# Recordbase 5.28: What's new

## Version 5.27 to 5.28

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# Recordbase 5.28 release notes

Wild Bamboo is proud to announce the release of Recordbase 5.28.

This release marks the long-awaited unveiling of our new activity screens! **These changes are quite significant. Make sure you read this update so you know what to expect before you upgrade.**

In addition to the big activity changes, we've tweaked attachments, referrals and PRIMHD reviews, and have made the usual slew of bug fixes and minor enhancements. We're also ready to start demonstrating an early prototype of shared events. This is an upcoming feature that will allow sharing client details between Recordbase instances.

As with all Recordbase releases, this upgrade is free of charge. You will be upgraded automatically by the Wild Bamboo team, which will require a small out-of-hours outage. We'll give you plenty of notice in advance.

If you have any questions about this or any other Recordbase release, please contact our support team: support@wildbamboo.co.nz.

As always, thanks for being part of the Recordbase family!

Cheers,
The WildBamboo team

# What's new in Recordbase 5.28?


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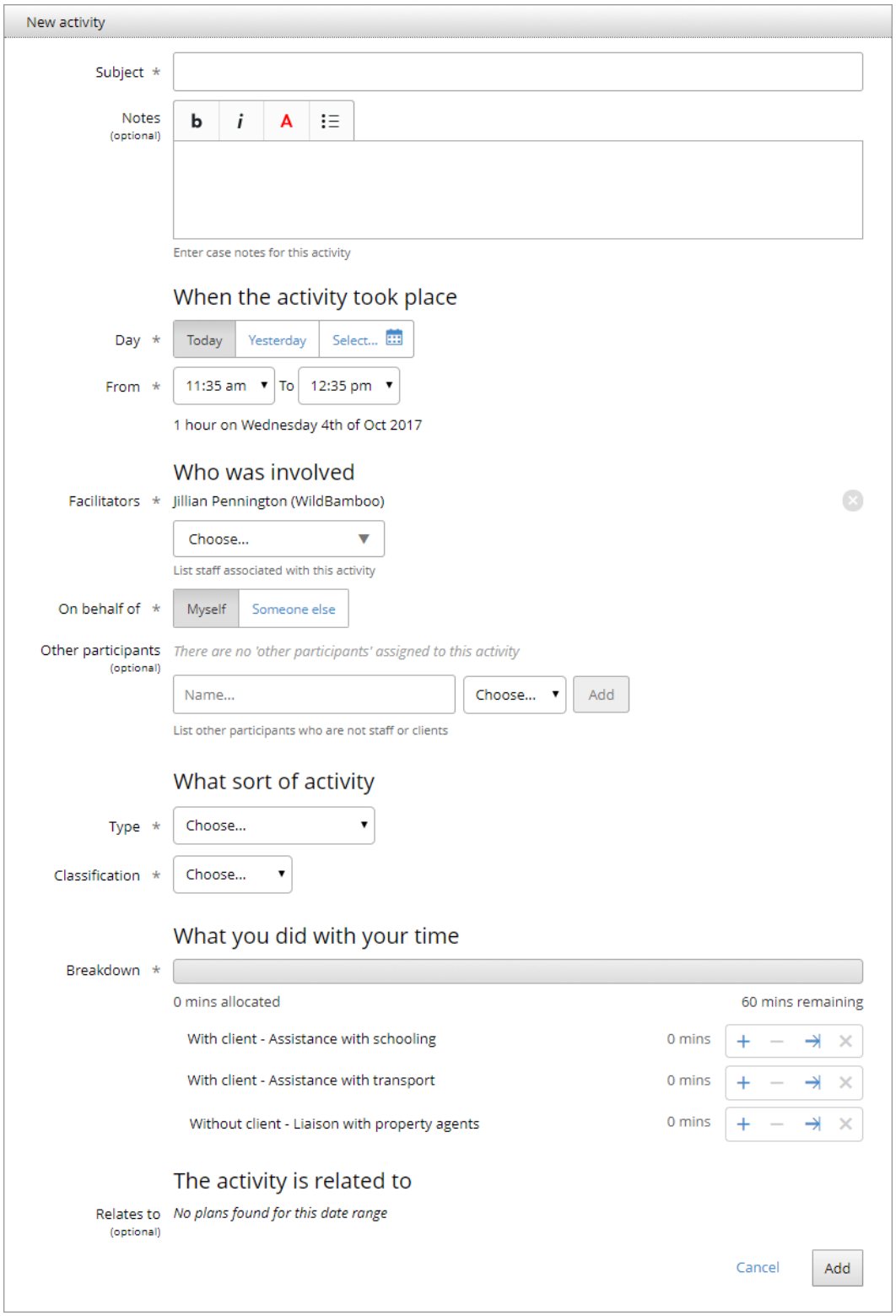
# Activities

