

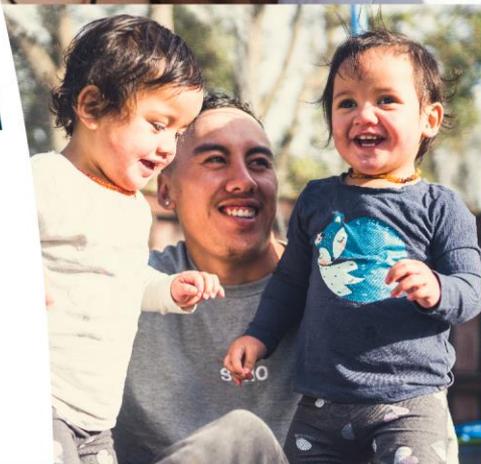


Recordbase



September 2022

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.

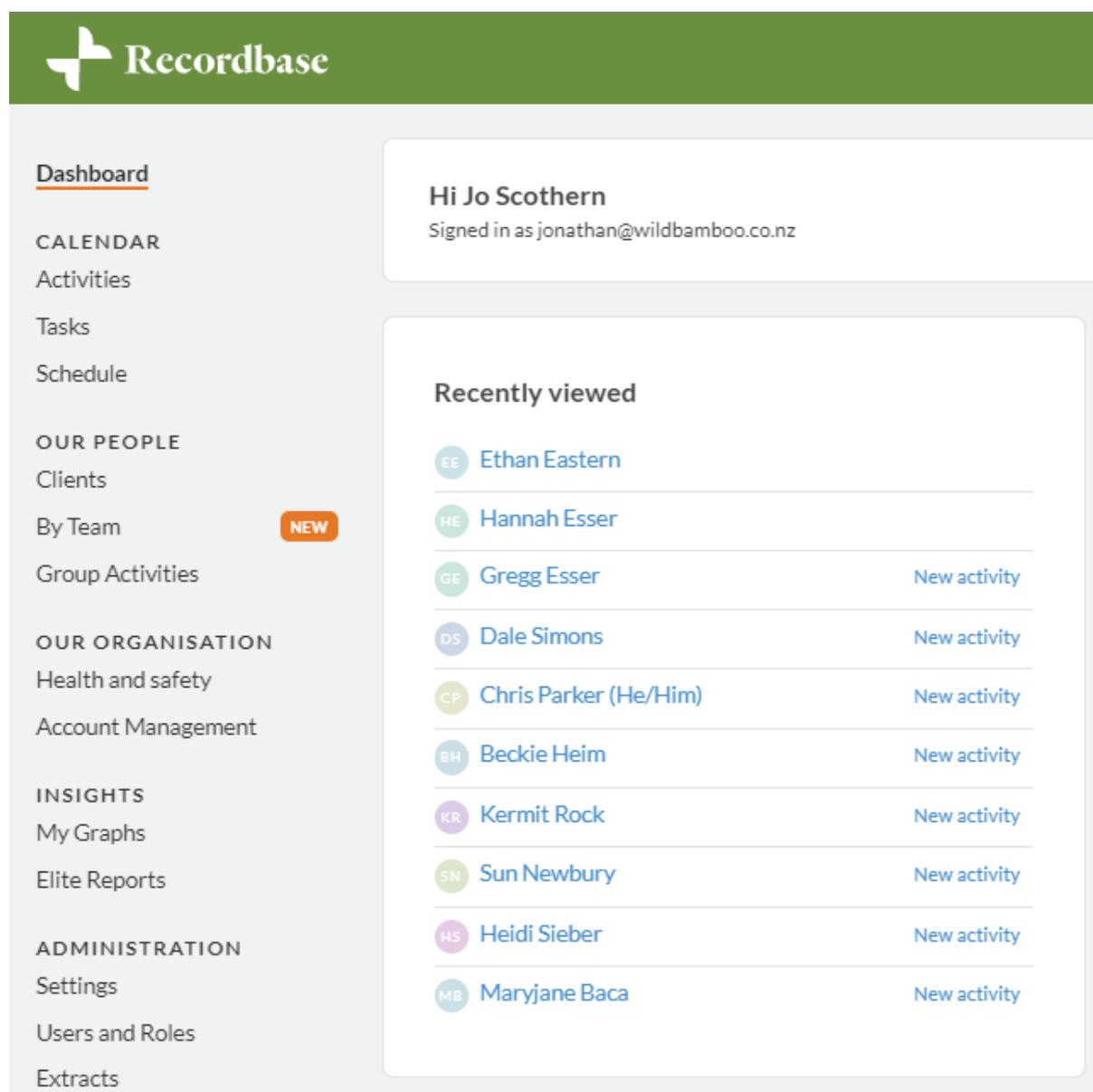
Our What's New Guide has been refreshed and you will see that Recordbase has had a facelift. We would love to know what you think.

