How do I set up my cases, sessions and clients in the Data Exchange?

November 2020

This document provides an overview of how to set up your cases, sessions and clients in the Data Exchange for the Targeted Earlier Intervention (TEI) program.

It includes the following information:

- definitions for cases, sessions and clients
- how to set cases and sessions up and the rules you need to follow, including specific examples for each program activity (see Appendix 1 and 2)
- how to count individual and unidentified (group) clients.

We have developed general rules for setting up cases, sessions and clients in the Data Exchange. This will ensure consistency throughout the TEI program.

Please note: The information in this document may change over time as we learn about the Data Exchange and the best way to use it for the TEI program.

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What is a case?

Cases act as containers. They link client and session data to location and program activity data. Cases contain the following information:

Case ID	Name of your case. Only your organisation can see this. Name it something that is clear and will make sense to you and your colleagues.
Outlet	Location your activity was/will be conducted it.
Program Activity	Program activity the service is delivered under. Only program activities assigned to the chosen outlet will appear in the drop down menu.
Total number of unidentified clients with case	Note: this field will only display once a program activity has been selected. Enter the number of unidentified clients you expect to participate in the activities. If 0, leave blank.
Attendance profile	The relationship between clients in the Case. E.g. Family, couple, peer support group.

How do I set up my cases in the Data Exchange?

You can create cases in a format that best suits your needs. However, there are a few rules that you need to follow:

Rule 1. A case can only have one outlet. You must create a new case for each outlet.

Examples:

- You run weekly computer skills workshops with community members at the local library. Only 1 case is created because the location is the same every week.
- You run weekly Aboriginal language workshops in three local schools. Three cases need to be created, one for each school.
- You run a mobile supported playgroup. The location of the playgroup changes each week. Only 1 case needs to be created. The outlet used will be the location where staff are based.

Rule 2. You must add at least one session to a case. A session must be added for clients to be counted in reports. A case can contain an unlimited number of sessions.

Rule 3. If a client attends a number of different services you provide, you must treat each service as a separate case.

Example: a client attends an employment workshop you provide and a supported playgroup you provide. You must attach the client to each case separately.

Rule 5. The number of expected unidentified clients recorded at the case level should be the total number of unique unidentified people who are expected to attend relevant sessions.

Rule 6. The maximum number of unidentified clients you can record at the Case level is 999. This may impact how many cases and sessions you set up for your services.

Rule 7. Cases can operate over multiple reporting periods. For example, if a client returns to receive the same service or if a service is delivered over 12 months.

How do I create a case in the Data Exchange?

DSS have developed useful resources to show you how to use the Data Exchange web-based platform.

For help creating cases see:

Task card: Add a case

Video: Add a case

Task card: Find and edit a case

Video: Find and edit a case

Video: Add a community case and session

What is a session?

A session is an individual episode of service. Sessions are stored within cases. They contain the following information:

Case ID	Name of your case. This will be populated for you.
Session ID	Name of your session. Only your organisation can see this. Name it something that is clear and will make sense to you and your colleagues.
Session date	Date the session occurred on.
Service type	Type of activity that was conducted. Only services relevant to the program activity (selected in the Case) will appear.
Number of unidentified clients attended session	Note: this field will only appear if unidentified clients were entered in the Case. Enter the number of unidentified clients who attended the session.
Service setting	The setting the service took place in (e.g. telephone, digital, client's residence). You can leave this field blank.
Interpreter present	Was an interpreter present? You can leave this field blank.

How do I set up my sessions in the Data Exchange?

You can create sessions in a format that best suits your needs. However, there are few rules that you need to follow:

Rule 1. At least one session must be added to a case. A session must be added for clients to be counted in reports. You can have an unlimited number of sessions.

Examples:

- You run weekly computer skills workshops with community members at the local library. You create one case, because the location is the same every week. Every time you run a workshop, you create a new session in the Data Exchange.
- You run weekly Aboriginal language workshops in three local schools. Three cases need to be created, one for each school. Every time you run a workshop, you create a new session in the Data Exchange. These sessions are attached to the relevant case.
- You run a mobile supported playgroup. Only 1 case needs to be created. The outlet used will be the location where staff are based. Every time the playgroup is run, you create a new session in the Data Exchange. These sessions are attached to the relevant case.

Rule 2. At least one client must be attached to a session or the number of unidentified clients must be recorded, for a session to be counted in reports.

Rule 3. The number of unidentified clients recorded at the session level must be equal to or less than the number recorded at the case level. If there are more unidentified clients in your session, you will need to go back to the case and edit the number of expected unidentified clients.

You cannot record more than 999 unidentified clients in a case. This may impact how many cases and sessions you set up for your services.

Rule 4. You must report sessions in the reporting period they occurred in.

Example:

- If a session occurred on the 2 February 2020, you must report it in the January-June 2020 reporting period. You cannot report it in a different reporting period.

Rule 5. You must create a session within the relevant reporting period for it to be counted in reports. Reporting periods are:

- 1 July – 31 December
- 1 January – 30 June

Service providers have an extra 30 days at the end of each reporting period to finalise their data entry.