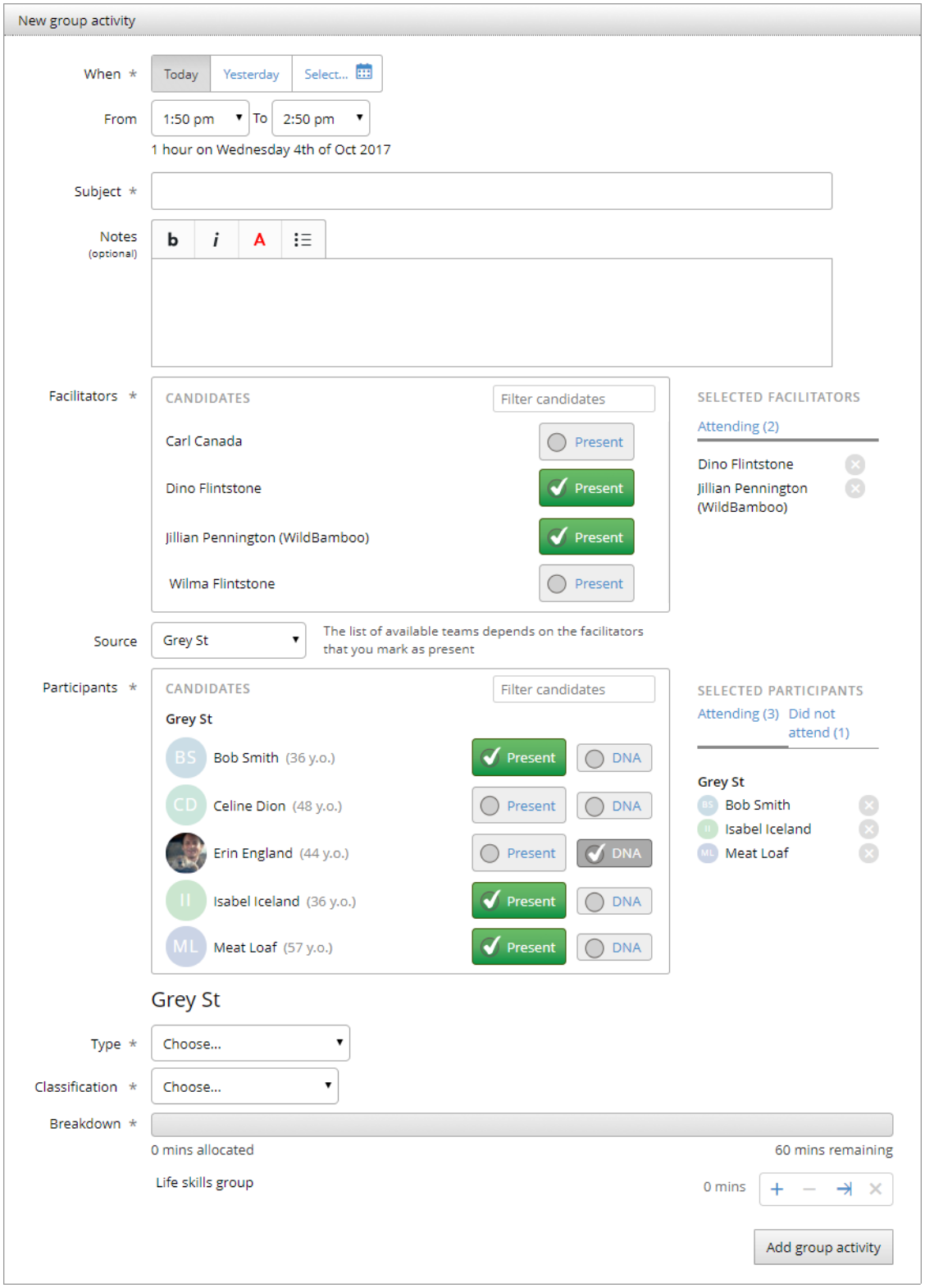
## Revamped activity screen

The noble activity is, in many ways, the fundamental data unit in Recordbase. We've given it quite an overhaul – we're proud to unveil the new activity screen:



