar His His Em	ed sess me my NONDEN then CRIGHTO ederick JAMI	Cient 004 28 003 ESON 002	1	312/1939 5/12/1940 6/11/1941	Male Female Male	03/08/2018 03/08/2018 03/08/2018	
Participation SUPPORT CLIENT	n type Nas He He Las	ed sess me mox NONDEN elen CRIGHTS ederick JAMI ecz JONES	Client 004 28 003 8508 002 001	1	312/1939 5/12/1940 6/11/1941	Male Female Male	03/08/2018 03/08/2018 03/08/2018	

#### Figure 23 – Case details screen Session ID link

( Program ar mber of unidentified (	ise ID: Outlet:	ZB113355			ETE CASE	EDIT CASE DET	
( Program ar mber of unidentified (		ZB113355					
Program a	Outlet:						
mber of unidentified of		Catchment Tea	m				
	ctivity:	Financial Crisis	and Material Aid	- Emergency Re	elief		
associated with		0					
Attendance p	profile:	Peer support gr	oup				
End	date:						
is attached	tot	ne case (6	)				
					ATTAC	H/DETACH CLIE	NT
ne 🔿	Client ID	\$	Date of Birth \$	Gender	Created on 🗢	Referral source and reasons	
derick JAMIESON	002		05/11/1941	Male	03/08/2018	<u></u> Ω+	
en CRIGHTON	003		05/12/1940	Female	03/08/2018	2+	•
NONDEN	004		13/12/1939	Male	03/08/2018	2+	
CY JONES	001		01/08/2018	Female	03/08/2018	2+	
EV JONES	001		01/08/2018 08/08/1942	Female	03/08/2018	ይ <del>ነ</del> ይ <del>ነ</del>	
T	Enc ts attached ter c derick JAMIESON en CRIGHTON	te 🌣 Client ID derick JAMIESON 002 en CRIGHTON 003	End date: as attached to the case (6 Client ID ¢ derick JAMIESON 002 en CRIGHTON 003	End date: ts attached to the case (6) Client ID (Date of Birth (Date of Birth) derick JAMIESON 002 05/11/1941 en CRIGHTON 003 05/12/1940	End date: ts attached to the case (6) he O Client ID O Date of Birth O Gender O derick JAMIESON 002 05/11/1941 Male en CRIGHTON 003 05/12/1940 Female	End date:           ts attached to the case (6)           Matrix           Client ID         Date of Birth         Gender         Created on           derick JAMIESON         002         05/11/1941         Male         03/08/2018           en CRIGHTON         003         05/12/1940         Female         03/08/2018	End date: ATTACH/DETACH CLIE ATTACH/DETACH CLIE ATTACH/DETACH CLIE Client ID O Date of Birth O Gender O Created on O Referral source and reasons derick JAMIESON 002 05/11/1941 Male 03/08/2018 O en CRIGHTON 003 05/12/1940 Female 03/08/2018 O

The Session details screen displays. Refer to Figure 24. Table 4 includes descriptions of the icons on this screen.

28**+** found next to the relevant client. Select

Figure 24 – Session details screen

			DELETE SE	SSION	OPTSES	EDIT	SESSION DE	TAILS
		Case ID:	ZB113355					
		Session ID:	0007					
		Session date:	8/08/2018					
		Service type:	Intake/assessment					
		Service setting:	Organisation outlet/o	mice				
	In	nterpreter present:	No					
11	ents atten			Data of Diffs	Gundar	Referrals to other		
11	Participation type \$	Name 🗘	Client ID 🗇	Date of Birth	Gender	Referrals to other services		
		Name © Henry NONDEN		Date of Birth 13/12/1939 05/12/1940	Gender Male Female	Referrals to other services		
	Participation type 🗢 Support Person	Name 🗘	Client ID 🗢 004	13/12/1939	Male	Referrals to other services		
	Participation type © Support Person Client	Name 🗘 Itenny NONDEN Itelen CRIGHTON	Cilent ID 0 004 003 001	13/12/1939 05/12/1940	Male Female	Referrals to other services	Clients SCOREs	

ble 4 - Icon descriptions for Deferreds ----. . . . т

	descriptions for Referrals to other services (Refer Figure 24)
ICON	DESCRIPTION
<u> 28</u> +	This icon indicates a referral for other services can be added for this client for this case.
<b>**</b> +	This icon indicates a referral for other services can be added for this client's record summary attached to a session. One internal and one external referral type can be added per client, per session.
*	This icon indicates the full quota of referrals to other sources is added to a client's record summary, attached to a session.

