Government of South Australia

human services

The Results Reporting Data Dock (R2D2) Instruction Manual

Contents

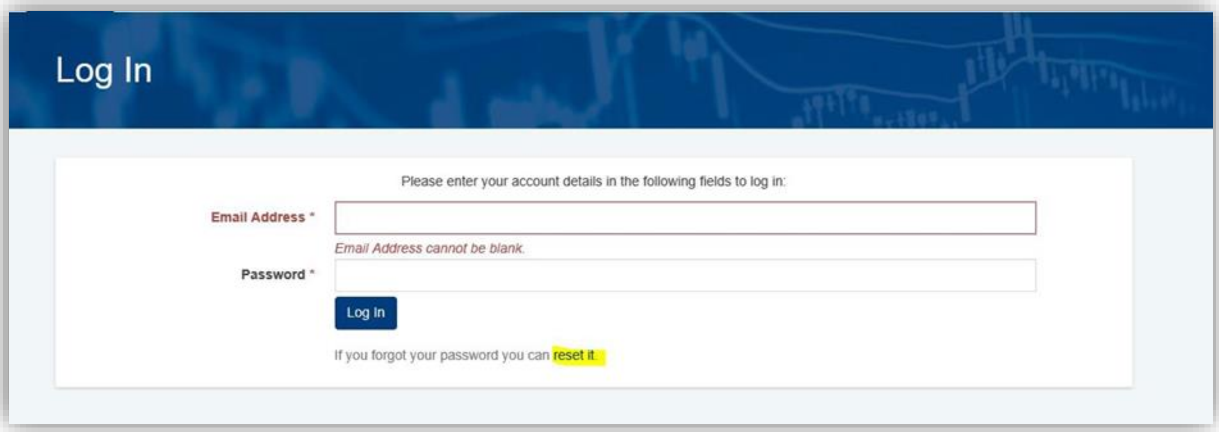
Introduction

The purpose of this instruction manual is to provide community organisations and providers step-by-step instructions on how to use all aspects of the Results Reporting Data Dock (R2D2). It can be used as a resource along with the video guides which can be found in the R2D2 Resource Library at: https://dhs.sa.gov.au/how-we-help/ngo-and-sector-support/results-based-accountability/results-reporting-data-dock-r2d2/

Logging in

Accessing R2D2

1. Use Google Chrome, Mozilla Firefox or Microsoft Edge. Do not use Internet Explorer.
2. Access the R2D2 website at: https://r2d2.dhs.sa.gov.au/
3. Enter your email address and password



4. If it is your first time using R2D2, or if you forget your password, use the "reset it" link on the Log In page. This will send you an email from noreply@communityci.com.au containing a link to reset/setup your password

Tips

- Change your password the first time you log in (and regularly thereafter) to maintain security.
- Your password must contain a mix of numbers, lower-case and upper-case letters – there is not a specific character requirement, but it will only let you set a password that is complex.
- If you aren't receiving password reset emails check your junk/spam folder and ask your IT department to add **@communityci.com.au** and **@relay.communityci.com.au** as trusted domains.

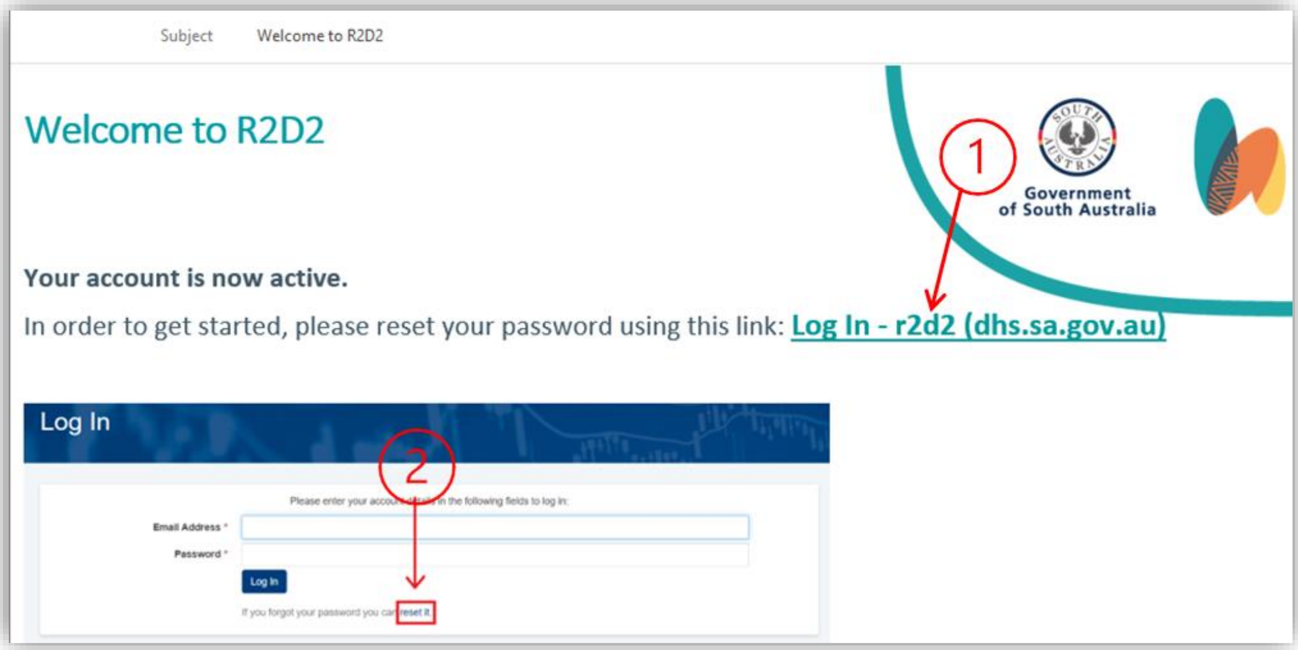
Initial Login for Administrators

When your organisation is first onboarded to R2D2, DHS will setup nominated users (usually 2) as Administrators. After this time, **it is the responsibility of your organisation, particularly the Administrators, to administrate i.e., Create, Edit, & Deactivate all other users in your organisation** (instructions on how to do this are contained in this manual under the section Managing Users). Whilst

DHS will setup the initial Administrators in accordance with the procedure below, DHS does not have access to your organisation's R2D2 environment, and therefore does not have the ability to administrate non-admin users in your organisation.

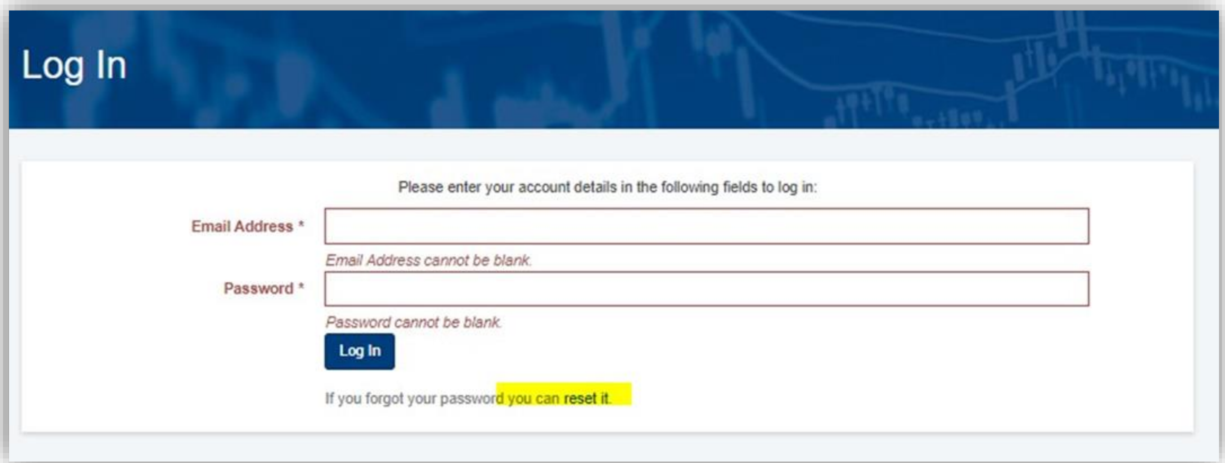
After nominating your organisation's users' full names and email addresses to your contract manager, DHS will set them up as Administrators and they will receive an email like the one below. This email will contain a link to the login page of R2D2 along with instructions about initial login.

DHS will not provide you with a password. Instead simply click the login link and then once the login page is open, click the option to reset your password (i.e. "reset it", below the Log In button).



Resetting Your Password

If you have forgotten your password, you can reset it from the R2D2 Login screen. Simply click on "reset it" underneath the blue Log In button. This will send an email from **noreply@communityci.com.au** to the email address in your username.

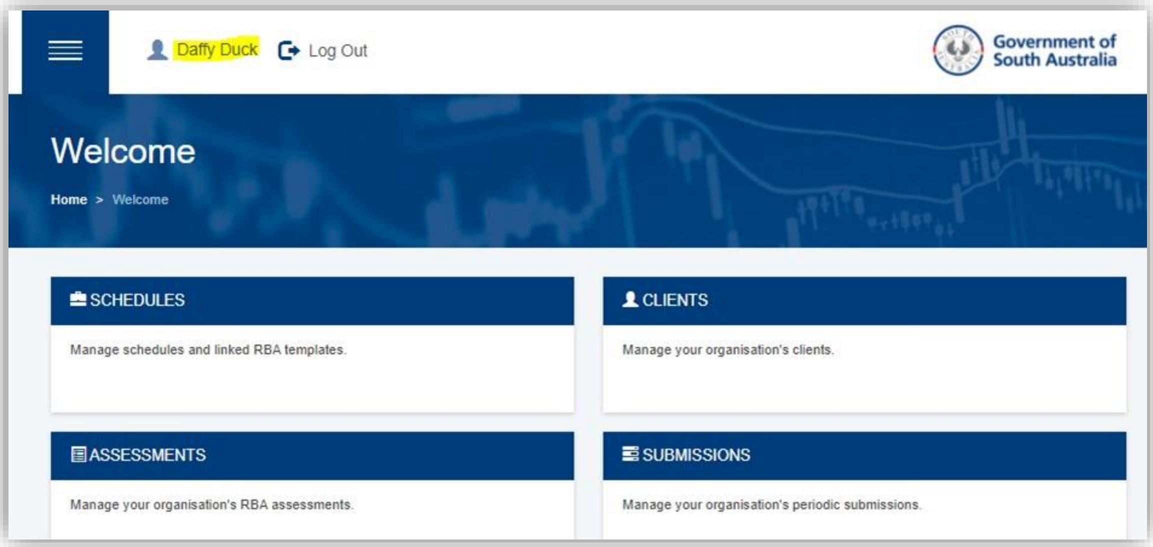


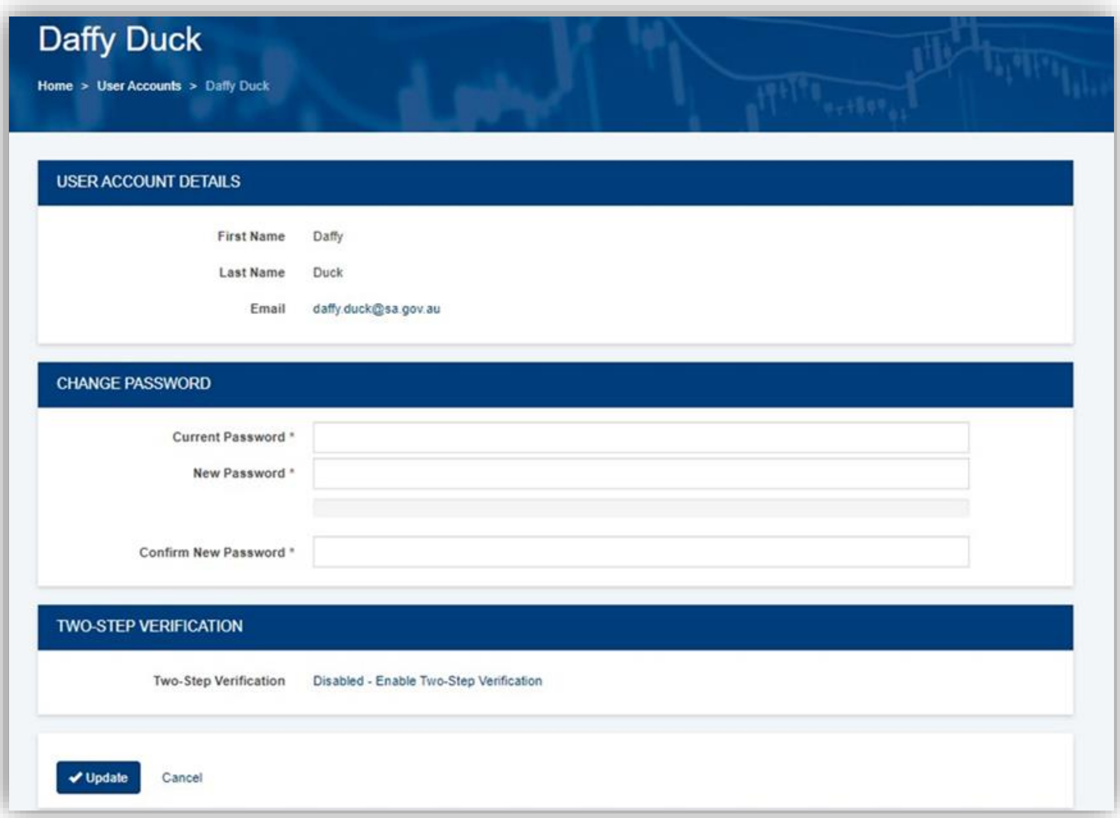
Once you receive the password reset email, click on the link within it which will open a new window where you can reset your password.

Changing Your Password within R2D2

1. Log in to R2D2

2. Click on your name at the top of the Home screen





3. The User Account screen will display the following:
4. Enter your **current** password

5. Enter your **new** password – make sure the new password is strong enough by including upper and lower case letters, numbers, and symbols

6. Enter the new password again

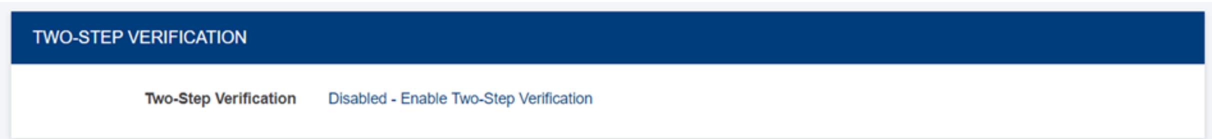
7. Click the blue “Update” button at the bottom left of the screen. Your password has now been changed.

Setting up Multi-Factor Authentication (MFA)

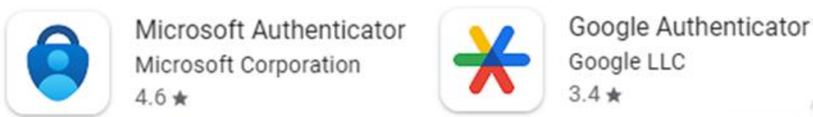
1. Log in to R2D2

2. Click on your name at the top of the screen (for example, “Daffy Duck”)

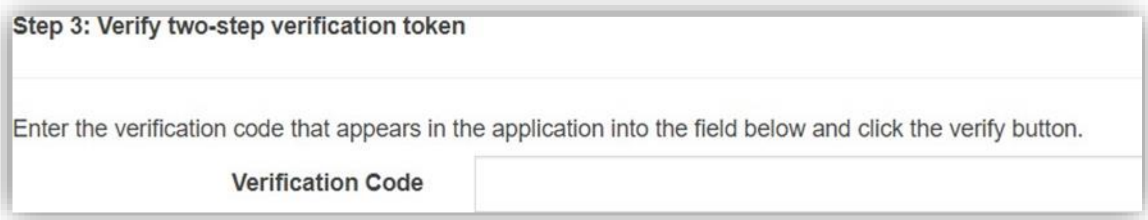
3. Scroll down to the bottom of the page, and look for the heading “Two-Step Verification”



5. Click “Disabled – Enable Two Step Verification”
6. This takes you to a page with three key steps:
   a. First, on your mobile device download an authenticator app, such as Google Authenticator or Microsoft Authenticator (unless you already have either app)



   a. Then open the app and scan the QR code or manually enter the code provided by R2D2 into the app
   b. Finally, take the verification code provided by the app and enter this into R2D2 where it says “Verification Code” (with no spaces between the numbers)



User Administration

Different Types of User Accounts

There are four types of user accounts or roles, which determine what level of access you have. They are described below:

Worker

Workers only have access to view and create Clients and Assessments.

Manager

Managers have access to:

- Clients
- Assessments
- Schedules
- Submissions
- Reports

Referral & Placement Coordinator

Referral & Placement Coordinators have access to:

- Clients
- Assessments
- Schedules
- Submissions
- User Accounts
- Reports
- Referrals
- Placements

The Referral & Placement Coordinator role is only relevant to programs undertaking Referrals and Placements in R2D2, see Referrals and Placements sections of this document for further information. **Note: the Referral and Placement Coordinator role *cannot* view, add or amend users with Administrator roles**, so it is advised that organisations consider the relevant level of access required, and maintain some Administrator roles specifically for user administration.

Administrator

Administrators have access to:

- Clients
- Assessments
- Schedules
- Submissions
- Reports
- User Accounts

Note: When DHS sets up initial user accounts, they are set up as “Administrator” by default. After this, it is the organisation’s responsibility to manage staff access, including the relevant role level, and for deactivating users who no longer require access.

