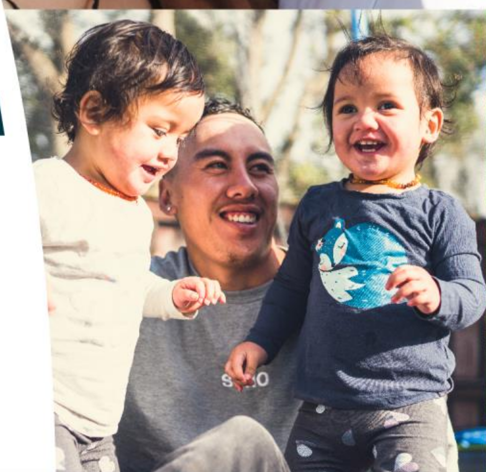


Recordbase

September 2022

What’s new




What's new

Highlights of new release

This release is packed with enhancements we hope you will enjoy, plus as a change in the look of Recordbase to reflect the new Wild Bamboo brand.

We have expanded on recent changes to activities, improved the functionality of direct relationships and introduced the concept of goal categorisation. We are also excited to share the work we have been doing with modernising the client list screen. On top of that we are proud to announce the introduction of e-referrals linking Recordbase with the Karo system.

As always, this release includes a lot of work behind the scenes that will improve performance and general user experience.

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.

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New Look

Over the next few months, you will notice that things to do with Recordbase and Wild Bamboo will start to look a little different. We've been working hard to better understand and reflect on what makes Recordbase unique. As a result, we have refreshed our brand.

To better understand where we are moving with our new brand, we've created this video. Watch it here. We look forward to you joining us on this journey and we cannot wait to share more with you.

This new look will run out across all our different mediums – from a fresh new website right through to our standard invoices.

One thing will however always remain the same – our mahi to provide you with a product that lets you get back to doing what your core purpose is: making positive change for tāngata whai ora in Aotearoa New Zealand.

The Wild Bamboo whānau are committed to working together to make things happen for people, make things easy for people and to make things better for people.

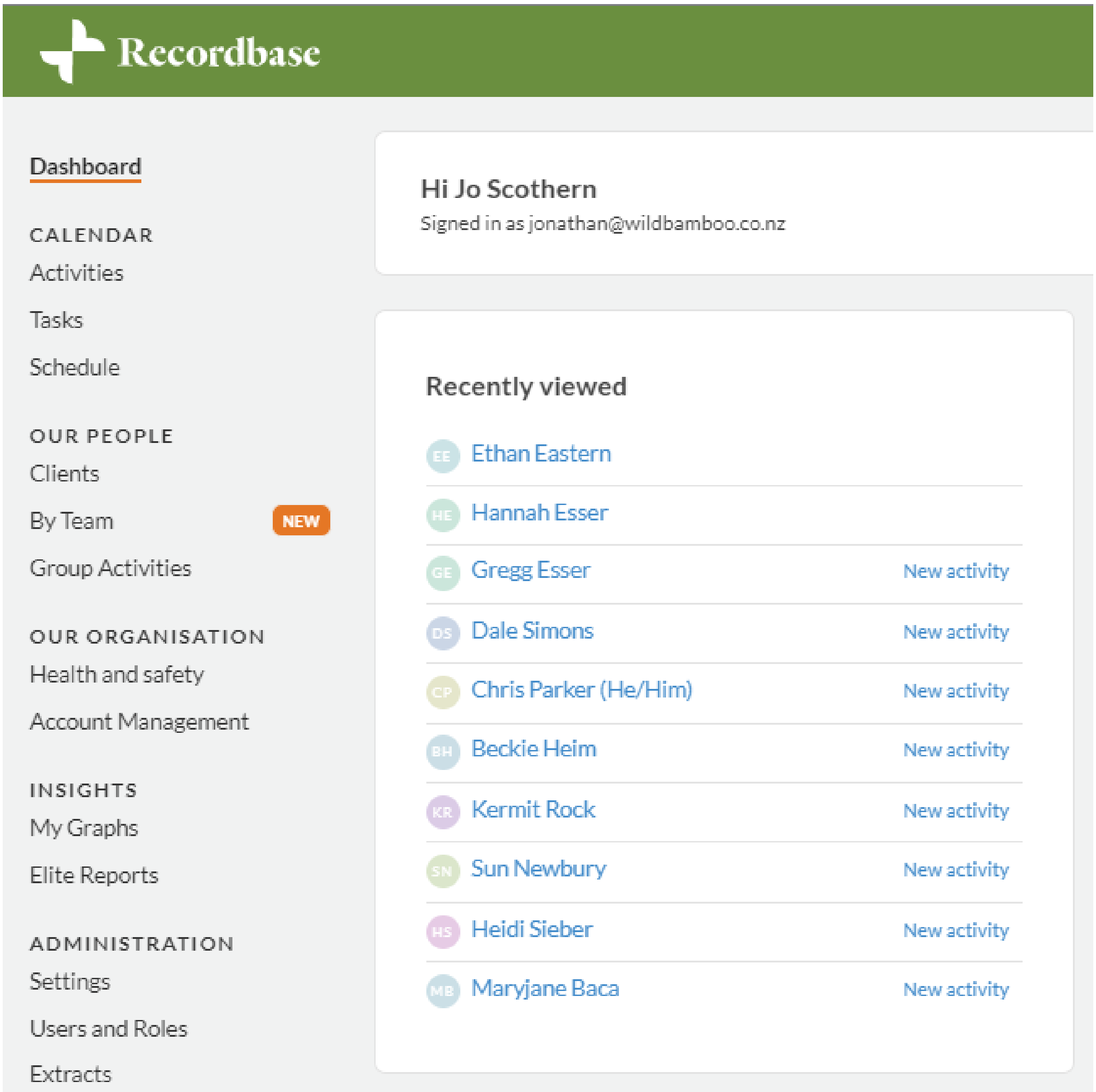
Our What's New Guide has been refreshed and you will see that Recordbase has had a facelift. We would love to know what you think.