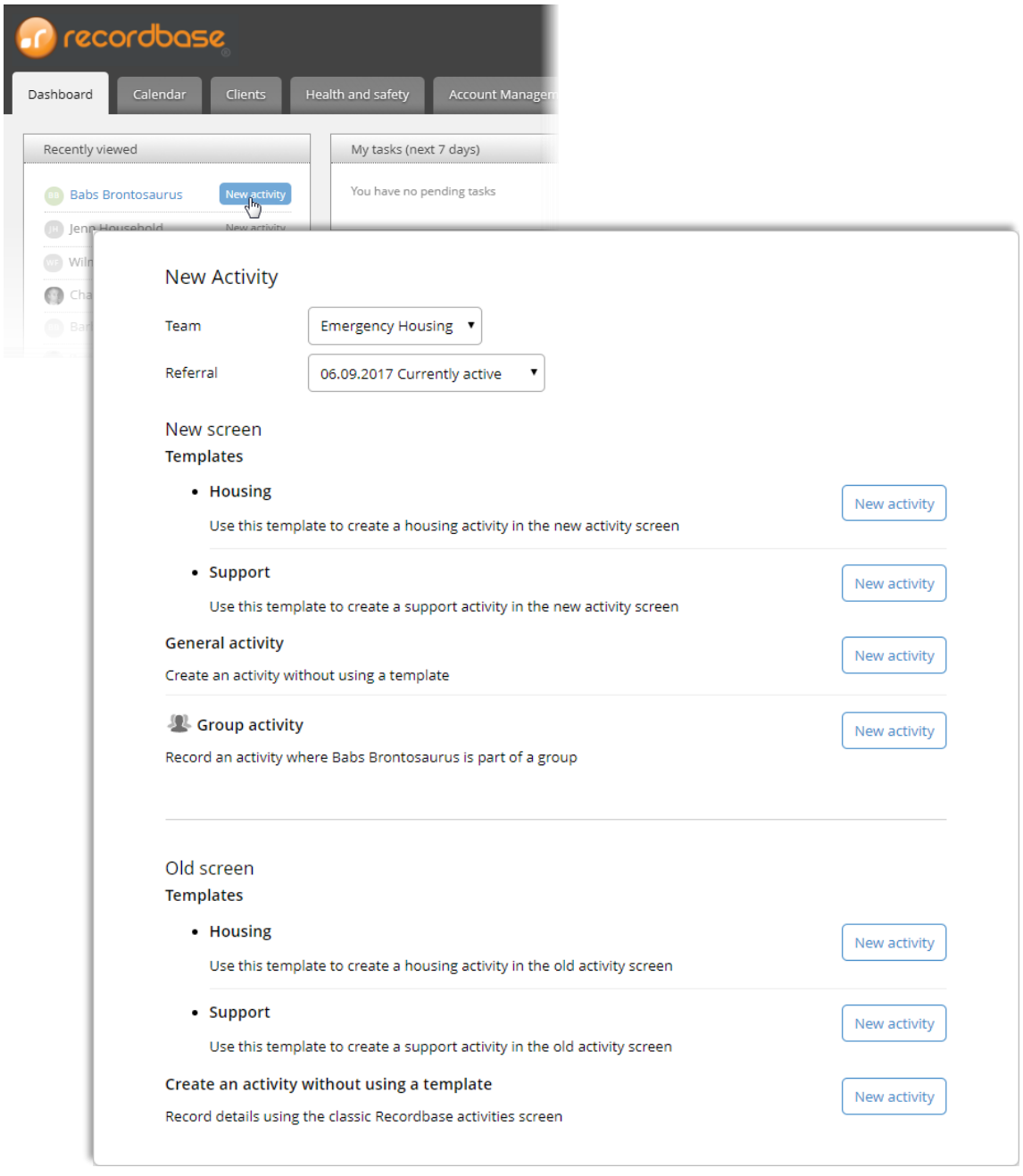
# Group activity screen

The group activity screen isn't new in 5.28, but it will be taking on a starring role, rather than the quiet understudy it played in the last few releases. If you haven't seen it, welcome to the Recordbase group activity screen:



# New initial screen when creating activities

It's not just the look of the activity screens that has changed. We've also made some big changes to Recordbase's behaviour when you create a new activity. As soon as you click New activity (whether from the dashboard, the client activities tab, a goal or an employment plan), Recordbase will deliver you to this new initial screen:




**The appearance of this screen depends on organisation-specific configuration (as described on the following page), so you may not see all the sections above in your Recordbase.**

To use this screen, first choose a team, then a referral. With this information, Recordbase will offer you a selection of valid activity types and templates. Click the "New activity" button that best suits your situation and away you go!

# How will these activity improvements help you?

These are big changes, we know – but here's why we're making them.

## Making decisions earlier means Recordbase can be smarter

Until now, you've made decisions within the activity about which team you are recording the activity against and the number of clients that attended the activity. However, these decisions are critical in determining which options are valid for an activity. For example, the type of support you provide in a group setting is probably quite different from the support delivered in individual sessions.