## 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.

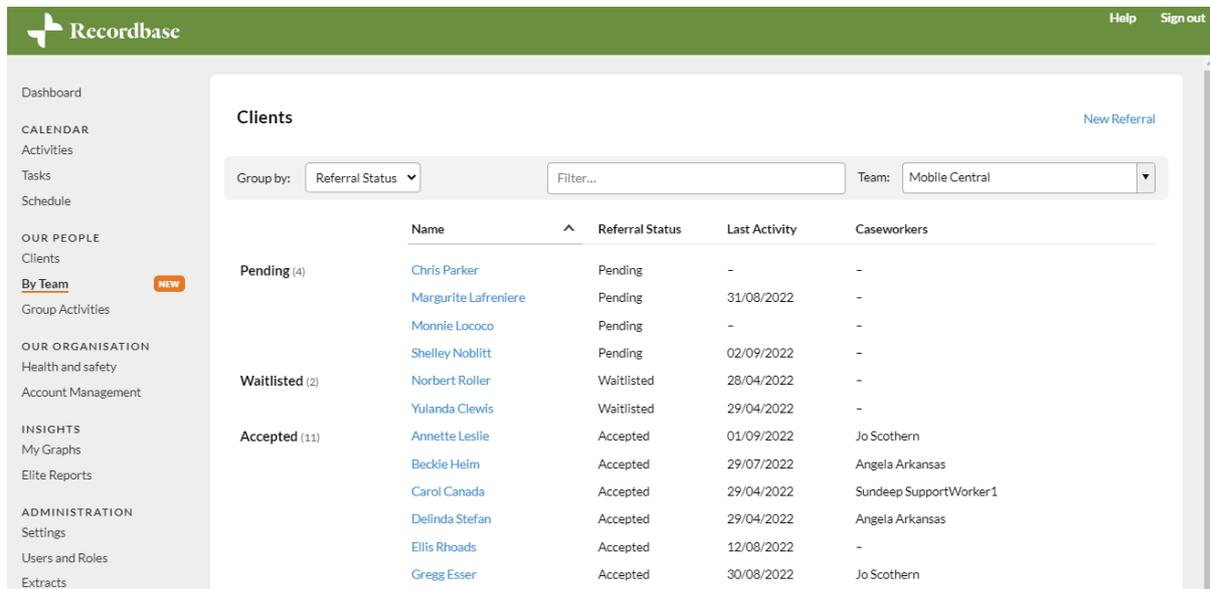


The screenshot shows the Recordbase dashboard interface. At the top left is the Recordbase logo. A sidebar on the left contains navigation menus: 'Dashboard' (underlined), 'CALENDAR' (with sub-items: Activities, Tasks, Schedule), 'OUR PEOPLE' (with sub-items: Clients, 'By Team' (marked with a 'NEW' badge), Group Activities), 'OUR ORGANISATION' (with sub-items: Health and safety, Account Management), 'INSIGHTS' (with sub-items: My Graphs, Elite Reports), and 'ADMINISTRATION' (with sub-items: Settings, Users and Roles, Extracts). The main content area shows the user 'Hi Jo Scothern' signed in as jonathan@wildbamboo.co.nz. Below this is a 'Recently viewed' section listing ten clients with their initials in a colored circle, their names, and a 'New activity' status for each.

Client Name	Activity Status
Ethan Eastern	
Hannah Esser	
Gregg Esser	New activity
Dale Simons	New activity
Chris Parker (He/Him)	New activity
Beckie Heim	New activity
Kermit Rock	New activity
Sun Newbury	New activity
Heidi Sieber	New activity
Maryjane Baca	New activity

