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

February 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 allow us to compare similar service types delivered by different organisations and will strengthen the evidence-base for TEI. However, service providers are encouraged to set up their cases and sessions in the format that best suits their needs.

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 information about:

- the outlet (where the service was or will be delivered
- the program activity (i.e. community connections, community centres, community support, targeted support, intensive or specialist support)
- number of unidentified clients
- clients relevant to the case

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.

If you provide a mobile service, i.e. the location of the service frequently changes, the outlet used should be the location where staff are based.

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. Cases in the community strengthening stream will typically be activity based. Cases in the wellbeing and safety stream will typically be client based. Please note, there are exceptions to this rule (see the examples in Appendix 1 and 2).

Rule 4. 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 clients 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.

What is a session?

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

- the date the service occurred
- the service type
- the clients who received the service
- referrals to other services

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. These sessions are attached to the case.
- 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 you record at the session level cannot exceed the number you record at the case level. 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 2nd of Februry 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 30th of June.

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

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.

Are support persons clients?

Support persons (e.g. carers, family members) are not expected to achieve direct outcomes through the service. They are not counted as clients.

There are no requirements 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 support people at the session level.

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 another organisation's staff, the staff members are considered 'clients'.

These clients may be individual clients or an unidentified group.

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

Unidentified clients are people unknown to you who attend large-scale or one-off group activities. They are unidentified because it may not be practical, possible or appropriate for you to collect or record their information.

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

Table 1. Counting identified clients in the Data Exchange

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 that a different group of people will 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 approximately 30 people will attend each session. You expect the same people to attend each session. Your number of unidentified clients is 30.	You count the exact number of attendees at each information night. First information night: 22 Second information night: 28 Third information night: 30

Please note: The number of unidentified clients recorded at the session level will need to 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.

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

Example 1. Organising a 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. This event aims to increase community connectedness for attendees. This event is held 4 times a year, in a park next to the local community centre.

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

Service providers may also collect additional outcome and satisfaction information that is meaningful to them, even if this information is not reported in the Data Exchange.

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.

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.

Case	Session	Clients
1 case is created.	1 session is created.	Clients are people who attend the event, including children. They may be individual clients and/or an unidentified group.
Example		
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 3).	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 3).	Throughout the event each service provider engages with a few people who already participate in a service they provide – their information is already in the Data Exchange, they are an individual client. These service providers attach the individual clients to the session.

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 3)

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 and a Community SCORE.

Service providers may also collect additional outcome and satisfaction information that is meaningful to them, even if this information is not reported in the Data Exchange.

Rule 6. Do 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 sector development training sessions for service providers and their staff.

Case	Session	Clients
1 case is created.	In total, 6 sessions are created. 1 for every training session that is conducted.	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.
Example		
1 case is created.	6 sessions are created. 1 for each training session.	
The total number of expected unique unidentified clients is 15.	At the first training session, 12 unidentified clients attend. At the second training session, 10 unidentified clients attend.	2 individual clients are attached to the first session. 3 individual clients are attached to the second session.

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 adhoc support

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

A TEI service provider supports 5 different TEI funded services. They provide policy advice and research and evaluation support. They meet with organisations as needed throughout the reporting period, either in person or over the phone.

Case	Session	Clients
5 cases are created – 1 for each organisation.	A new session is created every time substantive effort is put into providing the service (see Rule 2).	Clients are the individual people who attend a meeting or receive this service. Individual clients are attached to the relevant session. Unidentified (group) clients are recorded at the case and session level.
Example		
1 case is created for the organisation 'Port Augusta Community Services'.	The service provider has weekly 1hr meetings with this organisation. They create a session for every meeting.	3 different people have attended these meetings: the Director and two managers. These three people are added as clients to the Data Exchange and are attached to the sessions they attend.

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. You should only record information in the Data Exchange if you can identify and/or count the number of clients you have engaged with.

For example, if you distribute a newsletter or information sheet to 200 people via email, you cannot count this activity. This is because you do not know if these people have engaged with the material.

While you cannot record this information in the Data Exchange, service providers are encouraged to collect and report this information in other ways.

Rule 4. 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. Community sector coordination in partnership with other agencies

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

A TEI service provider supports coordination and collaboration between other TEI service providers. They facilitate and coordinate interagency activities and local consultation and act as a conduit between service providers, government, business and the wider community.