If Recordbase knows ahead of time that this activity was a group session, it can offer you smarter options within the activity itself. This makes data entry easier for staff and more reliable for managers.

## We need to teach Recordbase some things first

The new initial screen has been built to ask you these important questions up-front. The next step is teaching Recordbase which activity options it should offer users, based on their answers to the initial screen questions.

We'll work with you to identify which activity options are valid in groups versus individual settings for each of your services. We'll also need to transition your legacy activity templates into new quick activities. There's a fair bit of configuration work to be done, but we hope you'll be as excited as we are about the new potential for data collection!

## Please be patient with us during the transition

Although we've started ahead of time, it may still take us a little while to get group activities configured for everyone and to help migrate your legacy templates into new activities. Where possible, we'll get this configuration done before the release to make the transition seamless.

## The old screen is still there for you

If we're not able to get everything set up beforehand (this may be the case for those of you with more complex configurations), then we'll leave the old activity screen fully accessible after the upgrade. You'll find this under the heading "Old screen" when you scroll down to the second section of the initial screen.

Although we recommend using the new screen whenever possible, you will still need to use the old screen to record activities with multiple clients until we have configured group activities for you.

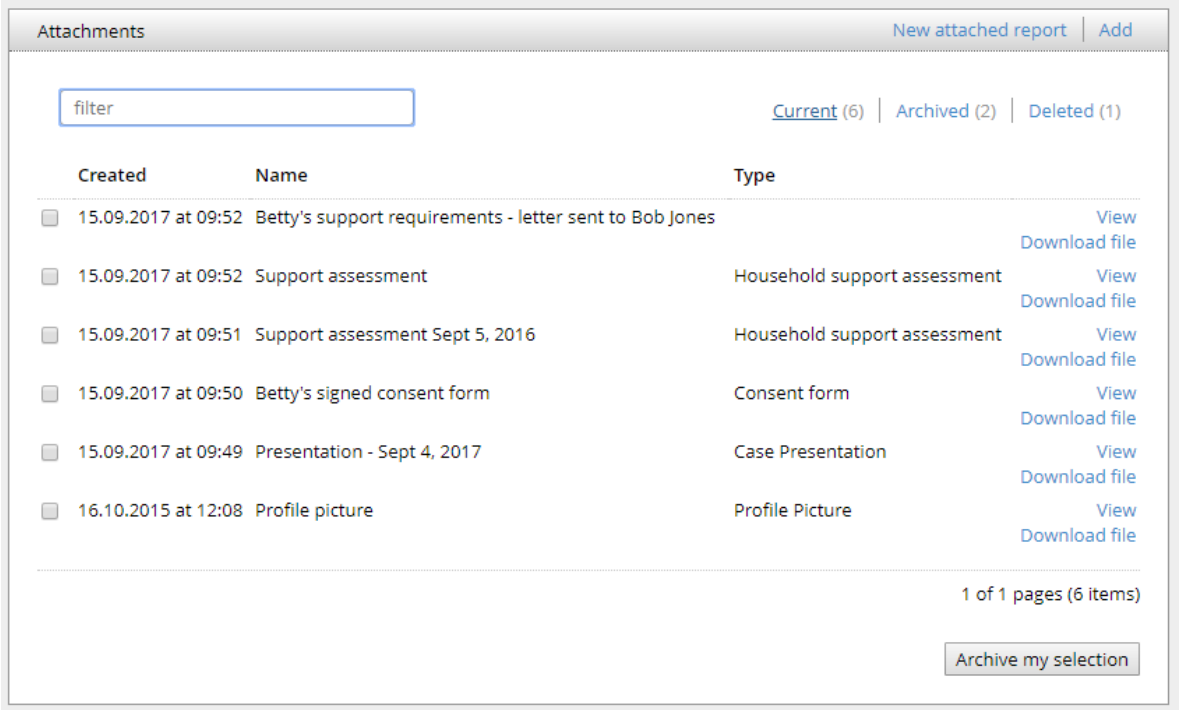
# What happens now?

We're working now on the initial configuration of your group activities. In the next few weeks, we'll be in touch to confirm our proposed setup for groups and to discuss your options for transitioning old activity templates into new.

# Attachments

## Easier searching, sorting and selecting

Many organisations have said they want a better way to organise the attachments they upload into Recordbase – we thought that was a great idea and have improved the attachment screen in both form and function:




Significant improvements include:

- dynamic search at the top left (which searches both attachment name and type)
- click-to-sort enabled for column headings (eg created, name, type)
- multi-select checkboxes to allow quick archiving of multiple files.