## 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.



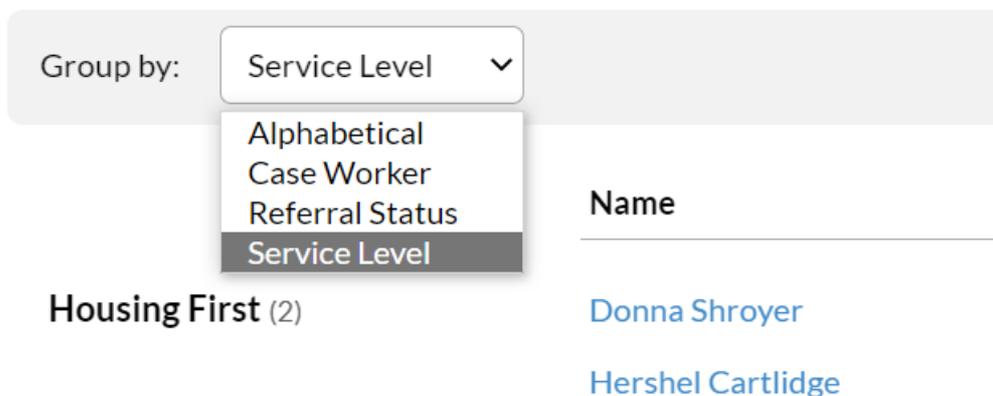
The screenshot shows the Recordbase interface with a sidebar on the left and a main content area. The sidebar includes navigation options like Dashboard, CALENDAR, OUR PEOPLE, OUR ORGANISATION, INSIGHTS, and ADMINISTRATION. The main content area is titled 'Clients' and features a 'Group by:' dropdown menu set to 'Referral Status', a 'Filter...' input field, and a 'Team:' dropdown menu set to 'Mobile Central'. Below these controls is a table of clients with columns for Name, Referral Status, Last Activity, and Caseworkers.

	Name	Referral Status	Last Activity	Caseworkers
Pending (4)	<a href="#">Chris Parker</a>	Pending	-	-
	<a href="#">Margurite Lafreniere</a>	Pending	31/08/2022	-
	<a href="#">Monnie Lococo</a>	Pending	-	-
	<a href="#">Shelley Noblitt</a>	Pending	02/09/2022	-
Waitlisted (2)	<a href="#">Norbert Roller</a>	Waitlisted	28/04/2022	-
	<a href="#">Yulanda Clewis</a>	Waitlisted	29/04/2022	-
Accepted (11)	<a href="#">Annette Leslie</a>	Accepted	01/09/2022	Jo Scothern
	<a href="#">Beckie Heim</a>	Accepted	29/07/2022	Angela Arkansas
	<a href="#">Carol Canada</a>	Accepted	29/04/2022	Sundee SupportWorker1
	<a href="#">Delinda Stefan</a>	Accepted	29/04/2022	Angela Arkansas
	<a href="#">Ellis Rhoads</a>	Accepted	12/08/2022	-
	<a href="#">Gregg Esser</a>	Accepted	30/08/2022	Jo Scothern

## 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.

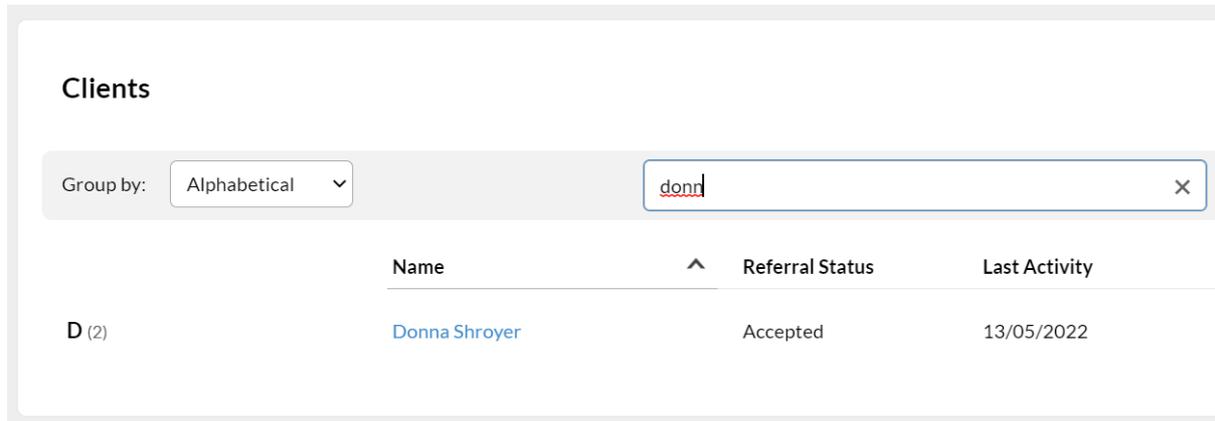
### Clients



The screenshot shows the 'Clients' page with the 'Group by:' dropdown menu open. The menu options are 'Alphabetical', 'Case Worker', 'Referral Status', and 'Service Level', with 'Service Level' highlighted. Below the menu, the text 'Housing First (2)' is visible, followed by the names 'Donna Shroyer' and 'Hershel Cartlidge'.