Example:

- If a session occurred on the 2 February 2020, you need to create the session in the Data Exchange before the end of that reporting period. In this case, 30 days after the 30 June 2020.

Rule 6. Attendees to a session can be clients or support persons.

How do I create a session in the Data Exchange?

DSS have developed useful resources to show you how to use the Data Exchange web-based platform.

For help creating sessions see:

Task card: Add a Session

Task card: Find and edit a session

Video: Add a Session

Video: Add a community case and session

Who is a client?

In the Data Exchange, a client is:

> An individual who receives a service as part of a funded activity that is expected to lead to a measureable outcome.

Clients can be individuals or groups.

Individual clients	Unidentified group clients
Individual people who receive a service under the TEI program that is expected to lead to a measureable outcome. An individual person who has/will have a client record created in the Data Exchange.	A group of people who have received a service under the TEI program. No identifying information is collected from these clients.

Are support persons clients?

No. Support persons (e.g. carers, family members) are not expected to achieve a direct outcome through the service. As such, they are not counted as clients.

You are not required to record the details of support people in the Data Exchange. However, if you want, you can create an individual record for these people and record them as a support person at the session level.

Do not record outcomes for support persons. If you expect them to achieve an outcome, they should be recorded as a client.

Are children clients?

A child is considered a client if they directly receive a service that is expected to led to a measurable outcome.

Example:

A child and parent participate in a supported playgroup that is designed to support age-appropriate development for the child and develop the parent's skills and knowledge. The service is expected to lead to a measureable outcome for both the child and parent. They are both be recorded as individual clients in the Data Exchange.

I provide sector development activities. Who are my clients?

If you are funded to provide training, support and skills development to other TEI organisations, the staff members you work with are your 'clients'.

These clients may be individual clients or an unidentified group.

Your clients are NOT the organisations you work with. This is because it is not possible to record an organisation in the Data Exchange.

Who is an unidentified client and how do I count them?

Unidentified clients are anyone who participates in a TEI activity, and it is not possible or practical to collect individual information from them (e.g. a large community event).

Unidentified clients are counted at the case level and the session level.

Case Level	Session Level
Record the total number of unique unidentified clients you **expect** to participate in your service. You should estimate this number based on your experience in providing this service. When you count unidentified clients at the case level, you need to count the number of **unique** individuals. See below.	Record the number of clients who actually participated in the service. If you do not know the actual number of participants, for example, you've organised a community fete with over hundreds of people, you can record an estimate.
Example 1	
You run three information nights for new parents. You estimate that approximately 30 people will attend each session. You expect a different group of people to attend each session. The number of unidentified clients is 90.	You count the exact number of attendees at each information night. First information night: 24 Second information night: 32 Third information night: 33
Example 2	
You run three information nights for new parents. These sessions are related to one another, and parents are encouraged to attend all three sessions. You estimate that	You count the exact number of attendees at each information night. First information night: 22

approximately 30 people will attend each session. You expect the same people to attend each session. Your number of unidentified clients is 30.	Second information night: 28 Third information night: 30

Please note: The number of unidentified clients recorded at the session level must be equal to or less than the number recorded at the case level. If there are more unidentified clients in your session, you will need to go back to the case and edit the number of expected unidentified clients.

Can I record my organisations newsletter and social media posts in the Data Exchange?

No. You can only record activities in the Data Exchange if you have directly provided a service to a client and that interaction could lead to a measurable outcome.

For example, if you distribute a newsletter or resource to 200 people via your mailing list, you cannot count this activity. This is because:

- you do not know if the person receiving the email is a client. It could, for example, be a DCJ staff member, or an old employee.
- you do not know if the people who receive the email have genuinely engaged with the content. You may be able to see who has 'opened' the email, but that does mean they read the email or other documentation.

Other activities that cannot be recorded in the Data Exchange include:

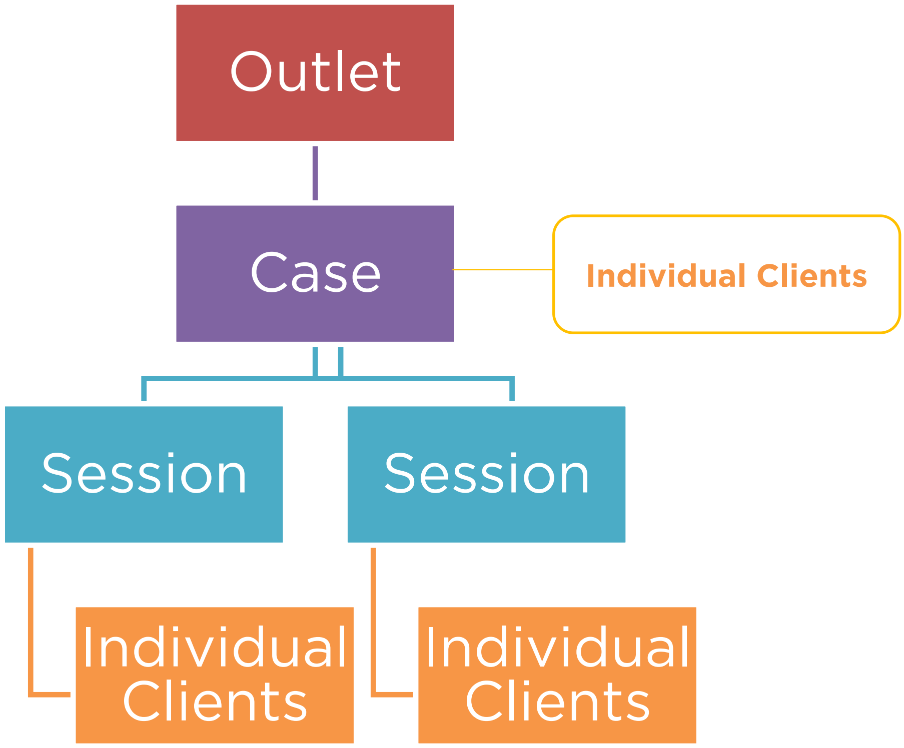
- website visits/hits
- Document downloads
- Newsletters/emails
- Radio show
- Social media posts (e.g. Facebook, YouTube)