Adding New Users — *Administrators/Referral and Placement Coordinators only*

1. Login to R2D2 and click "User Accounts"
2. Before adding a user, search for them first to make sure the user isn't already in the system

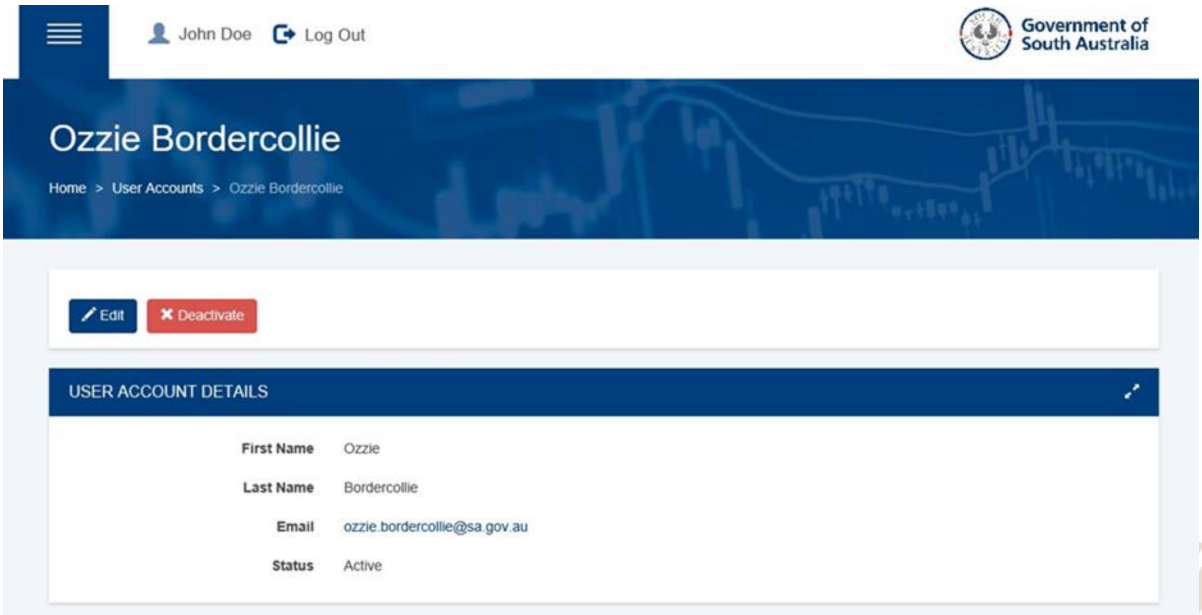
3. If you do need to add them, click the blue "Create User Account" button, and enter the relevant details: First and Last name; Email address; Password; and Role
4. Click the green "Activate" button, which will enable the new user to login

Managing Users

Administrators can edit all aspects of all other User profiles within your organisation including their Name, Email, Password, & Role. Referral & Placement Coordinators can edit these aspects too however they **cannot view or edit Administrator Users**, nor can they assign Users to the Role of Administrator.

Editing Users

1. Login to R2D2 and click "User Accounts"
2. Use the search box to search for the user
3. Click the name of the user which brings up the user's profile page, shown below:



4. Click edit and make the changes you need to
5. Click "Update" to save your work

Note if you are a Referral and Placement Coordinator you will not have the ability to assign other users to the role of Administrator, nor can you edit existing Administrator users (only Administrators can create, view or edit other Administrators).

Deactivating Accounts

Deactivating a user account means the user will no longer be able to log in to R2D2. You can always Activate a user's account again, should you need to.

This is important in instances where a staff member or volunteer leaves. It helps protect the confidentiality of the data you upload and enter into R2D2. It is your responsibility to follow your own organisational protocols about information security, and to ensure that all users are deactivated when they no longer require access to the system.

1. Login to R2D2 and from the Home menu click "User Accounts"
2. Use the search box to search for the user
3. Click on the user's name to display the individual user's account screen.
4. Click the red "Deactivate" button at the top of the screen. The system will ask if you're sure you want to deactivate the user's account. Once you click OK the account will be Deactivated.

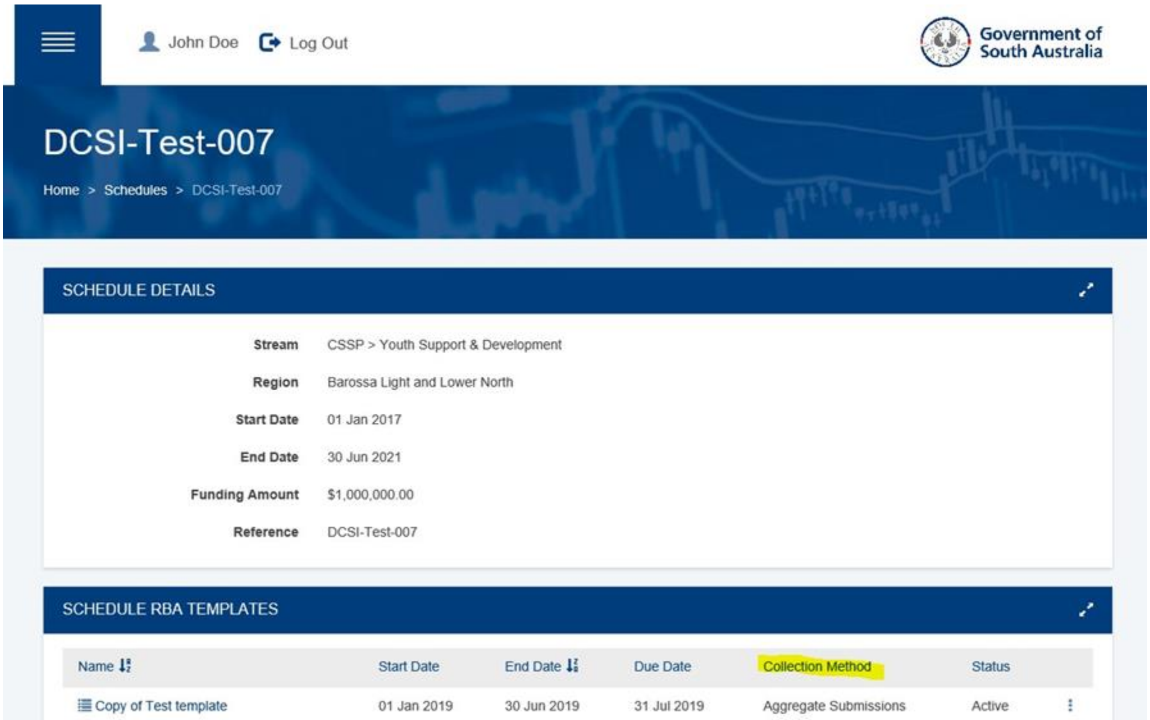
Understanding the Workflow of R2D2

To understand the workflow of R2D2, you need to understand whether you are an **Individual Reporter** or **Aggregate Reporter** (or a combination of the two). Individual Reporters need to enter clients into R2D2 in order to complete individual assessments for them. Aggregate Reporters, however, only use aggregate templates which ask questions such as '*how many participants received service?'* and therefore, do not need to enter data about individual clients.

Are you an Individual or Aggregate Reporter?

In order to check what type of reporter you are – you need to:

1. Navigate to the **Schedules** section of R2D2 on the top left of the Welcome screen.
2. Click the Schedule reference for example, "DCSI-Test-007"
3. This takes you to a screen that shows you Schedule (i.e. contract) details and lists Schedule RBA Templates
4. Look in the Collection Method column (highlighted below) of your Schedule RBA template(s) – it will either say Aggregate Submissions or Individual Submissions. For example, in the screenshot below you can see that the Schedule RBA template requires Aggregate submissions.



If none of your organisation's templates are Individual Submissions, this means your organisation does not need to add clients into R2D2 and several sections of this guide will not be relevant to you, including the following sections, may not apply to you. See the section: **Aggregate Reporters**.

Individual Reporters

As an individual reporter, you need to:

1. Add clients
2. Complete assessments for each client:
    a. An assessment refers to a set of questions on the R2D2 website, which are to be answered for an individual client.
    b. Each assessment has a Phase which can be Pre-service or Post-service – see the Pre-service and Post-service section below for a more detailed explanation.
    c. The source of this data may be a participant or worker-completed survey, practice tool, and/or another selected data collection tool.
3. Create a Submission

When you create your submission after adding clients and completing assessments, data from the assessments will automatically appear. You will have the opportunity to answer additional questions and provide written information (for example, Story Behind the Data and/or Any Additional Information).

Note: We ask that you assess 80% or more of the clients that are engaging with your service during the reporting period. Only data from the most recent assessment will be counted in the submission to DHS. You may wish to do more than one assessment to track change for individual clients within a reporting period, this data will be available within your organisation.

Pre-service and Post-service

Many funded programs using R2D2 undertake Pre- and Post-service measurement.

Pre-service

Pre-service assessments act as a baseline to track outcomes against and it is assumed that if a client is still engaging, it is because they are still working towards achieving outcomes.

Pre-service assessments should be completed as close to the start of service as possible.

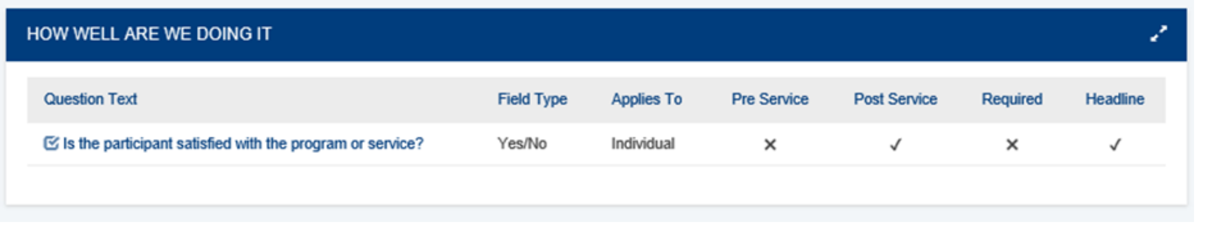
Post-service

The Post-service assessment is the second point of data collection for a client, and is used to assess any change that has happened throughout the program. If your service uses the placement functionality in R2D2, the Post-service assessment is attached when you close your placement. If you don’t use placements, Post-service assessments should be collected once every reporting period (usually 6 months) for as long as the client is active in your service.

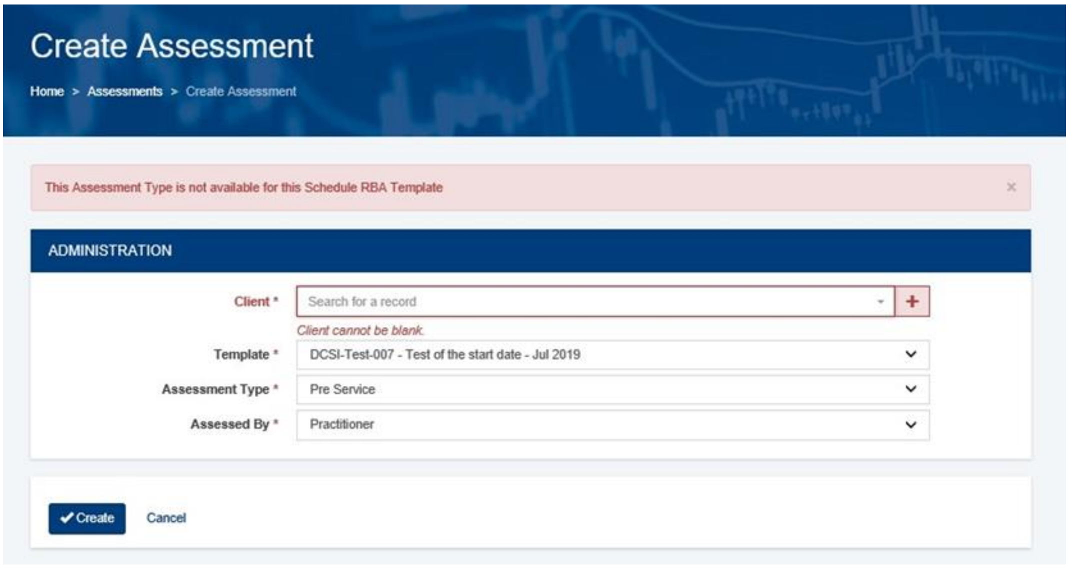
How do I tell if I should be doing Pre- and Post-service measurement?

You have multiple options for finding out:

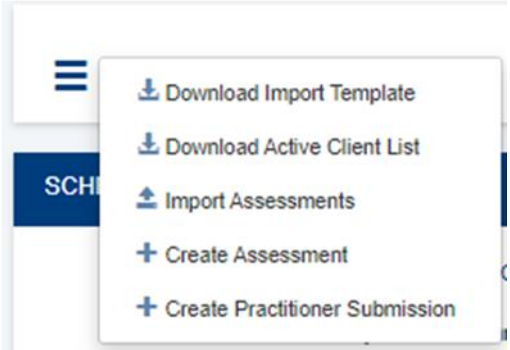
1. **You can check the Schedule RBA template in R2D2**
   a. From the home menu, click on "Schedules", then click on the appropriate Schedule and then the Schedule RBA template – it will show you the list of questions that need to be answered, as well as their question properties. A "tick" symbolises the question is asked at this time point, an "X" symbolises it is not – for example, the below screenshot tells us that the satisfaction question is only asked at Post-service



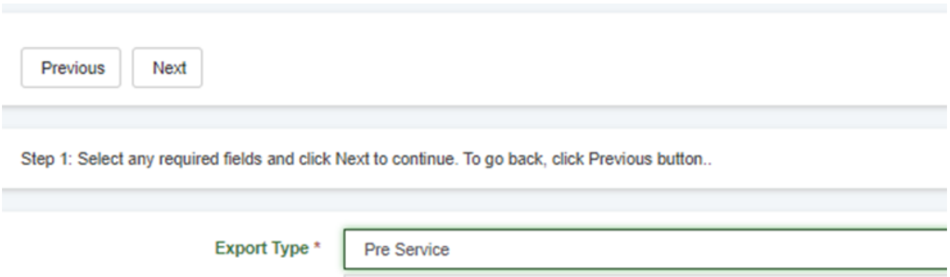
2. **Alternatively, you can try completing an assessment in R2D2** (step-by-step instructions on how to do this can be found under the section: Managing Assessments – Individual Reporters Only) via:
   a. Direct Entry
      i. If you try and do a Pre-service assessment via direct entry and there are no Pre-service questions to answer, you will get an error message that reads "the assessment type is not available for this Schedule RBA template" – as per the below screenshot:



   b. Bulk upload
      i. Download the bulk import assessment template by clicking "Download Import Template" from the pop-up menu shown below:



i. On the next page you need to nominate an "Export Type" The options for the "Export Type" are determined by what types of questions appear on the template. For example, you can only download a bulk import template with a Pre-service phase if Pre-service questions exist, and vice versa



3. Finally, you can always get in touch with R2D2 support staff via dhscommunityservicesdata@sa.gov.au if you get stuck.

Aggregate Reporters

As an aggregate reporter, you need to:

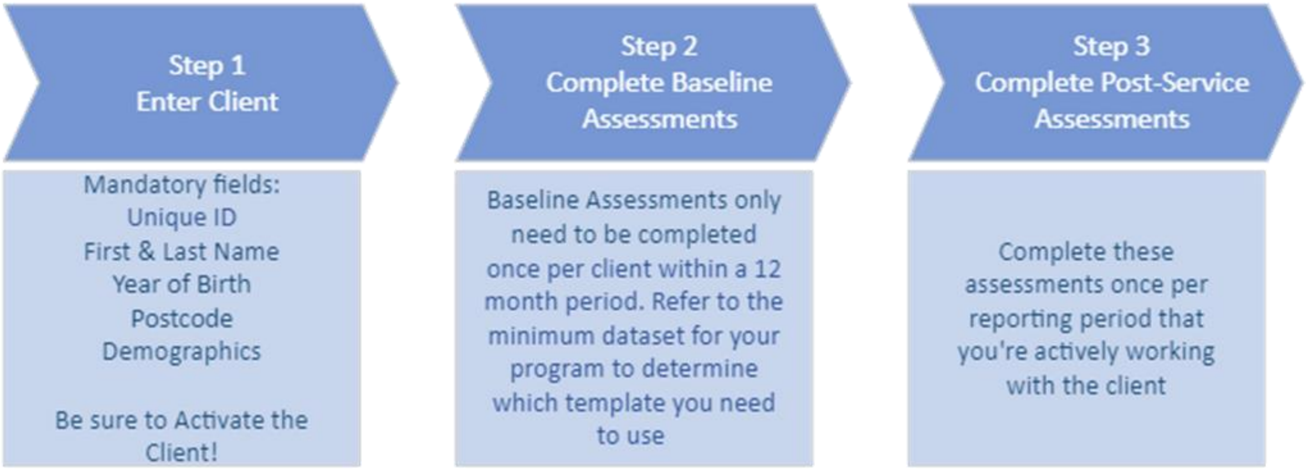
1. Create a submission
2. Enter data directly into the submission - you will have the opportunity to answer additional questions and provide written information (for example, Story Behind the Data and/or Any Additional Information).
3. Save
4. Submit – including ticking the box to confirm you wish to submit the submission

You do not need to add clients or complete individual assessments for an Aggregate Submission.

If you have multiple templates, you may have both Individual and Aggregate templates. There is a Glossary at the end of this manual if you need further clarification.