## Secure attachments to teams

While working on the main attachments screen, it also seemed like a good time to add some functionality that has been on our list for quite a while. You can now secure an attachment to a specific team so only users with access to that team can view the attachment.

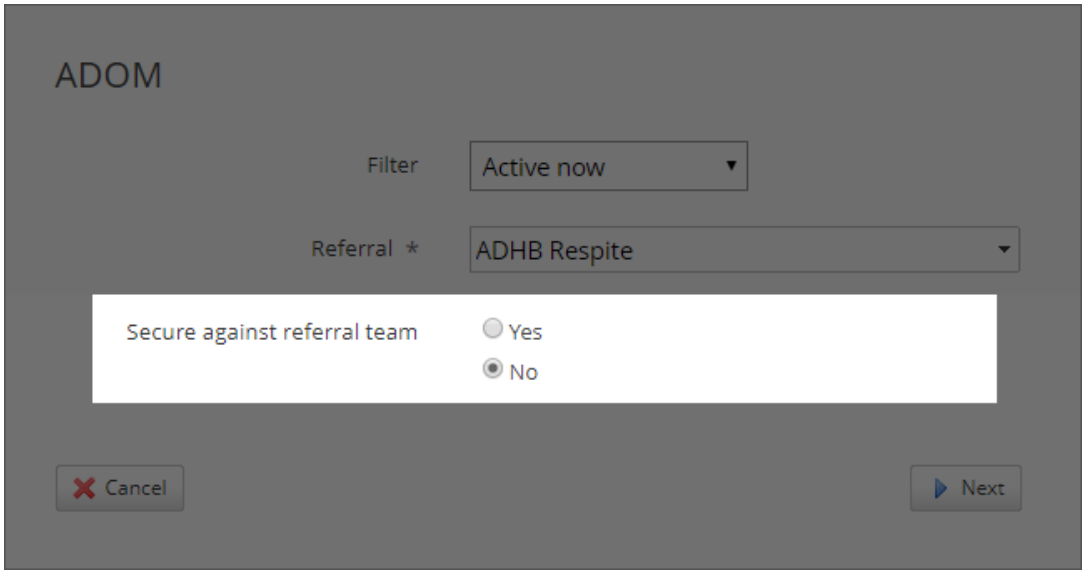
## Review your attachment types

If you use attachments, this may be a good time to look at the list of attachment types your organisation has available. Because there's no good 'generic' set of options here, the default list only has 'case presentation.' As with most things in Recordbase, this is easily configured to suit your business processes. Now that attachment types are more visible, let us know if you'd like us to add other options to your list – just drop us a line at support@wildbamboo.co.nz with the options you'd like set up.

# Outcome tools

## Secure outcome tool assessments to teams

In Recordbase 5.26, we added the ability to link outcome tools to a referral. This made a connection between an assessment and a referral but did not explicitly restrict access to that assessment. Based on your feedback, we've now added an additional option which appears only when referral linking is turned on. You can decide whether to secure the outcome tool assessment to the team of the linked referral:




## New outcome tool setting allows editing by anyone

Previously, outcome tool assessments have only been editable by the person who originally created them, to prevent non-clinical staff from modifying assessments conducted by clinical staff. However, we've heard from you that this isn't always appropriate.