While you cannot record this information in the Data Exchange, service providers are encouraged to collect and report this information in other ways. See the Sector Development Optional Reporting Tool and Appendices.

How do cases, sessions and clients all fit together?

Cases, sessions and clients are all interconnected in the Data Exchange. A case groups your sessions together. Sessions are individual episodes of services. They tell us when and who you delivered a service to.

Figure 1. Cases, Sessions and Clients



Appendix 1. How do I set up cases, sessions and clients in the Community Strengthening Stream?

Example 1. Community event

Program Activity 1: Develop community connections
Service type: Community Engagement

A TEI service provider organises a community event. They host a barbeque for families with children in the local area, including games where adults and children can mix e.g. soccer and sack races. The event aims to increase community connectedness for attendees. It is held 4 times a year, in a park next to the local community centre.

The record the event in the Data Exchange as follows:

Case	Session	Clients
1 case is created. It is estimated that in total 60 unique unidentified clients will attend the four events.	4 sessions are created as there are 4 events. The number of actual unidentified clients for the first event (session) is 23.	Clients are anyone who attends the event, including children. They may be individual clients and/or an unidentified group. 2 individual clients attend the first event. They are attached to the first session.

The maximum number of unidentified clients you can record at the Case level is 999. This may impact how many cases and sessions you set up for this service.

Counting rules for organising a community event

Rule 1. You can only record this in the Data Exchange if your service is responsible for organising and running the event, (e.g. contributing resources, time and staff), not just attending the event.

Rule 2. If you organise a multi-day event, you should create 1 session for every day e.g. if an event runs for 3 days, 3 sessions will be created.

Rule 3. For this activity, an individual client may be a person who participates in another service you provide. As such, they may already be recorded in the Data Exchange as a client. In this circumstance, you can attach this client to the session for your event. It is useful to record this information as it captures the client’s journey through the service system.

Rule 4. An unidentified client is any person who attends the event and it is not practical or possible for you to collect and record their information.

Rule 5. It is not expected that service providers collect individual client data for people who attend community events. It may not be practical, possible or appropriate. At a minimum, service providers should record the total number of unidentified clients.

Example 2. Organising a community event with local volunteers

Program Activity 1: Develop community connections
Service type: Community Engagement

A TEI service provider engages a group of community members to volunteer to organise an event to raise public awareness for mental illness. The volunteers are people with lived experience of mental illness and carers. They volunteer their time to organise and run the event.

The TEI service provider helps the volunteers to run 12 planning sessions to organise the event. They also provide the volunteers with any support they need on the day of the event.

Note: In this example, the purpose of the service provider's activities is increase the volunteers' sense of belonging to the community and to empower them to impact decisions that affect their lives. The volunteers are our clients and we are interested in their outcomes.

The record this work in the Data Exchange as follows:

Case	Session	Clients
1 case is created.	13 sessions are created. 12 sessions are the planning meetings that the service provider facilitated. 1 session is the actual event.	Clients are the volunteers who help organise the event. All the volunteers are recorded in the Data Exchange as clients. They are attached to the sessions they attended.

Example 3. Organising a community event with other service providers

Program Activity 1: Develop community connections
Service type: Community Engagement

Five TEI service providers work together to organise a community event. They take turns to organise and host meetings. They all work together to ensure tasks are completed on schedule and the event goes ahead as planned.

All the service providers have equally contributed to organising the event. They each record the event in the Data Exchange as follows:

Case	Session	Clients
Each service provider creates 1 case. It is estimated that 150 unique unidentified clients will attend the event. Each service provider records the number of expected unidentified clients as 30 (see Rule 6).	Each service provider creates 1 session. The total number of actual attendees was 120. Each service provider records the number of unidentified clients as 24 (see Rule 6).	Clients are people who attend the event, including children. They may be individual clients and/or an unidentified group.

Please remember that the maximum number of unidentified clients you can record at the Case level is 999. This may impact how many cases and sessions you set up for this service.

Counting rules for organising a community event with other service providers

Rule 1. This activity can only be counted if your service has contributed to organising and running the event, (e.g. contributing resources, time and staff), not just attending the event.

