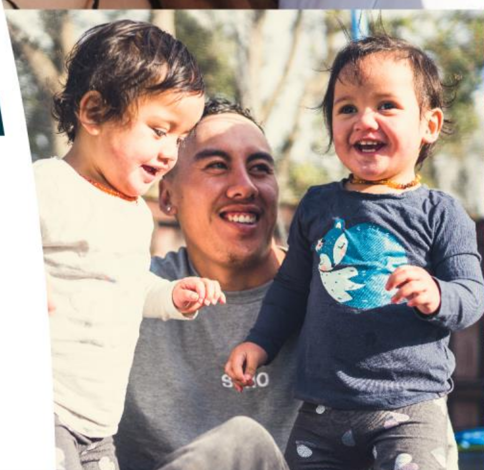


Recordbase

May 2023

What’s new




What's new

Highlights of new release

We are committed to our mahi of providing you with a product that lets you get back to your core purpose and away from the computer.

As promised, we are making new features available as soon as possible, so this release comes to you hot on the heels of our last one. You can look forward to more regular improvements throughout the year.

This release provides an updated user dashboard, activity recovery, expands on our client list changes and introduces NHI lookup as part of the referral wizard. Along with these key changes, this release includes a lot of work behind the scenes that will improve performance and general user experience.

Recordbase

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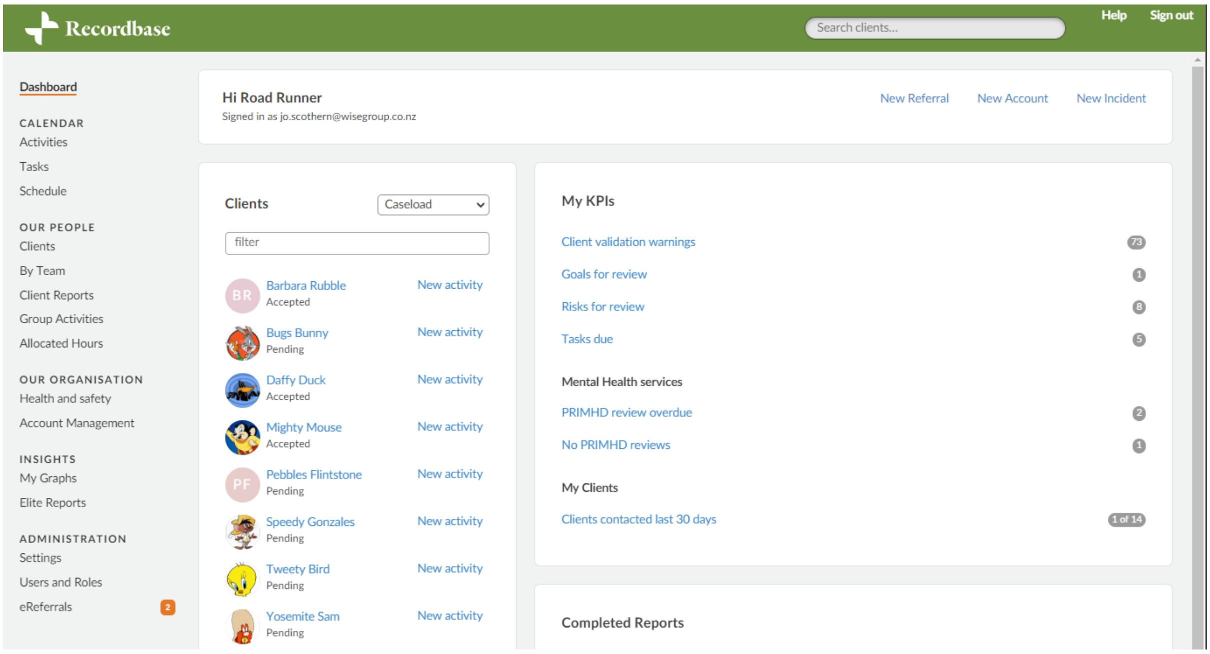
User dashboard refresh

The main user dashboard is the first page to load when you sign in to Recordbase and we think it should be a place to provide important information at a glance and give you the chance to quickly navigate to where you need to be.

