Recordbase 5.38 release notes

Wild Bamboo is proud to announce the release of Recordbase 5.38.

This release includes enhancements to activities and referrals, along with several minor performance improvements.

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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Enhancements in 5.38

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.

Changes with the activity screen

Activities are often at core of the way you capture information about the sessions you deliver to the people you support. You can already link to things like goals, protocols and purchase orders, but we know it would be nice to be able to capture more information. In Recordbase 5.38, we have extended the functionality of the activity screen to allow you to add attachments, as well as adding a whole new section dedicated to IPMHA (Integrated Primary Mental Health and Addictions) contracts.

Attachments

We have added the ability to add attachments as part of an activity. This could be an external document that is relevant, or simply a photo that captures the essence of the session delivered.

The activity view screen now presents you with the option to add a new attachment. Simply click "New" under the Attachments heading and you can now add a file to your activity. We have chosen to streamline this as much as possible for you and you can either drag on an attachment or browse for it.

If you want to further categorise the file, you can still go to the attachments menu and update the details there.

IPMHA fields

In order to meet the requirements of IPMHA data reporting extract, we have added a new block that can be added to an activity template. This means that Access and Choice teams can now collect the additional required information as part of an activity collection.

Along with the new fields on the new activity form, we have also extended the view screen to allow you to directly add a Hua Oranga outcome tool to an activity template configured for IPMHA.

Hua Oranga – Primary care

In a similar change to attachments on activities, the activity view screen now also gives you the option to capture a Hua Oranga outcome. Simply click "New" under the Hua Oranga – Primary care heading and you will be presented with an outcome tool form. When you click save the completed outcome tool, you will be directed back to the activity, where it will now display the calculated domain scores. The linked Hua Oranga will still display in the Outcome tools menu.

Repeat   Edit

First contact

01/04/2022 at 08:30 – 09:30 (1 Hour)

First IPMHA contact with Mike

✅ Display in MyRecord

	Hua Oranga - Primary care	View
Taha Tinana:	15	
Taha Wairua:	9	
Taha Whanau:	12	
Taha Hinengaro:	9	

Whānau involvement:	No
Type:	Residential
Classification:	Completed needs assesment
Breakdown:	Face to Face with individual/Family – *60mins*

Attachments   New

No attachments found

This functionality is only available in conjunction with the IPMHA configuration and Hua Oranga is the only outcome tool you can add to an activity at this stage. But watch this space, as we will be looking to extend this to other tools soon…

New look view screen

With the introduction of the ability to add more things to an activity, we have also taken the time to rearrange how this screen displays.

Individual activities

For individual activities, we have moved things around to prioritise the parts of the activity that give you the most context to a given session. You'll notice the note is still in prime position, but we have moved the linked items to the top and put them on the right side of the screen. Here you will see the addition of the Hua Oranga and Attachments as mentioned above.

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Repeat   Edit

Support follow-up

11/04/2022 at 11:00 – 12:00 (1 Hour)

> Lorem ipsum dolor sit amet. Ut necessitatibus velit qui rerum iure est soluta aut dolores rerum At nostrum fugit. Ex autem fugiat ab doloribus consequatur eum eveniet debitis ea corporis enim ut dignissimos nihil ut molestiae rerum et molestiae nulla. Ex incidunt nihil est amet totam At earum sapiente. Sed amet tenetur et alias rerum et placeat aperiam accusantium alias ut animi optio qui maiores aperiam!
>
> ✅ Display in MyRecord

Hua Oranga - Primary care   New

No outcome tool found

Attachments   New

No attachments found

Whānau involvement:	No
Type:	Residential
Classification:	Completed needs assesment
Breakdown:	Face to Face with individual/Family – *60mins*

Session type:	Individual
Confidence in carrying out plans:	7
How helpful was this visit:	8
External referral:	General Practitioner
Client judgement of change:	Better
Client experience of plan:	Feels like it is going in the right direction
Client problem rating:	5

Facilitators

Jo Scothern

Group activities

With group activities, we have taken a similar approach and gone for a similar layout.. Again, the note is still in the prime position, but this time we have moved the participants to the top right of the screen.

Group activity

Repeat   Edit   Copy

Group session

17/05/2022 at 10:00 – 11:00 (1 Hour)

> Lorem ipsum dolor sit amet. Et illo delectus et obcaecati quidem sit dolor doloribus ut quos sunt. In consequatur culpa eum quia incidunt qui natus odit eum facilis sequi! Et velit quos et minima quidem eum voluptas voluptas.
>
> Et recusandae adipisci et culpa consequatur ut obcaecati quae vel sint provident et debitis amet qui sint temporibus ex dolorem rerum. Sit sequi perferendis qui quibusdam expedita ea rerum repellendus.

Present

BB	Bill Bermuda	Add details
GH	Georgia Hanson	Add details
JB	Jacob Bradley	Add details
KC	Kim Crawford	Add details
SS	Susan Swanson	Add details

Mobile Team #1

Type:	CM Community
Classification:	T07 Group attendances
Breakdown:	Group sessions – *60mins*

Did not attend

CM	Chris Mattington	Add details
JB	Jonny Blaze	Add details
MB	McGregor Bennet	Add details

Facilitators

- Gerry Germany

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Capture the presenting issues for a referral

This is another requirement for the IPMHA data collection, but it has usefulness beyond that purpose. A presenting issue is a way to capture the support they have come to the service to receive help for. We have made changes to the referral process to provide a way to easily collect this information.

When you enter a new referral into Recordbase, when you are select an IPMHA configured team, you will now be presented with presenting issue fields.

The primary presenting issue will be required, and you will be able to select up to two additional presenting issues.

You can also manage these fields from the referral main screen

Edit Referral

Referral Details

Received date * *Enter the date the referral was received*	**15/10/2021** 📅 ▾ *Enter a date using dd/mm/yyyy format, i.e 31/12/2015*
Team	Titans ⚠ Team cannot be changed due to associated activities or employment plans
Priority	Medium ▾
Referring organisation *	Police Department ▾
Primary presenting issue *	Health and Lifestyle ▾ Exercise ▾
Secondary presenting issue	Choose... ▾
Tertiary presenting issue	Choose... ▾

We recognise that not all services will need this, so it is something you can configure per team.

Admin features

To give you more control of your own Recordbase setup, there is a new admin screen to allow you to configure Presenting Issues yourself. This comes with a new permission so you have control of who can access this screen.

Appendix I – Minor changes

As part of the continuous improvement process of the Recordbase system, we've made the following notable bug fixes and minor enhancements:

In addition to the 'big ticket' items, Recordbase 5.38 also includes the following minor enhancements and new items:

- My Graphs now has an option to display "Last Calendar Month"
- More data points available in the reporting database
- PRIMHD reviews will prevent duplicates based on team and date
- Option to export the user lists from the billing menu
- Referral Service Level Definitions can now be managed from the settings menu
- Person interactions improvements
    - can now have multi-level interaction types
    - interactions can now be deleted

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 5.38 also includes the following bug fixes:

- Minor wording change on the Protocol review screen
- Disabled custom fields are now hidden from person dashboard and detail views
- Group activity participant order is now case insensitive
- Reference number types no longer allow spaces in the key
- Custom field "tips" now display in the same format as other fields

Appendix III – Browser versions and devices

Wild Bamboo strives to support the platforms you use, but maintaining backward 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