Rule 2. Service providers must work together and negotiate how their work will be recorded in the Data Exchange. They must agree on:

- the Community SCORE domain(s) to measure
- the Community SCORE rating
- the number of unidentified clients
- how to record the number of unidentified clients (see Rule 6)

Rule 3. For this activity, an individual client may be a person who participates in another service you provide. As such, they may already be recorded in the Data Exchange as a client. In this circumstance, you can attach this client to the session for your event. It is useful to record this information as it captures the client's journey through the service system.

Rule 4. For this activity, an unidentified client is any person who attends the event and it is not practical, possible or appropriate for you to collect and record their information.

Rule 5. It is not expected that service providers collect individual client data for people who attend community events. It may not be practical, possible or appropriate. At a minimum, service providers should record the total number of unidentified clients.

Rule 6. If over 100 people attend the event, service providers should not duplicate the number of unidentified clients. Once a total number has been determined the service providers should divide the number of clients among each provider.

> For example, 1,000 people attend an event. There are 5 service providers who organised the event. Each service provider records 200 unidentified clients.

If service providers not funded by TEI helped organise the event, divide the total number of clients by the number of TEI service providers.

> For example, 1,000 people attend an event. There are 5 service providers who organised the event. Only 3 of these service providers are funded by TEI. These 3 service providers record 333 unidentified clients each.

If each service provider also runs a stall at the event, they will count these clients separately. Another case and session will need to be created in the Data Exchange, under the 'Information, Advice and Referrals' service type. Each service provider should count the number of clients who visit their stall and are given information.

Rule 7. If one organisation leads this work (i.e. they support coordination and collaboration between the organisations), they record their activities as the 'Community Sector Planning' service type under Program Activity 1: Develop Community Connection. See 'Example 4', page 13, for how to set up cases, sessions and clients in the Data Exchange.

Example 4. Sector development training sessions

Program Activity 1: Develop community connections
Service type: Education and Skills training

A TEI service provider supports other organisations to achieve TEI outcomes. They run training sessions with other TEI service providers. They run 6 training sessions for service providers and their staff.

The record this work in the Data Exchange as follows:

Case	Session	Clients
1 case is created. The total number of expected unique unidentified clients is 15.	6 sessions are created. 1 for each training session. At the first training session, 12 unidentified clients attend. At the second training session, 10 unidentified clients attend.	Clients are the individual people who participate in the workshops (e.g. staff members of other TEI service providers). Individual clients are attached to the relevant sessions. Unidentified (group) clients are recorded at the case and session levels.

Counting rules for sector development training sessions

Rule 1. Clients are the individual people who attend a workshop or meeting etc. (e.g. staff members of other TEI service providers). Clients are not the organisations you provide support to.

Rule 2. The way you count your unidentified clients for this activity will depend on the nature of the workshops and if they will be run with the same group of people or different groups of people.

In the example above, we expect the same 15 people to attend every workshop. So the total number of expected unique unidentified clients is 15. If you run 6 workshops, and you expect 10 different people to attend each workshop, the total number of expected unique unidentified clients would be 60.

Rule 3. In this example, the sector development organisation has been contracted to work with TEI funded services. As such, they have only reported on the activities they have conducted with TEI service providers.

Your contract may stipulate something different. What you report on, will depend on your contract and what has been negotiated with your District. You may be expected to report on activities with services that are not funded by the TEI program.

Example 5. Sector development ongoing/adhoc support

Program Activity 1: Develop community connections
Service type: Community Sector Coordination

A TEI service provider supports 5 different TEI funded services. They provide coaching and mentoring, assist organisations with governance issues, and act as a conduit between local service providers and government. They meet with organisations as needed throughout the reporting period, in person or over the phone.

The record this work in the Data Exchange as follows:

Case	Session	Clients
5 cases are created – 1 for each organisation. E.g. 1 case is created for the organisation 'Port Augusta Community Services'.	A new session is created every time substantive effort is put into providing the service (see Rule 2). E.g. The service provider has weekly 1hr meetings with Port Augusta Community Services. They create a session for every meeting.	Clients are the individual people who attend a meeting or receive this service. Individual clients are attached to the relevant session. Unidentified clients are recorded at the case and session level.

Counting rules for sector development adhoc support

Rule 1. Clients are the individual staff members who attend a workshop or meeting etc. Clients are not the organisations you provide support to.

Rule 2. When providing adhoc support, a new session should be made if substantive effort was put into providing the service and the client directly benefited from the service. Service providers are able to determine this at their own discretion, e.g. a new session might be made if client engagement/service provision exceeds 30 minutes.

Rule 3. In this example, the sector development organisation has been contracted to work with TEI funded services. As such, they have only reported on the activities they have conducted with TEI service providers.

Your contract may stipulate something different. What you report on, will depend on your contract and what has been negotiated with your District. You may be expected to report on activities with services that are not funded by the TEI program.

Example 6. Interagencies

Program Activity 1: Develop community connections
Service type: Community Sector Coordination

A TEI service provider runs interagency meetings with other local service providers. They support local organisations to connect with another and to address new and emerging issues in their local community.