Client list changes

We wanted to make it easier for the variety of services that use Recordbase to have access to the information that is important, in a way that makes sense to that service.

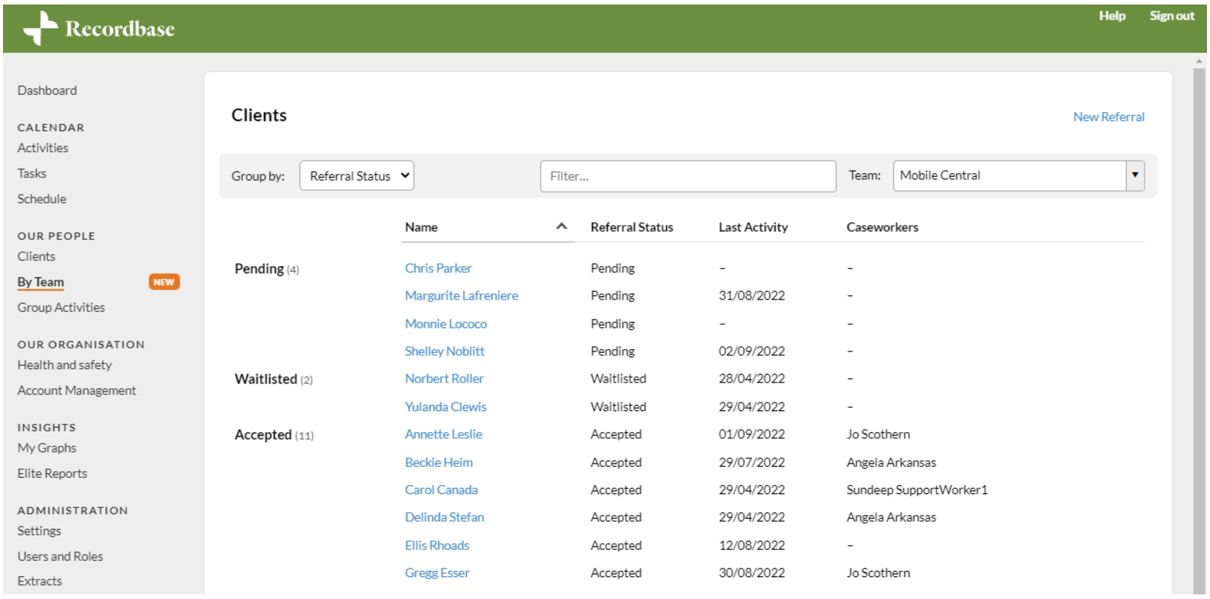
This is a complete makeover and we wanted to deliver changes in a way that allows you to feedback as quickly as possible, so we can get the best result. For this reason, we have split up the functionality of the client list into three functions and will deliver the changes in phases – clients by team, my clients, and my team (caseload).

To allow you to continue to work as normal, these changes will be delivered as additional screens instead of replacements – so you will still have access to the old way of doing things.



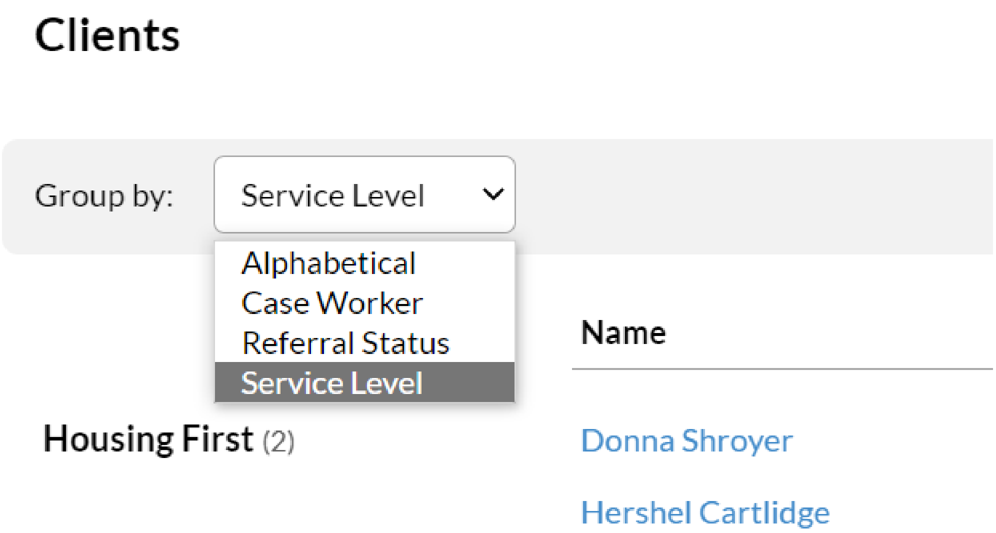
By Team

In this release, we have included a new menu option called “By Team”, which allows you to see the people supported by a team in Recordbase. This screen presents information in a more modern way and introduces both grouping and filtering functionality.