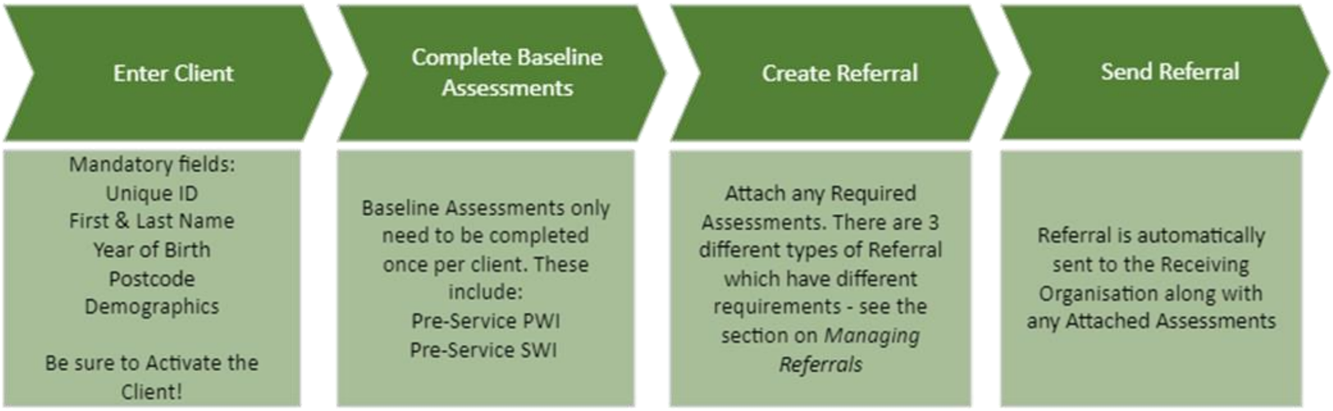
Intake and Assessment Process – *Individual Reporters only*

The client journey for Organisations that **do not** use Referrals and Placements can be summarised in 3 steps:

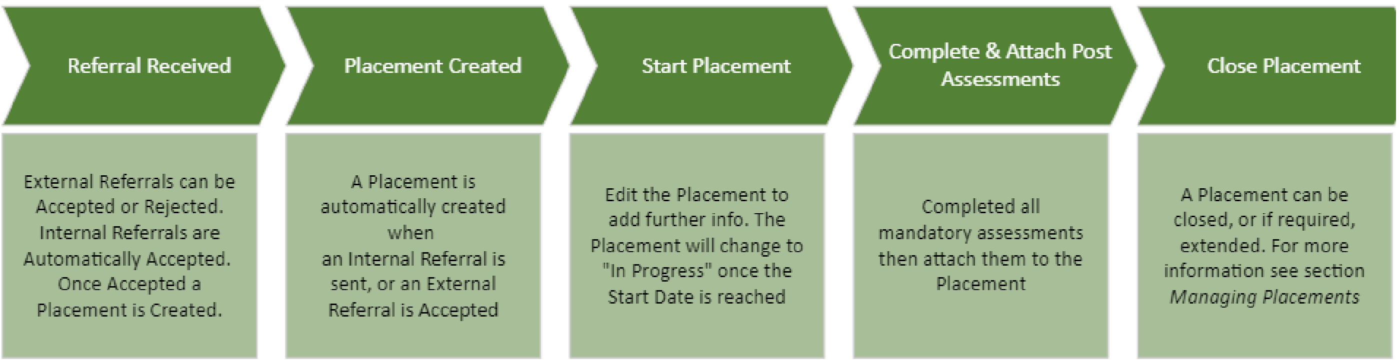


If your organisation **does** use the Referrals and Placements functions in R2D2, then the sequence depends on whether you are the one **making**, or **receiving** the Referral:

Steps for Organisation making the Referral



Steps for Organisation receiving the Referral



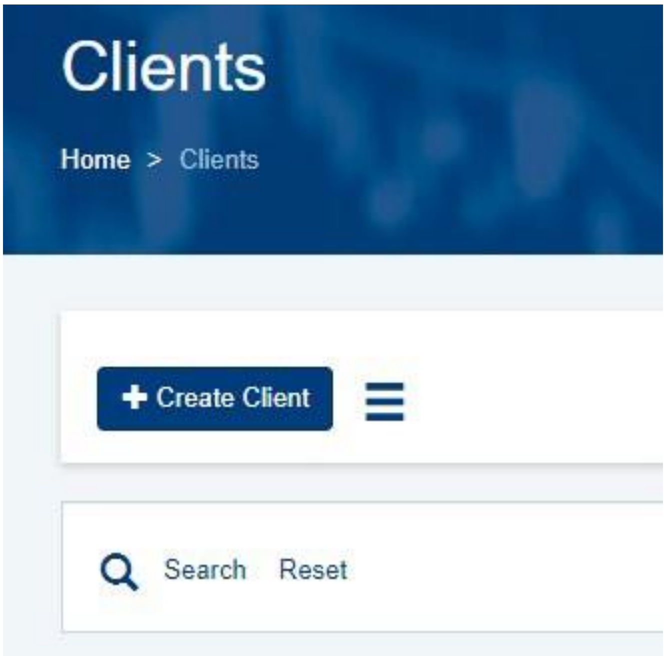
Managing Clients – *Individual Reporters only*

As per "Step 1" of The Intake and Assessment Process illustrated above, client demographic information needs to be recorded in the system. There are three ways to enter clients:

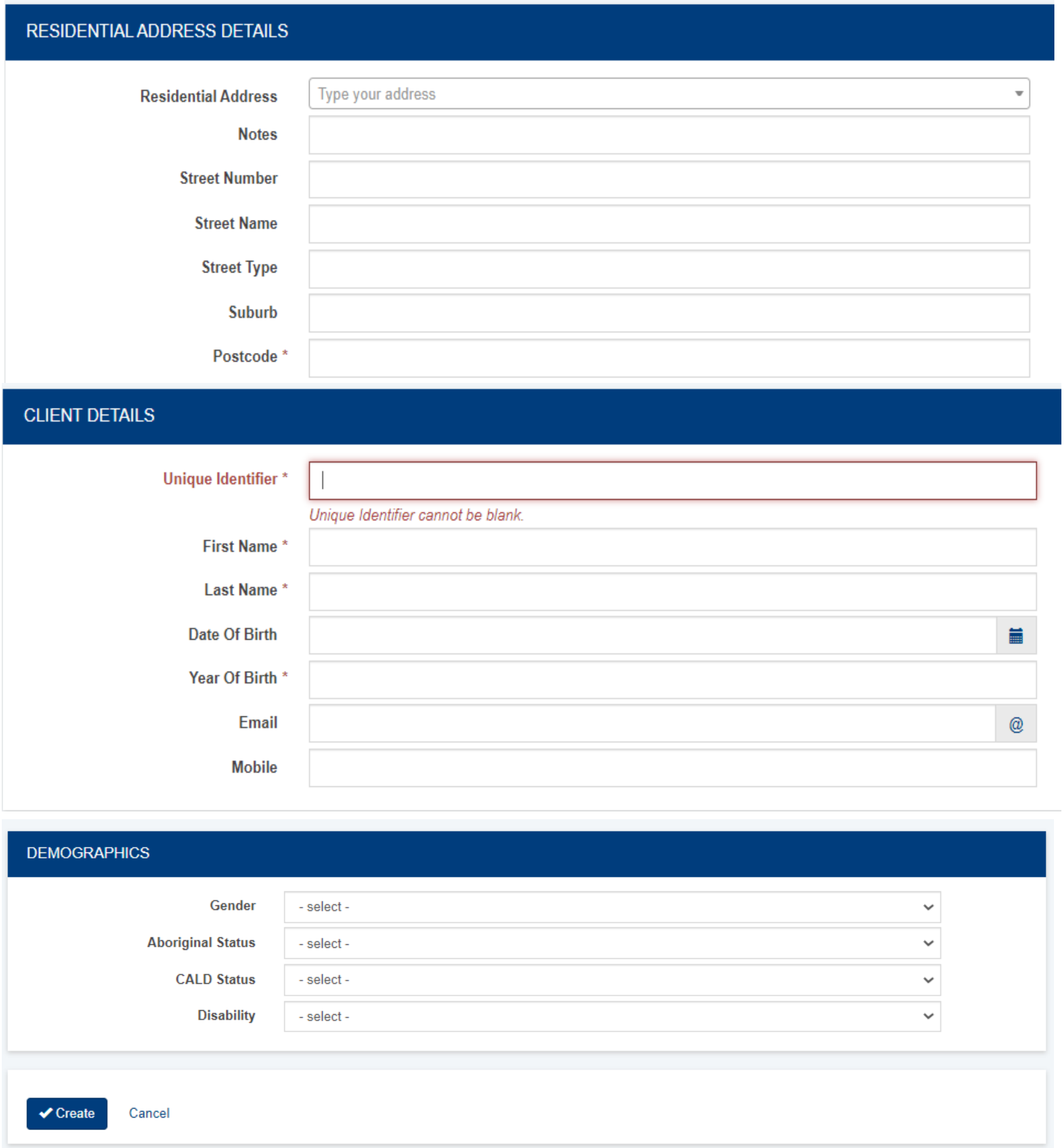
1. Direct Entry
2. Bulk Import of Clients
3. Bulk Import of Assessments (including new clients)

Direct Entry of Clients

1. From the Home menu, click "Clients"
2. Search to see if the clients have already been added by using the search button. As much as possible, we want to reduce the likelihood of having duplicate clients in the R2D2 system. You should also check that the unique ID you are assigning to an individual, is not already in use.



3. If they have not been entered before, click the blue "Create Client" button
4. This brings up the screen shown below:



RESIDENTIAL ADDRESS DETAILS

Residential Address: Type your address
Notes
Street Number
Street Name
Street Type
Suburb
Postcode *

CLIENT DETAILS

Unique Identifier *
Unique Identifier cannot be blank.
First Name *
Last Name *
Date Of Birth
Year Of Birth *
Email
Mobile

DEMOGRAPHICS

Gender: - select -
Aboriginal Status: - select -
CALD Status: - select -
Disability: - select -

Create
Cancel

This page asks for the following information, by section:

a. **Client Details** – any fields denoted with a red asterisk * are mandatory[1].
   i. **Unique identifier** – this can be numbers, letters, or a mixture of both. The Unique Identifier **is very important for reducing the likelihood of duplicate clients being entered into the system**. If you use a Client Management System, your clients most likely have a unique identifier already, which should be used in R2D2. Otherwise, you will need to develop a way to assign and record unique identifiers for each individual client.

[1] Note: landline phone number formats are not accepted as valid by R2D2. The rationale underpinning this is because these contact details may be used in the future for directly emailing or texting survey links to clients.

ii. If you need to develop your own unique identifier, an example could be using the first three letters of a client's first and last name and their DOB. For example, John Doe born 01/02/1970 would have the unique identifier JohDoe01021970

iii. Make sure the unique identifier you assign to a client is not already in use – you can do this by searching in the "Clients" section of R2D2. Otherwise, R2D2 will think that you are trying to update existing client information, and may overwrite the details of a client that is already in the system with that unique identifier.

b. **Residential Address Details** – you can search for the full address or enter it manually. The address will automatically validate, please try to enter a valid address wherever possible. Postcode is the only compulsory field in this section.

c. **Demographics** - specific demographics may vary by Stream, but typically include Age Group, Gender, Aboriginal status, CALD status and Disability. Demographics are typically mandated at the point of assessment but can still be answered here using the drop-downs.

d. Once you finish adding Client details, click **Create**, then on the following screen you need to click the **Activate** button, as only active clients can be assessed.

Bulk Import of Clients

Note: users with Worker level access are unable to upload clients in bulk

1. From the Home menu, click "Clients"
2. 2. Click on the hamburger icon (to the right of the "Create Client" button) and select "Download Client Template"
3. Choose an Export option, "Blank Template" or "All Data" and then click next
   a. "Blank Template" will download with no data apart from column headings
   b. "All Data" will download with the details of previously added clients
4. This downloads an excel spreadsheet – with column headings that match the fields required when adding Clients via "Direct Entry" (see screenshot below)

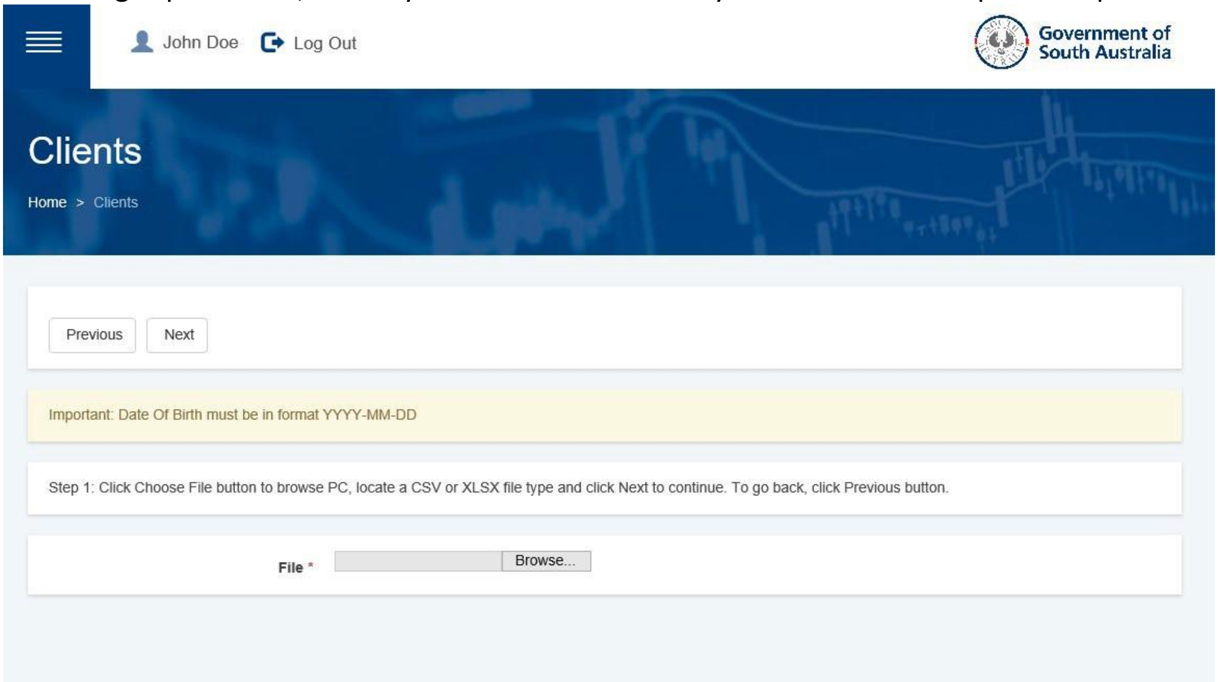
	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R
1	Unique Ide	First Name	Last Name	Email	Mobile	Date Of Bir	Year Of Bir	Street Num	Street Nam	Street Type	Suburb	Postcode	Verified	Gender	Aboriginal	CALD Statu	Disability	Status
2																		
3																		
4																		
5																		
6																		
7																		

5. Complete the spreadsheet, noting that:
   a. Dates must be formatted YYYY-MM-DD
   b. If there is a drop-down list of possible answer responses, you must select from this list – **do not** type in your own response.

c. In the status section select Active so that you do not have to search for clients in the system and Activate them later.

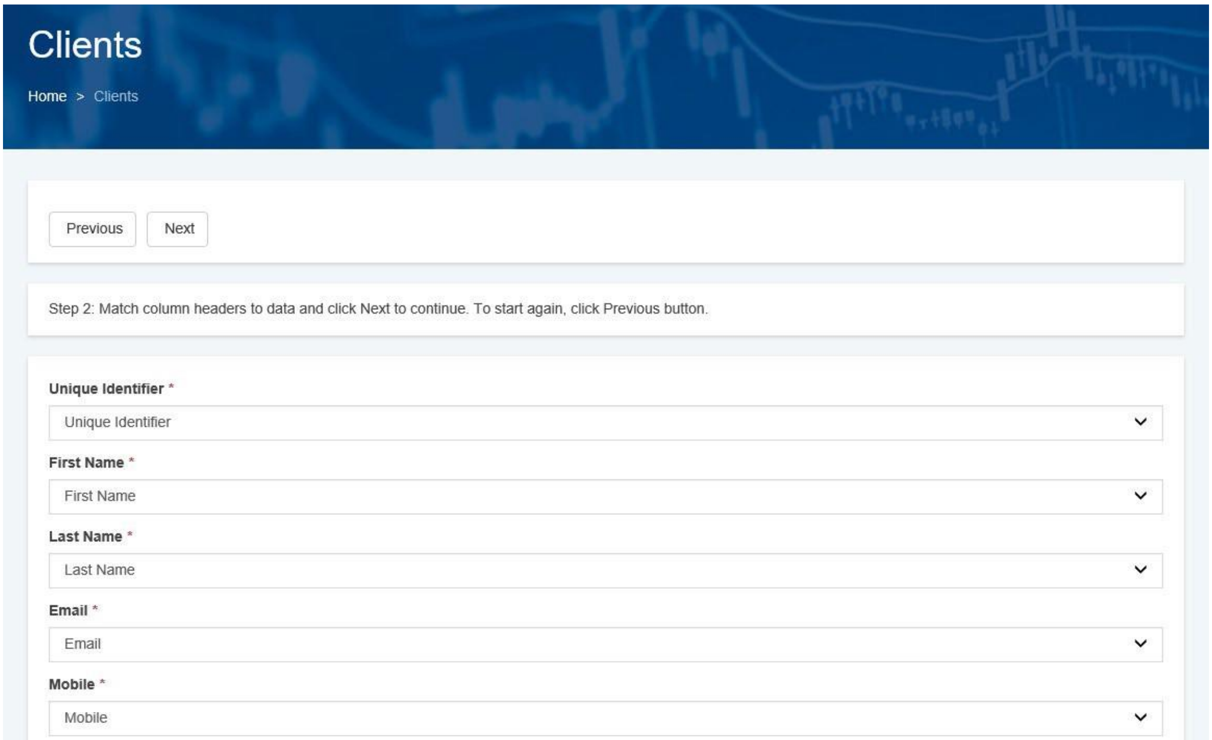
6. Save the spreadsheet somewhere on your computer

7. In R2D2, once again click on the hamburger icon ☰. Select "Import Clients"
This brings up a screen, where you need to browse for your saved Client Import Template.