The record this work in the Data Exchange as follows:

Case	Session	Clients
1 case is created.	They create a session every time the group meets.	Clients are the individual people who participate in the meetings (e.g. staff members of other TEI service providers). Individual clients are attached to the relevant sessions. Unidentified (group) clients are recorded at the case and session levels.

Counting rules for interagencies

Rule 1. Clients are the individual people who attend a workshop or meeting etc. (e.g. staff members of other TEI service providers). Clients are not the organisations you provide support to.

Rule 2. You can only record this activity in the Data Exchange if your service is responsible for organising and running the interagency, (e.g. contributing resources, time and staff), not just attending them.

Example 7. Community sector coordination in partnership with other agencies

Program Activity 1: Develop community connections
Service type: Community Sector Coordination

Two TEI service providers facilitate consultation sessions with young people, youth organisations and employers around barriers to youth employment. They facilitate 5 consultation sessions between these key stakeholders.

Both service providers have contributed equally to coordinating this work. They each record their work in the Data Exchange as follows:

Case	Session	Clients
1 case is created. The total number of expected unique unidentified clients is 10.	A session is created for every meeting. The service providers run 5 fortnightly meetings bring together key groups of stakeholders. 5 sessions are created. 1 for each meeting.	Clients are the people who attended/participated in meetings. Individual clients are attached to the relevant sessions. Unidentified clients are recorded at the case and session levels.

Counting rules for community sector coordination in partnership with other agencies

Rule 1. You can only record this activity in the Data Exchange if your service is responsible for organising and running the sessions, (e.g. contributing resources), not just attending them.

Rule 2. Service providers must work together and negotiate how their work will be recorded in the Data Exchange. They must agree on:

- the Circumstance/Goal SCORE domain(s) to measure for individual clients
- the Community SCORE domain(s) to measure for unidentified (group) clients
- the SCORE rating
- the number of unidentified clients

Rule 3. If there is a lead organisation, they can report the total number of clients. Support organisations should report the number of clients they engaged directly.

Rule 4. If the number of clients for jointly delivered activities exceeds 100, service providers should NOT duplicate the number of unidentified clients.

Once a total number has been determined the service providers should divide the number of clients among each provider.

Example 8. Developing a plan with local community members

Program Activity 2: Provide a community centre
Service type: Community Engagement

A TEI service provider engages a group of community members to develop a plan to raise public awareness of mental illness and available support services. All members of the group have lived experience of mental illness. The service facilitates a number of planning sessions for the community members.

They record these sessions in the Data Exchange as follows:

Case	Session	Clients
1 case is created.	A session is created for every meeting. The service provider run 10 fortnightly meetings with the community to develop the plan. 10 sessions are created. 1 for each meeting.	Clients are the people who attended/participated in meetings. As the service is engaging with community members directly, they record they all as individual clients in the Data Exchange.

Counting rules for developing a plan with local community members

Rule 1. Clients are the individual people who attend the meetings. Community members should be recorded as individual clients – this is because you are meeting with them on numerous occasions, so it is possible to collect their personal information and record outcomes data to see if contributing to the planning session has improved outcomes.

Rule 1. You can only record this activity in the Data Exchange if your service is responsible for organising and running the sessions, (e.g. contributing resources), not just attending them.

Example 9. Building/room hire

Program Activity 2: Provide a community centre
Service type: Social participation

A neighbourhood centre rents out their hall to a number of different organisations. Every week the hall is rented out to supported playgroups, a ballroom dancing class, a group counselling service and a youth group. The clients are the organisations who hire the space.

The neighbourhood centre records the number of times the hall is hired. They record this number in the Data Exchange on a monthly basis.

Case	Session	Clients
1 case is created for the reporting period. It is expected that the hall is hired 50 times a month. The number of expected 'unidentified clients' entered in the case is 300.	6 sessions are created – one for each month in the reporting period. In January, the hall is hired 26 times. The number of unidentified clients in this session is 26. In February, the hall is hired 45 times. The number of unidentified clients in this session is 45.	Clients are the organisations who hire the space. The number of times the hall is hired each month is entered as the 'number of unidentified clients'. I.e. if an organisation hires the hall four times in one month, it would be recorded as four separate occasions, not one. No individual clients are attached to the case or sessions.

Note: The example above is just one way to record this service type in the Data Exchange. You could, for example, create weekly sessions. You should identify the best way to record this information for your service.

Counting rules for building/room hire

Rule 1. Clients are the organisations who hire the space. They are not the individual people who participate in the activities or services that are run.

Rule 2. You do not need to record who hires the space. You only need to record the number of times it is hired.

Rule 3. You do not need to collect individual client details or outcome information from the people who participate in activities held in the hired space. This is the responsibility of the organisation who runs the activities.

Rule 4. Services are encouraged to collect additional information that may be used to inform their service delivery, e.g. the number of people who participate in activities. However, services are not obligated to record this information in the Data Exchange.

Example 10. Information, advice and referral

Program Activity 2: Provide a community centre
Service type: Information/advice/referral

A community centre provides community members with information and advice about different issues. They also refer them to specific services as needed. Community members contact the centre via email, through their website and over the phone. They also visit the centre in person.