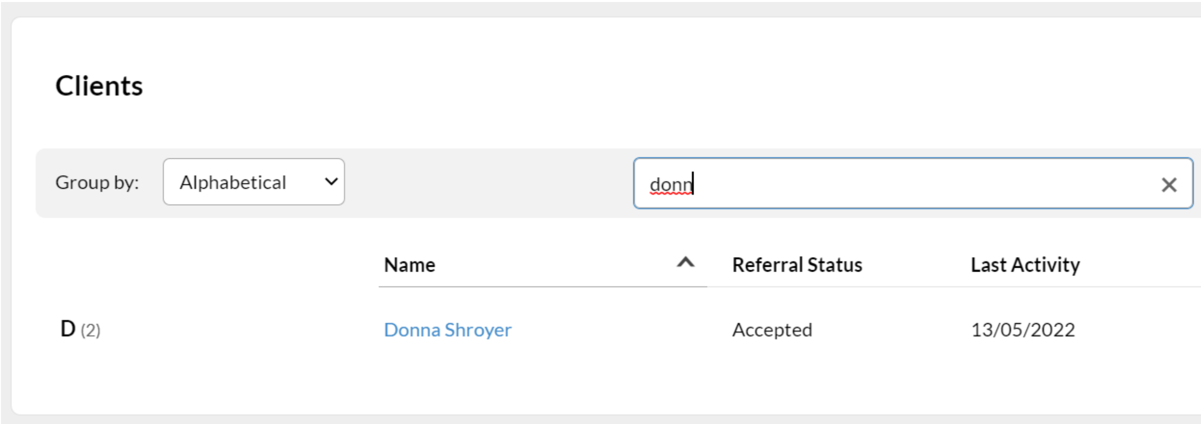
Grouping

In addition to the grouping by referral status that you have always had, you can now also choose to group by service level, caseworker or simply in alphabetical order.



Filtering

We have also added the ability to filter the list. This is simply a matter of starting to type and the results will be adjusted to show only those that match your criteria. The filter will work against all of the text-based fields you can see on the screen.



We will continue this work in future releases where you can expect to see enhanced searching, quick access to your own caseload and finally an improved staff caseload view.

If you would like to be involved with future development in this space, please contact the product team and we will get in touch.

Changes to the activity screen

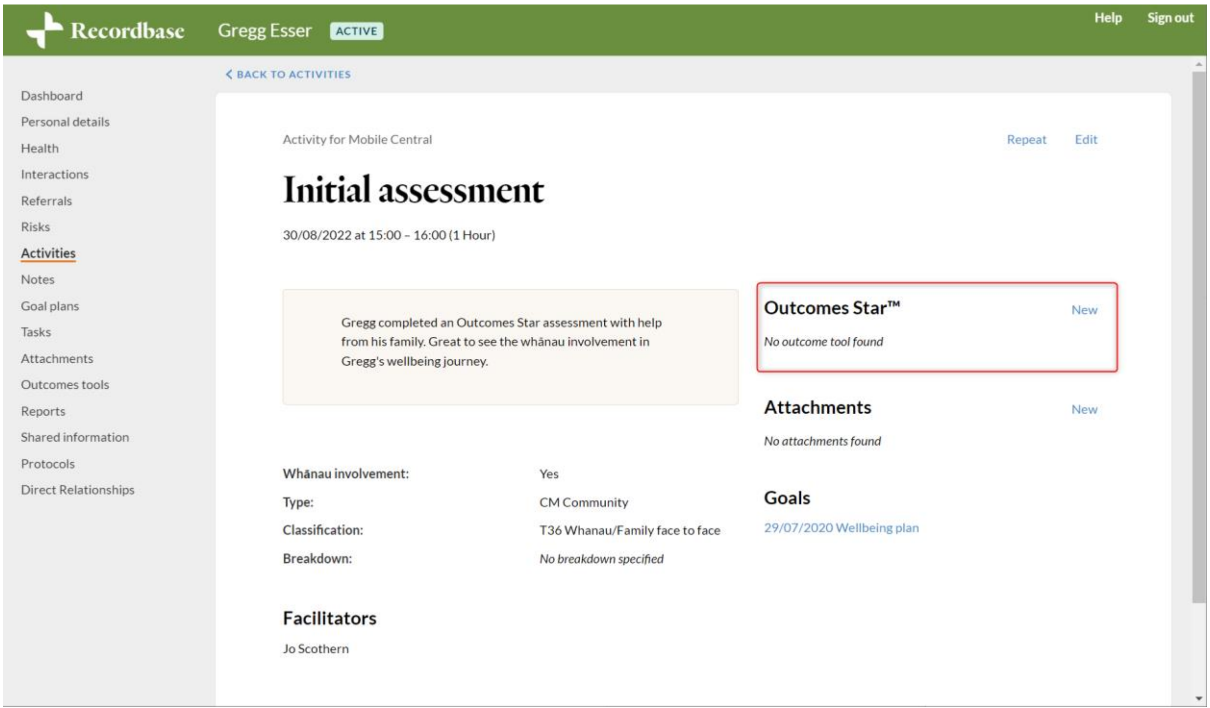
In the last release, we introduced changes to the activities screen that we hoped would make life easier for you.

When we shared the ability to capture a Hua Oranga as part of an activity to support IPMHA contracts, we heard from you how useful this would be for other services. In this release, we have extended this functionality, and now you can configure outcome tools you can capture as part of an activity.

We have also extended the configuration options of an activity template to remove the requirement to capture activity breakdowns.

Outcome tools

You can now configure Recordbase to make specific outcome tools available directly on the activity view screen. This is done on a per team basis and currently requires support from the Wild Bamboo team, though an admin screen for this will be coming soon.

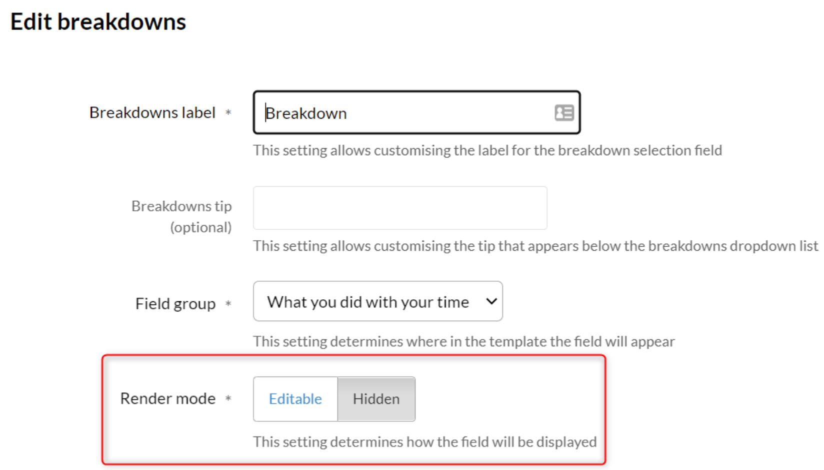


Once you have configured the outcome tools you want to capture, the activity view screen will reflect these changes by adding the selected outcome tools to the top right of the screen. Simply click "New" next to the appropriate outcome tools heading and you will be presented with an outcome tool form. When you save the completed outcome tool, you will be directed back to the activity, where it will now display a summary view of the completed form – note that the information displayed will vary between outcome tools.