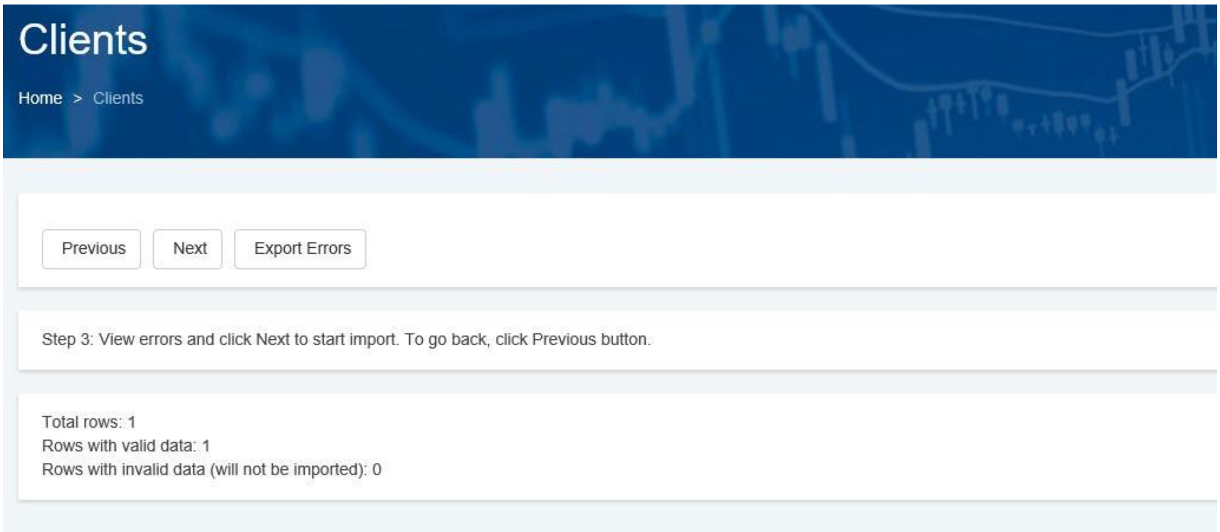
8. When you have selected the saved file, click "Next"

9. This brings up a screen where you check to see that the column headings in excel are being correctly matched to the data fields in R2D2:



10. If you are satisfied it is being matched correctly, click "Next"

11. The next screen looks like this:



12. Only "Rows with valid data" will be successfully imported.

13. If you click "Next" – the import process is complete

14. If you have "Rows with invalid data" – don't click "Next", instead:

    a. Click "Export Errors" – which will generate a report in Excel describing why the data has been deemed invalid – which you can fix.

    b. Click "Previous" until you are back at the screen where you browse and select your file

    c. Use the error report to guide you in fixing up any errors on your bulk Client Import Template

    d. Save any changes you make

    e. Browse and select the updated file, and follow the steps above until the import process is complete

Note, if you Bulk import assessments with new clients the new client details will be added to the system. If you add clients to the system this way, you will not be able to add their email address or mobile number, but you can add this information later from the Clients section in R2D2. See the section Bulk Importing Assessments for more information.

Tips

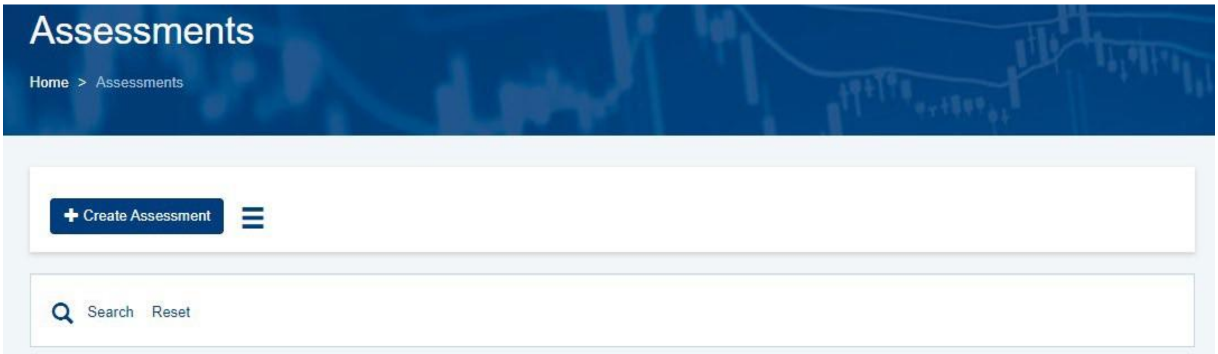
- If a client has been Deactivated and returns to your service, simply Activate their existing client record –don't add them again.
- If you accidentally add a duplicate, make sure one is deactivated as soon as possible – preferably the client record with no assessments.

Managing Assessments – *Individual Reporters only*

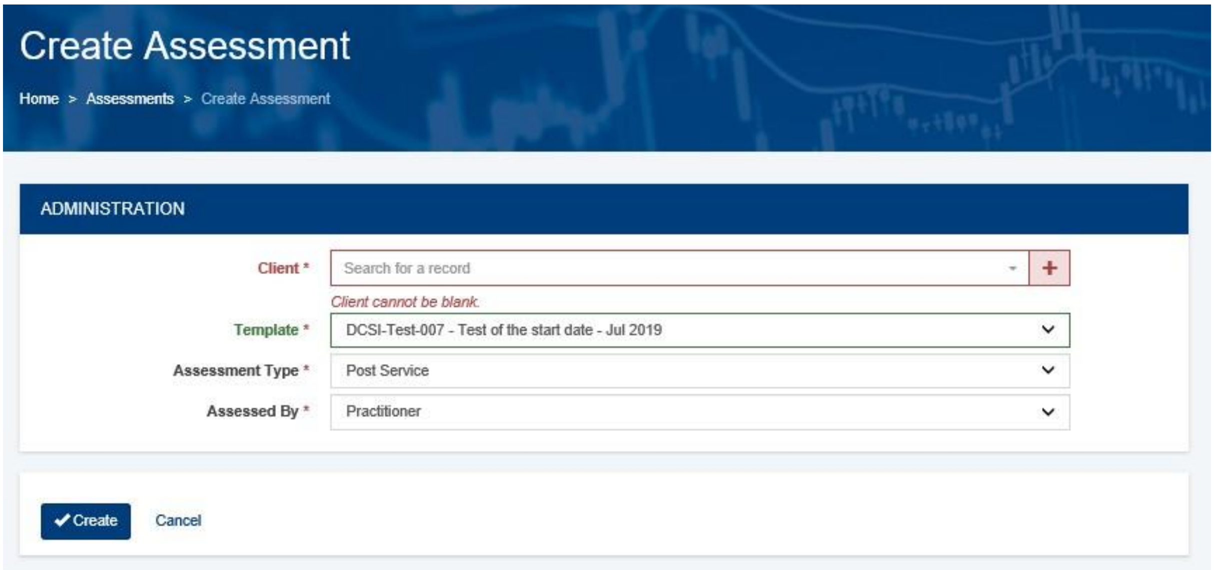
There are two ways to record assessments against an RBA template: **Direct Entry** and **Bulk Import**

Direct Entry of Assessments

1. Navigate from the Home Menu to "Assessments"
2. You can search to see if a client has been assessed – multiple assessments for a particular assessment type per client are possible, but R2D2 only counts the most recent assessment in the reporting period towards the submission to DHS
    a. By assessment type, we are referring to Pre or Post-service.
        i. If you do a Pre-service assessment and a Post-service assessment for a client, both get counted
        ii. If you do one Pre-service and multiple Post-service assessments for the same client, the Pre-service assessment and the most recent Post-service assessment will get counted



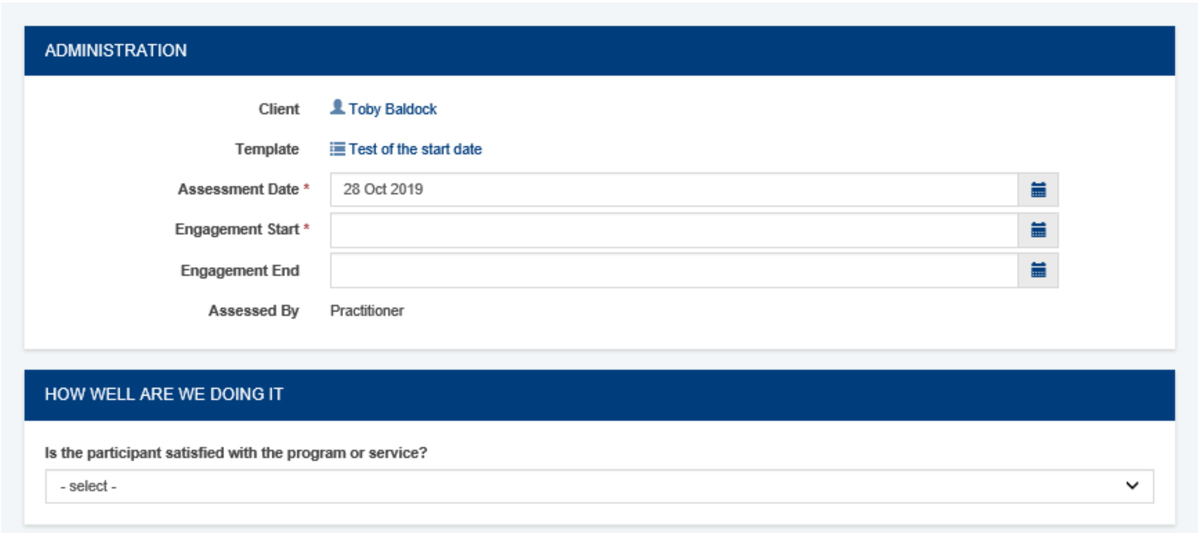
3. If you want to create an assessment, click the "Create Assessment". This brings up a screen that looks like this:



4. In the “Client” box you can search for client or, you can create a new client by clicking the plus sign
5. In the “Template” box you need to select the appropriate template from the drop-down menu.

> For some organisations, there may be only one template, but for other organisations there could be multiple.
>
> **Importantly, in certain months there will be identically named templates available, that differ only by the month in the title.** The month in the title refers to the FIRST month of the reporting period.
>
> For example, for six monthly reporting, a template with “Jan” in the title will count towards the Jan–June period, a template with “Jul” in the title will count towards the July–December period.
>
> For example, for quarterly reporting, a template with “Jan” in the title will count towards the Jan–March period, a template with “April” in the title will count towards the April–June period, a template with “Jul” in the title will count towards the July–September period and a template with “Oct” in the title will count towards the October–December reporting period.

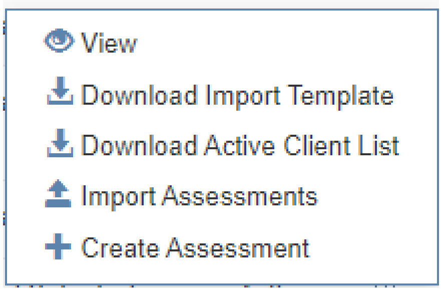
6. In the “Assessment Type” – you need to select whether you are completing a Pre or Post-service assessment. If you are confused by this terminology, see pg. 14.
7. In the “Assessed By” box, you need to leave the answer as “Practitioner.”
8. When you click the “Create” Button, this creates a draft assessment – which you can begin completing. The screen will look something like this:



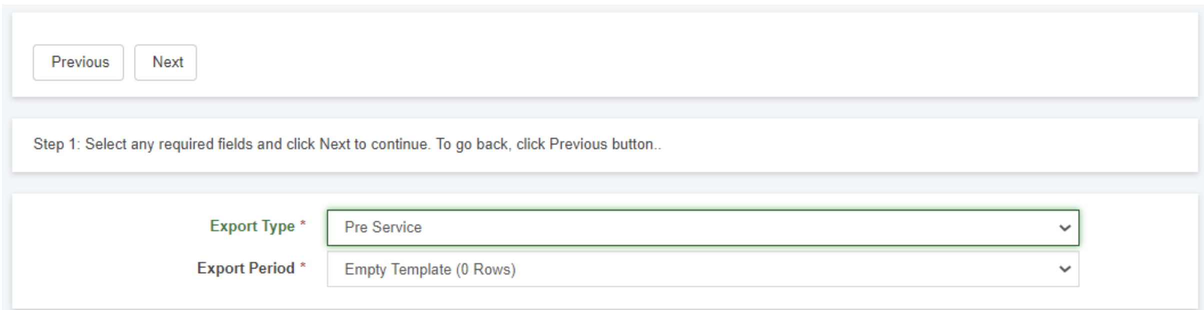
9. Client name and Template name - are pre-populated, based on your previous selection
10. Assessment date – must fall within the start and end date of the template. You will receive an error message if it does not. Other things to note:
    a. It is pre-populated with the current date – though you can change this.
    b. **It cannot be earlier than the client's Engagement Start date.**[6]
    c. It is mandatory.
11. Engagement Start – this is the date the client commenced with your service or program. This can be a date in the current reporting period, or a date prior to this. It is mandatory.
12. Engagement End – This is the date the client completed or exited the service. This is not mandatory so you can leave it blank if the client is still active in the service.
13. The rest of the assessment contains the questions for you to complete for the client.
14. Scroll to the bottom of the assessment and click "Update" – this will save the data you have entered as a Draft – this means that you can return to the assessment and edit it later (by locating the assessment and clicking "Edit").
15. If you have finished completing the assessment – click "Mark As Completed" – this changes the status of the assessment to "Completed". Note: Only completed assessments will be counted towards a submission.
16. If you have Manager, Administrator or Referral and Placement Coordinator level access, you can send assessments back to draft by clicking "Revert Completed" – this is useful if you notice a mistake

Bulk Import of Assessments

1. From the Home menu, click Schedules
2. Select the appropriate Schedule (there may be multiple options)
3. Hover over the three stacked dots at the end of the template you want to complete assessments for.
4. Remember, you can only complete assessments for a Schedule RBA template with a Collection Method that is "Individual Submissions."
5. This will bring up a pop-up menu with a "Download Import Template – as depicted below:



6. Select "Download Import Template" and you will see a screen like this:



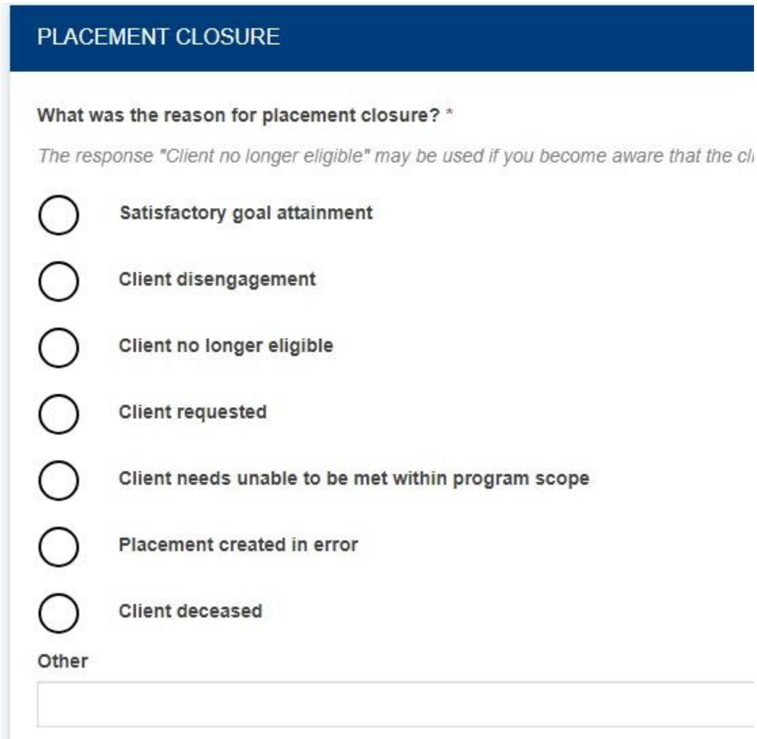
7. Select whether you want to download a Pre or Post-service bulk import template (you will only have both options if there are questions to answer at both pre and Post-service) for "Export Type"
8. You also need to select the "Export Period" (i.e. whether to download an "Empty template", or a template with clients who were assessed in the previous reporting period "Previous Period Data", or a template with all clients who have been assessed historically against the template, "All data."
9. Click next when you have made your selections
10. Click "Download File"
11. This will download an excel spreadsheet. It is similar to the Client Import Template, but has additional column headings that represent questions answered on the pre

or Post-service assessment

12. Complete the spreadsheet, noting that:

    a. Dates must be formatted YYYY-MM-DD

    b. If there is a drop-down list of possible answer responses, you must select from this list – **do not** type in your own response unless the question offers an option for "Other" via Direct Entry; then any text you type in the cell will be accepted and recorded under "Other" once the spreadsheet is imported into R2D2. If the options provided do not cover the option you wish to enter and the question provides the ability to enter an alternative answer – this will be indicated in the minimum dataset – you can type in any free text answer. Below is an example of a question which offers an "Other" via Direct Entry:



    c. In the status section select Active so that you do not have to search for clients in the system and Activate them later.

Remember…

You can add the details of a client who has not been added to R2D2 before to the bulk assessment import template

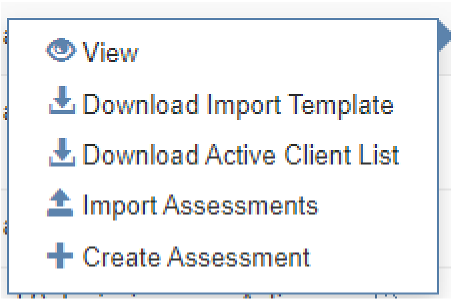
You can choose to download a blank bulk import template, or a template with clients that have been assessed historically, if you need to assess them again.