The community centre keeps track of the number of people who seek information and advice and are referred to services. They decide to record the number of people they provide this service to on a monthly basis.

Case	Session	Clients
1 case is created for the reporting period. It is expected that 100 unique clients receive this service a month. The expected number of unique unidentified clients entered in the case is 600.	6 sessions are created – one for each month in the reporting period. At the end of each month, the number of unidentified clients is recorded in the Data Exchange. In January, 120 unidentified clients received this service. In February, 56 unidentified clients received this service	Clients are people who seeks information, advice and/or referral from the community centre. Individual clients are attached to the relevant session (see Rule 1). Unidentified clients are recorded at the case and session levels (see Rule 2). In January, 30 individual clients received this service. They are attached to the relevant session. In February, 2 individual clients received this service. They are attached to the relevant session.

Note: The example above is just one way to record this service type in the Data Exchange. You could, for example, create weekly sessions. You could also create additional cases for specific types of activities that are conducted, e.g. helping clients fill out forms, emergency respite, etc. You should identify the best way to record this information for your service.

Remember the maximum number of unidentified clients you can record at the Case level is 999. This may impact how many cases and sessions you set up for this service.

Counting rules for information, advice and referral

Rule 1. For this activity, an individual client could be:

- A person who participates in another service you provide and is already in the Data exchange as a client. It is useful to record this information as it captures the clients journey the service system.
- A person who regularly visits the community centre for assistance. For example someone may visit the centre on multiple occasions to seek support on applying for rental accommodation. This could

include, planning open house visits, completing a rental application, organising removalists etc. You could collect their information and record them in the Data Exchange.

Rule 2. For this activity, an unidentified client is any person who seeks information, advice or referral from the community centre and it is not practical, possible or appropriate for you to collect and record their information.

Rule 4. Website visits should not be recorded as unidentified clients. This is because you do not know if the website visit is from someone seeking information/advice. You also do not know if the person visiting the website has found the information they need.

Rule 5. Mailing lists for a newsletter should not be recorded as unidentified clients. This is because you do not know if the person receiving the newsletter is a genuine client (e.g. it could be a DCJ staff member). You do not know if the recipient has genuinely engaged with the material (i.e. have they actually read the newsletter, or did they open the email).

Rule 5. We do not expect you to collect outcome data for individual clients of information, advice or referral services. This is because it may not be practical, possible or appropriate to do so. If you do wish to collect outcome data for this service, you must engage with a client on at least 2 separate occasions. This is because you need to collect pre- and post-outcome data.

Services can collect outcome and satisfaction information that is meaningful to them, even if this information is not reported in the Data Exchange.

Rule 6. The cases and sessions set up for this activity should not be used to capture referrals that occur in other activities the service provider runs.

For example, a community centre runs a supported playgroup. At one of their sessions, the practitioner observes and speaks with a client and realises they need additional family-functioning support. They refer this client to another service to help them. The practitioner records this referral in the session for the supported playgroup (See Add a Session for help to do this).

The practitioner does NOT need to save this referral information and report it back to the community centre to record in the 'information/advice/referral' cases and sessions.

Example 11. Group activities

Program Activity 2: Provide community support
Service type: Social participation

A TEI service provider runs a weekly Aboriginal men's group. The sessions enable local communities members to connect with their peers, raise any issues they're having and seek additional support.

They record the group activities in the Data Exchange as follows:

Case	Session	Clients
1 case is created.	A session is created for every meeting. The service provider runs 10 weekly group sessions. 10 sessions are created.	Clients are the people who attended/participated in the group activities. Individual clients are attached to the relevant sessions. Unidentified clients are recorded at the case and session levels.

Counting rules for group activities

Rule 1. Clients are the individual people who attend a group session. Service providers should try to record all clients as individual clients. However, when this is not possible, a client may be recorded as an unidentified client (e.g. someone new attends the session late and leaves early).

Rule 2. This example can be applied to other similar group activities (e.g. youth groups, parenting groups, women's groups etc.).

Example 12. Drop in centre

Program Activity 2: Provide community support
Service type: Social participation

A neighbourhood centre has a drop in centre with computers, printers, wifi etc. that anyone from the community can use. The community centre keeps track of the number of people who use the resources available.

They record this information in the Data Exchange as follows:

Case	Session	Clients
1 case is created for the reporting period. It is expected that 50 unique clients access the resources each month.	6 sessions are created – one for each month in the reporting period. At the end of each month, the number of unidentified clients is recorded in the Data Exchange. In January, 45 unidentified clients used the resources. In February, 32 unidentified clients used the resources.	Clients are people who access the drop in centre and use the resources available. Individual clients are attached to the relevant session (see Rule 1). Unidentified clients are recorded at the case and session levels (see Rule 2). In January, 5 individual clients used the resources. They are attached to the relevant session. In February, 7 individual clients used the resources They are attached to the relevant session.

Note: The example above is just one way to record this service type in the Data Exchange. You could, for example, create weekly sessions.

Remember the maximum number of unidentified clients you can record at the Case level is 999. This may impact how many cases and sessions you set up for this service.