The linked outcome tool will still display in the Outcome tools menu.

Optional breakdown

Another change we have made in this space is the option to make the breakdown section hidden as part of an activity template.



This is useful when you have simplified reporting and a breakdown of the activity beyond type and classification is not required. This works exactly as you would expect and after changing this setting, the activity forms will no longer show breakdown information for the selected template.

Relationships

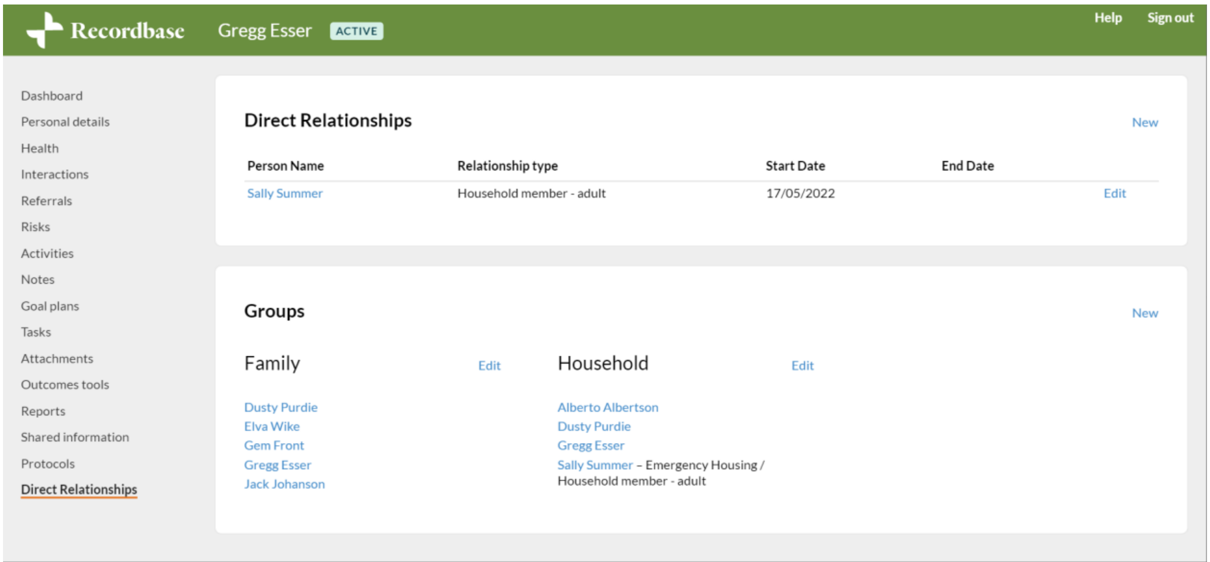
We first introduced the concept of direct relationships to Recordbase as a way to connect people. This has worked well when recording a relationship between two individuals, but things got more challenging as you have more people you want to connect. In this release, we have built upon this functionality and extended it to better support groups.

With the addition of groups to Recordbase, it made sense to combine the new functionality with direct relationships, both are about connecting people together. So it won't be surprising that there is now a new menu called Relationship where you can access these features. Direct and external links have been removed from the person details screen and combined into a single list.

Family groups

The primary purpose for this was to record a relationship between two people, and it does this well. Where things get more challenging is when you have more people you want to connect.

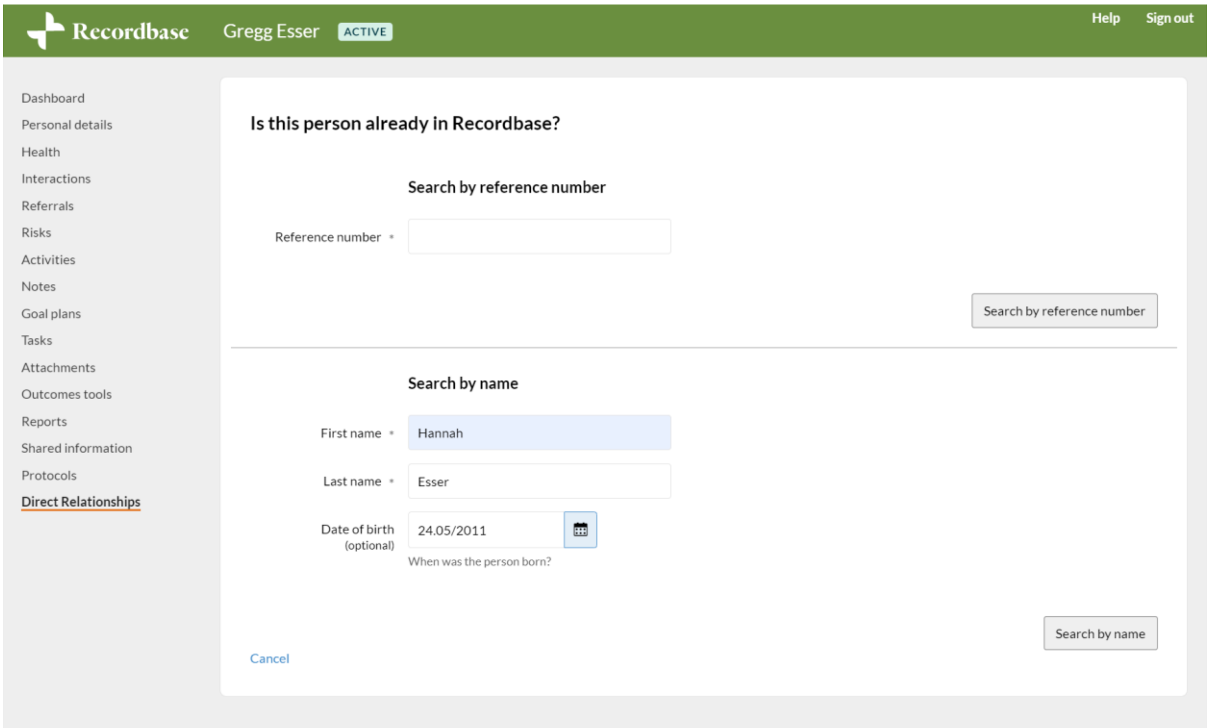
With this in mind, we have taken the opportunity to introduce the concept of groups. This is a simple concept that allows you to easily show a group of people on the file of everyone that is part of the group. An example of where this might be useful is when recording a family; by creating a group, you now have visibility of the family from each person and can easily navigate between them. Family groups is just one example, and group can easily be used for other group types.



