



Find and edit a session

Task card

This task card discusses the following:

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KEY HIGHLIGHTS

- At least one session must be recorded during a reporting period for the session and associated clients to be counted in reports.
- A session can be updated any time only during the relevant reporting period.
- The use of special characters such as * & % # @ should **not** be included in the free text fields as they are used as search functions in the Data Exchange.

Information on updating sessions

A session records what service was delivered on a particular date within a reporting period, the type of service delivered and which clients attended. Sessions are a critical part of the service record of a service provider and drive the reporting function of the Data Exchange.

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

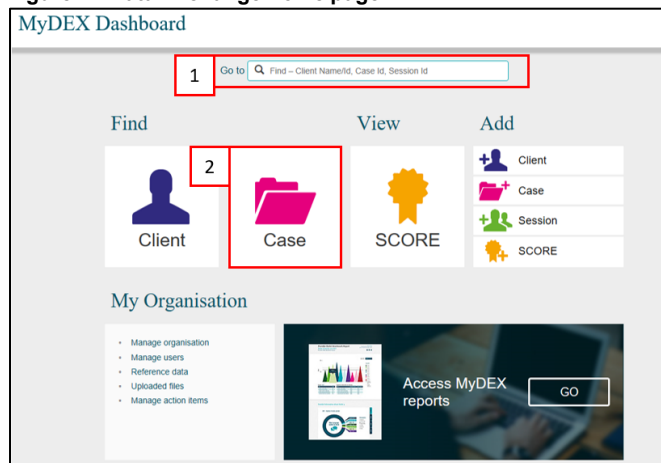
Find a session

There are a number of ways to find an existing session. Refer to Figure 1.

Go to the Data Exchange home page and either:

1. Enter information in the **Go to** field
2. Select the **Find Case** action tile

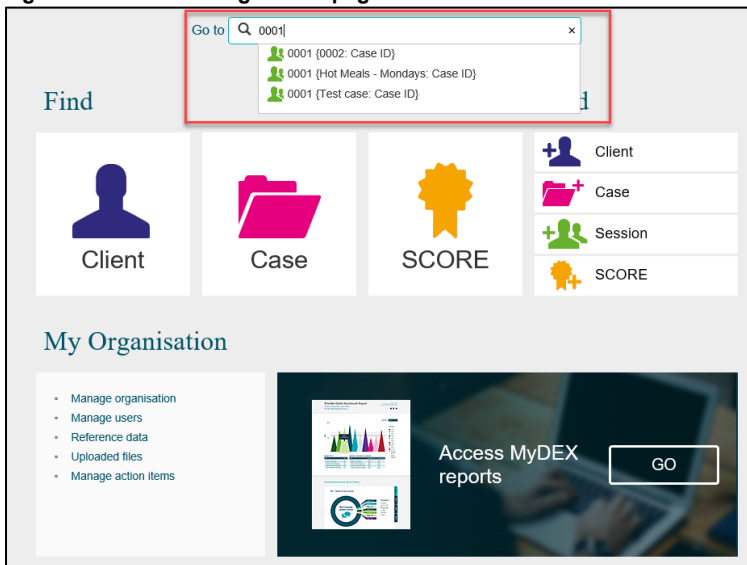
Figure 1 - Data Exchange home page



Method 1 – From the Go to field

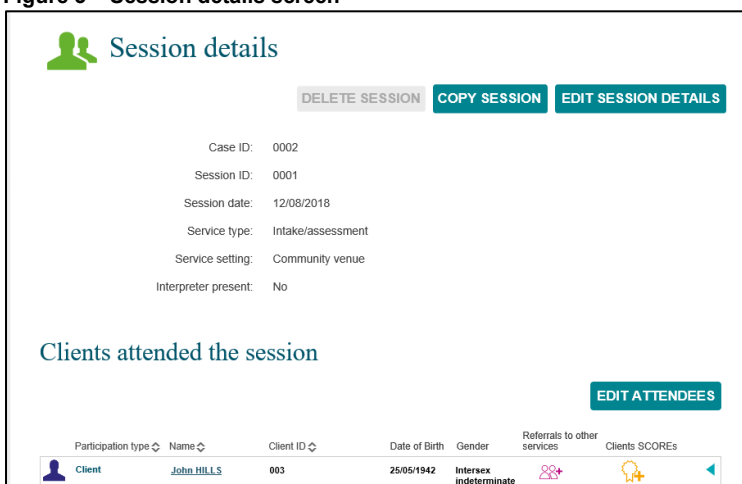
Start typing the session ID (this could be numerical or alphabetical) in the **Go to** field
The field will provide a drop down list to select the required session. Refer to Figure 2.

Figure 2 – Data Exchange home page - Go to field



The **Session details** screen will display. Refer to Figure 3.

Figure 3 – Session details screen



Refer to the [Edit a session](#) details in this task card for further instructions.

