# Organisation overview

## Standard report – available to all organisations

| This is an image of the Organisation overview report icon | This report provides a one-stop view of an organisation’s service delivery over time. You will only see the information submitted by your organisation, or organisations with which you have a ‘handshake’ arrangement.By using the reporting filters, the report will display information on client types and demographics, outlets, services types, and patterns of service delivery. |
| --- | --- |
| Unique features: |  |
|  | * Shows delivery partner data – where ‘handshake’ agreements are in place
* Provides support person data (as separate from clients).
 |
| Key questions: |  |
| Examples of possible analysis areas (questions the report can answer) | * What program activities do we deliver? From which outlets? For each activity delivered, what were the total number of cases, sessions, individual/group clients and support persons?
* Who are our clients and why do they seek our services? Were they referred to us? Are they part of a priority group for this program?
* Have we recorded key client demographic details? Do these correspond to the target groups for our program?
* When filtering to show individual and group clients, what does this tell us about our client group? Do we have higher or lower numbers than expected?
* What outlets do we have and who uses them? Which program activities are delivered at those outlets? What could the reason be for variations in client numbers or activity levels?
* Does the data suggest there may be different practises at different outlets?
* How many sessions have we delivered over all? How many sessions do clients attend, on average? How many sessions and clients are there for each case, on average?
* What does this overview of our organisation tell us? Have there been changes over time? Do we need to make adjustments to our service delivery model?
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| Main filters: |  |
|  | * Reporting period
* Client type
* Program activity
* Delivery organisation / Outlets
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Table 1 – Sheet information for the Organisation overview report

| Sheets: | Measures / Notes: | Displays: |
| --- | --- | --- |
| User guide & filters page  | * Report purpose and main features
* Filters
 | Lists |
| Attendance and sessions | * Total number of clients, and monthly details for each client type: individual clients, group clients and support persons
* Total number of sessions and monthly attendance by client type
* Average session and case information
* Monthly number of cases
 | Bar and scatter charts |
| Service Summary | * Attendances per month of the year
* Attendances per day of the week
* Individual clients and support persons by exit reason
* Attendance per service setting
* Attendance per profile
* Attendance by interpreter present
 | Bar charts |
| Organisation summary | * Organisation outlets by name, state, activity
* Clients by type, attendances, sessions and cases
 | Table |
| Activity | * Clients, group clients and support persons by activity
* Sessions by service type
 | Bar and scatter charts |
| Service type | * Number of sessions by service type
 | Bar chart |
| Client Trends | Clients and support persons over time by:* Reporting period and client type
* Month and client type
 | Line charts |
| Client demographics | Individual clients and support persons by:* Age group
* Gender
* Indigenous status
* Disability status
 | Bar chart and pie charts |
| Extended Demographics | Individual clients and support persons by* highest level of education
* NDIS eligibility status
* employment status
* is client a carer flag
 | Bar charts |
| Demographics – CALD | Individual clients and support persons by:* CALD status
* Country of birth
* Main language spoken at home
 | Pie charts and tables |
| Ancestry and migration | Individual clients and support persons by: * Ancestry
* Migration visa
* By years in Australia
 | Pie chart, bar charts and table |
| Home situation | Individual clients and support persons by: * Homeless indicator
* Annual income
* Household composition
* Income source
 | Table and bar charts |
| Demographic Trends | Individual client per reporting period by:* Gender
* % gender
* CALD status
* % CALD status
* Indigenous status
* % Indigenous status
* Disability status
* % disability status
* Disability type
* % disability type
 |  Line charts |
| Referrals | Individual clients and support persons by: * Referral origin
* Reason for seeking assistance
* External versus internal referrals
* Referral reason
 | Bar charts |
| Outlet state | Individual/group clients and support persons by: * Session attendance and state where the outlet is located
* State summary by organisation, outlet, client type and support persons
 | Bar chart and table |
| NDAP activity (if applicable) | * Number of sessions and clients by service type
* Number of sessions by NDAP topic and service type
 | Table and bar chart |
| Attorney General’s Department (if applicable) | * Fees charged/client contribution by activity, delivery organisation and outlet
* Number of sessions by parenting agreement and legal help
* Clients issued certificates by certificate type, and by quarter
 | Table, bar charts and pie chart |
| Education and skills training (if applicable) | Money workshops :* Sessions and attendances by topic and client types for each workshop
 | Table and bar chart |
| Information page | * Glossary of terms used, grouped by category
* Version history, with details of document changes
 | Lists |

For all Data Exchange reports, there is additional user guidance available on the Data Exchange [website](https://dex.dss.gov.au/) (https://dex.dss.gov.au/).