Counting rules drop in centre

Rule 1. For this activity, an individual client could be:

- A person who participates in another service you provide and is already in the Data exchange as a client. It is useful to record this information as it captures the clients journey the service system.
- A person who regularly visits the community centre. For example, a young person may visit the centre every day to access the computer to look for jobs. You could collect their information and record them in the Data Exchange. You could also use this as an opportunity to refer them to other useful services.

Rule 2. For this activity, an unidentified client is any person who uses the resources in the community centre and it is not practical, possible or appropriate for you to collect and record their information.

Rule 3. We do not expect you to collect outcome data for individual clients when they just ‘drop in’. This is because it may not be practical, possible or appropriate to do so. If you do wish to collect outcome data for this service, you must engage with a client on at least 2 separate occasions. This is because you need to collect pre- and post-outcome data.

Services can collect outcome and satisfaction information that is meaningful to them, even if this information is not reported in the Data Exchange.

Example 13. Employment skills workshop

Program Activity 3: Provide community support
Service type: Facilitate employment pathways

A TEI service provider runs a series of workshops for newly arrived refugees to develop employment and resume writing skills. They conduct 6 workshops, on a weekly basis, in the local library.

Case	Session	Clients
1 case is created.	6 sessions are created. 1 for every workshop.	Every person who attends a workshop is entered in the Data Exchange. They are attached to the sessions they attend.

Counting rules for workshops:

Rule 1. Clients are the individual people who attend the workshops. Service providers should try to record all clients as individual clients. However, when this is not possible, a client may be recorded as an unidentified client (e.g. someone new attends the session late and leaves early).

Example 14. Advocacy and support

Program Activity 3: Provide community support
Service type: Advocacy and support

A TEI service provider meets with clients one-on-one to provide support. They problem solve and help the client identify what supports they need to improve their circumstances. Sometimes this includes supporting the client while they meet with other organisations to advocate on their behalf (e.g. attending a parent-teacher meeting with a parent to make sure their children get the support they need).

They record these activities in the Data Exchange as follows:

Case	Session	Clients
They create a case for each client or family they see.	A session is created every time they meet with the client or family.	Clients are the people who attend the support sessions and expect to achieve a measurable outcome. Every time someone meets with the service they are attached to the relevant session.
Example		
1 case is created for Kyla Jones.	Kyla meets with the service twice. Two sessions are recorded.	Kyla met with the service on her own. She is the only individual client attached to the sessions.
1 case is created for Sarah Bathe and Ana Martinez.	Sarah and Ana meet with the service 4 times. 4 sessions are recorded.	Sarah and Ana both attended all four sessions. They both attached to all four sessions.

Counting rules for counselling

Rule 1. As per the example above, cases should be set up as families/couples/individuals. A new session should be created for every individual episode of service delivery, i.e. every time the service meets with a client(s) and provides support.

> Note: When setting up your cases in the Data Exchange, do no enter any personal information in the Case ID, such as first and last names.

Rule 2. You do not have to attach support persons, it is optional.

Rule 3. When you meet with a third-party (e.g. a school) to advocate on your clients behalf, this activity should only be recorded in DEX if the client was present.

Appendix 2. How do I set up my cases, sessions and clients in the Wellbeing and Safety Stream?

Example 1. Supported Playgroup

Program Activity 4: Provide targeted support
Service type: Supported playgroup

A TEI service provider runs a supported playgroup. This activity supports parents to share their experiences, develop their parenting skills and build information networks. It also supports children to develop early literacy and numeracy skills and socialise in a structured environment.

This supported playgroup runs once a week for 6 months.

Case	Session	Clients
1 case is created.	In total, 26 sessions are created. 1 for every time the supported playgroup meets during the reporting period.	Every parent and child who attends the supported playgroup during the reporting period is recorded in the Data Exchange. In this example, parents and children are recorded as individual clients because the service is expecting an outcome for both of them. Every time they attend the supported playgroup, they are attached to the relevant session.

Counting rules for supported playgroups:

Rule 1. Clients are the individual people who attend the playgroup. Service providers should try to record all clients as individual clients. However, when this is not possible, a client may be recorded as an unidentified client (e.g. someone new attends the session late and leaves early).

Example 2. Group parenting program

Program Activity 4: Provide targeted support
Service type: Parenting programs

A TEI service provider runs a parenting program. This program gives parents simple and practical strategies to help them manage their children's behaviour, prevent future problems from developing, and build strong, healthy parent-child relationships.

This is a group parenting program that consists of five session.

Case	Session	Clients
1 case is created.	In total, 5 sessions are created. 1 for every group the session during the reporting period.	Every parent who attends the sessions during the reporting period is recorded in the Data Exchange. Every time they attend a session, they are attached to the relevant session.

Counting rules for group parenting programs:

Rule 1. The example above is for a group parenting program. One-on-one parenting programs would be recorded the same as Examples 3, 4 and 5 below.

Rule 2. Clients are the individual people who attend a group session. Service providers should try to record all clients as individual clients. However, when this is not possible, a client may be recorded as an unidentified client (e.g. someone new attends the session late and leaves early).