In order to improve the way this works, we have made a few changes that we hope will make things easier. We have removed the task list and have instead prioritised the use of the KPIs widget to give you important insights at a glance.

We have also taken the chance to work on the layout of this screen and have allowed for more space to display the people you are working with. We have also made additional improvements to the functionality of this widget and you can now switch between a “Caseload” and “Recently viewed” list.



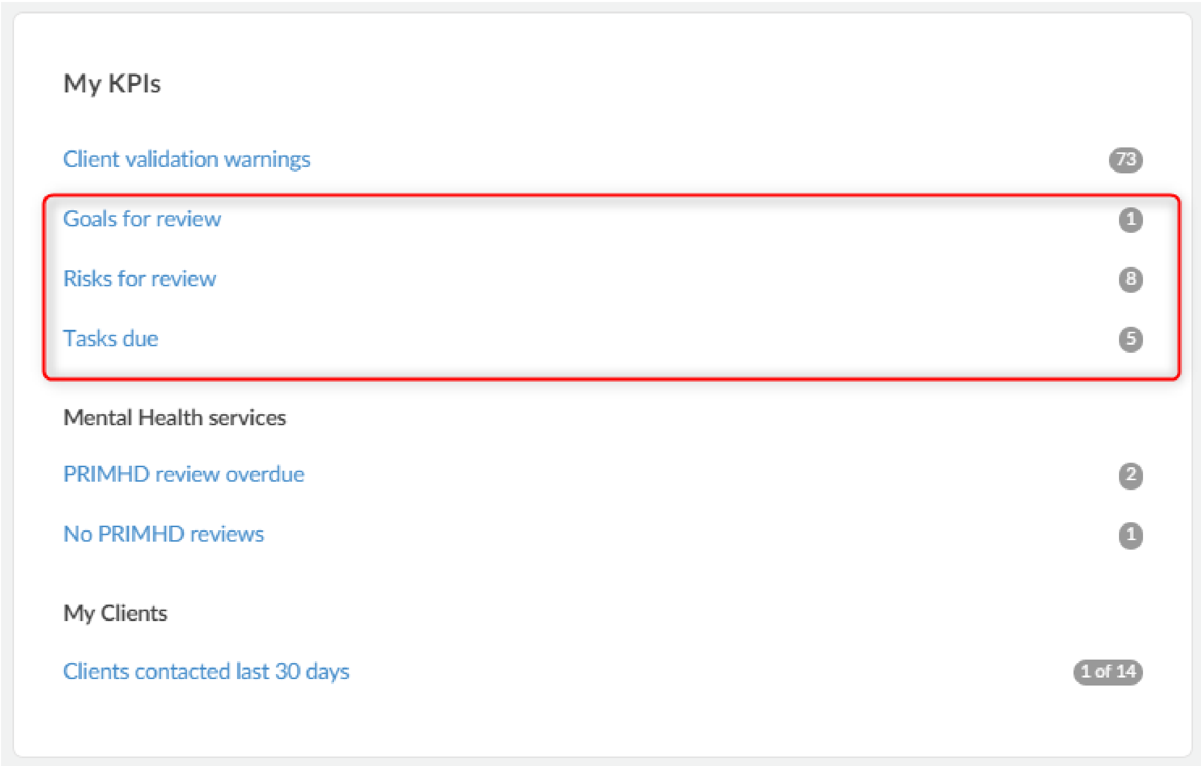
My KPIs

KPI stands for "key performance indicator" – a performance measurement intended to evaluate the achievement (or progress toward achievement) of specific, strategic organisational goals. Continuous assessment of KPIs provides insights into performance and highlights potential areas of improvement.

In Recordbase, KPIs let your organisation configure a reminder to follow up on specific tasks. It could be as simple as showing people in service that have not been assigned a caseworker, or something specific to your organisation.