## 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.



The screenshot shows a web interface for a 'Clients' table. At the top left, the title 'Clients' is displayed. Below the title, there is a 'Group by:' dropdown menu set to 'Alphabetical'. To the right of this is a search input field containing the text 'donn' with a red underline under the 'n'. A small 'x' icon is visible in the top right corner of the search field. Below the search bar, the table has the following structure:

	Name	Referral Status	Last Activity
D (2)	<a href="#">Donna Shroyer</a>	Accepted	13/05/2022

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

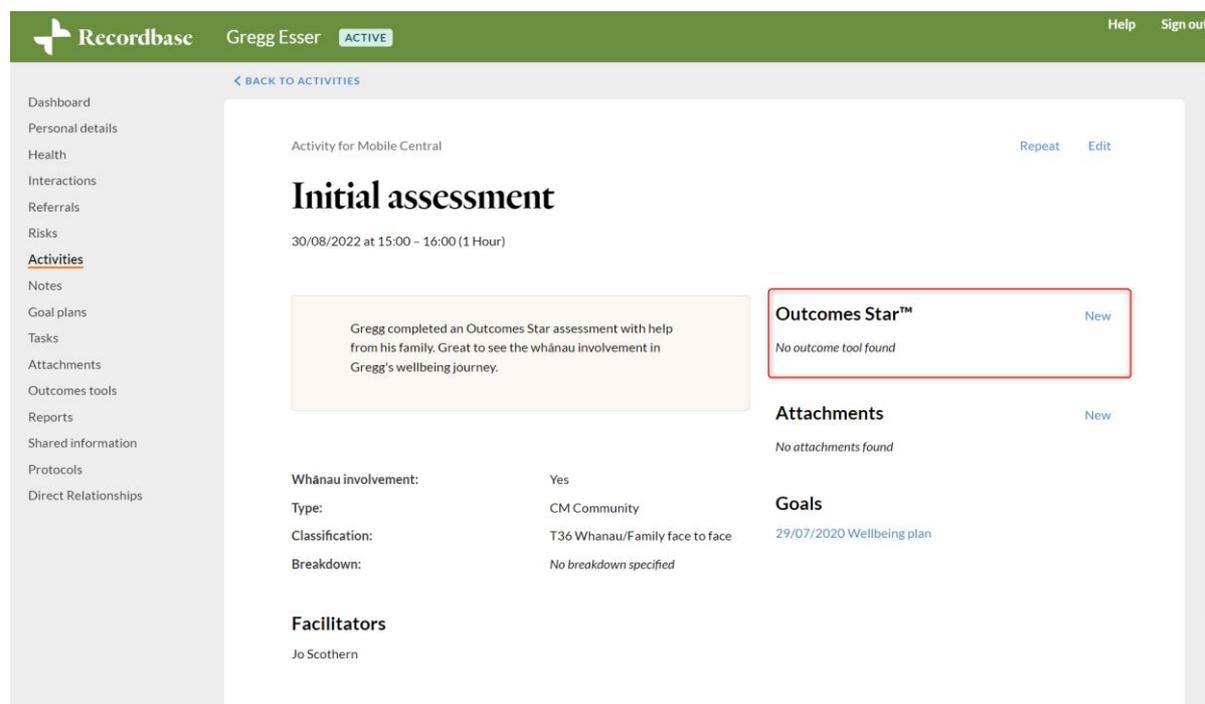
In the last release, we introduced changes to the activities screen that we hoped would make life easier for you.

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.



The screenshot shows the Recordbase interface for an activity titled "Initial assessment". The header includes the Recordbase logo, user name "Gregg Esser", and status "ACTIVE". A navigation menu on the left lists various sections like Dashboard, Personal details, Health, Interactions, Referrals, Risks, Activities (highlighted), Notes, Goal plans, Tasks, Attachments, Outcomes tools, Reports, Shared information, Protocols, and Direct Relationships. The main content area shows the activity details: "Activity for Mobile Central" with "Repeat" and "Edit" buttons. The title "Initial assessment" is followed by the date and time "30/08/2022 at 15:00 - 16:00 (1 Hour)". A text box contains a note: "Gregg completed an Outcomes Star assessment with help from his family. Great to see the whānau involvement in Gregg's wellbeing journey." Below this, a table lists details: Whānau involvement: Yes; Type: CM Community; Classification: T36 Whanau/Family face to face; Breakdown: No breakdown specified. On the right, there are sections for "Outcomes Star™" (with a "New" button and "No outcome tool found" message), "Attachments" (with a "New" button and "No attachments found" message), and "Goals" (with a link to "29/07/2020 Wellbeing plan"). At the bottom, the "Facilitators" section lists "Jo Scothern".