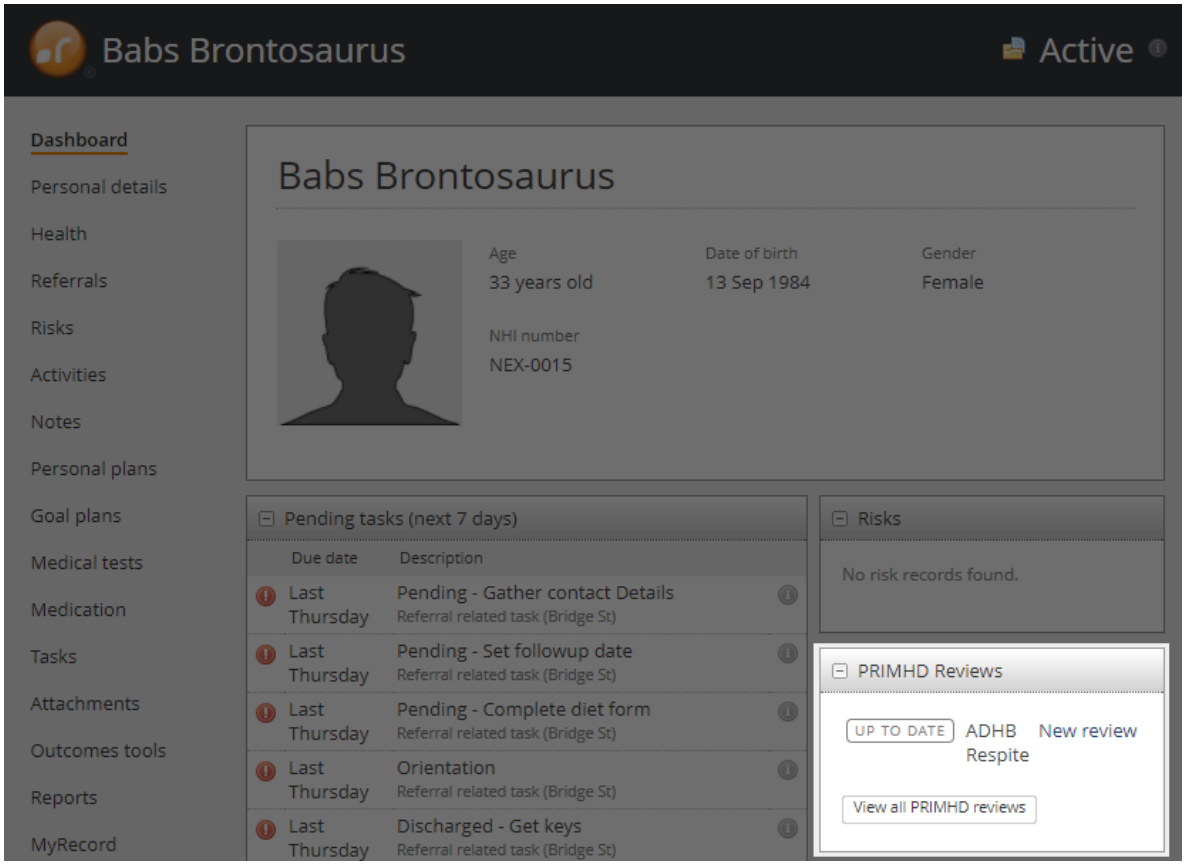
We can now specify whether a specific outcome tool should have editing restricted to the user who created the assessment, or whether any user with adequate permission should be allowed to edit an assessment.

If you use outcome tools and this sounds like an appropriate setting, then please get in touch with our support team at support@wildbamboo.co.nz. We'll need to know the names of each outcome tool for which you'd like the "Anyone can edit" setting enabled.

# PRIMHD reviews

## PRIMHD reviews now available to all services

Although we originally built the PRIMHD reviews widget according to the Ministry of Health's specification for PRIMHD-submitting teams, we think social outcomes information is quite valuable for all service types. We've removed the restrictions and granted access to the feature to all services in Recordbase. It's still named "PRIMHD reviews", so let us know if you'd like us to rename it in your environment.



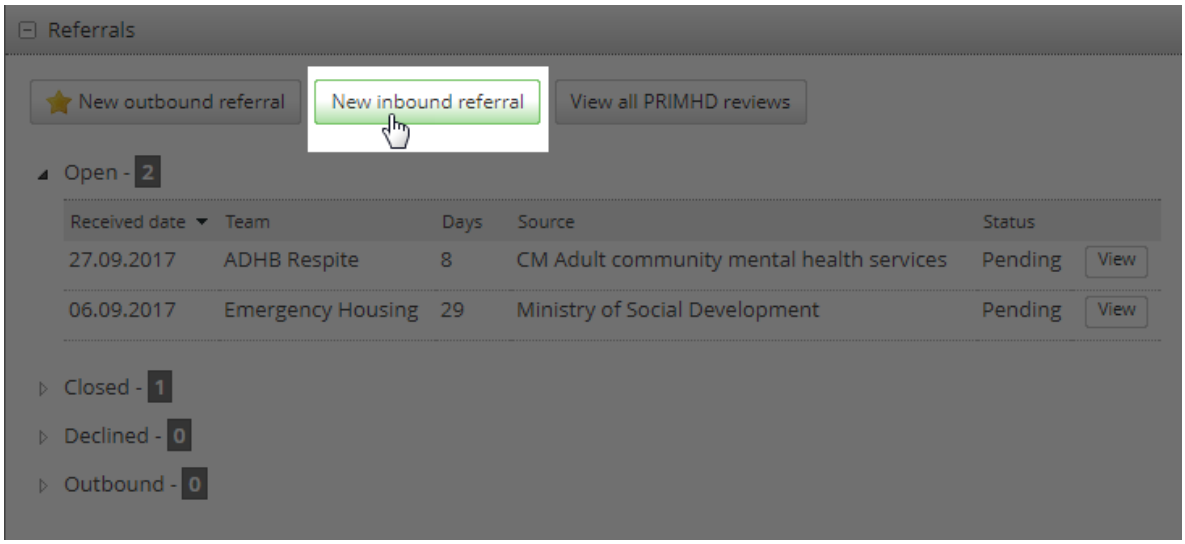

## New delete permission for PRIMHD reviews

While we were in the neighbourhood, we also fixed some usability issues and bugs, and added the ability to delete PRIMHD reviews. This ability is restricted to the "Referral administrator" permission (which is usually granted to superusers). Contact us to confirm which users in your organisation should see the new delete button.