They lead a project, in collaboration with 2 other TEI service providers, to develop a plan with local government, schools and youth and mental health services to tackle youth mental illness. They support relevant service providers to engage key stakeholders, seek funding, and they provide expert advice on the community plan.

Each of the three service providers record the activities they conducted in the Data Exchange.

Case	Session	Clients
1 case is created.	A session is created for every meeting, workshop etc.	Clients are the people who attended/participated in workshops or meetings. Individual clients are attached to the relevant sessions. Unidentified (group) clients are recorded at the case and session levels.
Example		
1 case is created.	The lead service provider runs 10 fortnightly meetings to provide advice and feedback on the plan and to connect key stakeholders.	Individual clients are attached to the relevant sessions.
The total number of expected unique unidentified clients is 10.	10 sessions are created. 1 for each meeting.	
	At the first meeting, 8 unidentified clients attend.	2 individual clients are attached to the first session.
	At the second meeting, 7 unidentified clients attend.	1 individual client is attached to the second session.

Counting rules for community sector coordination in partnership with other agencies

Rule 1. You can only record activities in the Data Exchange if your service is responsible for organising and running them, (e.g. contributing resources, time and staff), 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. 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 5. 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 7. 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 for problem gambling 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 decide to record this number in the Data Exchange on a monthly basis.

Case	Session	Clients
1 case is created for the reporting period.	6 sessions are created – one for each month in the reporting period. E.g. January 2020, February 2020, March 2020, April 2020, May 2020, June 2020.	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.
Example		
It is expected that the hall is hired 50 times a month. The number of expected 'unidentified clients' entered in the case is 300.	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.	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 8. 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.	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.	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).
Example		
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.	In January, 120 unidentified clients received this service. In February, 56 unidentified clients received this service.	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.

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 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. 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.

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 9. Business Planning Support

Program Activity 3: Provide community support
Service type: Business planning

A TEI service provider gives business planning support to Aboriginal-led enterprises. The service assists Aboriginal-led businesses to access finance, provides financial and business advice and ongoing support.

The TEI service provider runs workshops with Aboriginal-led business owners and employees. They also provide adhoc support e.g. phone conversations, meetings, reviewing proposals. They record these activities in two different ways.

Example 9a. Workshops to support local business development

A TEI service provider runs 3 business development workshops for Aboriginal small business owners and their staff.

Case	Session	Clients
1 case is created.	In total, 3 sessions are created. 1 for every time a workshop is conducted.	Every person who attends a workshop is entered in the Data Exchange. They are attached to the sessions they attend.
Example		
1 case is created.	3 sessions are created. 1 for each workshop.	
The total number of expected unique unidentified clients is 10.	At the first workshop, 8 unidentified clients attend.	No identified clients are attached to the first session.
	At the second workshop, 7 unidentified clients attend.	1 individual client is attached the session.

Example 9b. Adhoc support for local business development

A TEI service provider supports 4 different Aboriginal-led local businesses. They provide financial advice and ongoing support. They meet with these businesses as needed throughout the reporting period, either in person or over the phone, and they provide feedback on funding proposals.

Case	Session	Clients
4 cases are created – 1 for each business.	A new session is created every time substantive effort is put into	Every person who attends a meeting or receives this service is attached as a client to the session.

	providing the service (see Rule 2).	
Example		
1 case is created for the business 'Aboriginal Art Gallery'.	The service provider has weekly meetings with this business. They create a session for every meeting.	3 different people have attended these meetings: the two business owners and the manager of the business. These three people are added as clients to the Data Exchange and are attached to the sessions they attend.

Counting rules for business planning support

Rule 1. Clients are the individual people who attend a workshop or meeting etc. Clients are not the businesses you provide support to.

Rule 2. When providing ad hoc 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. 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 Example 9a above, we expect the same 10 people to attend every workshop. So the total number of expected unique unidentified clients is 10.

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.

Example 10. 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.

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.

Example 2. Parenting program (group)

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

A TEI service provider runs a parenting program. This program gives parents simply 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.

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. The purpose of this service is 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 an in-home training session 8 times. The Asif family has 4 sessions recorded because they have participated in an in-home training session 4 times.	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’.

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 for this service – 1 for every family/couple/ individual who receives the service.	A session is created every time they meet with a family/couple/individual to provide this service. It is attached to the case for that 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 his counselling sessions on his own. He is the only client attached to his 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 the Data Exchange 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 his counselling sessions to support him. His family members 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/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.