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.

### Edit breakdowns

Breakdowns label \*  

This setting allows customising the label for the breakdown selection field

Breakdowns tip (optional)

This setting allows customising the tip that appears below the breakdowns dropdown list

Field group \*  

This setting determines where in the template the field will appear

Render mode \*

This setting determines how the field will be displayed

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.

The screenshot shows the Recordbase user interface. At the top, there is a green header with the Recordbase logo, the user name 'Gregg Esser', and a status indicator 'ACTIVE'. On the right side of the header are links for 'Help' and 'Sign out'. A left-hand navigation menu lists various sections: Dashboard, Personal details, Health, Interactions, Referrals, Risks, Activities, Notes, Goal plans, Tasks, Attachments, Outcomes tools, Reports, Shared information, Protocols, and 'Direct Relationships' (which is highlighted). The main content area is divided into two sections. The first section, 'Direct Relationships', has a 'New' button in the top right and a table with the following data:

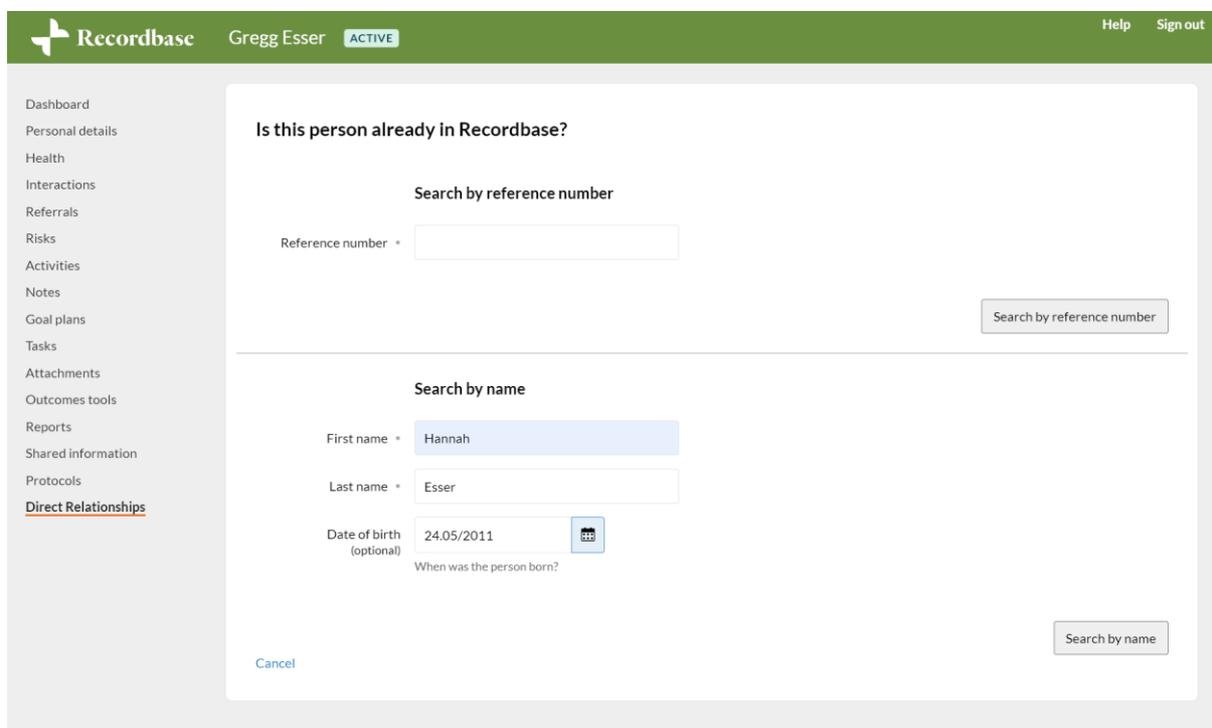
Person Name	Relationship type	Start Date	End Date
<a href="#">Sally Summer</a>	Household member - adult	17/05/2022	<a href="#">Edit</a>

The second section, 'Groups', has a 'New' button in the top right and displays two group types: 'Family' and 'Household'. Each group type has an 'Edit' link and a list of members with their names as links. The 'Family' group includes Dusty Purdie, Elva Wike, Gem Front, Gregg Esser, and Jack Johanson. The 'Household' group includes Alberto Albertson, Dusty Purdie, Gregg Esser, and Sally Summer - Emergency Housing / Household member - adult.

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.



