

Recordbase 5.33 release notes

Wild Bamboo is proud to announce the release of Recordbase 5.33.

This release includes extending recurrence to group activities, a referral delete button, a new gender identity field, an accessible Recordbase reporting database, support enhancements, making allocated hours accessible to more contracts, plus lots of other little improvements behind the scenes.

All this work, both the new features and the enhancements to existing features, came about because you asked us for it – so thank you for the guidance! 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.

Wild Bamboo

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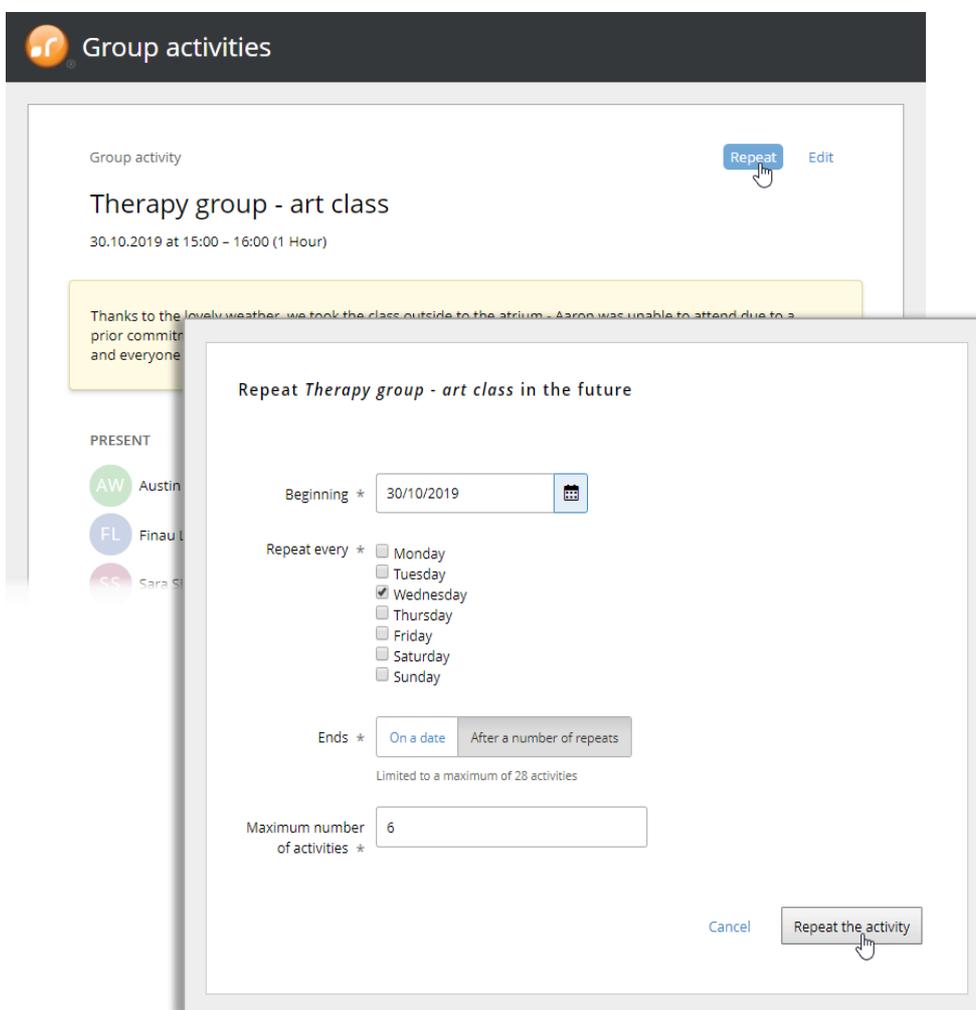
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New features in 5.33

Schedule recurring group activities

Following on from the addition of recurrence in the last release, we are now pleased to say we have extended this to work with group activities. To help make planning easier, we've added recurrence, which allows you to create a schedule of repeating group activities all at once.

Scheduling a recurring group activity will be very familiar to those of you that have been using the individual activity recurrence feature: simply create the initial activity, and then click on the Repeat button to set up the schedule. When scheduling a recurring group activity, you can choose how often and for how long the scheduled repeats should continue, with a weekly frequency. You can schedule a maximum of 28 repetitions of an activity, which should let you plan the month ahead.



