

Recordbase 5.30 release notes

Wild Bamboo is proud to announce the release of Recordbase 5.30.

This release includes risk reviews and foster care support, plus enhancements to PRIMHD reviews, shared events, activity and note screens, dependants, and the team picker in Elite.

All of this work, both the new features and the enhancements to existing features, came about because you asked us for it – so we sure hope you like it! As always, we're keen to hear feedback on this work (what's great, what's not, what would make it better?) and any ideas you have for further improvements and developments. Recordbase is your system after all, so tell us what you need it to do.

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.

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New features

Risk reviews

As part of Recordbase 5.30, we've given risks a bit of a makeover and introduced risk reviews. When you review a risk, you can add information about the review (the review date, any comments about the review, and the next scheduled review date) as well as update the contents of the risk itself:

Risk — Medical

Poisoned apples

NOT FLAGGED

WHAT TO LOOK FOR

Older women in cloaks bearing fruit

HOW TO RESPOND

Ensure she doesn't eat food from strangers

COMMENTS

Apples seem to be the fruit of choice

Last modified 26.09.2018 at 10:10 by Jillian
Added 26.09.2018 at 10:06 by Jillian Pennir

About this risk

Status	Current	Mark as his
Next review	31.01.2019	Review th
Last review	15.11.2018	
Previous	1	See all reviews

Review risk

Date of this review * Today Yesterday Select...

Review comments (optional) Discussed stranger danger with Snow White again. She informed me that she has seven new friends living with her now, and that they will also keep a look out for any suspicious fruit-bearing visitors.

Next review * 28/2/2019

Current risk

Brief description * Poisoned apples

Risk type * Medical

Show alert flag * Yes No

What to look for (optional) Older women in cloaks bearing fruit

How to Ensure she doesn't eat food from strangers

Add information about the review

Update information about the risk

The risk always displays the most up-to-date version (which should be the result of your last risk review). The review history of a risk is summarised in the bottom grey section of the risk. To see the details of past reviews, click *See all reviews*, which opens the *Previous reviews* list.

Comments

Apples seem to be the fruit of choice - but best to watch out for pears and oranges too

Last modified 26.09.2018 at 10:10 by Jillian Pennington
Added 26.09.2018 at 10:06 by Jillian Pennington

About this risk

Status Current Mark as historic

Next review 28.02.2019 Review this risk

Last review 16.11.2018

Previous reviews 2 See all reviews

Previous reviews

Review date	Reviewer	Description	Type	
16.11.2018	Jillian Pennington	Poisoned apples	Medical	<a>View
15.11.2018	Jillian Pennington	Poisoned apples	Medical	<a>View

Risk Review

Poisoned apples

Information about the review

Reviewed: 16.11.2018 by Jillian Pennington

Comments: Discussed stranger danger with Snow White again. She informed me that she has seven new friends living with her now, and that they will also keep a look out for any suspicious fruit-bearing visitors.

Before review

NOT FLAGGED

Brief description: Poisoned apples

Risk type: Medical

WHAT TO LOOK FOR

Older women in cloaks bearing fruit

HOW TO RESPOND

Ensure she doesn't eat food from strangers

COMMENTS

Apples seem to be the fruit of choice - but best to watch out for pears and oranges too

After review

Updated risk

NOT FLAGGED

Brief description: Poisoned apples

Risk type: Medical

WHAT TO LOOK FOR

Older women in cloaks bearing fruit

HOW TO RESPOND

Ensure she doesn't eat food from strangers

COMMENTS

Apples seem to be the fruit of choice - but best to watch out for pears and oranges too

To view the contents of a specific review, click its *View* button. A risk review includes both the review details (the review date, comments, and next review date) and the risk itself, both before and after review:

It is very important to distinguish between **editing** and **reviewing** a risk.

Edit should only be used to make a correction (eg fixing a typo or misspelling), whereas review should be used any time you are reviewing the risk or making meaningful changes to its content.