# Referrals

## Create inbound referrals directly from client record

We've been working on a new and improved referral wizard too. While it's not ready for release yet, we have been able to make some improvements to the referral process. You can now create a new inbound referral from within the client record:

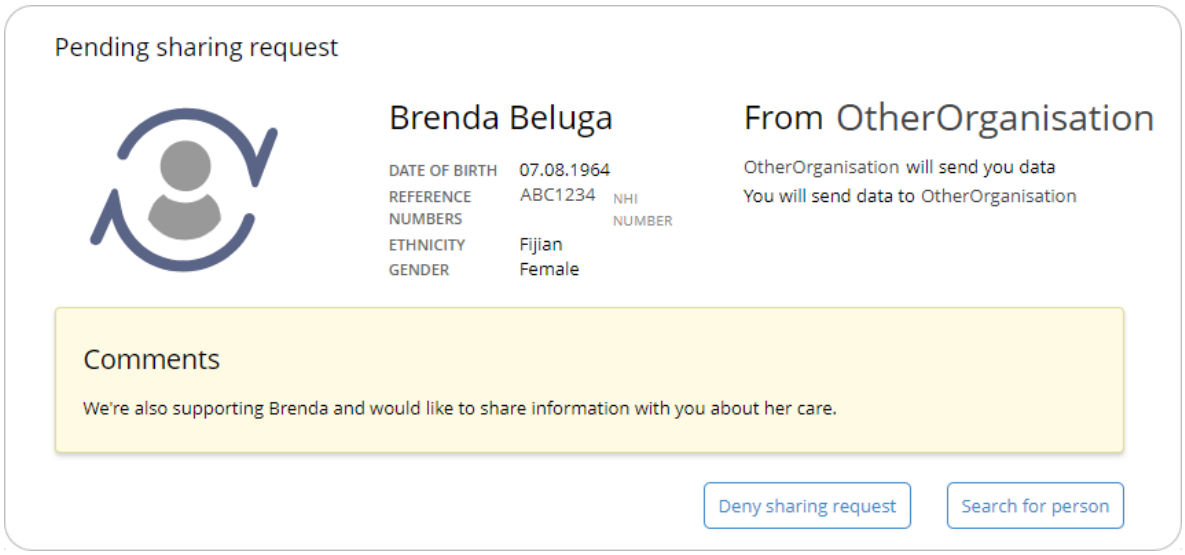


# Shared events

## Recordbase-to-Recordbase sharing is ready for demo

We have been working for some time now on a feature that will allow limited information about a client to be shared with another instance of Recordbase. We take privacy and consent very seriously, so this is not a feature that would ever be turned on without a fully-consented request from both sharing organisations.

Nonetheless, this release marks an exciting milestone in the development of this feature – we've reached a stage now where we're ready to begin demonstrating our working prototype.




It's still in its early stages, so we are very keen to get feedback on how useful you think it will be and what would need to be in place before it is deemed acceptable for use.

If this feature sounds like something that would be beneficial to your organisation, please contact our support team at support@wildbamboo.co.nz. We'll schedule a time to run you through the current prototype in some test environments, to see what you think.

# Appendix I – Minor enhancements

In addition to the big-ticket items, Recordbase 5.28 also includes the following minor enhancements and new items:

| | |
|---|---|
| **RB-1727** | New report element for informed consent |
| **RB-1765** | Remove the "Where has spelling gone" message |
| **RB-1855** | New field for travel distance (in travel activity) |
| **RB-1969** | New Elite ETL table - person skills and abilities |
| **RB-1987** | Simplify the display of schedule conflicts |
| **RB-2016** | New Recovery Star outcome tool |
| **RB-2046** | New Elite ETL field - user position (lookup) |
| **RB-2129** | Add warning banner to additional pages for training environments |
| **BAU-149** | Amend MSD Supported Employment extract to sort clients by surname first |
| **BAU-340** | New MSD Vocational services extract |
| **BAU-390** | New incident people involved extract |
| **BAU-450** | New generic dashboard KPIs: pending clients, accepted clients without caseworker |
| **BAU-518** | New person interactions extract |
| **BAU-567** | New employment plan tasks extract |