The Add referral to other services screen displays. Refer to Figure 25.

+ Add referra	al to other services		
Session details			
Case ID:	ZB113355		
Session ID:	0001		
Session date:	08 August 2018		
Service type:	Intake/assessment		
Referral to other se	TVICES		
Referrar to other se	111005		
Client:	Frederick JAMIESON		
Client ID:	002		
Referral type: *			
Referral purpose(s): *	Age-appropriate development		
	Community participation and networks		
	Employment		
	Education and skills training		
	Family functioning		
	Housing		
	Material wellbeing and basic necessities		
	Mental health wellbeing and self-care		
	Financial resilience		
	Personal and family safety		
	Physical health		
	Support to caring role		
	□ Other		
<u>Cancel</u> <u>Clear</u>		SAVE	

Select the relevant **Referral type** and **Referral purpose(s).** Refer to Figure 25. Table 5 has descriptions for the referral type and purpose.

Table 5 –Field descriptions for the Add referral to other services screen	(Refer Figure 25)
Table 5 - I leid descriptions for the Add referral to other services screen	(Itelei i igule 23)

FIELD	DESCRIPTION
Referral type	Select the appropriate referral type for the client. This can be internal or external.
Referral purpose(s)	Select the appropriate reason for referral to other services (including own services).
	More than one can be selected.

Select SAVE.

The **Session details** screen will display.



. Refer to Figure 26.

Figure 26 – Session details screen – Added referral to other services

Sessi	ion detail	s						
		DELETE SES	SSION	OPY SES		SESSION DET	AILS	I WANT TO
	Case ID:	ZB113355						Find a client Find a case
	Session ID:	0001						View a client SCORE Add a client
	Session date:	8/08/2018						Add a case Add a session
	Service type:	Intake/assessment						Add a client SCORE Manage organisation
	Service setting:	Organisation outlet/o	ffice					Manage users
In	terpreter present:	No						Reference data Uploaded files
								Go to home page
Participation type 🗘	•	Client ID 🗘	Date of Birth 05/11/1941	Gender Male	Referrals to othe services	Clients SCOREs	•	
Support Person	Henry NONDEN	004	13/12/1939	Male	28+	Q.	•	
Client	Helen CRIGHTON	003	05/12/1940	Female	<u> 88</u> +	Ω <b>.</b>	•	
Support Person	Lucy JONES	001	01/08/2018	Female	<b>28+</b>	Q <b>4</b>	•	
mmunity	SCOREs				+ ADD CO		_	
	Ir eents atten Participation type © Client Support Person Client Support Person	Case ID: Session ID: Session ID: Session date: Service type: Service setting: Interpreter present: Interpreter present: Sents attended the set Participation type (Name () Client Ency MONDEN Client Heingr MONDEN	Case ID: ZB113355 Session ID: 0001 Session date: 808/2018 Service type: Intake/assessment Service setting: Organisation outlet/or Interpreter present: No Client Sattended the session Client Frederick JAME SON 02 Support Person Isen/ NONDEN 04 Client Haten CRIGHTON 04 Client Haten CRIGHTON 04	Case ID:       2B11335         Session ID:       001         Session ID:       808/2018         Service type:       Intake/assessment         Service setting:       Organisation outlet/office         Interpreter present:       No	CASE ID:       COPY SES         Case ID:       2B113355         Session ID:       001         Session ID:       608/2018         Service type:       Intake/assessment         Service setting:       Organisation outlet/office         Interpreter present:       No         Cents attended the session       Date of Bin       Gender         Service type:       Client ID       Date of Bin       Mate         Client       Federick JAMESON       62       6511154       Mate         Support Person       Henry KONDEN       04       1312153       Mate         Client       Helen CRIGHTON       003       65121540       Female         Support Person       Lacy JONES       01       01082018       Female	COPY SESSION       COPY SESSION       EDIT         Case ID:       28113355         Session ID:       001         Session ID:       808/2018         Service type:       intake/assessment         Service setting:       Organisation outlet/office         Interpreter present:       No         Participation type \ Name \       Client ID \       Date of Birm       Gender       Referratis to other         Support Person       Hanry KONDEN       062       051111941       Male       Service         Support Person       Hency KONDEN       04       13121839       Male       Service         Support Person       Lucy JONES       061       01062018       Female       Service	DELETE SESSION       COPY SESSION       EDIT SESSION DET         Case ID       ZB11335         Session ID       6001         Session ID       8002018         Service type       Intake/assessment         Service setting       Organisation outlet/office         Interpreter present       No         Cents attended the session       EDIT Attended         Service type       Name Q       Cient ID Q       Date of Birh       Gender       Referratis to other       Cients SCOREs         Participation type V       Name Q       Cient ID Q       Date of Birh       Gender       Referratis to other       Cient SCOREs         Support Person       Hann NONDER       04       13121493       Male       Cient       Cient         Support Person       Hann NONDER       01       01082018       Female       Cient       Cient         Support Person       Hann NONDER       01       01082018       Female       Cient       Cient         Support Person       Hann NONDER       01       01082018       Female       Cient       Cient         Support Person       Hann NONDER       01       01082018       Female       Cient       Cient	DELETE SESSION       COPY SESSION       EDT SESSION DETAILS         Case ID       ZB11335         Session ID       000         Session ID       808/2018         Service type       Intake/assessment         Service setting       Organisation outlet/office         Interpreter present       No         Sentes attended the session       Entrepreter         Sentes attended the session       Service type         Participation type \ Name \ Cient ID \ Date of Birh       Gener Services Cores         Seport Person       Hann NONDEN       04       13172/1933       Nate       Gener Cient SCOREs         Seport Person       Hann NONDEN       03       6512/1840       Female       Gener Cient SCOREs         Seport Person       Hann NONDEN       03       6512/1840       Female       Gener Cient SCOREs         Seport Person       Hann NONDEN       04       13172/1933       Nate       Gener Cient SCOREs       Gener Cie