If you already have recurrence enabled, you will automatically be able to recur group activities after the upgrade; if you have not enabled recurrence yet, it won't be turned on as part of your upgrade. If you would like to enable recurring activities, get in touch with us at support@wildbamboo.co.nz and we'll turn it on for you.

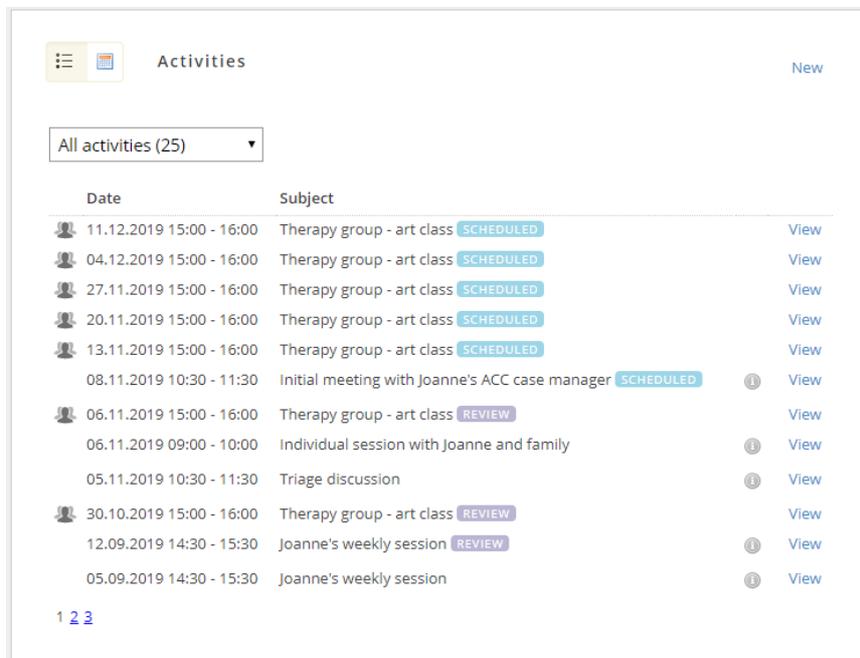
View scheduled activities and activities for review (new in 5.32)

This feature was first introduced in the last release, 5.32. If you are already using recurrence, there is nothing new here; it may be a useful refresher if you plan to start using recurrence with group activities.

As part of the recurrence functionality, we've given Recordbase some new smarts around handling future-dated group activities and we've added badges to help inform users.

- An activity is **scheduled** when its start date is in the future. A scheduled activity represents planned support, but it may or may not occur.
- A scheduled activity changes to **for review** when its start date has passed, but no one has yet modified the activity.
- Once an activity for review has been modified, it no longer displays any special badge. At this point, the activity represents actual support time with the client.

The Activities screen in the client window now indicates whether an activity is scheduled or for review:



The screenshot shows the 'Activities' screen in the Recordbase client window. It features a header with a menu icon, the title 'Activities', and a 'New' button. Below the header is a dropdown menu set to 'All activities (25)'. The main content is a table with columns for 'Date' and 'Subject'. Each row represents an activity, with a 'View' link on the right. Activities are marked with 'SCHEDULED' (blue badge) or 'REVIEW' (purple badge) labels. The 'SCHEDULED' activities include 'Therapy group - art class' (multiple instances) and 'Initial meeting with Joanne's ACC case manager'. The 'REVIEW' activities include 'Therapy group - art class', 'Individual session with Joanne and family', 'Triage discussion', and 'Joanne's weekly session'. There are also information icons (i) next to some activities.