You can’t have different assessment types (e.g. pre and Post-service) on the same bulk import template

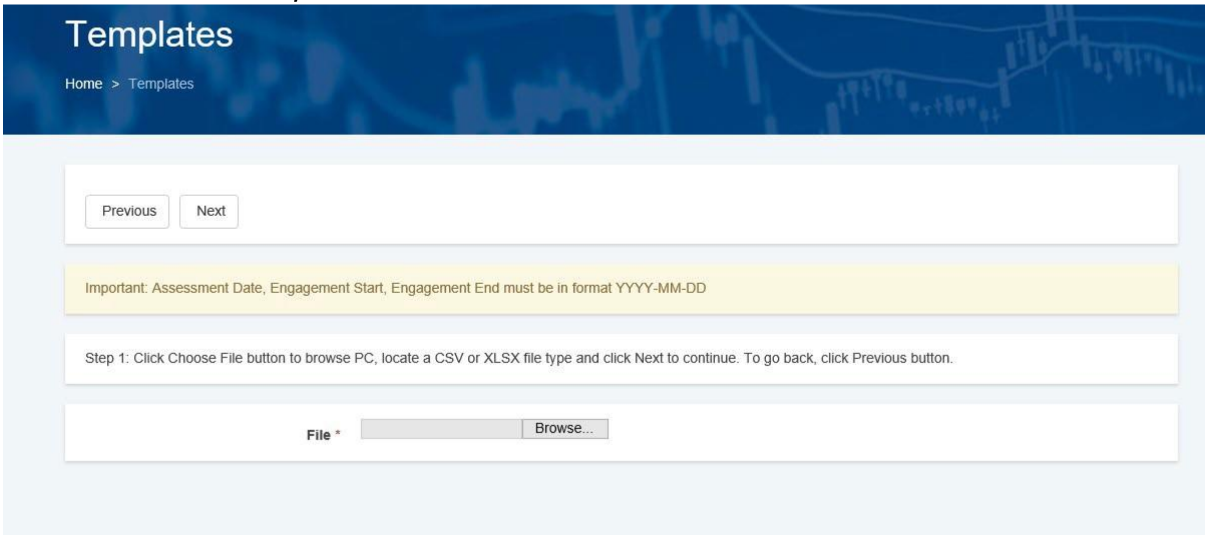
13. Once you have saved your file and are ready to upload – return to the same

Schedule and locate the correct Schedule RBA template (be mindful of the Start and End dates). Once again, hover over the 3 stacked dots at the end of the row to bring up the pop-up menu

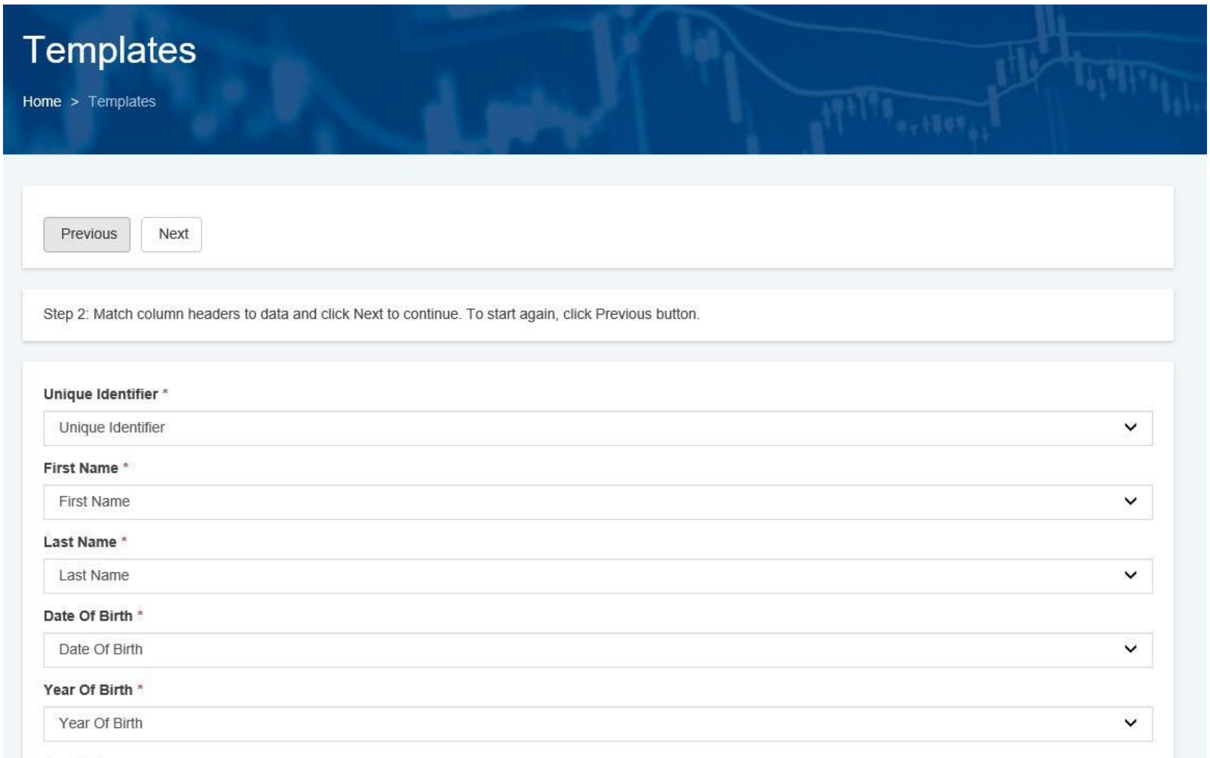
This time – select "Import Assessments"



14. Browse for your saved file

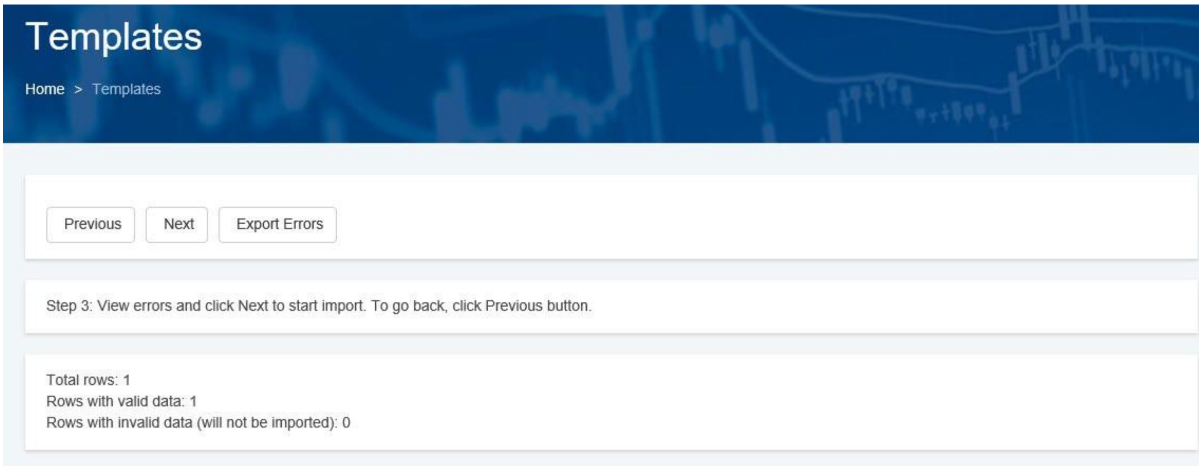


15. Complete the column matching exercise



16. When you are satisfied that the column headings match up, select "Next"

17. The screen will then look similar to this:



18. Much like when importing clients in bulk, only "Rows with valid data" will be successfully imported. If you have "Rows with invalid data" – don't click next:
    a. Click "Export Errors" – which will generate a report in Excel describing why the data has been deemed invalid – which you can fix.
19. Click "Previous" until you are back at the screen where you browse and select your file
20. Use the error report to guide you in fixing up any errors on your bulk Client Import Template
21. Save any changes you make

22. Browse and select the updated file, and follow the steps above until the import process is complete

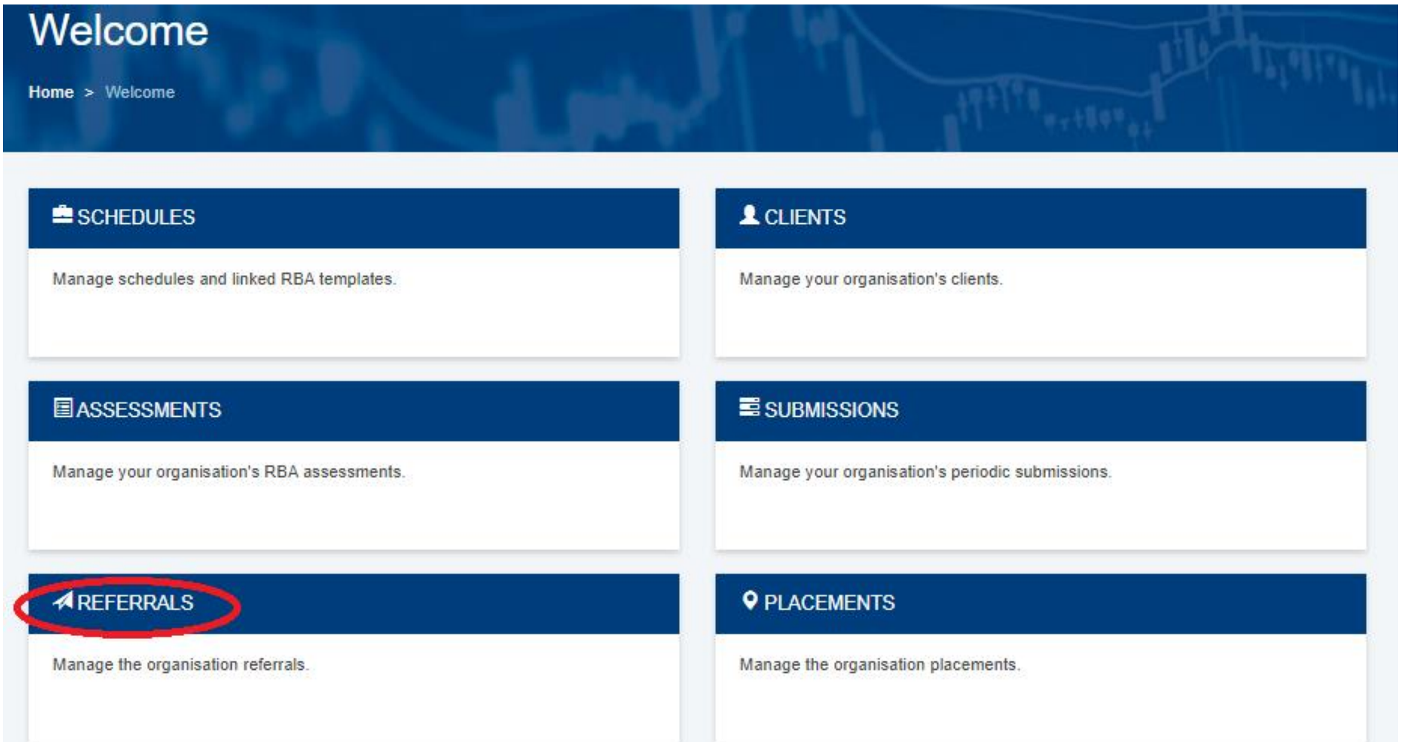
Note: assessments uploaded from a template will be automatically marked as complete

Managing Referrals - *certain Programs only*

Note: Referrals are only applicable within the Community Connections Program, Financial Wellbeing Program, and Young Carer Support Services.

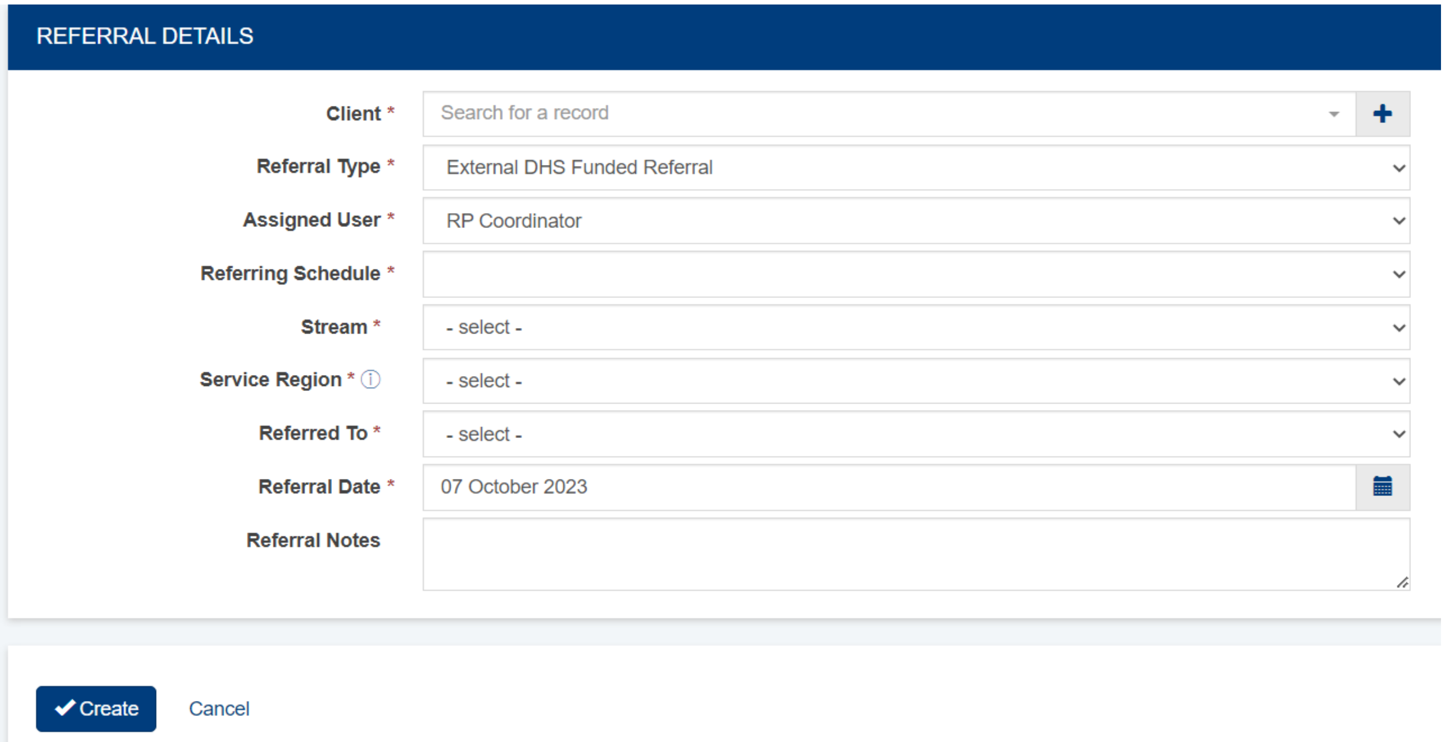
Creating a Referral:

1. From the Home Screen, click “Referrals” (circled in red, below)
   a. Note: if you cannot see the “Referrals” and “Placements” options, you may not have Referral and Placement refer Access. If you need your access level changed, your Administrator can do this for you.



2. When the referral page loads, click the blue “Create Referral” button.

3. This brings up a screen that looks like this:



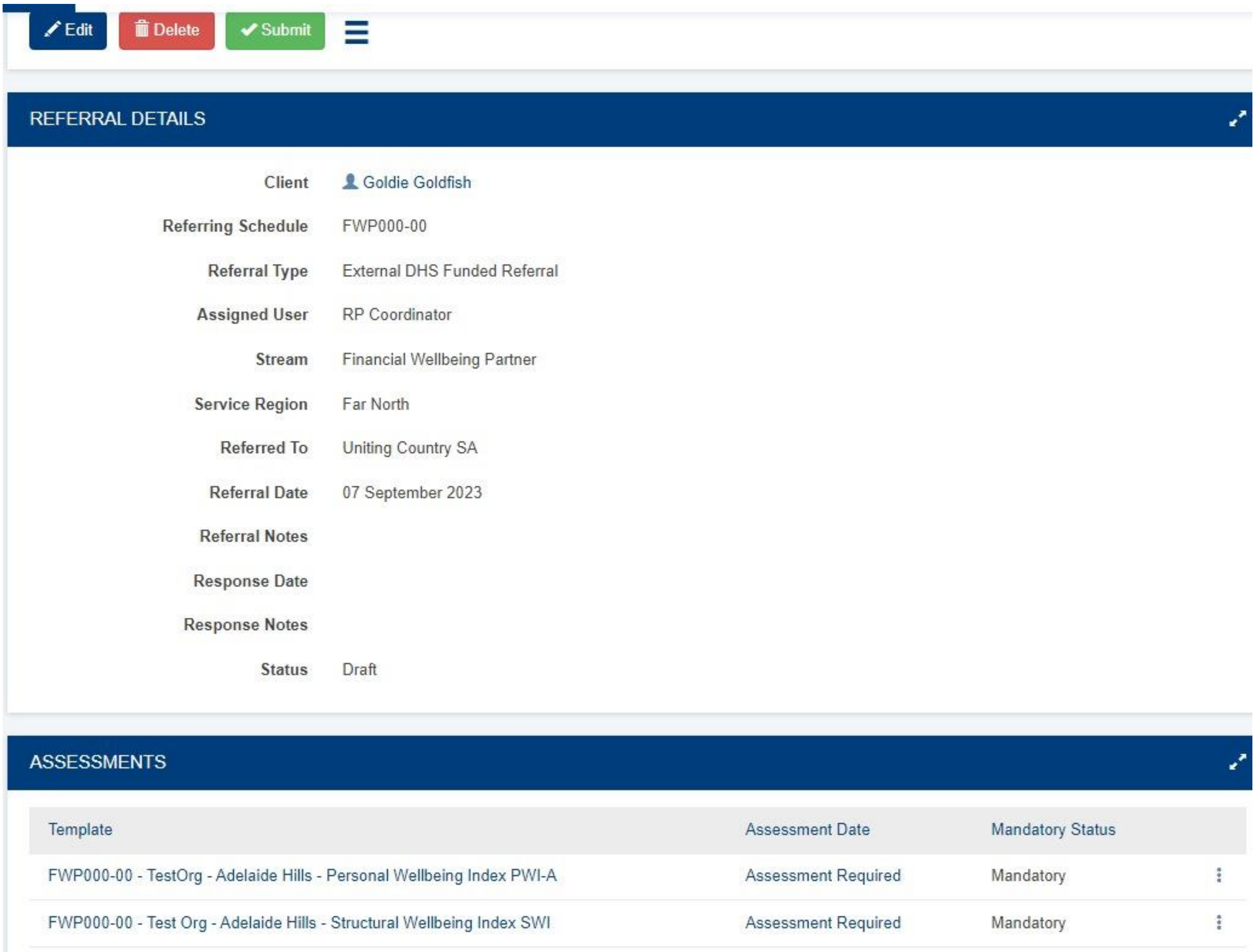
4. In the **Client field**, search for a client you have previously added to R2D2 via direct entry or bulk import. Make sure you have completed any mandatory Pre-service assessments for the client already. If you don't have these assessments completed and ready to attach to your referral you will be unable to complete the referral.
5. For **Referral Type**, you have three options outlined in the table below:

Internal Funded Referral	When a DHS funded service is to be delivered to the client within your own organisation. Once an internal referral is submitted it will be accepted automatically. Any time a referral is accepted this will automatically create a placement**.** For example, if you are referring a client from the Financial Wellbeing program delivered by your organisation to the Community Connections program also delivered by your organisation, this would be an internal funded referral.
External DHS Funded Referral	When you want to refer to another organisation to provide a service that is also funded by DHS. Doing this **will send through client information and the ability to view the client assessments you have linked to the referral**. The organisation being referred to is expected to either Accept or Reject the referral using R2D2. If the referral is accepted, this will create a Placement (which will go into Wait-Listed status).