The Recordbase dashboard is the first screen you see when you sign in, which makes it a great place to provide a summary of KPIs your organisaton has enabled. After all, regular visibility makes it much easier to monitor how you're doing – and hey, if you need to make some course correction, the KPI drill through can take you directly to individual client records!

In this release we have prioritised the layout of this functionality and it now takes pride of place at the top of the screen. We have also removed the previous task view and replaced it with a summary view included in the KPI section.



If you would like to know more about KPIs, or have specific rules you would like enabled, please contact the product team and we will get in touch.

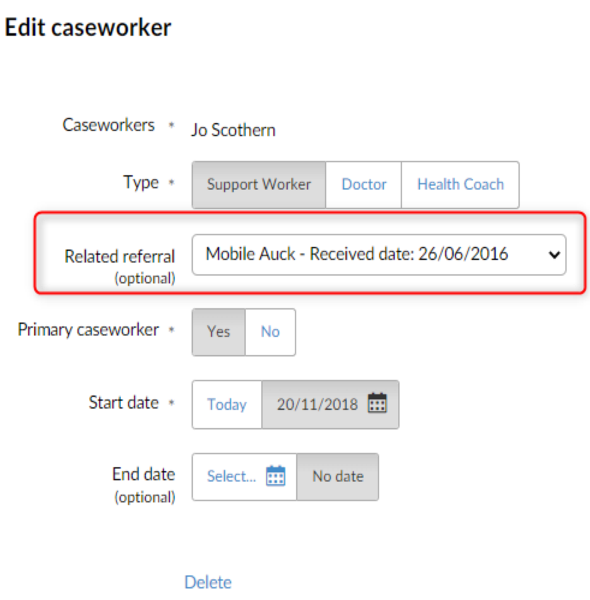
Client list improvements

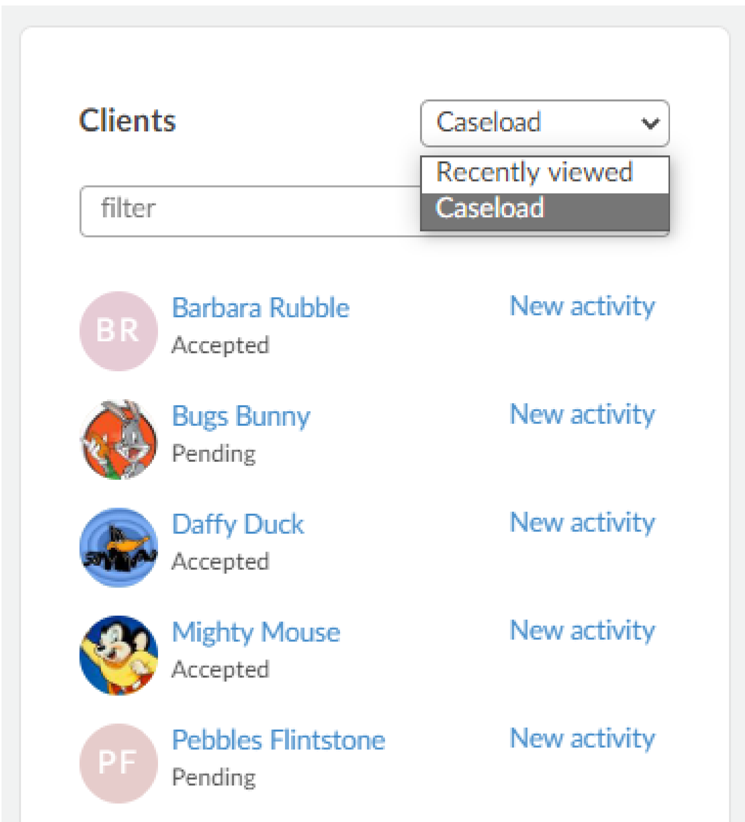
This is another phase in our journey towards improving the way you can view and find the people you support. In a previous release, we introduced the new “By Team” view with the plan to ultimately replace the “Clients” menu.

In this release we have introduced the ability to view your caseload directly on the user dashboard. We have also created an alternative place to search for people and made sure it is always available through the top level banner.