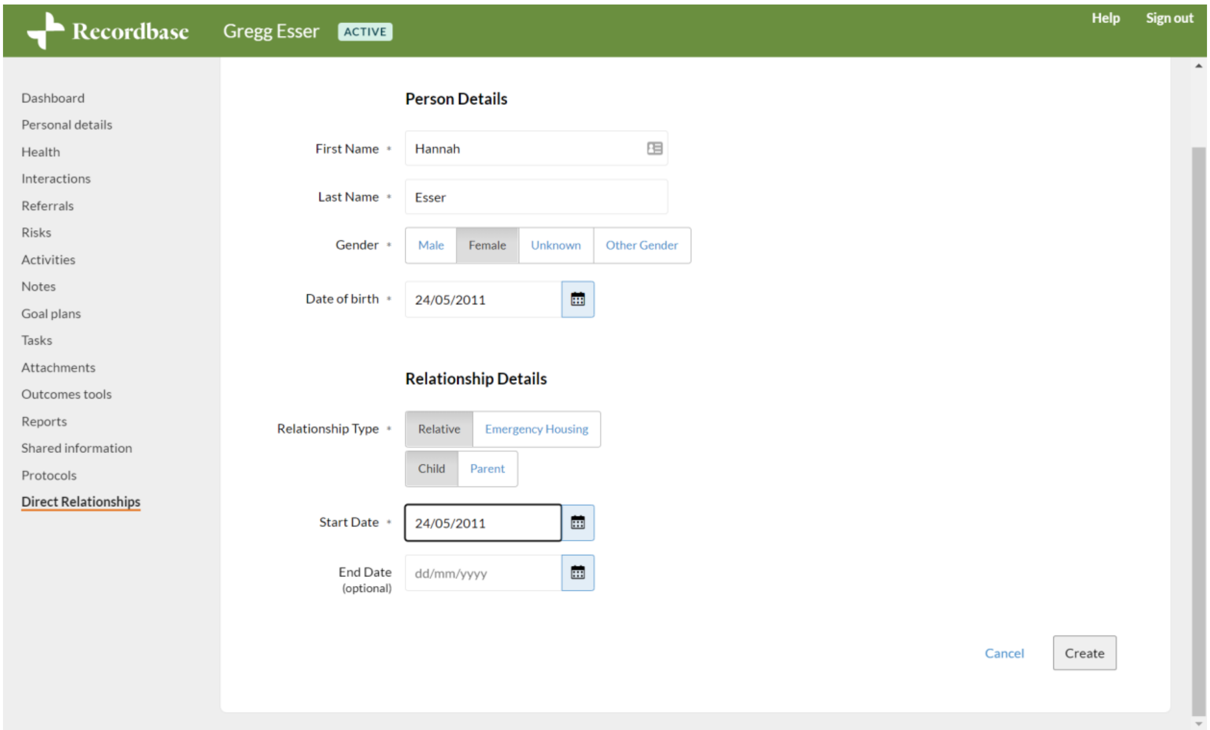
We want to hear from you and are keen to extend this further with your feedback. If you would like to be involved with future development in this space, please contact the product team and we will get in touch.

Enforce search

While we were working in this area, we wanted to take the time to address some aspects of the direct relationship's functionality. Searching is now enforced as part of creating new related people and we hope this will reduce the chance of duplicates being added. We have made use of the referral search functionality, so you should find this change familiar.