External Non DHS Funded Referral	When you want to record the fact that you have made a referral for the client to a service which is outside the extended DHS funded service system, such as mental health, financial, legal, housing, and disability services. The information will not be sent anywhere / nor will the referred to organisation respond via the system – **so you will need to make a referral using your usual means**, such as via a phone call or email. This is also what should be used if you are going to refer the client to a **non DHS funded service that your organisation delivers – e.g. Housing**

6. The **Assigned User** will default to you, although it can be changed to other R2D2 Referral & Placement Coordinators from your organisation.
7. For **Referring Schedule** – this is your (the referring organisation's) contract that the referral should be counted against. Some organisations will only have one option, others will have multiple (for example, if they are a Community Partner <u>and</u> a Regional Coordinating Partner in Community Connections).
8. For **Refer to Stream** you are nominating broadly what type of service the client is being referred for (e.g. Community Connections, Financial Wellbeing, or Young Carer Support Services). This field automatically disappears if you are making an "External – Non DHS Funded Referral" as this is N/A.
9. **One Off Engagement** if you have selected the Stream: Financial Wellbeing Partner, then the One Off Engagement field will appear. If you are referring for Emergency Financial Assistance select Yes, otherwise select No.
10. **Service Region** the region where the service you are referring to, operates in. Generally (but not always) the region should include or be close to the client's residential address.
11. For **Referred To** select the name of the Organisation you are referring to. This field will only appear if you are completing an External DHS Funded Referral. The Organisations in the drop-down list will change depending on the selections you have made for "Stream" and "Service Region" above.
12. **Referral Date** is the date the referral is being made.
13. The **Referral Notes** section is not compulsory but provides an avenue to provide any further information about the referral. **Do not include any sensitive, personal, or medical information about the Client here as this information needs to be communicated securely through other means.** A practice tip based on feedback from the sector is to include the name and contact details of the person making the referral, to make communication between organisations easier.

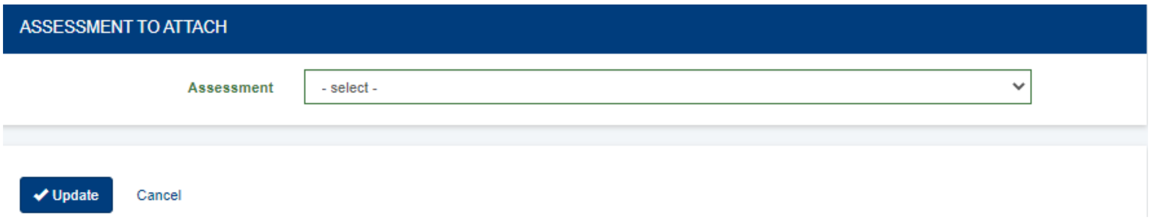
14. When you are satisfied with the information entered, click the blue “Create” button
15. This creates a **Draft** referral i.e., a referral that has not been finalised or sent yet:



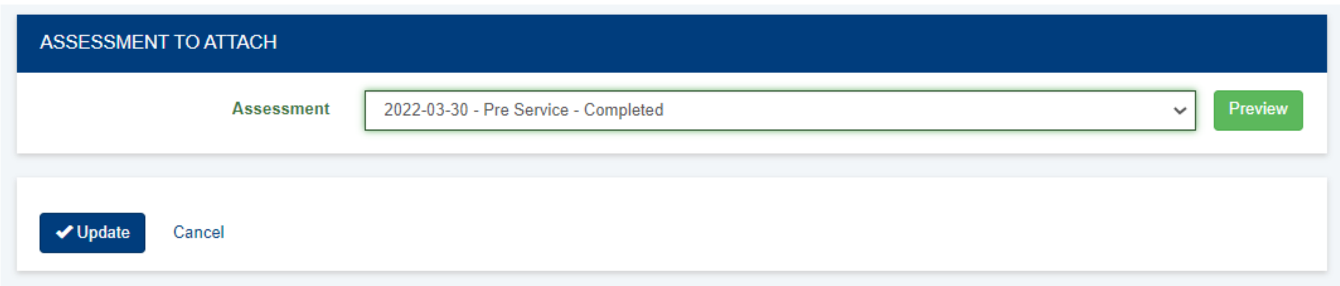
16. Before finalising the referral, you need to attach any mandatory assessments to the referral
    a. **You can attach assessments that are up to one year old, including assessments from a previous reporting period**
        i. This should assist with making referrals around the end/beginning of reporting periods, especially if you assess a client as eligible in one period, and then identify an opportunity for referral in a later reporting period.
        ii. If you think a client’s circumstances have changed, we encourage you to re-complete the relevant assessments, so that the most accurate data is reflected in assessments.
        iii. For each linked assessment to a referral the Phase Type must be Pre-service – if you complete a Post-service phase type by accident, you will not be able to attach it to the assessment and you will need to create a new assessment as Pre-service.

17. To attach the required assessments, click "Assessment Required" (highlighted in yellow)

18. This brings up the following screen:



19. Use the drop-down list to select the completed assessment. It will display the date[2], phase and status of the assessment. You can also click the green preview button to open the assessment in a new tab (shown below). If you cannot click the drop-down and you get a red circle icon this means the required assessment has not been completed for the client yet. Be sure to check the assessment was completed against the correct Schedule and that the Phase Type was Pre-service. If you have not yet completed the correct assessment, click Cancel and leave the Referral in Draft. You can then go to the Home Screen and complete the assessment, then return to your Draft Referral and attach it.



20. Click "Update" to attach the selected assessment to the referral.

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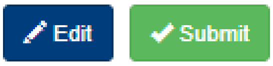
[2] Multiple assessments can be completed for the client against any particular template; however, you can only link one to the referral. Generally, it will be the most recently completed assessment that should be linked.

21. Once you have done this, instead of "Assessment Required" the date of the attached assessments will be displayed:

ASSESSMENTS

Template	Assessment Date	Mandatory Status
FWP000-00 - TestOrg - Adelaide Hills - Personal Wellbeing Index PWI-A	01 September 2023	Mandatory
FWP000-00 - Test Org - Adelaide Hills - Structural Wellbeing Index SWI	04 September 2023	Mandatory

22. After attaching all of the required assessments, you are ready to finalise the referral. To do this, click the green "Submit" button.



23. You will get a message that confirms the Referral has been finalised, and the status changes from "Draft" to "Referred".

24. The referred-to Organisation will then see the referral listed in their Referrals page. They will also receive a referral notification if they have chosen to set these up. It is up to each funded organisation to set these notifications in R2D2 (information on how to do this can be found in this guide under the section: Referral and Placement Notifications)

Note: you can create multiple referrals and placements for the same client on the same day if the client requires more than one type of service. You will need to attach the required assessments to each referral, however you do not need to complete the same assessment more than once, as you can attach a single completed assessment to multiple referrals.

Recalling Referrals

You can recall a submitted referral, so long as the referred-to organisation hasn't already accepted or rejected it.

1. To recall a referral:
2. Click on Referrals from the Home Menu
3. Find the referral you wish to recall. You can search for the referral if required (e.g., by Client Name)

4. Click on the referral

5. Click the green “Recall button”

Deleting Draft Referrals

You can delete referrals that your organisation has created – **so long as they are in draft status**. Referrals can be deleted even if they have assessments linked to them – this process does not delete the assessments.

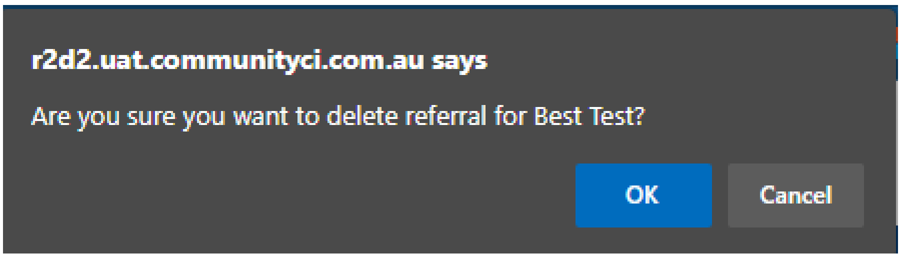
To delete referrals:

1. Click on “Referrals” from the home menu
2. Locate the draft referral you wish to delete e.g.:

Client	Stream	Referral Type	User	From	To	Referral Date	Referral	Destination	Date	Status
Best Test	Aboriginal Community Partner	External DHS Funded Referral	AcCare RPCoord	ac.care	Healthy Dreaming	23 August 2023	Other	Other	(not set)	Draft

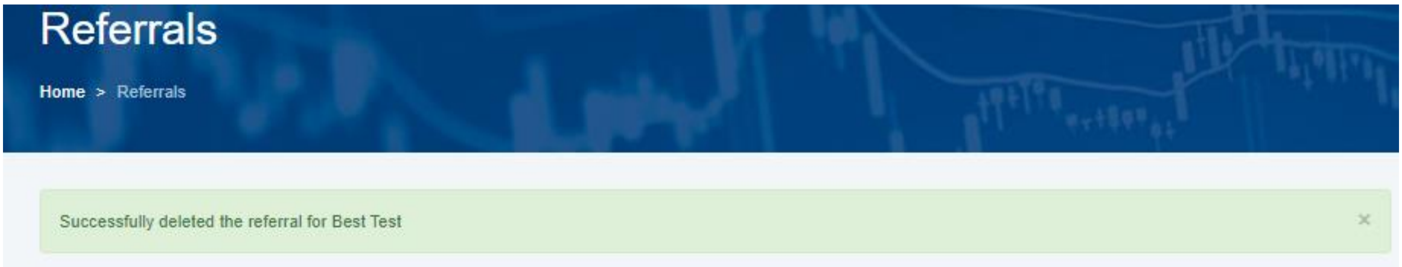
3. Click on the Client’s name – in the above case it’s “Best Test”
4. On the following page click the red “Delete” button:

5. A pop-up notification will appear asking if you are sure you want to delete:



6. If you wish to proceed (i.e. delete the referral) click “OK”
   a. If you don’t wish to delete the referral, click “Cancel”

7. If you clicked "OK" you will get a green banner notification confirming that the referral has been deleted, as depicted in the screenshot below:



Responding to Referrals

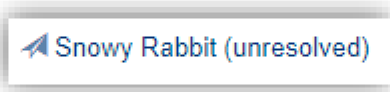
This section describes how to respond to referrals from other providers (i.e., "External - DHS Funded Referrals")

Note: Internal referrals do not need to be responded to – they are accepted automatically, and a placement is created.

1. From the home screen in R2D2, click Referrals
2. The Referral display looks like this:

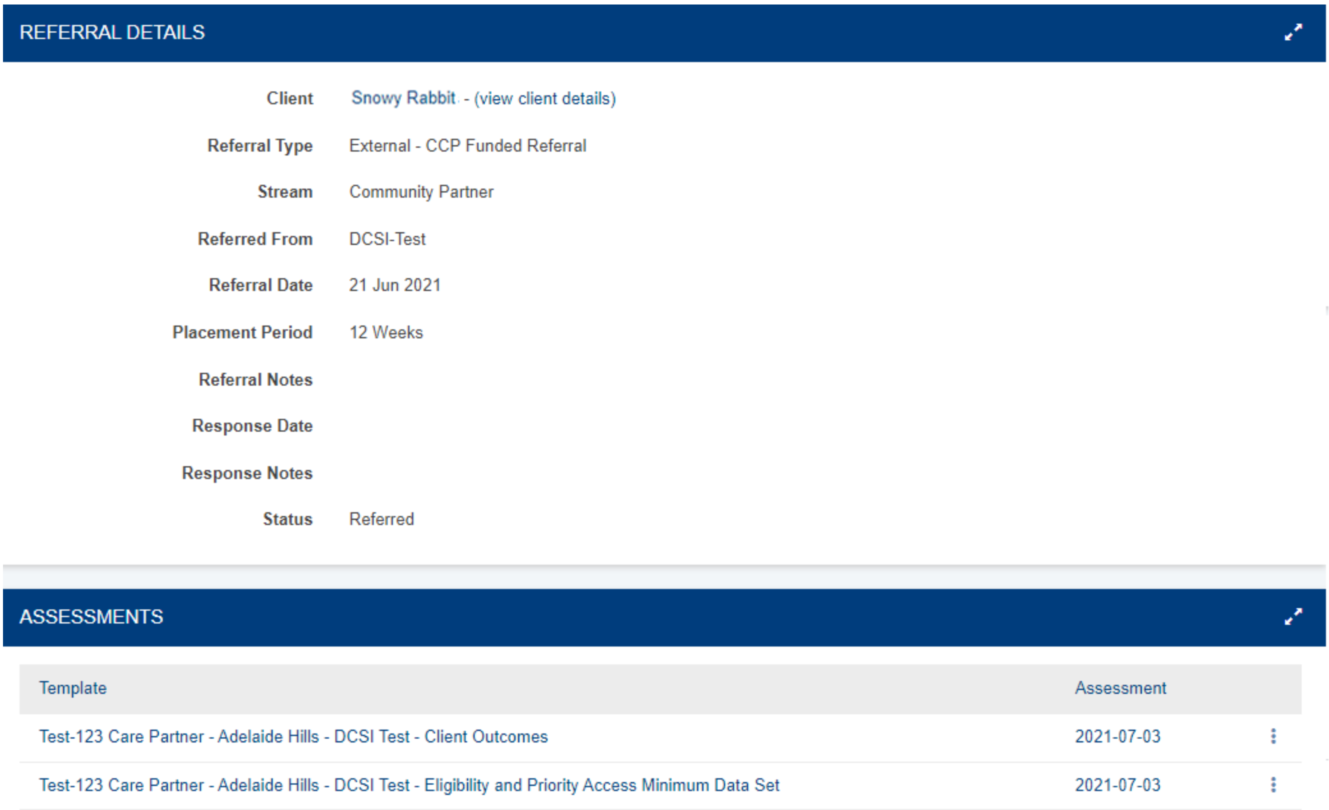
Client	Stream	Referral Type	Assigned User	Referred From	Referred To	Referral Date	Non Funded Referral	Funded Referral Destination	Response Date	Status
Goldie Goldfish	Financial Wellbeing Partner	External DHS Funded Referral	RP Coordinator	DCSI-Test	Uniting Country SA	07 September 2023	Other	Other	(not set)	Referred

   a. Note: you can sort the order of referrals by clicking on the following headers (in the blue ribbon):
      i. Stream
      ii. Referral Type
      iii. Referred From
      iv. Referred To
      v. Referral Date
3. New incoming referrals will be denoted by "(unresolved)" next to the client name:



   a. The Status will say "Referred"

4. To view a referral, click on the client name



   a. To view client details (e.g., demographics) click "view client details"
   b. To view the attached assessments, click the blue template name down the bottom

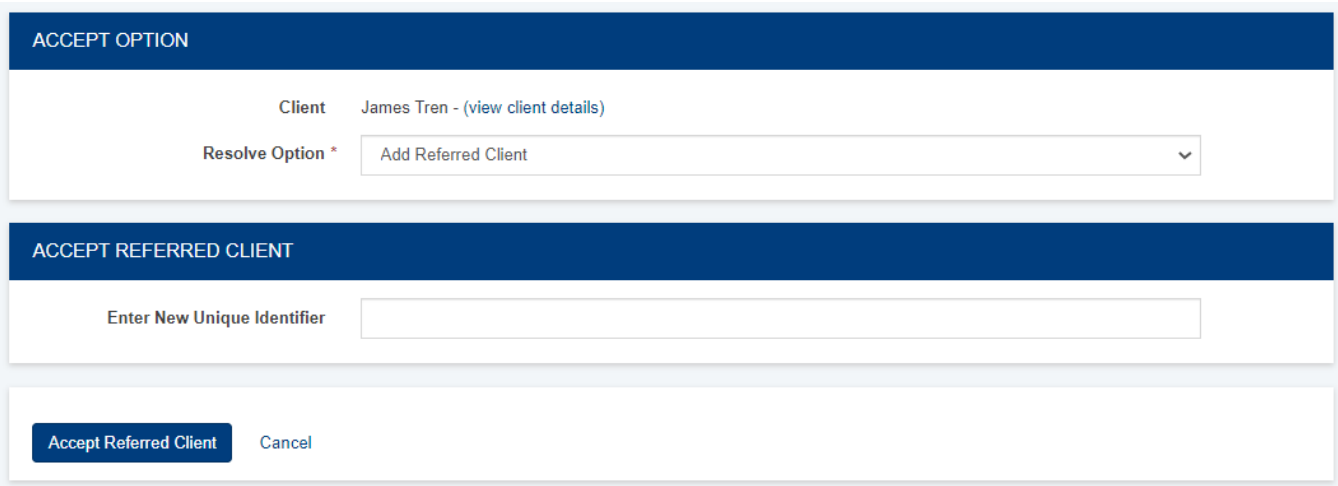
5. At the top of the referral are three buttons:

   a. Edit – click this to add **Response Notes**. For example, this may be particularly useful if you are going to reject the referral and wish to provide a reason why.
   b. Reject – to reject the referral. If you reject a referral, you'll lose access to the client information within it. The client will no longer have "(unresolved)" next to their name. The status of the referral will change from "Referred" to "Rejected".
   c. Accept – to accept the client for service delivery.
      i. This automatically adds the client to the "Clients" section of R2D2 and creates a placement that is in "waitlist" status.
      ii. The client will no longer have "(unresolved)" next to their name.
      iii. The status of the referral will change from "Referred" to "Accepted".