Method 2 – from the Find a Case button

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

Find your session by selecting the corresponding case

Figure 4 – Find a case screen

Home > Find a case

Find a case

Case ID: [Show Advanced Options](#)

Client ID:

Outlet:

Program activity:

[Clear Outlet and Activity](#)

SEARCH [Clear](#)

Results (4)

Show **GO**

Case ID	Outlet	Program activity	Ended on	Sessions	Created on
0002	Bay Community Centre	Reconnect		3	13/08/2018
Transport - Wednesdays	Bay Community Centre	Community and Home Support		0	08/08/2018
Hot Meals - Mondays	Bay Community Centre	Community and Home Support		4	25/07/2018
Test case	Bay Community Centre	Reconnect		1	06/07/2018

Results section

The most recently created cases will display in the **Results** section. Refer to Figure 5.

1. Select **GO** to change the amount of records displayed on the screen. The options are 10, 20 and 50.
2. Click on the heading hyperlinks of Case ID, Outlet, etc. to filter columns from ascending to descending order and visa-versa either alphabetically or numerically.
3. Click on the case hyperlink to select the case.

Figure 5 – Results section

Results (3)

Show **GO** 1

Case ID	Outlet	Program activity	Ended on	Sessions	Created on
Transport - Tuesdays	Bay Area Services	Community and Home Support		1	03/08/2018
Community Event 1	Bay Area Services	Financial Crisis and Material Aid - Emergency Relief		2	08/08/2018
0001	Bay Area Services	Financial Crisis and Material Aid - Emergency Relief		0	09/08/2018

Select the relevant case hyperlink and the **Case details** screen will display. Refer to Figure 6.

Figure 6 – Case details screen

The screenshot shows the 'Case details' screen. At the top, there are buttons for 'DELETE CASE' and 'EDIT CASE DETAILS'. Below this, case information is displayed: Case ID: Community Event 1, Outlet: Bay Area Services, Program activity: Financial Crisis and Material Aid - Emergency Relief, Total number of unidentified clients associated with case: 250, Attendance profile: Community event, and End date: (blank). A section titled 'Clients attached to the case (3)' includes an 'ATTACH/DETACH CLIENTS' button and a table of three clients. Below that, a section titled 'Sessions associated with the case (2)' includes a '+ ADD SESSION' button and a table of two sessions. A '< BACK' button is at the bottom left.

Name	Client ID	Date of Birth	Gender	Created on	Referral source and reasons
Helen CRIGHTON	003	05/12/1940	Female	03/08/2018	
Henry NONDEN	004	13/12/1939	Male	03/08/2018	
Babz HENDERSON	005	05/05/1942	Female	03/08/2018	

Session ID	Session date	Service type	Created on	Total client attendance	
0002	08/08/2018	Material Goods	08/08/2018	2	COPY SESSION
0001	21/07/2018	Food Parcels & Food Vouchers	08/08/2018	150	COPY SESSION

Select the relevant session hyperlink and session details will display. Refer to Figure 7.

Figure 7 – Session screen

The screenshot shows the 'Sessions associated with the case (4)' screen. It features a '+ ADD SESSION' button at the top right. Below is a table listing four sessions. The first session, with ID '0004', is highlighted with a red box. A '< BACK' button is located at the bottom left.

Session ID	Session date	Service type	Created on	Total client attendance	
0004	14/08/2018	General House Cleaning	15/08/2018	1	COPY SESSION
0003	02/08/2018	Self-Care Aids	10/08/2018	1	COPY SESSION
0002	01/08/2018	General House Cleaning	10/08/2018	1	COPY SESSION
0001	05/08/2018	General House Cleaning	08/08/2018	1	COPY SESSION

Refer to the [Edit a session](#) details in this task card for further instructions.

Edit a session

There are a number of ways to edit an existing session. Refer Figure 8.

1. Delete a session

NOTE: you can only delete a session that is in the current reporting period.

2. Copy a session
3. Edit a session

NOTE: The use of Special characters such as * & % # @ should **not** be included in the free text fields as they are used as search functions in the Data Exchange.

4. Edit Attendees

Figure 8 – Session details screen

The screenshot shows the 'Session details' page for Case ID: Hot Meals - Mondays, Session ID: 0004, dated 14/08/2018. The service is 'General House Cleaning' at an 'Organisation outlet/office'. Key actions are highlighted with numbered boxes: 1. DELETE SESSION, 2. COPY SESSION, 3. EDIT SESSION DETAILS, and 4. EDIT ATTENDEES. The page also shows 'Amount of assistance provided' (1 hour, 0 minutes) and a table of 'Clients attended the session' with one client, Mandy FRANKS.

Home > Find case > Case ID: Hot Meals - Mondays > Session ID: 0004

Session details

1 2 3

DELETE SESSION COPY SESSION EDIT SESSION DETAILS

Case ID: Hot Meals - Mondays
Session ID: 0004
Session date: 14/08/2018
Service type: General House Cleaning
Service setting: Organisation outlet/office
Interpreter present:
Fees charged: \$0.00

Amount of assistance provided

Hours: 1
Minutes: 0

Clients attended the session

4

EDIT ATTENDEES

Participation type	Name	Client ID	Date of Birth	Gender	Referrals to other services	Clients SCOREs
Client	Mandy FRANKS	002	25/05/1941	Female		

Community SCOREs

+ ADD COMMUNITY SCORE

You can find more information on outlets, clients, cases, and sessions on the [Data Exchange Protocols](#) and the [Training](#) page.

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