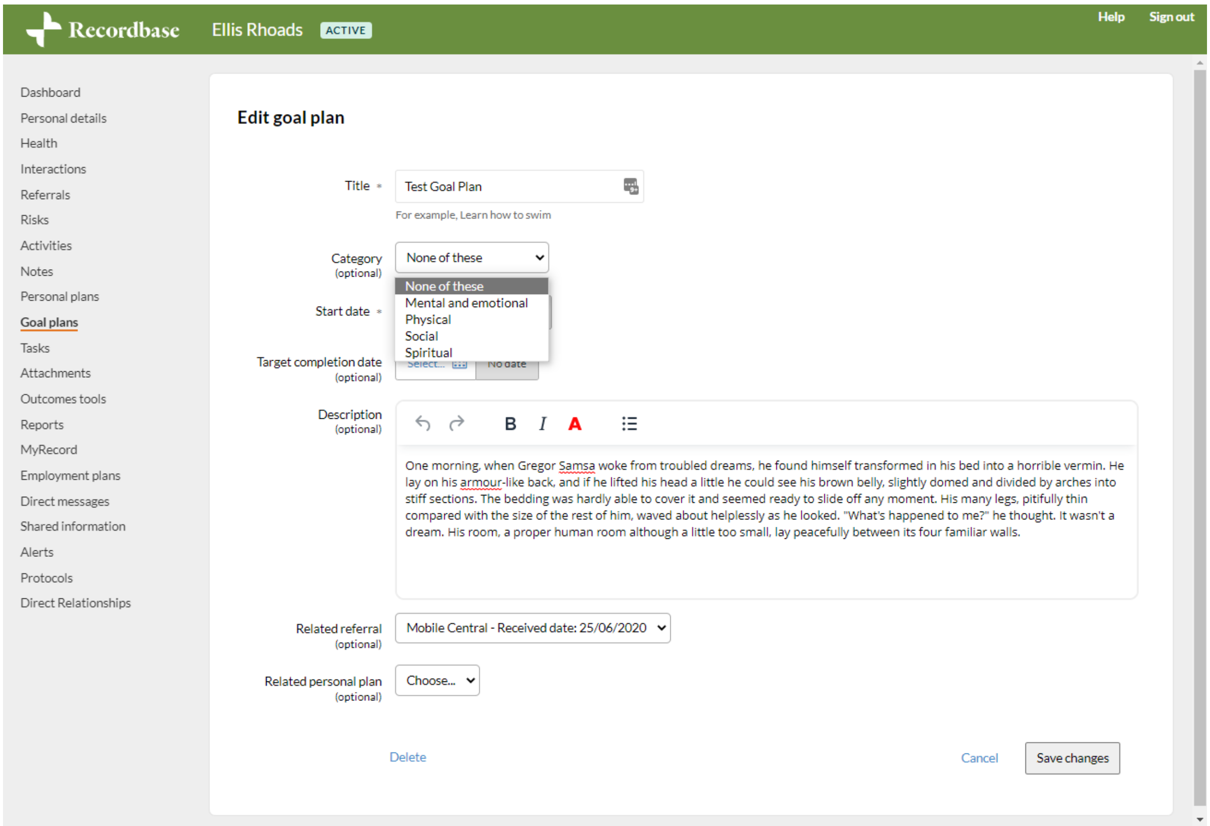
If the person exists, you can pick them from the list (just like you do when creating a referral) and specify the type of relationship. If the person cannot be found, you will be directed to add a new client record.


Recordbase
Gregg Esser
ACTIVE
Help
Sign out
Dashboard
Personal details
Health
Interactions
Referrals
Risks
Activities
Notes
Goal plans
Tasks
Attachments
Outcomes tools
Reports
Shared information
Protocols
Direct Relationships
Person Details
First Name *
Hannah
Last Name *
Esser
Gender *
Male
Female
Unknown
Other Gender
Date of birth *
24/05/2011
Relationship Details
Relationship Type *
Relative
Emergency Housing
Child
Parent
Start Date *
24/05/2011
End Date (optional)
dd/mm/yyyy
Cancel
Create

Goal categorisation

Goals have been around since Recordbase was first introduced and we believe they are a core part of supporting people. We want to improve on the functionality that Recordbase offers and choose to start by introducing the concepts of categories.

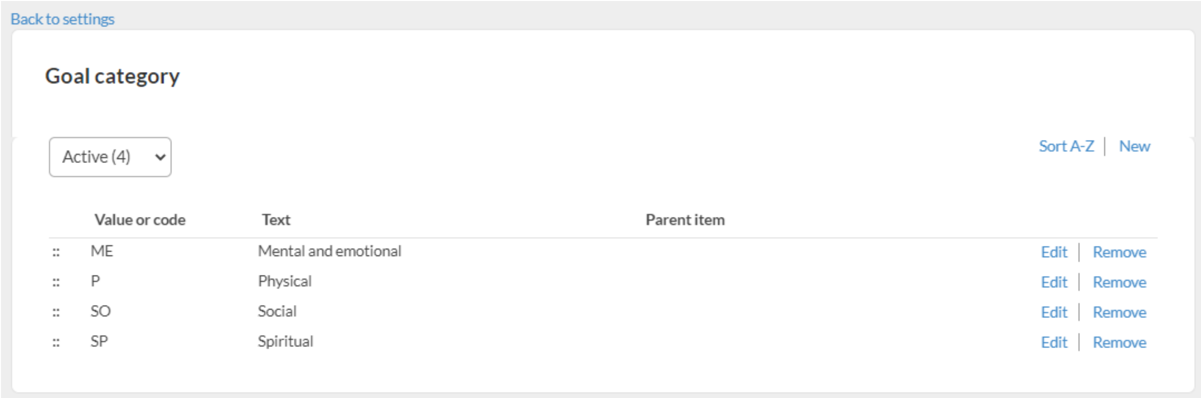
We believe that categorization will provide more insights into the progression of a person's success in achieving goals in certain areas.



Goal categories are disabled by default, and your super user will need to configure Recordbase to enable this feature.