Note: If a client is referred to you and they have either the same Unique ID as an existing client of yours, OR they have been flagged as a duplicate by R2D2, the "Accept" button will instead say:

If the Client has the same Unique ID as an existing client, you can either:

1. Add Referred Client – only by entering a New Unique Identifier



2. Or, you can Link to Existing Client. The client will be added with the Unique Identifier of the Referring Organisation. You can update the client record in R2D2 by locating it in the "Clients" section and clicking edit, or by doing a Bulk Client Import as per the duplicate handling rules for bulk client importing.

Placements - *certain Programs only*

Note: Placements are only applicable within the Community Connections Program, Financial Wellbeing Program, and Young Carer Support Services.

A **placement** is automatically created in R2D2 anytime a Referral is accepted. This can either be when:

- An **internal referral** is submitted (and therefore automatically accepted)
- You **accept a referral that has come from another DHS funded provider.**

Upon creation, placements are **automatically waitlisted** as we are aware that for various reasons, service delivery may not be able to happen immediately.

Viewing and Editing Placements:

1. You need to be logged in to R2D2 as a "Referral & Placement Coordinator"
2. Click on Placements
3. The Placements display will look like:

Client	Stream	Assigned User	Schedule	Placement Type	Duration	Acceptance Date	Start Date	Expiry Date	Closure Date	Status
Goldie Goldfish	Community Partner	(not set)	(not set)	(not set)	(not set)	15 September 2023	(not set)	(not set)	(not set)	Wait-listed

4. To edit the placement, click on the client name
5. Then click the blue "Edit" button
    a. You will need to provide
        i. The Schedule (i.e. contract) that the service will be delivered under
        ii. The Service Region – i.e. where services are being delivered for this client
        iii. Placement Type: select Long-Term for all placements except for cases of Emergency Financial Assistance in which case select Short-Term.
        iv. Placement Start Date
    b. The rest of the information will populate automatically
6. When the placement's Start Date is reached, the status of the placement will change from "Wait-listed" to "In Progress"

a. You can edit the fields mentioned above as many times as you like whilst the placement is "Wait-listed"

b. Once the placement is "In Progress" you **will lose the ability** to edit the start date (but you can still edit the other fields)

7. To Close the placement, you need to attach[3] the required Assessments:

    i. **When attaching an assessment to a Placement, the Assessment must have a date no earlier than 90 days prior to the Placement expiry date.**

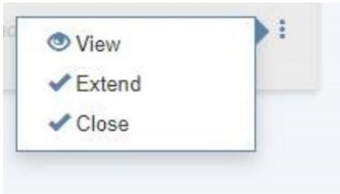
8. Then click the red "Close" button – the status will change to Closed

Extending Long-term Placements

If not already closed, when the placement hits the "expiry date" (12 weeks after the placement start date), the placement status will change to "Expired".

If more time is required, you can extend the Placement by:

1. Hovering your mouse over the three stacked dots at the end of the row
2. Clicking "Extend" from the pop-up menu (depicted below)



3. Your placement will have another 12 weeks applied to the previous extension date. You can close the placement any time before this date, after which it will expire.
4. A formal approval process is not required, but placement extensions will be monitored by the contract management team.

Short Term Placements – *Only applicable to FWP*

Unlike Long Term Placements, Short Term Placements are reserved specifically for EFA service delivery and require you to attach an EFA related assessment on closure. Short Term placements cannot be extended as they are instantaneous by design.

Note: you can create multiple referrals and placements for the same client on the same day, if the client requires more than one type of service. You will need to attach the required assessments to each referral, however you do not need to complete the same assessment more than once, as you can attach a single completed assessment to multiple referrals.

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[3] Attaching assessments to placements occurs the same way as you attach assessments to referrals. Assessments can be completed via direct entry or bulk import.

Referral and Placement Notifications

<u>Note: This section is only applicable to organisations within streams which use Referrals and Placements within R2D2.</u>

Email notifications can be setup for each Schedule to trigger an email to a designated address each time:

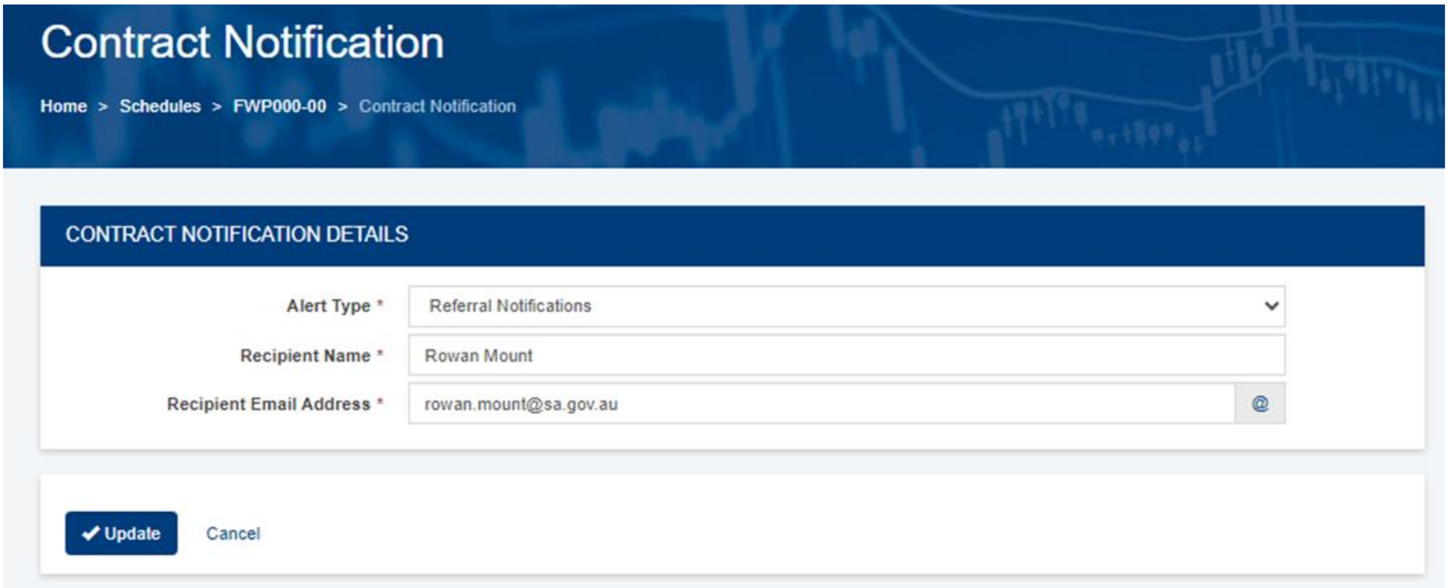
A **Referral** is:

- Created
- Accepted
- Rejected

A **Placement** is:

- Created
- Commenced
- Extended
- Expired

This can be setup by any user who is a Referral and Placement Coordinator by going to Schedules, selecting a Schedule, then clicking on the hamburger icon ☰ then **Add Schedule Notification**.



This will bring up the screen shown above, where you need to select the **Alert Type** (Referral or Placement – and yes, you can set up one of each), then enter the **Recipient Name** (this is just the name of the person to receive the email notification), and their **Email Address** (this can be an individual or shared mailbox). Finally click **Update**.

Below is an example of a Placement Notification Email for a new placement. If you've set up email notifications but aren't receiving them check your junk or spam folder and ask your IT department to add **@communityci.com.au** as a trusted domain.

New placement created

CommunityCI <noreply@communityci.com.au>
To DHS:Community Services Data

Reply | Reply All | Forwarc

Thu 16/

This sender noreply@communityci.com.au is from outside your organization.

You don't often get email from noreply@communityci.com.au. Learn why this is important

Dear Rowan Mount,

This placement is now waitlisted.

Please click the link below to view the placement detail online. Please update the placement start date when appropriate.

[VIEW PLACEMENT ONLINE]

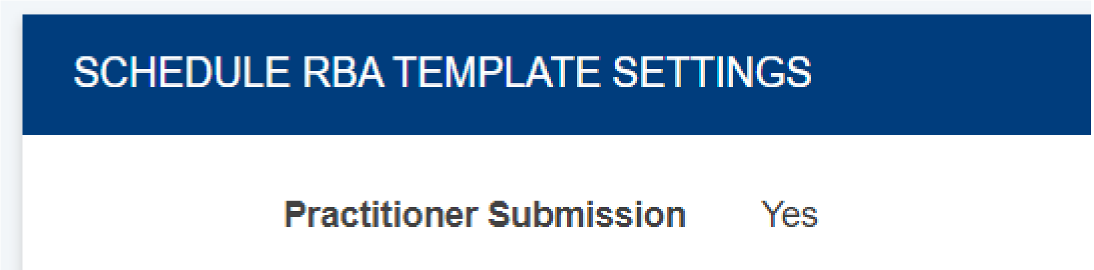
Regards,

R2D2 Referral & Placement System

Please note, this email is automatically generated by the R2D2 Referral & Placement System. Please do not reply to this email.

Managing Submissions

A submission is the periodic report that you submit to DHS. Not all templates require Submissions. You can check which templates you need to complete a submission for by going to Schedules then clicking on the template name and looking under Schedule RBA Template Settings. If Practitioner Submissions equals Yes then a Submission is required for this template.

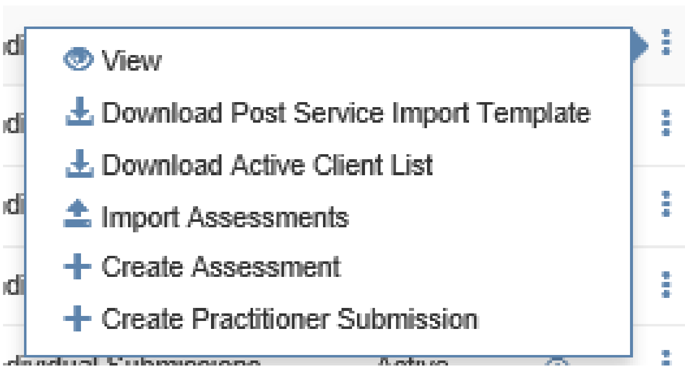


In some instances, you may have multiple Schedule RBA templates in a schedule – for example, if you report on client outcomes and collaboration outcomes.

Whether you are an individual or aggregate reporter will determine how data gets entered into a submission. This will be explained below.

Creating Submissions

1. Click on the Home button
2. On the Home screen, click Schedules – and then click on the appropriate Schedule (the schedule reference acts like a hyperlink/button)
3. Locate the Schedule RBA template that you want to create the submission for (make sure the Start and End date refer to the relevant reporting period)
4. Hover your mouse over the three stacked dots at the end of the row which will bring up a pop-up menu (see below) and click “Create Practitioner Submission”:



Completing Submissions

1. The first section to complete on a Submission is the "Participation and Assessments"
    a. Number of **new participants** active in this period: this is the total number of clients new to the service who have been active in the 6 month reporting period
    b. Number of **returning/continuing participants** active in this period: this is the total number of clients returning to the service or continuing in the service from the previous reporting period.
        i. Continuing clients are clients who were receiving services in the previous reporting period, did not exit the service and have received services in the current reporting period.
        ii. Returning clients are clients who have received services in any previous reporting period (under the current service agreement

            exited the service previously, and who have returned to receive services in the current reporting period.
        iii. Note: If you cannot discern whether a client is new or returning, count them as new – and then put in place mechanisms for tracking this for the next reporting period.
    c. **Accumulated total**: total number of unique people in your program to date – this will be calculated automatically.
        i. For the first reporting period the accumulated total is the sum of the new and returning participant counts.
        ii. In subsequent periods it is the sum of the current period's new participant count and the previous period's accumulated total.
    d. **Number of unique participants assessed:**
        i. If you are an individual reporter, this will be calculated automatically based on the number of participants you have completed at least one Pre-service or one Post-service (or both) assessment for
        ii. If you are an aggregate reporter, you need to enter the number of clients that you have collected RBA data for.

iii. Note: the number of unique participants assessed should be smaller than the sum of the number of new and returning participants. This is a logic rule because it doesn't make sense to assess more clients than were active in the period.

iv. An illustrative example:

You are a service with 12 participants during a reporting period. For:

10 of your participants you complete one Pre-service assessment and two Post-service assessments

1 participant , you just have the opportunity to complete one Pre-service assessment for them (i.e. NO Post-service assessment)

1 participant you do not complete any assessments

This means that you have completed 11 Pre-service assessments and 20 Post-service assessments - and that there are 11 unique participants assessed.

The denominator for the calculation of any percentages for Pre-service assessments will be 11 (as 11 participants had a Pre-service assessment completed for them)

However, the denominator for the calculation of any percentages for Post-service assessments will be 10 (as only 10 participants had a Post-service assessment completed and only the most recent Post-service assessment will be counted towards your submission).

Note: If you are an aggregate reporter, you will just be entering Post-service data. Therefore, the number of unique participants assessed will become the denominator for any # and % questions on your submission.

2. Measures and the Story Behind the Data
   a. If you are an aggregate reporter, you will need to enter all summary figures and story behind the data here – including the demographics of the participants that you assessed
   b. If you are an individual reporter, the majority of the data will have been extracted from assessments – but you will still need to answer the questions that appear on submission only, and the story behind the data / any additional improvements section.
3. **Save your submission regularly** – you can also save your submission as a draft and return to it later for additional editing.
   a. When you return to the Submissions section of R2D2 – it will appear in the list in "draft" form – you will not be able to "Create" it again

A Note on R2D2's "Time Out" Function

R2D2 has a timer function where it will log you out if it registers An extended period of inactivity (approx. 60 minutes).

Therefore, if you begin working on your submission but do not save within the 60 minutes there is the potential that you will be logged off, losing the data you have entered in the process.

To address this issue, make sure you save regularly.

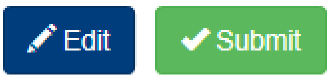
Another strategy to consider is to type your written responses in a word document and copy into your submission.

Viewing and Editing Submissions

These steps assume you have already created the draft submission. If you have not, please see the sections above Creating Submissions and Completing Submissions first.

1. From the home menu, click Submissions
2. You can search for the submission using the "Search" and the filters
3. In the below screenshot, we can see a Draft Submission

4. Click on the name to view the data
5. If you wish to edit, you need to select the blue "Edit" button



6. You can now pick-up where you left off with the draft submission to make changes and enter any missing data.

Submitting Submissions

Once you have entered all the necessary data into your draft Submission and you have checked to ensure it is accurate you then need to *Submit* the submission which sends the anonymised data through to DHS. **Make sure you submit your submission before the Due Date of the reporting period.**

1. Open the submission for the reporting period you need to Submit by following steps 1 to 4 in the section above "Viewing and Editing Submissions", then click the green "Submit" button

2. R2D2 will instruct you to "Please scroll down and confirm Submission"
3. Scroll to the bottom of the page (checking over your Submission for any errors as you do this)
   i. If you find an error – click the blue "Edit" button and fix the error
   ii. If there are no errors, tick the box at the bottom of the page confirming you want to submit, then click the Blue submit button
4. You will then get a banner notification in R2D2 confirming that your submission has been submitted.

Notes:

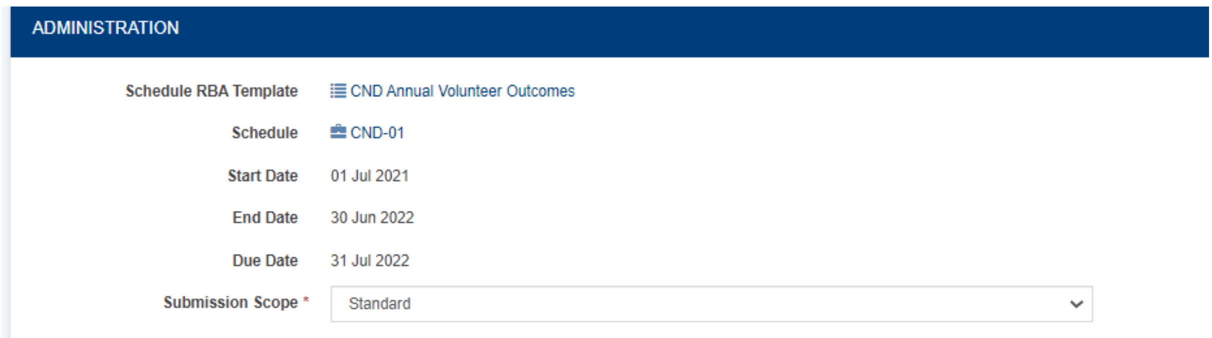
- ✓ DHS **cannot** see the content of your submission until you submit
- ✓ DHS does **not** receive identified client information – just de-identified data

Submitting Submissions with a 0-participant count

If you are an **Individual Reporter** and haven't completed any assessments, the assessed count will display as 0 when you create the submission. All questions that relate to assessments will be hidden, but certain questions that apply to an Organisation will still appear and require an answer (for example, the New and Returning Participant count).

If you are an **Aggregate Reporter** you need to:

1. Make sure you have clicked "Edit" on the submission.
2. change the **Submission Scope** from "Standard" (see screenshot below") to "No Assessed Participants".