The *After review* section of a risk review actually displays the risk at the time of the next review; if you edit the risk during that intervening period and make meaningful changes to its contents, then the presentation of the risk review may appear misleading.



Foster care support

We've also developed a new module within Recordbase to support foster care services. This functionality allows you to:

- capture details of caregivers and children in care
- record placements of foster children with your supported caregivers
- store expenses and receipts
- generate bednight and billing reports for Oranga Tamariki

The screenshot displays the 'Chester Caregiver' interface within the Recordbase system. The top navigation bar includes the Recordbase logo, the title 'Chester Caregiver', and a status indicator 'Active'. A left-hand sidebar lists various modules: Dashboard, Personal details, Foster care (highlighted), Health, Referrals, Risks, Activities, Notes, Personal plans, Goal plans, Medical tests, Medication, Tasks, Attachments, Outcomes tools, Reports, MyRecord, Employment plans, Employment history, Education, and Direct messages.

The main content area is divided into several sections:

- Caregiver summary:** Shows 'Full-time preferred' and 'CURRENT PLACEMENTS (3 / 4)'. It lists three full-time placements: Kellan Kid, Kristoff Kid, and Kandice Kid. A note states 'No contact information for this caregiver'.
- Foster caregiver quick actions:** Includes links for 'New activity' and 'Edit caregiver preferences'.
- Foster child placement list:** A table listing current placements with columns for Foster child, Care type, Duration, Starts, and Ends. It includes three entries for Kellan Kid, Kristoff Kid, and Kandice Kid, all in full-time care. A 'New foster placement' link is available.
- Expense claims:** A table listing claims with columns for Foster child, Receipt date, Claim type, and Amount. It shows three claims for Kristoff Kid, Kellan Kid, and Kellan Kid. A 'New expense claim' link is available.

Foster child	Care type	Duration	Starts	Ends	
Kellan Kid	Full-time	6 months, 24 days (ongoing)	21.04.2018	-	Edit
Kristoff Kid	Full-time	7 months, 5 days (ongoing)	09.04.2018	-	Edit
Kandice Kid	Full-time	16 months, 2 days (ongoing)	12.07.2017	-	Edit

Foster child	Receipt date	Claim type	Amount			
Kristoff Kid	20.05.2018	Clothing	\$17.99	Comment	View receipt	Edit
Kellan Kid	13.05.2018	One-off expense	\$50.45	Comment	View receipt	Edit
Kellan Kid	07.05.2018	Clothing	\$100.95	Comment	View receipt	Edit

This functionality requires configuration, so it won't be turned on as part of your upgrade. If you deliver foster care services and would like to learn more, get in touch with us at support@wildbamboo.co.nz and we'll schedule a demo.

Enhancements to existing features

To everyone who gave us feedback and suggested ideas for improvements – thank you! Here’s what you told us you wanted, and here’s what we did about it. If you have a great idea for 5.31, please let us know at support@wildbamboo.co.nz.

Link caseworkers to referrals

Many of you have asked for the ability to connect caseworker relationships to specific referrals, especially when individuals are supported by multiple services or contracts. We thought this was a brilliant idea, so we’ve built it for you. Now, when you add a caseworker, you can specify the related referral and indicate whether this is the primary caseworker or not – and if you’re assigning yourself, you can use the *Assign to me* button:

The screenshot shows the 'New caseworker' form. The 'Name' field contains 'Janna Jamaica'. Below it is a button labeled 'Assign to me'. The 'Type' field is set to 'Choose...'. The 'Related referral' field is set to 'ADHB Respite'. The 'Primary caseworker' field has radio buttons for 'Yes' (selected) and 'No'. The 'Period' section includes 'Start date' and 'End date' fields, both with date pickers. The form has 'Cancel' and 'Save' buttons at the bottom.