# Appendix II – Bug fixes

As always, please contact the team at Wild Bamboo if you discover a bug in Recordbase (no matter how small the issue may appear) so we can fix it. Thanks to your keen eyes and our devoted testers, Recordbase 5.28 also includes the following bug fixes:

| | |
|---|---|
| **RB-925** | Elite error message should say "fewer columns" not "less columns" |
| **RB-1240** | Client>Activity>schedule conflict flag doesn't always lift if overlap removed |
| **RB-1303** | New Incidents>People Involved>empty NHI numbers show as “null” |
| **RB-1679** | PRIMHD review>picking up "review type" from a previous referral into the same team |
| **RB-1722** | Client>Employment>Work preferences>shows deleted employment types |
| **RB-1736** | Quick activities templates>teams should be listed alphabetically |
| **RB-1755** | Personal details>Contacts>mandatory review date still has “No date” option |
| **RB-1756** | Personal details>Contacts>mandatory consent review date fails when hidden |
| **RB-1764** | Team configuration restriction - editing team on a transfer referral |
| **RB-1786** | Elite>ETL duplicates all rows in DimCompany |
| **RB-1811** | Group Activities>Spelling error |
| **RB-1819** | Elite>ReportId 100131 used twice |
| **RB-1820** | Client-side grid page summary has incorrect counts and zero result inconsistencies |
| **RB-1832** | Personal detail>crashes when permissions set to read only |
| **RB-1833** | Health>Smoking Status>Is a smoker?>editing behaviour changed in 5.27 |
| **RB-1834** | Calendar>account management activity duplicated for all direct reports |
| **RB-1854** | Print Processing showing up as square boxes (Chinese char) |
| **RB-1876** | PRIMHD residential referrals discharged on 15th submit un-ended bednight activity |
| **RB-1891** | Templated activity>edit single client, changing subject does not update note subject |
| **RB-1892** | Templated activity>view screen has no backlink |
| **RB-1952** | Full activity template>new activity: secure to team is displayed even when not enabled |
| **RB-1955** | Full activity template>migration data: required fields in template are not populated |
| **RB-1960** | PRIMHD data item with no time component>editing review removes time component |
| **RB-1971** | New interstitial activity screen doesn't have a backlink |
| **RB-1972** | Templated activities>RelatesTo field doesn't use entity resource |

| | |
|---|---|
| **RB-1973** | Full activity template>spelling mistake in template editor |
| **RB-1977** | Templated activities>admin builder needs to honour required fields |
| **RB-1980** | Templated activities>do not limit subject length; error occurs |
| **RB-1985** | Templated activities>notes optional, DisplayInMyRecord not conditionally mandatory |
| **RB-2005** | Cancelling a new editable report results in 404 |
| **RB-2057** | Backlink on activity in context of goal plan takes you to activities list not goal plan |
| **RB-2070** | Client>Referrals>New Inbound Referral: order of validation is a little bit annoying |
| **RB-2078** | Outbound referrals>lists teams from deleted referrals |
| **RB-2079** | Personal details>Addresses>postal address error message formatted incorrectly |
| **RB-2082** | Templated activities>view does not show the team |
| **RB-2086** | Personal details>Carer>the value “null” is not valid message is appearing |
| **RB-2093** | Health condition>validation fails when fields are not visible but required |
| **RB-2101** | Personal details>outbound referrals are doubling up in the display screen |
| **RB-2106** | Future activities widget on dashboard incompatible with templated activities |
| **RB-2110** | New account attachments are created as archived |
| **RB-2116** | Personal details>New language>IsMainLangauge field not allowing “null” |
| **RB-2117** | Personal details>Family>Can't select “Unknown” |
| **RB-2120** | Templated activities>audit information can show in incorrect place |
| **RB-2124** | Person>Contacts>has optional fields that should be required |
| **RB-2125** | Clinical History allows access to webforms version of activities (and activity notes) |
| **RB-2126** | Adjust which activity types and notes show in clinical history |
| **RB-2127** | Hosted notes diff view lacks styles |
| **RB-2128** | Editing hosted note via hosted note view page doesn't return to hosted note view |
| **RB-2131** | Backlinks to the Note list page does not respect page number |
| **RB-2143** | New PRIMHD review screen sets a default team |
| **RB-2149** | Make WYSIHTML rich text control correctly handle text pasted in from office |
| **RB-2153** | Notes>list error - Sequence contains no elements |
| **RB-2158** | MyRecord>Activity note displays validation error when notes are blank |
| **RB-2194** | PersonDetails PDF report element does not include the person's middle name |