Select Se

Figure 27 – Amending Referral to other services items Clients attended the session EDIT ATTENDEES Client Frederick JAMIESON 002 05/11/1941 Mak \*\* ନ୍ୟ Referrals SCORE details No SCOREs found 1 🏦 Family functioning Personal and family safety Physical health External / 🕯 Community participation and networks 13/12/1939 Henry NONDEN 004 Male 28**+** ୍ୱ • 1 • ନ୍ନ Client Helen CRIGHTON 003 05/12/1940 Female 28+ 1 Lucy JONES 01/08/2018 ∢ rt Person 001 Female 28**+ G**4 Ŵ Select to edit the referral. Select to delete the referral. Select to collapse the field.

Select **BACK** to go to the **Case details** screen, or the **I want to...** box where you can complete other tasks. Refer to Figure 26.

# **Special Data Entry fields**

Some programs have special data entry fields display when a session is created for the program activity. Go to the <u>Data Exchange Protocols</u>, program specific guidelines and the <u>Add a case</u> task card, Special Data Entry Fields for more information.

# Additional field for Family Law Services programs

## **Fees charged**

This field applies to all Family Law Services programs from February 2020. Once a service type is selected for the session, the mandatory Fees charged field will appear. Refer to Figure 28.

Figure 28 – Selecting a Session type and Fees charged field appearing

Session details	
Case ID:	0316
Session ID:	
Session date: *	13/11/2019 🔳 dd/mm/yyyy
Service type: *	Counselling
Service setting:	~
Interpreter Present:	~
Fees charged: *	

The Fees charged field is a numerical field. Fees charged can contain up to six digits before the decimal point and two digits after the decimal point. If no fee is charged, you need to enter a 0 (zero) amount in this field to be able to continue entering data. Refer to Figure 29.

Figure 29 – Populating the Fees charged field

Session details	
Case ID:	0316
Session ID:	
Session date: *	13/11/2019 🔳 dd/mm/yyyy
Service type: *	Counselling
Service setting:	~
Interpreter Present:	~
Fees charged: *	100.00

Once the field is completed the next button can be selected to move to the next screen. Refer to Figure 30.

Figure	30 –	Select	the	next	buttor
--------	------	--------	-----	------	--------

Session details		
Case ID:	0316	
Session ID:		]
Session date: *	13/11/2019 🔳 dd/mm/yyyy	
Service type: *	Counselling	
Service setting:	~	
Interpreter Present:	~	
Fees charged: *	100000.00	]
Cancel		NEXT>

## Additional fields for Commonwealth Home Support Program (CHSP) cases

Go to the Data Exchange website for <u>Program Specific Guidance</u> on the Commonwealth Home Support Programme (CHSP) counting rules in sessions. Further information on the CHSP can be found in the <u>Commonwealth Home Support Programme Manual</u> available on the Department of Health website.

You can find more information on outlets, clients, cases, and sessions on the <u>Data Exchange Protocols</u> and the <u>Training</u> page.

For system support, contact the Data Exchange Helpdesk by email <u>dssdataexchange.helpdesk@dss.gov.au</u> or on 1800 020 283.