Example 3. Intensive family capacity building

Program Activity 5: Provide intensive or specialist support
Service type: Family capacity building

A TEI service provider runs an intensive in-home training program for vulnerable families. This service seeks to build strong and positive interactions between parents and their children and to ensure children are safe from abuse and neglect. It supports parents to develop the practical skills and knowledge to keep their children safe and healthy.

This service is provided to 12 different families during the reporting period. Some of these families receive this service weekly, some fortnightly and some multiple times a week.

Case	Session	Clients
12 cases are created for this service – one for every family who receives the service.	A session is created every time you meet with a family to provide this service. E.g. The Anderson family has 8 sessions recorded because they have participated in 8 in-home training sessions. The Asif family has 4 sessions recorded because they have participated in 4 in-home training sessions.	Every parent/carer and child who participates in the training and who is expected to achieve a measureable outcome is recorded as a client. In this example, parents/carers and children are recorded as individual clients because the service is expecting an outcome for both of them. Every time they participate in a training session they are attached to the relevant session. If they do not participate, they are not added to the session. E.g. one week the father is not at home when the training is conducted. He is not added to the relevant session as a client for that week.

Counting rules for intensive family capacity building

Rule 1. As per the example above, cases should be set up as families. A new session should be created for every individual episode of service delivery, i.e. every time the service provider meets with a family and provides a service.

> Note: When setting up your cases in the Data Exchange, do no enter any personal information in the Case ID, such as first and last names.

Rule 2. You do not have to attach support persons, it is optional.

Example 4. Case Management

Program Activity 4: Provide targeted support
Service type: Family capacity building

A TEI service provider undertakes case management and conducts family support activities with clients. During the reporting period, they provided this service to 20 different families/individuals. They create a new session in the Data Exchange every time they meet with a family/individual.

Case	Session	Clients
20 cases are created for this service – 1 for every family/ individual who receives the service.	A session is created every time they meet with a family/individual to provide this service. It is attached to the case for that family/individual.	Clients are people who have a case plan and expect to achieve a measureable outcome. Every time a client meets with their case manager they are attached to the relevant session.
Examples		
1 case is created for Sam Axiak.	Sam meets with his case manager twice a week. Every time they meet a new session is created in the Data Exchange.	Sam receives these services on his own. He is the only client attached to his sessions.
1 case is created for the Colyer family.	The Colyer family meet with their case worker every 2 weeks. Every time they meet a new session is created in the Data Exchange.	There are 4 people in the Colyer family. All 4 people are entered into the Data Exchange as clients and are attached to the sessions they attend.

Counting rules for case management

Rule 1. As per the example above, cases should be set up as families, couples or individuals. A new session should be created for every individual episode of service delivery, i.e. every time the case manager meets with a client(s) and provides a service.

> Note: When setting up your cases in the Data Exchange, do no enter any personal information in the Case ID, such as first and last names.

Rule 2. A new session should be made if substantive effort was put into providing the service and if the client directly benefited from the service. Service providers are able to determine this at their own discretion, e.g. a new session might be made if client engagement/service provision exceeds 30 minutes.

Rule 3. You do not have to attach support persons, it is optional.

Rule 4. When recording this information in the Data Exchange, the Session ID should reflect the type of service provided. For example: 'Home Visit 1 – February 2020', 'Grocery Shopping 1 – February 2020'.

Rule 5. When recording this information in the Data Exchange, you may select different 'service types' at the session level (e.g. intake/assessment, material aid, family capacity building, information/advice/referral). Please pick the service type that is most relevant to the activities you conducted with the client on that day. See the TEI program specifications for descriptions of the service types.

Example 5. Counselling

Program Activity 4: Provide targeted support
Service type: Counselling

A TEI service provider runs counselling sessions with families, couples and individuals. During the reporting period, they see 13 different families/couples/individuals.

Case	Session	Clients
13 cases are created – 1 for every family/couple/ individual who receives the service.	A session is created every time they meet with a family/couple/individual.	Clients are people who attend a counselling session and expect to achieve a measureable outcome. Every time someone attends a counselling session they are attached to the relevant session.
Example		
1 case is created for Jason Smith	Jason attends 14 counselling sessions in the reporting period. 14 sessions are recorded.	Jason attends the counselling sessions on his own. He is the only client attached to the sessions.
1 case is created for Sarah Bergen and Scott Martinez.	Sarah Bergen and Scott Martinez attend 7 counselling sessions in the reporting period. 7 sessions are recorded.	Sometimes Sarah and Scott they attend their sessions together, sometimes alone. They are both entered as clients in and are attached to the sessions they attend.
1 case is created for the Jones family.	The Jones family attend 8 counselling sessions in the reporting period. 8 sessions are recorded.	Simon struggles with problem gambling. He is the only client attached to his sessions. Sometimes his Dad and his sister attend the counselling sessions to support him. They are entered into the Data Exchange as support persons and are attached to the sessions they attend.

Counting rules for counselling

Rule 1. As per the example above, cases should be set up as families, couples or individuals. A new session should be created for every individual episode of service delivery, i.e. every time the counsellor meets with a client(s) and provides a service.

Note: When setting up your cases in the Data Exchange, do no enter any personal information in the Case ID, such as first and last names.

Rule 2. You do not have to attach support persons, it is optional.