Once we’d made caseworker relationships a bit smarter, we also updated their list screen and dashboard widget. The list screen now uses modern Recordbase styling (complete with searching, sorting and quick links to jump between current and historic) and displays both the related referral and a primary caseworker badge. The dashboard widget also shows a primary badge, as well as the caseworker type.

The screenshot shows the 'Caseworkers' list screen. It has a search bar labeled 'filter' and a link to 'Add'. Below the search bar are links for 'Current (2)' and 'Historic (0)'. The table has the following data:

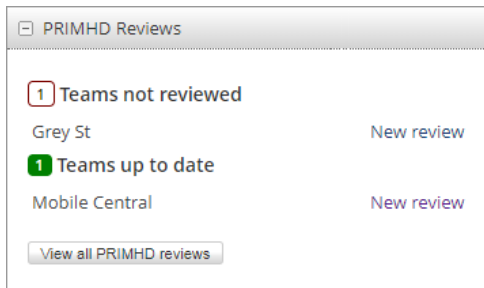
Name	Type	Related referral	Start date	End date
Edgar Ecuador	Support Worker		04.05.2016	Edit
Janna Jamaica PRIMARY	Support Worker	ADHB Respite	12.11.2018	Edit

Configure organisation-wide review schedule for PRIMHD reviews

You told us how tedious it was for staff to select a review date for every single PRIMHD review, especially when business rules always stipulate the same review cycle. Based on that feedback, we removed the *Next review date* from PRIMHD reviews entirely and introduced an organisational review schedule. Just tell Recordbase how often your organisation expects reviews to be done, and Recordbase will handle the notifications – no need for staff to calculate dates so they can schedule reviews! The default review schedule will be every 90 days per Ministry of Health recommendation but drop us a line at support@wildbamboo.co.nz if you'd like this tweaked to suit your business practice.

While we were working in PRIMHD reviews, we also made a few other enhancements:

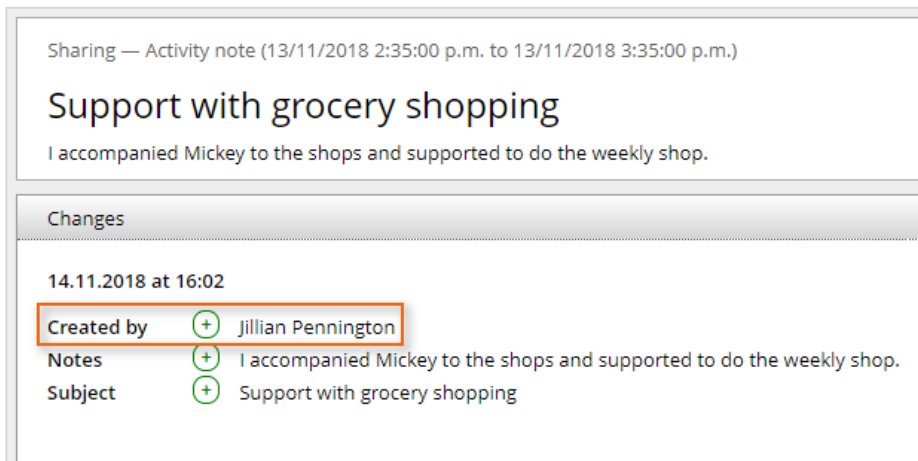
- Reorganised the dashboard widget to clarify review status for each team:



- Exterminated the bug that prevented a review on date of discharge
- Incorporated discharge codes into review logic, so that discharge reviews are not required for referrals discharged with codes DD, DG, DM, ID, RI or RO (in line with Ministry of Health rules)

Share more note detail via Shared Events

You explained that when sharing information between Recordbase environments, it's important to see which staff member in the other organisation created the note – that way, you know who to speak with if you need more details to coordinate care. We thought you had a great point, so we added it for you (and then tidied up a bit of date styling and the way employment plan notes are handled):



Identify MyRecord notes and group DNAs in note / activity list screens

You described where you'd like to see a bit more summary information about notes and activities – so we added badges to the notes and activities list screens to identify notes created by a MyRecord user and group activity DNAs, respectively:

The image shows two screenshots of the application interface. The left screenshot is the 'Notes' screen, which has a table with columns: Created, Subject, Relates to, and Notes. The first row shows a note created by 'Last Friday Carol Canada' with a 'Peer note' badge. The second row shows a note created by 'Last Friday Jillian Pennington' with a 'Group activity (Did not attend)' badge. The right screenshot is the 'Activities' screen, which has a table with columns: Date and Subject. The first row shows an activity on '11.11.2018 15:20 - 16:20' with the subject 'Financial Literacy group - session #3'. The second row shows an activity on '09.11.2018 13:15 - 14:15' with the subject 'Case meeting'. The third row shows an activity on '04.11.2018 15:15 - 16:15' with the subject 'Financial Literacy group - session #2' and a '(Did not attend)' badge. The fourth row shows an activity on '28.10.2018 15:15 - 16:15' with the subject 'Financial Literacy group - session #1'. The fifth row shows an activity on '25.10.2018 09:00 - 12:00' with the subject 'Support with grocery shopping'. The sixth row shows an activity on '15.12.2010 03:30 - 04:50' with the subject 'Washing Dishes'.

Record actual date of birth on dependants

You asked if you could capture actual dates of birth (rather than just ages) on dependants, so we added that in for you too. In case you don't always have an exact date of birth, we left you with the option to choose between an exact date of birth or an approximate age:

The image shows two screenshots of the 'New dependant' form. The left screenshot shows the 'Details' section with fields for Name, Gender, and a 'Is the date of birth known?' checkbox. The 'Is the date of birth known?' checkbox is checked, and the 'Date of birth (optional)' field is visible. The right screenshot shows the 'Details' section with fields for Name, Gender, and a 'Is the date of birth known?' checkbox. The 'Is the date of birth known?' checkbox is unchecked, and the 'Age (optional)' field is visible.

Filter teams in Elite team tree pickers

After using the fancy team picker in the new referral wizard in 5.29, several of you mentioned how handy that searching functionality would be when running Elite reports – so we added it to the team picker there as well:

The image shows a screenshot of the 'Elite team tree picker'. It features a search bar at the top with the text 'mob'. Below the search bar is a tree structure with the following nodes: 'Care Company' (expanded), 'Hamilton' (expanded), 'Mobile Team #1' (selected), 'Taranaki' (expanded), 'Mobile Central' (selected), and 'Mobile Taranaki' (selected).

Appendix I – Minor enhancements

In addition to the 'big ticket' items, Recordbase 5.30 also includes the following minor enhancements and new items:

RB-2713 Risk view screen – mark as historic

RB-2646 Client Dashboard > Person Summary Panel - to have the ability to set the visibility of this panel.

RB-2573 New activity screens (individual and group) should autoselect singleton type/classification/breakdowns

RB-2384 ADOM changes - feedback wheel language

RB-2647 Remove the configuration setting UsernameLength

RB-2733 Fix untrusted foreign keys

RB-2627 Remove multi-host support from the EReferral router

RB-2543 Store attachments in blob

RB-2551 Distributed session state

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 5.30 also includes the following bug fixes:

RB-934 Elite build fails with long account activity

RB-2572 Allocated hours broken

RB-2737 Elite > Recordbase User Licence Snapshot Report - pulls through deleted users

RB-2758 View attachment throws exception

RB-2768 Personal details > Courts order: invalid \"number of children\" message format

RB-2769 Personal details > Carers: get error when I enter 700 for the age

RB-2772 Personal plans > get \"Server Error in '/App' Application

RB-2773 Activities > New > Old screen > error when I save an activity

RB-2775 Attachments > New attached report > activities: crashes on save

RB-2778 Direct messages > crashes when I try to send a message

RB-2786 Personal details > Contacts/carers/languages > View > Expand and collapse is not working