My Caseload

By including a caseload view directly on the main dashboard, we hope this will make you lives easier with less clicks to get to the people you want to work with. We understand that differing roles have unique needs, so this feature now lets you switch between views. As a team leader the Recently viewed mode shows you the last 10 people you have viewed. The new Caseload view shows you any person that you have been setup as a kaimahi. It is important to note that only people relationships where the referral has been linked will be included.

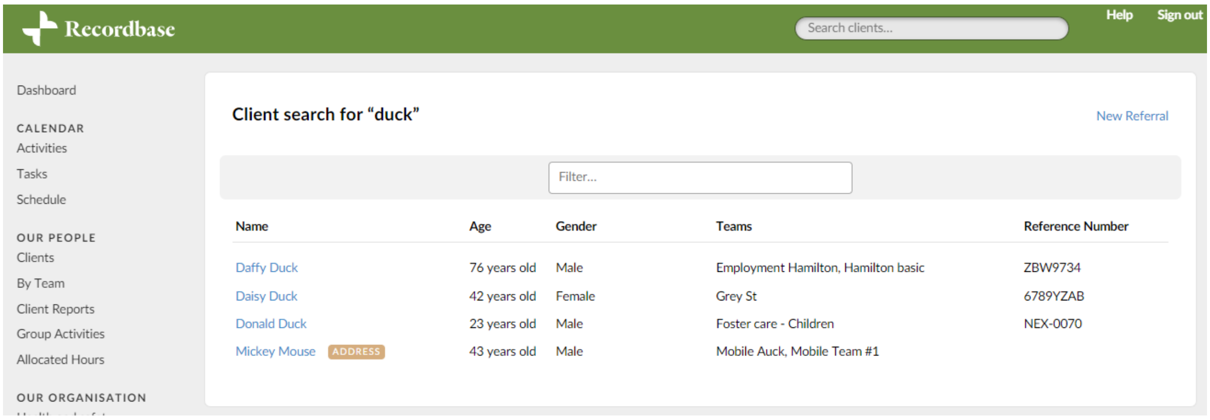




Client search

Another useability improvement we have added is to provide a person search on the main banner. This means you can always search for a person on any of the top-level pages and again reduces the clicks to quickly find the person you want to work with.

We have taken the opportunity here to extend the fields you can search on, and this will now work for Claims numbers and Purchase order numbers. In addition, there is now an indicator to show you how the person in the list was matched. So, if you search by phone number a badge will show you why the person was displayed.