Date	Subject	View
11.12.2019 15:00 - 16:00	Therapy group - art class SCHEDULED	View
04.12.2019 15:00 - 16:00	Therapy group - art class SCHEDULED	View
27.11.2019 15:00 - 16:00	Therapy group - art class SCHEDULED	View
20.11.2019 15:00 - 16:00	Therapy group - art class SCHEDULED	View
13.11.2019 15:00 - 16:00	Therapy group - art class SCHEDULED	View
08.11.2019 10:30 - 11:30	Initial meeting with Joanne's ACC case manager SCHEDULED ⓘ	View
06.11.2019 15:00 - 16:00	Therapy group - art class REVIEW	View
06.11.2019 09:00 - 10:00	Individual session with Joanne and family ⓘ	View
05.11.2019 10:30 - 11:30	Triage discussion ⓘ	View
30.10.2019 15:00 - 16:00	Therapy group - art class REVIEW	View
12.09.2019 14:30 - 15:30	Joanne's weekly session ⓘ REVIEW	View
05.09.2019 14:30 - 15:30	Joanne's weekly session ⓘ	View

It is **very** important to note that scheduled activities are treated like normal activities by all reporting (both Elite reports and PRIMHD reporting). This is the same rule that Recordbase has always followed when handling future-dated activities, but the new recurrence functionality makes it much easier to create large quantities of scheduled activities.

Scheduled activities are real activities

With recurrence, it is easy to create dozens of activities at once. Recordbase **will** treat these as having happened and they **will** show on reports.

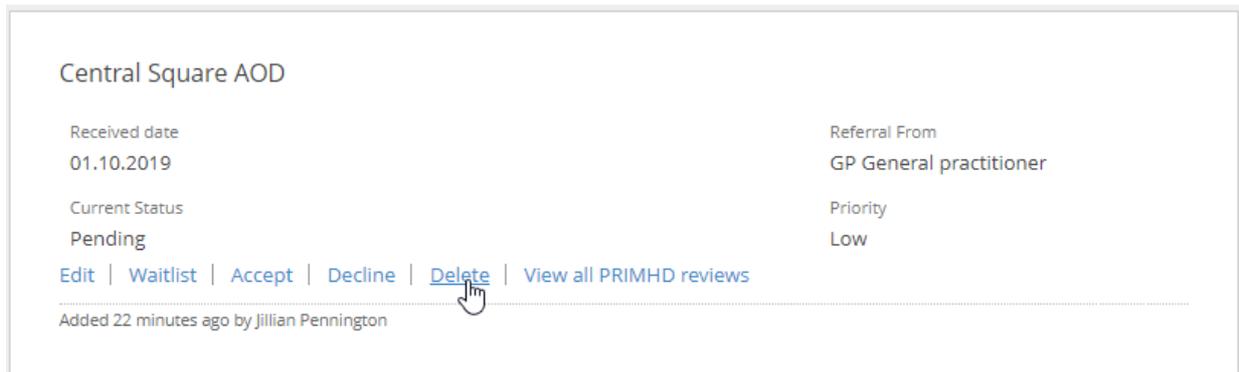
If a scheduled activity does not happen, it is up to you to remove it or mark as a DNA or cancellation in Recordbase.



Delete a referral

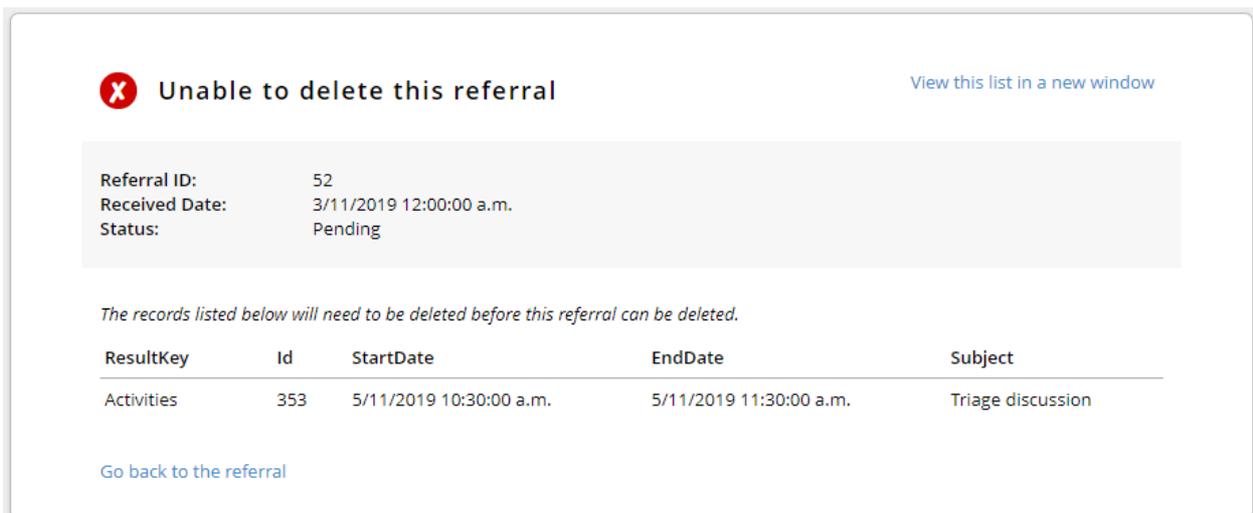
We all wish that we could get things right the first time, every time, but this isn't always the way things go and sometimes mistakes happen – for example, sometimes incorrect referrals are entered in Recordbase. Previously, deleting an incorrect referral was a task that could only be completed by the Wild Bamboo support team. While we love to hear from you, we figured you would rather be able to fix things yourself. Now you can.