The screenshot shows the Recordbase interface. At the top, the Recordbase logo is on the left, and the user name 'Gregg Esser' with an 'ACTIVE' status is in the center. On the right, there are links for 'Help' and 'Sign out'. A sidebar on the left lists various menu items: Dashboard, Personal details, Health, Interactions, Referrals, Risks, Activities, Notes, Goal plans, Tasks, Attachments, Outcomes tools, Reports, Shared information, Protocols, and Direct Relationships (which is underlined). The main content area is titled 'Is this person already in Recordbase?'. It contains two search sections. The first section is 'Search by reference number' with a text input field labeled 'Reference number \*' and a 'Search by reference number' button. The second section is 'Search by name' with three input fields: 'First name \*' containing 'Hannah', 'Last name \*' containing 'Esser', and 'Date of birth (optional)' containing '24.05/2011' with a calendar icon. Below the date field is the text 'When was the person born?'. There is a 'Cancel' link at the bottom left and a 'Search by name' button at the bottom right.

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.

- 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 \*

Last Name \*

Gender \*  Male  Female  Unknown  Other Gender

Date of birth \*

### Relationship Details

Relationship Type \*  Relative  Emergency Housing

Child  Parent

Start Date \*

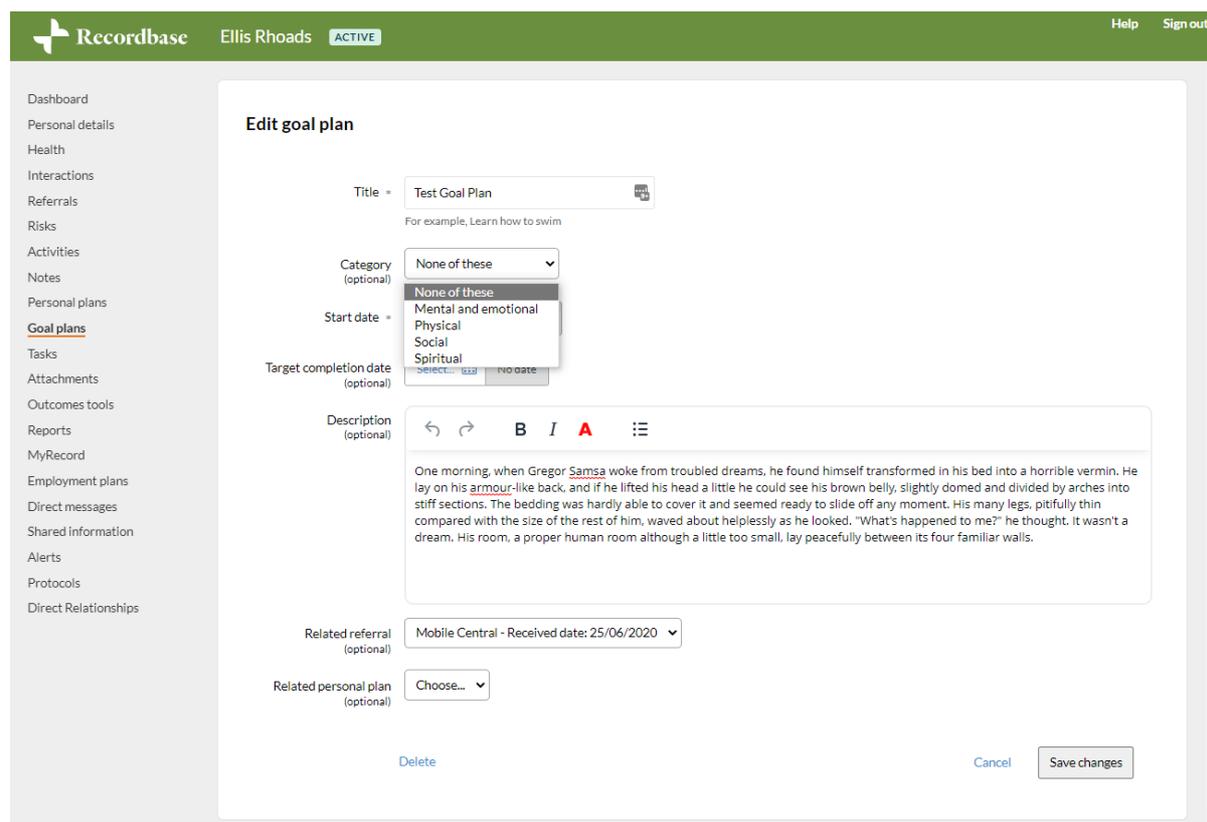
End Date (optional)

[Cancel](#)

# 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*.

[Back to settings](#)

### Goal category

Active (4) [Sort A-Z](#) | [New](#)

	Value or code	Text	Parent item	
::	ME	Mental and emotional		<a href="#">Edit</a>   <a href="#">Remove</a>
::	P	Physical		<a href="#">Edit</a>   <a href="#">Remove</a>
::	SO	Social		<a href="#">Edit</a>   <a href="#">Remove</a>
::	SP	Spiritual		<a href="#">Edit</a>   <a href="#">Remove</a>

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.