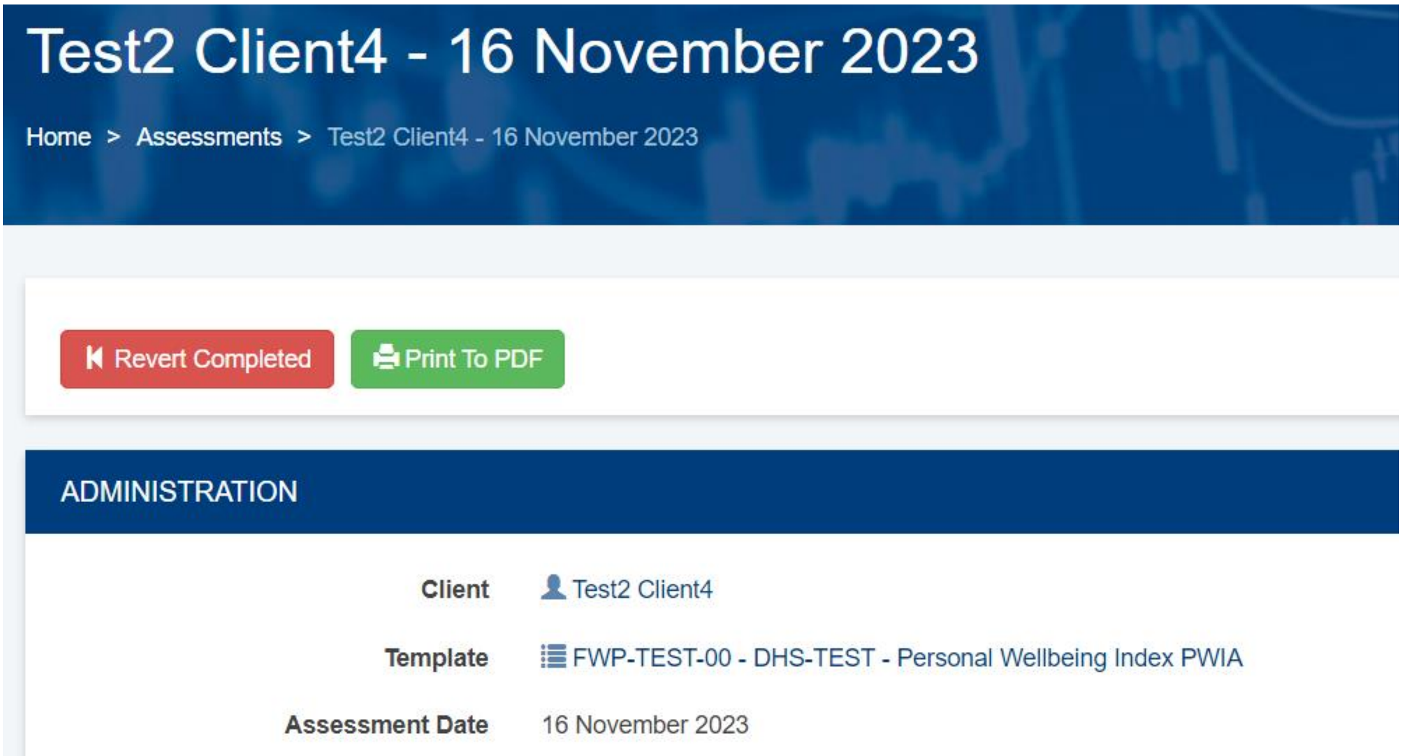
3. This will hide irrelevant questions that relate to the assessed participant count and allow you to submit with a 0 assessed count. You will still need to answer some questions that apply to an organisation.

Viewing Historical Submissions

1. From the home menu, click Submissions
2. You can search for the submission using the "Search" and the filters
3. The status will say "submitted" for historical submissions.
4. Click on the submission that you want to view, in order to look at the data you submitted. They will be locked from editing to preserve data integrity
5. You can print your submissions just like you can print a website (by right-clicking on the page then Print).

Saving and Printing to PDF

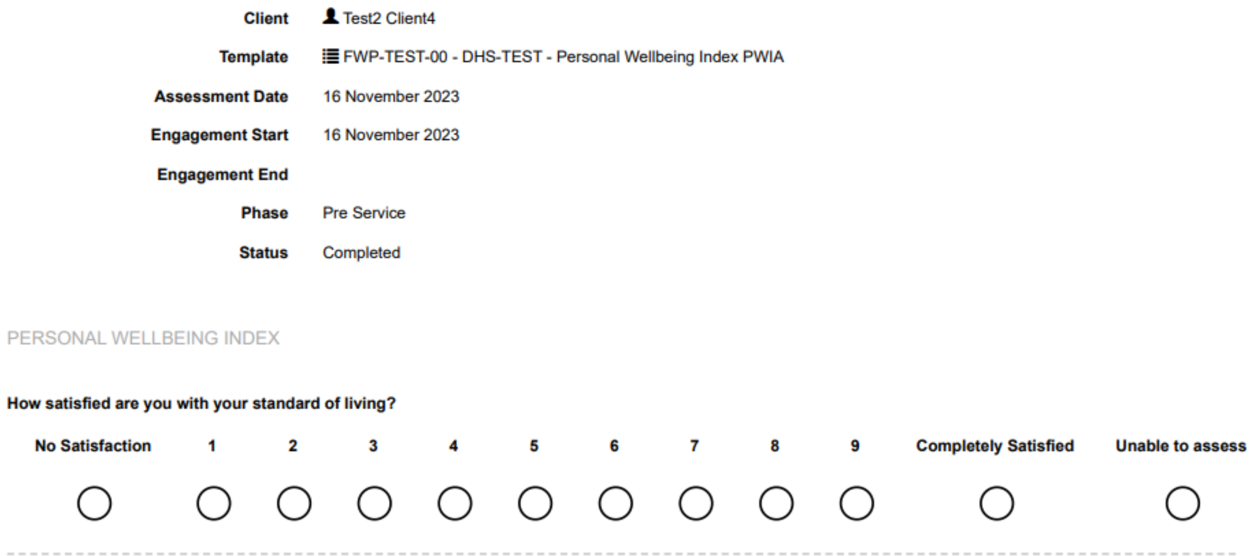
You can save or print pages from R2D2, such as Assessments or Submissions, as PDFs using the browsers Edge or Chrome. Some pages within R2D2 will have a built-in **Print To PDF** button :



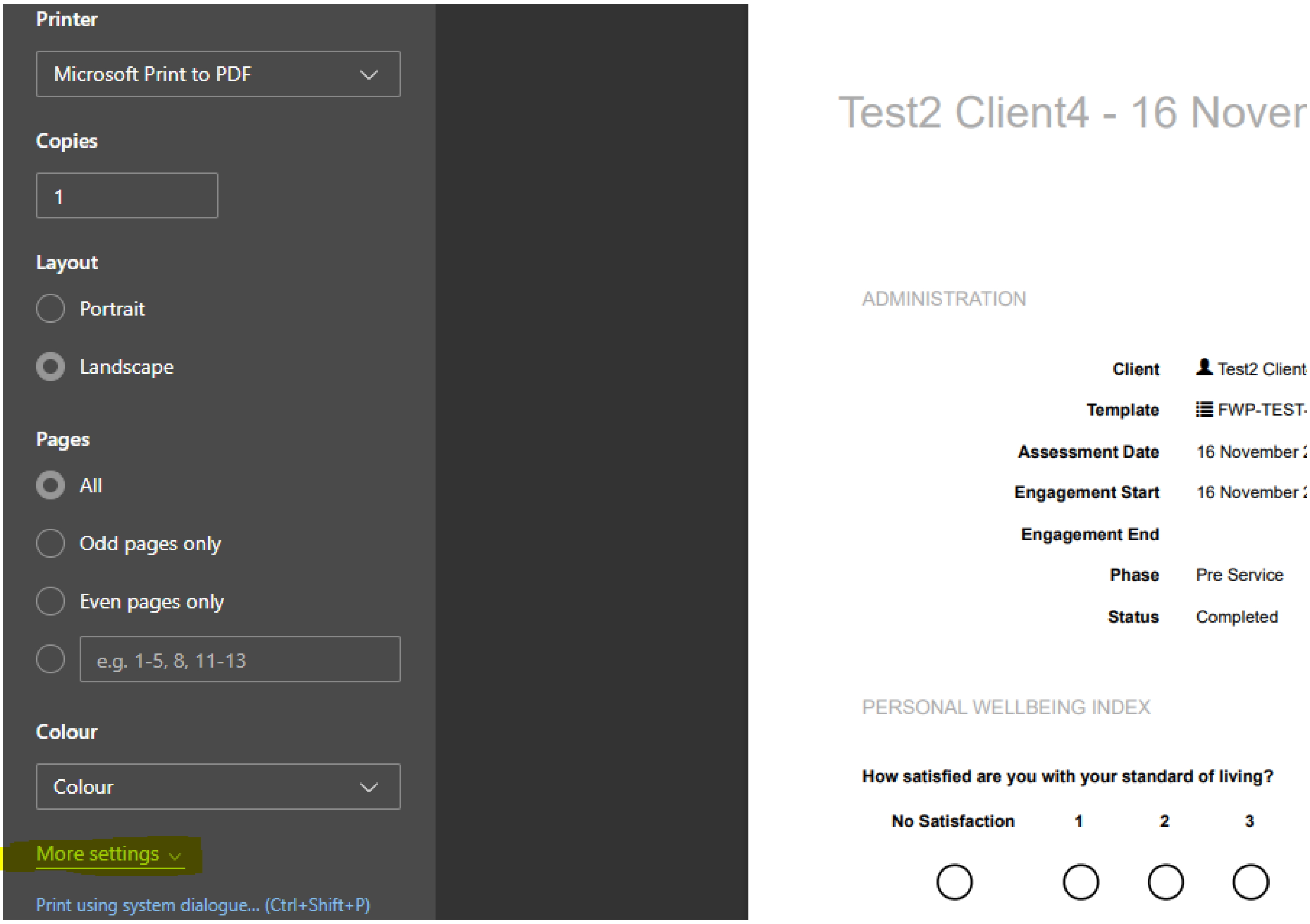
Other pages such as Submissions may not have a Print To PDF button. If you wish to print these pages simply **right-click** a blank area on the page then click **Print**.

A Note on Print to PDF

When trying to save or print as a PDF, you may find that the answers to the questions within the document appear blank as shown below:



In order to fix this simply click on **More Settings** in the printing pane shown below:



Then tick the box alongside **Background graphics**. The answers should no longer appear blank.

This setting should remain applied in your browser (even after you close and reopen it). So you shouldn't need to apply this setting the next time you Print to PDF.

Frequently Asked Questions (FAQs)

I added a duplicate client by mistake

This only applies to Individual Reporters.

Deactivate the duplicate as soon as you realize to prevent accidentally assessing them. Where possible, deactivate the client who doesn't have an assessment against it.

I started assessing a client against the wrong template

This only applies to Individual Reporters.

Assessments left in "Draft" are **NOT** counted towards the submission – so whilst you cannot delete an assessment, you can leave it in "Draft" and rest assured it will not affect the data you submit to DHS.

I assessed the wrong client by mistake

This only applies to Individual Reporters.

Assessments left in "Draft" are **NOT** counted towards the submission – so whilst you cannot delete an assessment, you can leave it in "Draft" and rest assured it will not affect the data you submit to DHS.

Why are identically named templates appearing?

DHS provides an additional month after the reporting period ends, so that there is sufficient time to prepare submissions. For example, for the Jan 01 – June 30 period, reports are not due until July 31. Therefore, the Jan 01 – June 30 template will remain active for the month of July, but the July 01 – December 31 template(s) will also be active. Thus, it is important to pay attention to the dates of the template when creating assessments and/or submissions. See page XX for more explanation.

I have forgotten my password

Remember there is a "Reset it" link on the log-in page of R2D2 – see pg. 4 for details. A colleague with Administrator level access can also edit your account from the "User Accounts" section. DHS cannot reset your password.

Are clients' details protected?

R2D2 is specifically designed as a secure and well governed data platform for service providers to enter participant information. The R2D2 platform is hosted in the Amazon Web Services (AWS)data centre in Sydney, Australia which provides network level protection. Amazon AWS data centre utilises cloud infrastructure technology which is backed by a set of cloud security tools, with 230 security, compliance and governance services and features.

Access to the R2D2 platform is controlled through unique role-based login. Logins are managed by each organisation, so that they have control over who has access to the information entered. The R2D2 database is partitioned to ensure that DHS never has access to identified participant data. DHS access to the system is controlled through unique role-based login and governed by access protocols and guidelines. Data encryption applies to participant information and some submission information to ensure private confidential information including identifiers and contact information is not compromised.

Why am I getting a Validation Error?

Regardless of whether you are an individual or aggregate reporter, **the sum of your "new" and "returning" participant count must be equal to or greater than the "unique participants assessed" count.** This is because logically, you cannot assess more unique clients than were active in the period (i.e. *you can only assess those who were active in the period*). Validation errors are typically caused when these counts do not add up, so you may need to update the numbers of the New or Returning participants to ensure that they don't total more than the Number of Unique Participants.

Further, if you are an aggregate reporter, it is important to understand that the unique participants assessed count becomes the denominator for any question that calculates a % based on the numbers you enter. For example, if this is the unique participant count:

PARTICIPATION AND ASSESSMENTS

Number of new participants active in this period

100

Number of returning participants active in this period

50

Accumulated total

150

Number of unique participants assessed in this period

49

Then we would expect the responses to a question such as the one below, to add up to 49 (the unique participants assessed count) – which it does. This means the % sums to 100% - which it should.

HOW WELL ARE WE DOING IT

Is the participant from the priority group?

	Post Service	%
Yes	27	55%
No	22	45%
Not Assessed / Blank	0	0%

Expectations on Data Collection

The outcomes data you collect can and should be used to drive continuous quality improvement.

In order to do this, accurate data is required.

We don't expect

- 100% rates for the performance measures

We do expect

- Realistic rates
- At 80% assessment rate – meaning at least one assessment is completed for 80% of your active clients (particularly if you deliver case management / one-on-one services)
- Explanations for trends in the data
- Descriptions of how data is collected
- A commitment to continuous improvement

This can be emphasised in your performance reviews and in the "Story Behind the Data" sections, explanation below:

Story Behind the Data

The Story Behind the Data sections appear on certain templates to provide real opportunities to contextualise reported figures and trends in the data for your specific outcomes measures. For example, how does this reporting period compare to previous reporting periods – and what are the reasons for any change (or lack thereof?)

It is also a good opportunity to describe how this data is being measured. This information needs to be concisely communicated in a paragraph or two as there is a 2000-character limit (including spaces) when answering these questions in R2D2.

Glossary

Accumulated Total

This is calculated by R2D2. It represents the total number of participants that have accessed the program or service since the beginning of your contract [or the beginning of a new reporting template] with DHS.

Aggregate Submission

A submission requiring the entry of summary figures against your reporting measures. You do NOT need to add clients or complete assessments for an Aggregate Submission. Instead you will simply answer questions about “*How many clients reported that… XYZ?*”

Assessment

Here, an assessment is referring specifically to the set of questions on R2D2 that relate to an individual. You are expected to answer using the data you have collected via survey, practice tool or via another valid process. Completing an assessment on R2D2 is only a prerequisite for producing an Individual Submission – though you still will likely need to collect data for your clients in your own system for an aggregate submission (depending on the reporting requirements).

Individual Submission

A submission which requires you to first add a client and complete an assessment for that client as part of the submission process.

When you create your submission after adding clients and completing assessments, data from the assessments will automatically appear. You will have the opportunity to enter additional summary figures (in some instances) and written information (for example, Story Behind the Data).

Number of new participants active in this period

This is entered at the point of submission, under the heading “Participation and Assessments.”

Number of returning (or continuing) participants active in this period

This is the total number of participants returning to the service (or continuing in the service).

Continuing participants are those participants who:

- were receiving service in the previous reporting period; AND,
- did not exit the service and thus are still active in the service currently.

Returning Participants are:

- Participants who have received services in any previous reporting period (under the current service agreement),
- exited the service previously; AND
- have returned to the service in the current reporting period.

Number of unique participants assessed in this period

This is the total number of unique participants for whom you have collected data. Since this has caused confusion in the past, please read this example for further clarity.

If there are 10 participants, and you assess them twice each – there are 20 *assessments*. **However, the number of unique participants assessed is still 10.**

"Participant" or "Client"

A participant is 1) an individual who participates in the program, and 2) for whom the program is intended to produce an outcome which will be recorded against an RBA measure.

This differs from casual participants for whom you are recording attendance data but not outcome data against your RBA program measures.

Post-service assessment

Post-service assessments are very similar to pre-service assessments, except that – as the name implies – they are to be completed *after* the client has been receiving service for some time – generally once per reporting period in which the client is still active. They are to be used for clients who are still engaged with the service, and for clients who have completed and exited the service. Post-service assessments are crucial because we can then compare them to the pre-service assessments to capture measurable changes (e.g. improvements) over the course of service delivery.

Pre-service assessment

A pre-service assessment should be completed for a client as close to the start of service as possible. This is because the pre-service assessment acts as a baseline against which we can then track outcomes (in relation to relevant post-service assessments) and it is assumed that if a client is still engaging, it is because they are still working towards achieving outcomes.

Question

A question used to collect data against an RBA measure, and can be one of several types e.g., Whole Number, Multi-select, Long Text, Calculated Field. Not all questions are mandatory (mandatory questions are marked with a red asterisk *). Assessments, templates, and submissions are all comprised of sets of questions, determined by the Minimum Dataset and your contract/s.

Schedule

A Schedule is an object in R2D2 which effectively represents a contract your organisation has with DHS which sets out your organisation, region, program, and which templates are required. Your organisation may have one or many schedules with differing properties. If you have multiple schedules, it is important that you select an assessment within the right schedule.

Schedule RBA template

Schedule specific template containing the questions you are required to answer, as negotiated for your contract. Some schedules may have multiple RBA templates (for example, client template containing RBA measures relating to clients, and collaboration template containing RBA measures relating to work with organisations).

Stream

Subset of funded program used to collect RBA data against (for example, , CSSP: Youth Support and Development)

Submission

A periodic report submitted by organisations to the funding body.

Summary figures

These are the numbers you enter at submission – it could be the number of clients that answer “yes” or “no” (or in some instances, there will be additional response options) against the RBA measures, it could also be responses to questions which require a whole number answer. Very often these are How Much measures – for example, “Number of referrals”.