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:

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.

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

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:

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.

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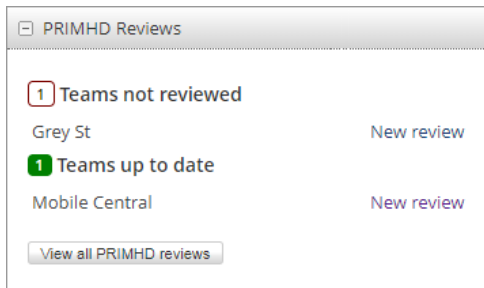
- Exterminated the bug that prevented a review on date of discharge
- Incorporated discharge codes into review logic, so that discharge reviews are not required for referrals discharged with codes DD, DG, DM, ID, RI or RO (in line with Ministry of Health rules)

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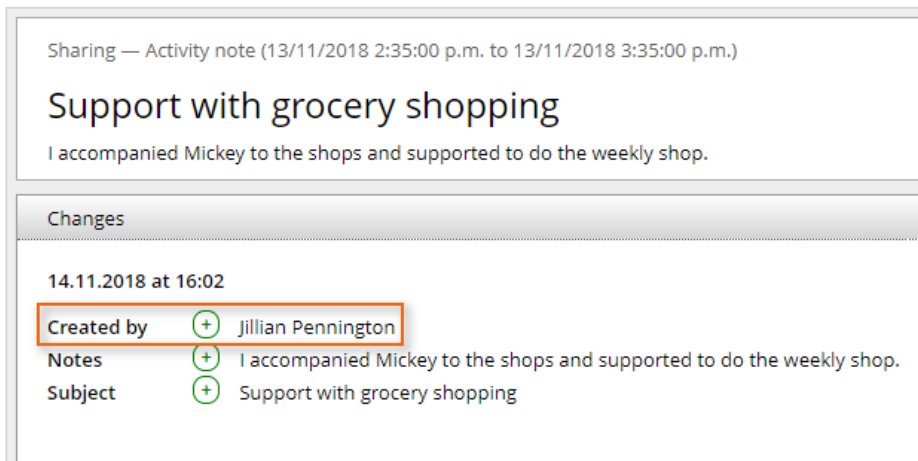
Identify MyRecord notes and group DNAs in note / activity list screens

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:

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:

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:

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