Person

- Panels
- + Abilities
- + Activities
- + Activity
- + Address
- + Alerts
- + Attachments
- + Carers
- + Case workers
- + Client validation view
- + Clinical
- + Contact
- + Contact details
- + Contacts
- + Court orders
- + Custom
- + Daily care events
- + Dashboard
- + Dependants
- + Discharged team info
- + Documentation
- + Education
- + Email
- + Employment
- + Employment history
- + Employment plan outcome job
- + Employment plan phase
- + Employment plans
- + Employment plan task
- + Employment plan task status
- + Employment plan vocational activity
- + Employment plan work preferences
- + Family
- + Foster care
- Goal
  - Fields**
  - Groups
  - Messages
  - Page headings
  - Section headings

Item	Property	Value	
Cancelled date	Text	Cancelled date	<a href="#">Edit</a>
	Tip		<a href="#">Edit</a>
Cancelled reason	Required	False	<a href="#">Edit</a>
	Text	Cancelled reason	<a href="#">Edit</a>
	Tip		<a href="#">Edit</a>
Category	Visible	True	<a href="#">Edit</a>
	Required	False	<a href="#">Edit</a>
	Text	Category	<a href="#">Edit</a>
	Tip		<a href="#">Edit</a>
Comments	Visible	True	<a href="#">Edit</a>
	Tip		<a href="#">Edit</a>
Completed date	Text	Completed date	<a href="#">Edit</a>
	Tip		<a href="#">Edit</a>
	Visible	True	<a href="#">Edit</a>
Completed reason	Required	False	<a href="#">Edit</a>
	Text	Completed reason	<a href="#">Edit</a>
	Tip		<a href="#">Edit</a>
	Visible	True	<a href="#">Edit</a>
Created date	Text	Created	<a href="#">Edit</a>
	Tip		<a href="#">Edit</a>
Description	Required	False	<a href="#">Edit</a>
	Text	Description	<a href="#">Edit</a>
	Tip		<a href="#">Edit</a>
	Visible	True	<a href="#">Edit</a>
Due date	Required	False	<a href="#">Edit</a>
	Text	Target completion date	<a href="#">Edit</a>
	Tip		<a href="#">Edit</a>
Goal status	Visible	True	<a href="#">Edit</a>
	Text	Goal status	<a href="#">Edit</a>
Overdue	Text	Over due	<a href="#">Edit</a>

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 image shows two parts of the user interface. On the left is a vertical navigation menu under the heading 'ADMINISTRATION'. The menu items are 'Settings', 'Users and Roles', 'Extracts', 'IPMHA Errors', and 'eReferrals'. The 'eReferrals' item is highlighted with an orange underline and has a small orange square badge with the number '2' next to it. On the right is the 'eReferrals' settings page, which has a header 'eReferrals' and a single checked checkbox labeled 'Administer eReferrals'.