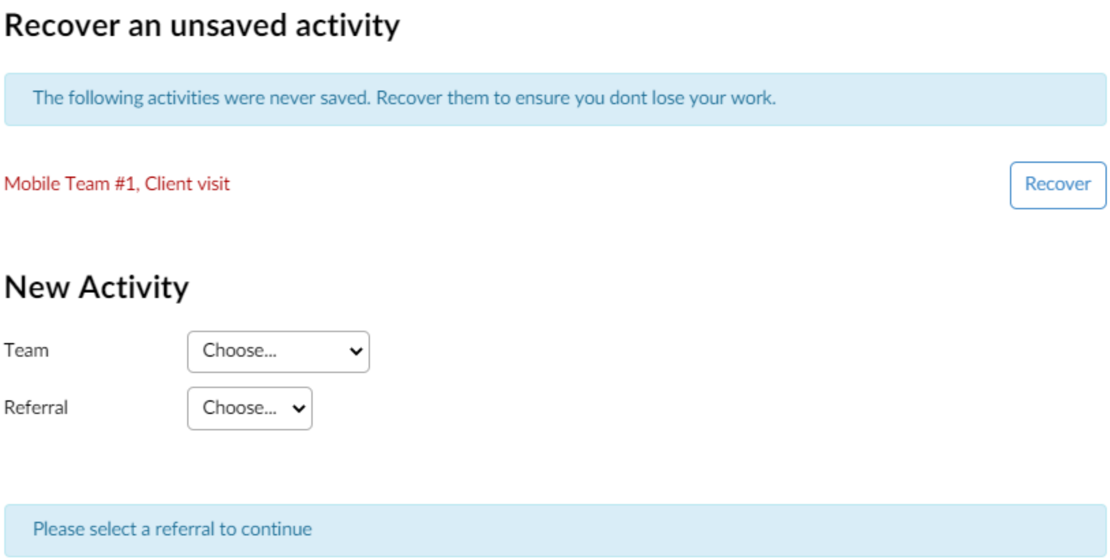


Activity recovery

No one likes to lose work they have invested time in, and we understand how frustrating that can be. In this release, we have made changes to the activity screen to ensure your work is not lost due to unexpected circumstances. Recordbase will now save your progress as you complete your activity and provide a way to recover it if something goes wrong.

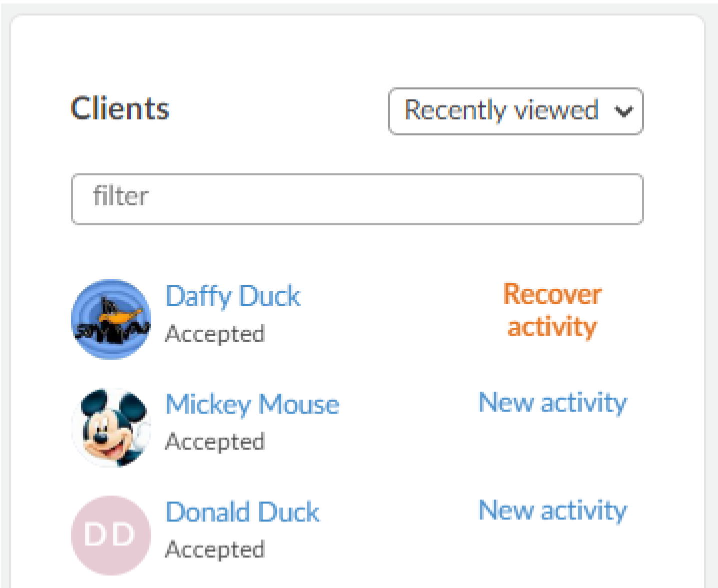
Recordbase will allow capture one set of recovery information per referral. The intention is that you would complete any “lost” activity as soon as you can. If you start a new activity for the same referral as the recovery record, it will clear the recovery.

An activity recovery will be saved whenever you start filling out an activity, but for some reason leave without clicking the *Cancel* or *Create activity* buttons. When this happens, the next time you go to create an activity, the template chooser screen will present you with the option to recover the activity.



Clicking on the *Recover* button will load the activity screen in the sate it was when the last automatic save occurred. Activity recoveries are only available for individual activities, and will be saved automatically after 15 seconds for most fields. The Notes field is a special case and will be saved every 2 minutes.

To make it easier to find an activity recovery record, we have updated the Clients panel will reflect when one is available by changing the *New activity* button



If you have an activity recovery record available, you will instead be presented with a *Recover activity* button.