Setting up categories

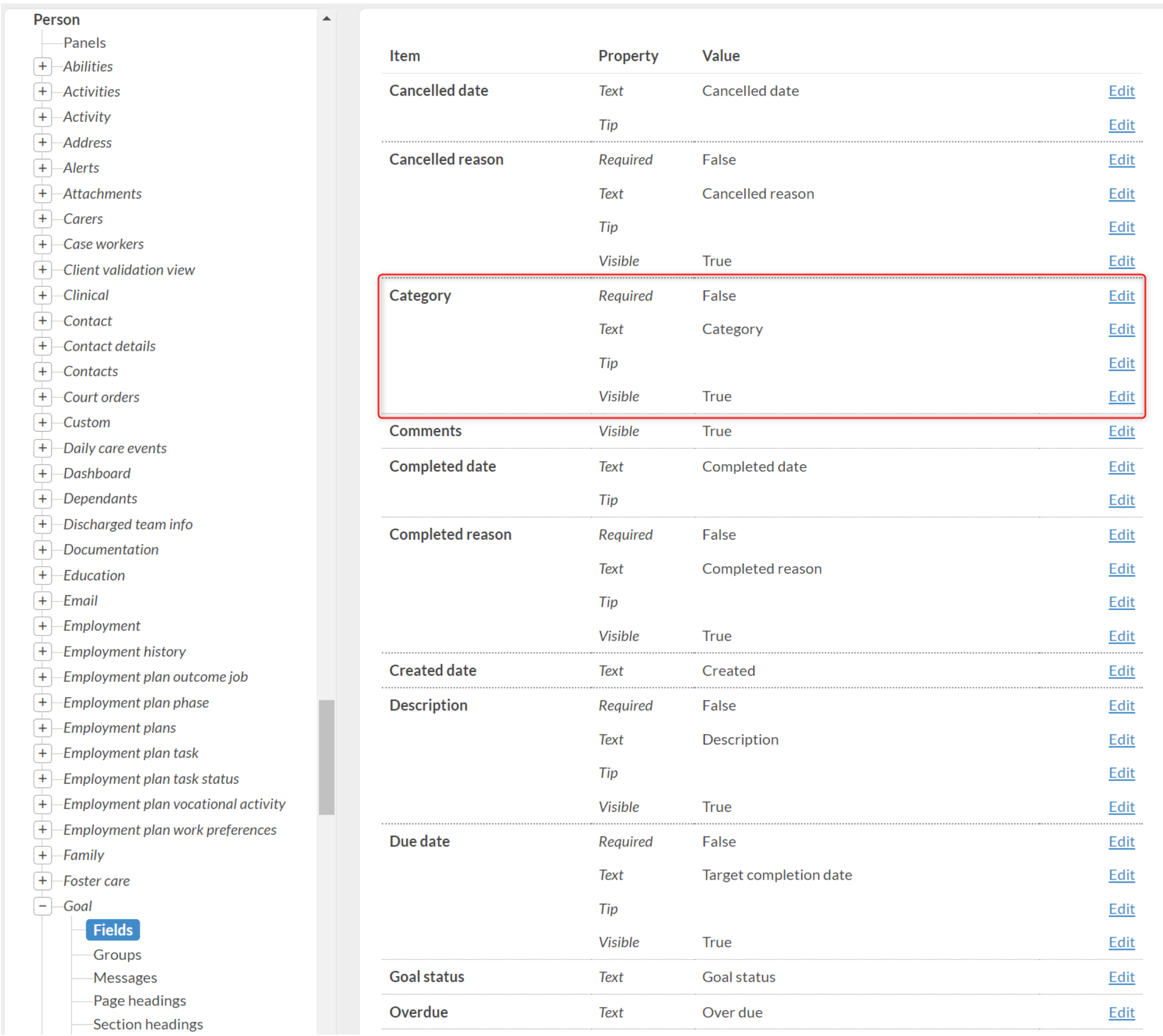
Before you can enable the category field, you will need to specify the category values. This can be done from the *Dropdown lists* section within the *Settings* menu. Scroll down until you find Goal category and click *View*.



Here you can add the categories you want to use on the Goal screen.

Enable the category field

Now you have values available for use, you can enable the goal category field using Customise Interface from the Settings menu. Scroll down to Person > Goal and select Fields, then set the appropriate Visibility and Requiredness values.



Recordbase

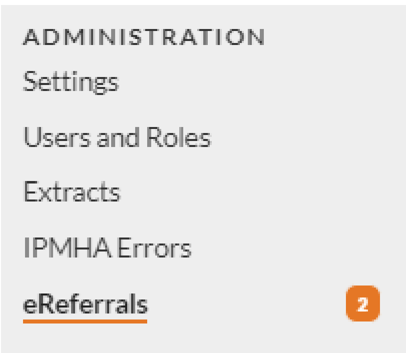
We want to hear from you and are keen to extend this further with your feedback. If you would like to be involved with future development in this space, please contact the product team and we will get in touch.

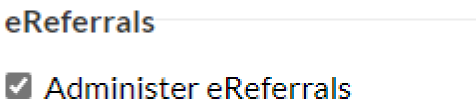
IPMHA eReferrals

In the last release, we introduced the ability to capture additional information as part of an activity to better support services delivering IPMHA contracts. In this release, we are adding more functionality to support these services by introducing eReferrals. Specifically, Recordbase now supports receiving referrals sent from Karo electronically. This means less manual entry and more accurate data.

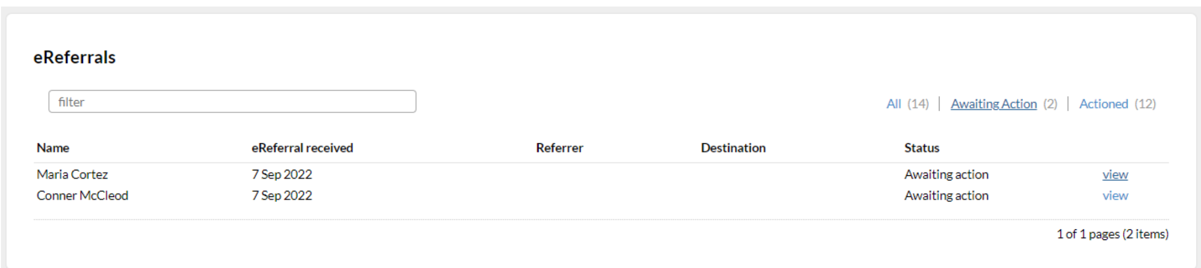
eReferral inbox

There is a new menu item called *eReferrals* where you can view any electronic referrals that have been sent through. This menu will show up for anyone who has been granted the “Administer eReferrals” permission. We have included a notification badge, so when there are unactioned electronic referrals present it will display the number of waiting referrals next to the menu.