To delete a referral, simply click the Delete button on the main referral view screen.



The screenshot shows a referral card for 'Central Square AOD'. It includes fields for 'Received date' (01.10.2019), 'Current Status' (Pending), 'Referral From' (GP General practitioner), and 'Priority' (Low). Below these fields are action buttons: 'Edit', 'Waitlist', 'Accept', 'Decline', 'Delete', and 'View all PRIMHD reviews'. A mouse cursor is hovering over the 'Delete' button. At the bottom, it says 'Added 22 minutes ago by Jillian Pennington'.

If there are attached items preventing the deletion, Recordbase will let you know.



The screenshot shows an error message with a red 'X' icon: 'Unable to delete this referral'. A link 'View this list in a new window' is in the top right. Below the message is a box with referral details: 'Referral ID: 52', 'Received Date: 3/11/2019 12:00:00 a.m.', and 'Status: Pending'. A note states: 'The records listed below will need to be deleted before this referral can be deleted.' Below this is a table with one row of data.

ResultKey	Id	StartDate	EndDate	Subject
Activities	353	5/11/2019 10:30:00 a.m.	5/11/2019 11:30:00 a.m.	Triage discussion

A link 'Go back to the referral' is at the bottom left.

The ability to delete a referral is restricted by permission. After the upgrade, you will need to grant Referral deletion permission to the appropriate role(s) before users can use this functionality.

Bring your Recordbase data in-house

You may have already heard the murmuring, since we've been piloting this one for several months now – but it's time for an official announcement: the Recordbase reporting database is here!

One of the guiding principles here at Wild Bamboo is the value of data and data-driven decision making; we know you can't very well make a data-driven decision without access to your data, though. For security reasons, we've never been able to grant organisations direct access to their hosted Recordbase databases, but that trade-off of accessibility for security has never sat well with us... so we decided that if we couldn't let you into your data, we'd build a safe way to let your data out to you: a secure pipeline to send Recordbase reporting data to external destinations, like an Azure database.

This means that you can have direct database access to your own reporting database, refreshed every night with Recordbase data. Elite reports in Recordbase will always serve a purpose, but this approach opens new doors to data analysis – make the most of BI tools like PowerBI, Tableau, Qlik and more; build an organisational data warehouse to combine Recordbase data with your HR or finance data; the world is your data oyster!

The pilot reporting database already includes a complete data lake of raw, untransformed Recordbase data, and as part of 5.33, we are releasing four new transformation schemas:

- **dropdown** provides the full recursive hierarchy of dropdown list values
- **legacy** replicates person and referral tables from the old database schema
- **dataset** contains simple person and referral tables intended for beginner BI users
- **ot** contains outcome tool data parsed out of its native xml

There are several options for the Recordbase reporting database – if you already have an organisational Azure server, you can host the database yourself; if not, we're happy to provide hosting on our servers. Other than an initial setup fee (and a minimal monthly hosting fee, if you would like us to host it), there is no charge for this reporting database – it's your data after all.