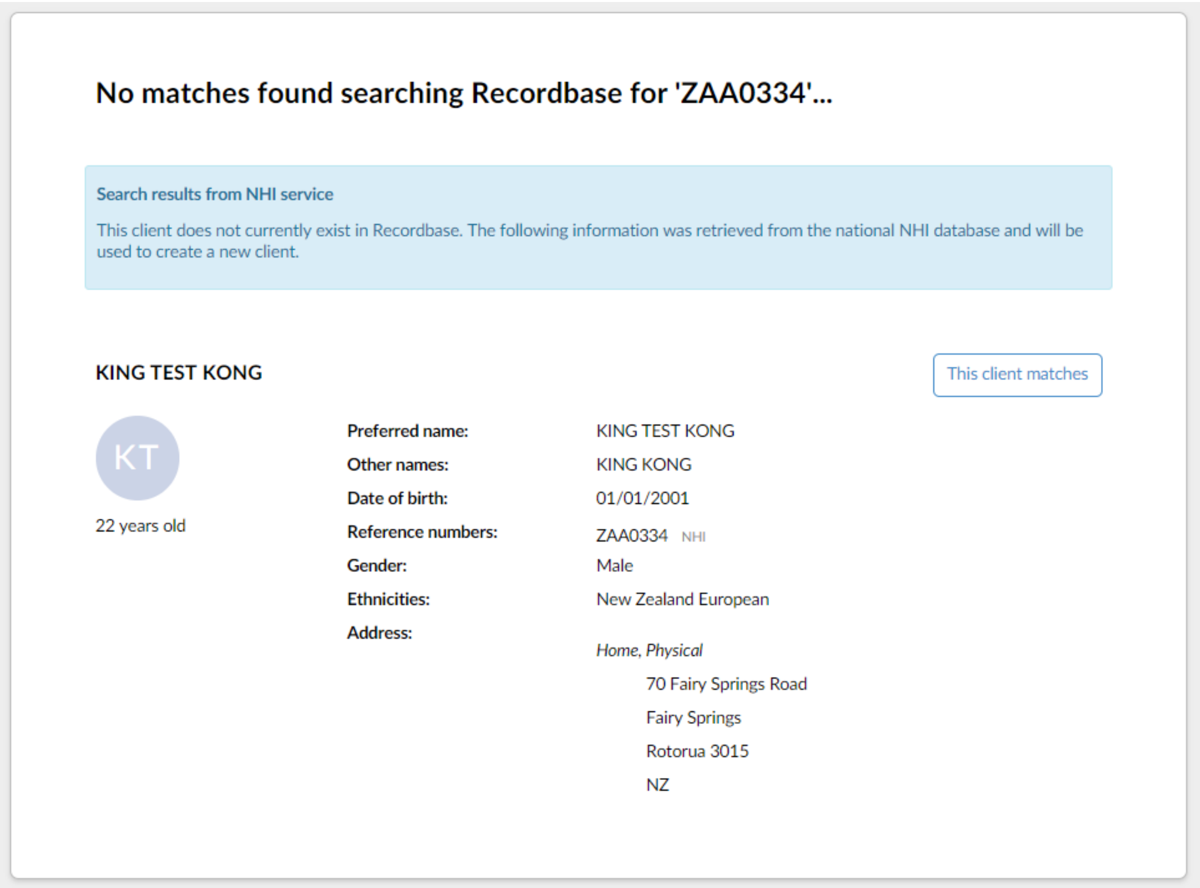
NHI Lookup

Our primary focus has always been to reduce the burden for the people using Recordbase wherever we can. One of the way we can to this is by connecting with other systems where possible and automating tasks.

In this release, we are introducing the capability to connect Recordbase to the NHI service and provide inbuilt lookup functionality. This means when you receive a referral, you can enter the NHI and let Recordbase pre-populate many of the default fields for you. This not only saves time, but ensures a high level of data quality and reduces the chance of PRIMHD errors.

Referral wizard

When this has been configured for you organisation, The referral wizard will automatically look for NHI details for any NHI that is not already in Recordbase. We will display the details about the person that is held in the NHI system, including contact details and address information. Some of this will automatically populate the following referral forms.



The address and contact details are not currently saved as part of this process, but we are already looking to improve on this in our next release.

How to get this setup

If this is something you would like enabled for your organisation, there is a simple process to get things configured.

First you will need to fill out the Production Credentials Request Form and send it through to the NHI access team at Te Whatu Ora - NHI_Access@health.govt.nz. See the link below for a version of the form with the appropriate details required for Recordbase.

Once this form has been approved, you will receive the required credential to connect. Once you share these details with Wild Bamboo, we can configure your environment and everything will start working straight away.

The document can be downloaded here.

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:

- My referrals filter on the eReferrals list screen
- Improved display of multi-tier optional lookups
- Gender now has the option of entering a custom text value
- The person summary panel has been updated to improve the layout
- An inactive people report has been added to easily identify people that have been out of service for a long time

Appendix II – 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/recordbase-and-supported-browsers