The default view will show only electronic referrals waiting to be actioned, but there are filters available to see historical ones if you want.


eReferrals

filter

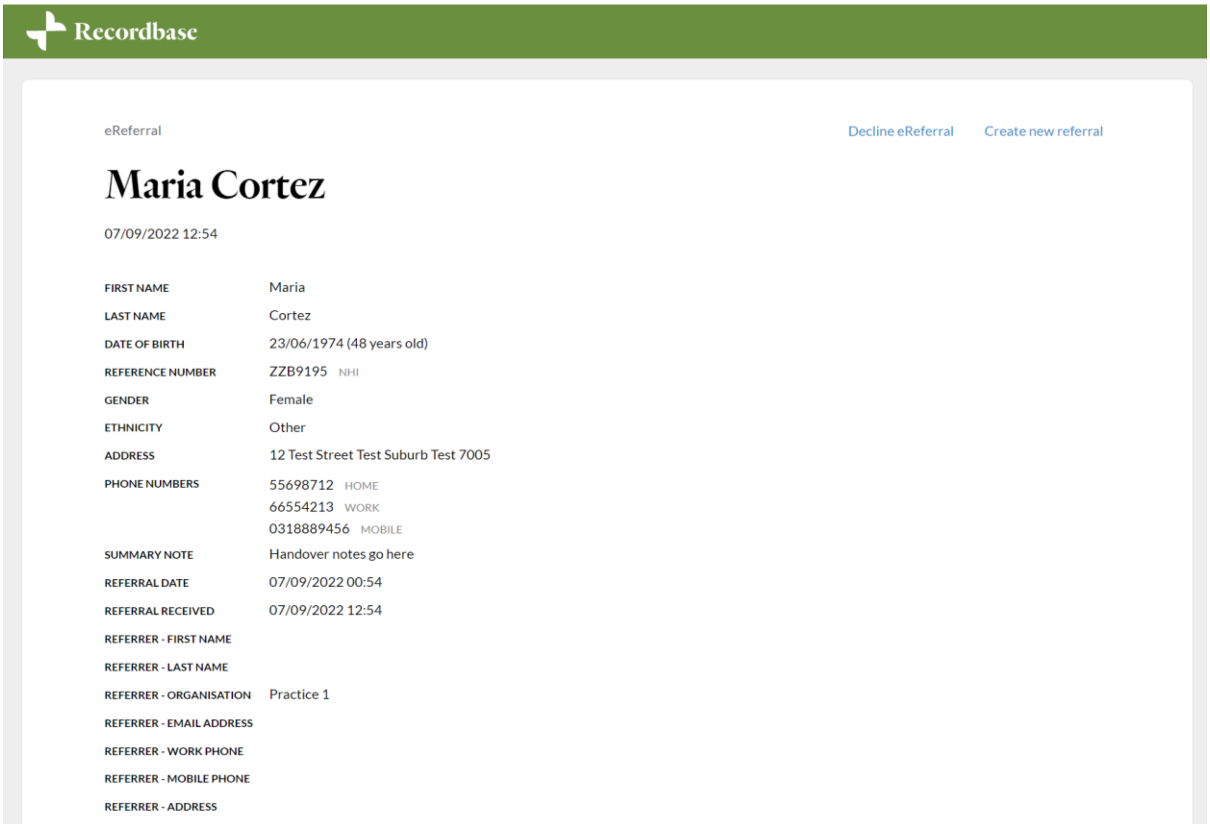
All (14) | Awaiting Action (2) | Actioned (12)

Name	eReferral received	Referrer	Destination	Status	
Maria Cortez	7 Sep 2022			Awaiting action	view
Conner McCleod	7 Sep 2022			Awaiting action	view

1 of 1 pages (2 items)

Accepting an eReferral

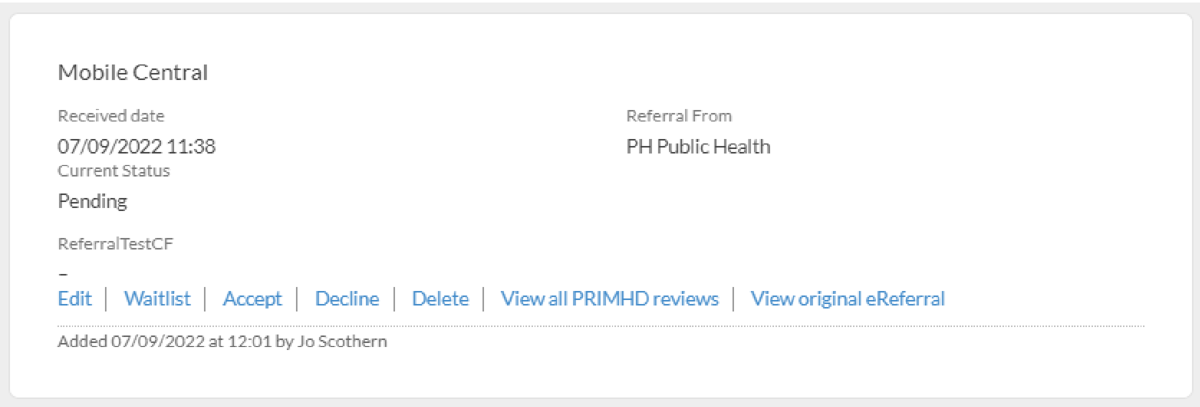
When you are ready to action an electronic referral, you can click *View* on the record you want to process. This will present you with the full details contained in the electronic referral.



To add this referral to Recordbase, click the *Create new referral* button in the top right. This will guide you through a familiar referral wizard and enable you to capture the required data needed as part of an IPMHA referral. When you select a team configured for IPMHA in the referral wizard, you will now also be prompted to capture a presenting issue.

Viewing the eReferral information

Some of the details included in the electronic referral are not automatically populated into Recordbase, but don't worry, you can view the original electronic referral details by clicking view on the Referral, then clicking *View original eReferral*.



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, this release also includes the following minor enhancements and new items:

- Address name has been added to person elite reports that allow column selection
- Addresses picked up by person elite reports now only include addresses that are not ended
- Goal actions are now shown in chronological order based on the due date in the person goal report
- The NHI validator has been updated to work with the new NHI number format
- The task list on the user dashboard is now loaded in the background and will not impact the performance of loading the page
- Client search now finds people based on their last name
- User team access extract now displays email address instead of username

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:

- Goal description set in template now populates goal when creating from a template
- Saving a country with no nationality will now correctly leave the nationality empty
- Average length of stay now correctly calculated for residential and respites services in elite cluster report

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, Edge, 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