If you'd like to start the discussion, get in touch with the team at support@wildbamboo.co.nz and we can help you to decide on the right options for your organisation.

Support enhancements

Looking back through the Wild Bamboo support queue, we noticed some common support requests that pop up frequently. Currently, we charge a small fee to cover our time for these tasks, but we think a better solution would be to build this functionality within Recordbase and then provide it to you as self-service support.

For the first iteration of these new features, we have restricted them to Wild Bamboo access only. This means our Level 2 support team will have an entire release cycle to use and improve them before we provide them to you in 5.34, a process that we used with the new delete referral functionality, and which worked very well. For now, you'll benefit from a much faster turnaround and no cost for these common support requests:

- Delete a person
- Make a person private
- Enable and disable individual Elite reports

Enhancements to existing features in 5.33

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. Where an enhancement can be turned on or off, we will leave it turned off by default during an upgrade, so that you can decide what features best suit your organisation. If you have a great idea for 5.34, please let us know at support@wildbamboo.co.nz.

Gender identity

The world is not as binary as simply male or female, and we know that people occupy many different spaces on the gender spectrum. Several organisations have requested that we update the existing gender field to better reflect this diversity; however, that gender field has long been used to represent biological sex in several key reporting outputs, namely PRIMHD. For PRIMHD reporting, we submit the NHI, sex (labelled gender in Recordbase) and date of birth. These three points are verified against the national NHI database to confirm the client’s identity, so the submitted sex must match that recorded against the client’s NHI.

Rather than break existing contractual reporting, we have added a separate new field for gender identity, to allow for better classification of clients’ identities. This new field comes with a default list of options:

- Male
- Female
- Gender Diverse

Gender diverse is then split into commonly used terms:

- Transgender
- Trans*
- Trans Woman
- Trans Man
- Cisgender
- Non-Binary
- Genderqueer
- Gender Fluid/Bigender
- Agender
- Takatāpui
- Whakawahine
- Tangata ira tāne
- Tāhine
- Gender diverse not elsewhere classified

The gender identity field won’t be turned on as part of your upgrade but it is free to turn on; if it sounds like a good fit for you, please get in touch with us at support@wildbamboo.co.nz and we can enable it for you.

Allocated hours without reporting periods

The allocated hours feature was built for a specific type of contract. Many of you have embraced the functionality but commented that you would like to allocate hours independent of reporting periods. We agreed entirely, so we have removed the requirement to setup report periods. This makes it easier than ever for you to configure your service to capture allocated hours.

Planned hours

Planned hours | Reporting

Team: East Street Community

Allocated support hours for East Street Community

Set planned hours

Service user * Adam Matthews

Hours per week * 1 Hour

Effective from * Today Yesterday Earlier...

Cancel Save

Planned hours

Current people | All people

Name	Total allocated hours
> Adam Matthews	6 Hours
> Babs Beluga	3 Hours
> Faith James	
> Sara Sims	

Last four weeks

Reporting Period	Planned hours	Delivered hours
10/10 to 16/10	10	9
17/10 to 23/10	7	9
24/10 to 30/10	12	9
31/10 to 06/11	2	11

All allocated hours services that already have reporting periods configured will continue to use those until they expire. If you would like to configure a team to use allocated hours, please contact the team at support@wildbamboo.co.nz.

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 5.33 also includes the following bug fixes:

- Protocol template management permission now working correctly
- My recent group activities widget now showing the correct badges
- Note paging issue – the list now shows the correct notes every time.
- Navigation in the New Referral wizard no longer causes display duplication
- Ethnicity saved correctly from New Referral wizard when auto-reference number is turned on

Appendix III – Browser versions and devices

Wild Bamboo strives to support the platforms you use, but, maintaining backwards compatibility with legacy browsers would mean severely limiting the future improvements we can make in Recordbase.

We recommend keeping devices on the latest version and changing to supported browsers such as Chrome, Firefox or Safari - not just because Recordbase will perform better, but because almost any web app will. Plus, as with most technology, browser security advances in leaps and bounds practically every day - using a modern browser will keep you and your data safer.

Please see the full list of our supported platforms on our website.

<https://www.recordbase.co.nz/supported-platforms>