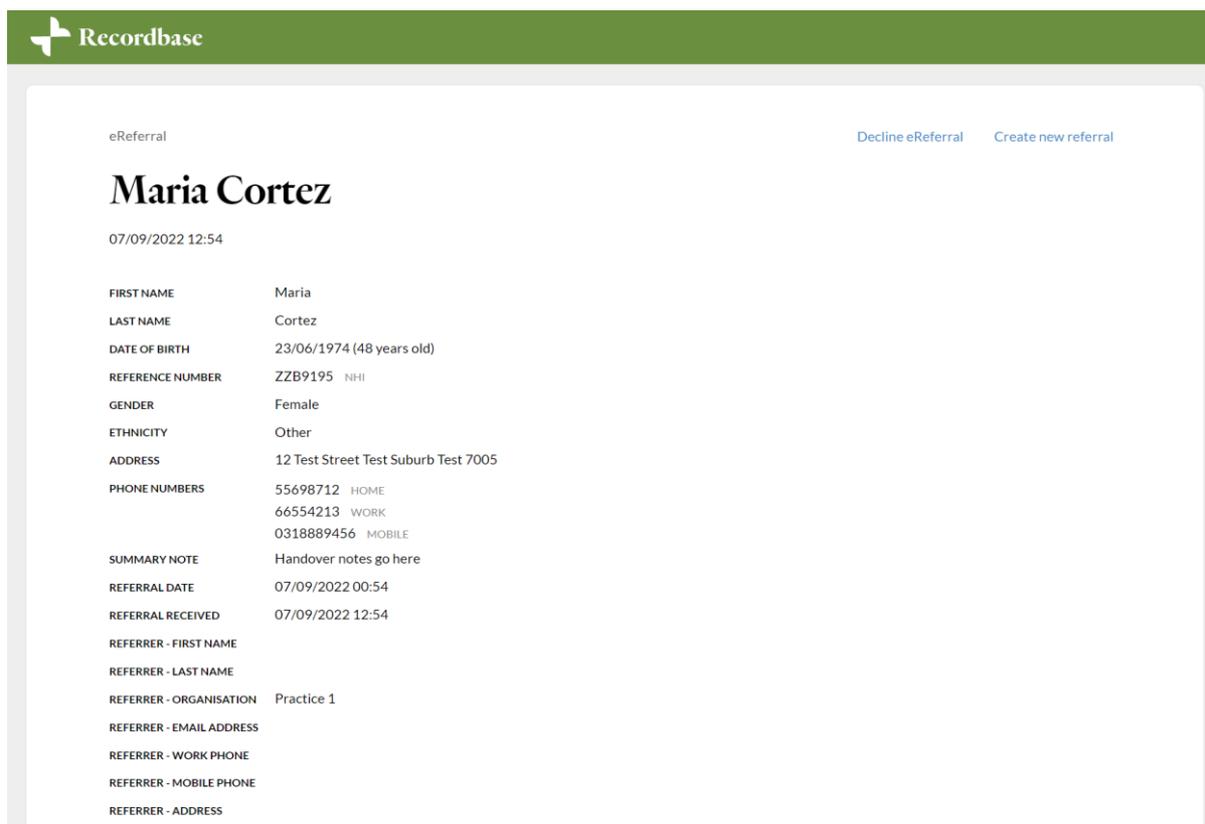
The default view will show only electronic referrals waiting to be actioned, but there are filters available to see historical ones if you want.

The image shows a screenshot of the 'eReferrals' table. At the top left is a search filter box containing the word 'filter'. At the top right are navigation links: 'All (14) | [AwaitingAction \(2\)](#) | [Actioned \(12\)](#)'. The table has five columns: 'Name', 'eReferral received', 'Referrer', 'Destination', and 'Status'. There are two rows of data. The first row shows 'Maria Cortez' with '7 Sep 2022' received, and 'Awaiting action' status, with a 'view' link. The second row shows 'Conner McCleod' with '7 Sep 2022' received, and 'Awaiting action' status, with a 'view' link. At the bottom right of the table is the text '1 of 1 pages (2 items)'.

Name	eReferral received	Referrer	Destination	Status
Maria Cortez	7 Sep 2022			Awaiting action <a href="#">view</a>
Conner McCleod	7 Sep 2022			Awaiting action <a href="#">view</a>

## 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.



The screenshot shows the Recordbase eReferral interface. At the top, there is a green header with the Recordbase logo and name. Below the header, the page title is "eReferral" and there are two links: "Decline eReferral" and "Create new referral". The patient's name, "Maria Cortez", is displayed in a large, bold font. Below the name, the date and time of the referral is shown as "07/09/2022 12:54". The patient details are listed in a table format:

FIRST NAME	Maria
LAST NAME	Cortez
DATE OF BIRTH	23/06/1974 (48 years old)
REFERENCE NUMBER	ZZB9195 NHI
GENDER	Female
ETHNICITY	Other
ADDRESS	12 Test Street Test Suburb Test 7005
PHONE NUMBERS	55698712 HOME 66554213 WORK 0318889456 MOBILE
SUMMARY NOTE	Handover notes go here
REFERRAL DATE	07/09/2022 00:54
REFERRAL RECEIVED	07/09/2022 12:54
REFERRER - FIRST NAME	
REFERRER - LAST NAME	
REFERRER - ORGANISATION	Practice 1
REFERRER - EMAIL ADDRESS	
REFERRER - WORK PHONE	
REFERRER - MOBILE PHONE	
REFERRER - ADDRESS	

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*.

Mobile Central

Received date	Referral From
07/09/2022 11:38	PH Public Health
Current Status	
Pending	
ReferralTestCF	
-	

[Edit](#) | [Waitlist](#) | [Accept](#) | [Decline](#) | [Delete](#) | [View all PRIMHD reviews](#) | [View original eReferral](#)

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Added 07/09/2022 at 12:01 by Jo Scothern

## 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>