

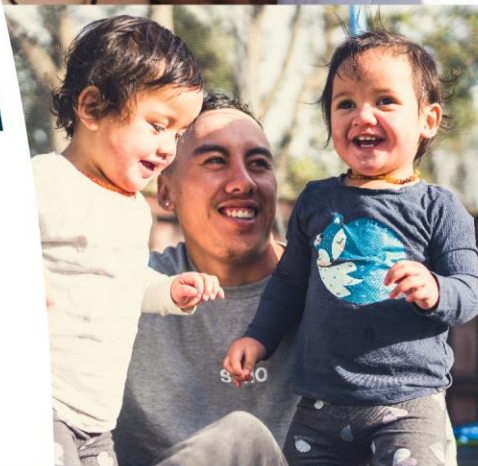


Recordbase



September 2023

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.

This release provides improvements for managing your tasks and enhanced filtering for the notes handover report. Along with these key changes, this release includes a lot of work behind the scenes that will improve performance and general user experience.

What's new

Table of Contents

TASK IMPROVEMENTS.....	1
ASSIGNING TASKS.....	1
VIEWING TASKS.....	2
NOTES HANDOVER REPORT.....	4
NOTES FOR SPECIFIC TEAM.....	4
NOTES FOR USER TYPE	5
APPENDIX I – MINOR CHANGES.....	6
APPENDIX II – BROWSER VERSIONS AND DEVICES	7

Task improvements

Tasks are a central part to how Recordbase helps you to organise and plan work that needs to be done. Tasks can be manually created as a point of reference, or automatically populated as part of the business process attached to a new referral.

Traditionally tasks created against a person's file have showed for everyone that has access. This is great as it ensures they remain visible and reduces the likelihood of being missed. However, there can be a downside, when you work with many people you have access to the list of tasks that can get overly long.

In this release, Recordbase now allows you to assign tasks to an individual user or alternatively link a task to a specific Recordbase team. This means that you have more control over the tasks that are presented and can filter to the ones that are appropriate.

Assigning tasks

Assigning tasks is a simple matter, and we have added a couple of optional fields at the bottom of the task form.

The screenshot shows the 'New task' form in Recordbase. The form includes the following fields and options:

- Subject ***: A text input field.
- Description (optional)**: A large text area.
- Due Date ***: A dropdown menu with 'Today' and 'Select...' (with a calendar icon).
- Completed Date (optional)**: A dropdown menu with 'Today', 'Earlier...' (with a calendar icon), and 'No date'.
- Assigned User (optional)**: A dropdown menu with 'Choose...' and a downward arrow. Below it are 'Assign to me' and 'Clear' links.
- Related Referral (optional)**: A dropdown menu with 'Choose...' and a downward arrow.

The 'Assigned User' and 'Related Referral' fields are highlighted with a red box. At the bottom right of the form are 'Cancel' and 'Save' buttons.

The *Assign to me* option provides a quick link to select yourself as the assigned user, which will save time. The related referral list will display a list of the currently open referrals.

Related Referral (optional)

North Street Community - Received date: 21/06/2023

East Street Day Programme - Received date: 17/08/2022

Viewing tasks

In order to make the most of these new options, we have made changes to the tasks lists, both on the person file and on the user task list.

The user task list will allow you to take advantage of the new fields to filter the tasks to show the most relevant information. Please note that if you have others reporting to you, you can use the *Caseworker* dropdown to see things from their perspective, and all the filters will still work in that new context.

Tasks (next 7 days)

Caseworker:

Teams:

☐ Assigned

Duedate	Person Name	Description	Task type	Team
10/08/2023 OVERDUE	Wendy Weka	Renew consent form	PersonTask	
11/08/2023 OVERDUE	Adam Albatross	Fruit - immediate reaction on skin contact	PersonRisk	
18/08/2023	Adam Albatross	Cleaning skills	GoalAction	
18/08/2023	Wendy Weka	Asthma	PersonRisk	
18/08/2023	Tama Tui	Get CV ready	PersonTask	East Street Day Programme
18/08/2023	Adam Albatross	Prepare for job interview	PersonTask	East Street Day Programme
21/08/2023	Terry Tuatara	Consent review	PersonTask	North Street Community
22/08/2023	Adam Albatross	Mental Health Act, Section 30	PersonLegalStatus	

1 of 1 pages (8 items)

The filter textbox allows you to start typing and reduce the items displayed to only those that match the text you enter. This will search on the text displayed on all columns displayed excluding the Team.

To filter on team, you can use the team selection. The team displayed will be the team of the related referral, this could be inherited in the case of a goal that has been related to a referral, or intentionally selected as part of a manual task.

Caseworker: My tasks (8) ▼

Teams: East Street Day Programme ▼

☐ Assigned

Duedate	Person Name	Description	Task type	Team
18/08/2023	Tama Tui	Get CV ready	PersonTask	East Street Day Programme
18/08/2023	Adam Albatross	Prepare for job interview	PersonTask	East Street Day Programme

1 of 1 pages (2 items)

Finally, you can also choose to show only tasks that have been assigned directly to you (the user).

Caseworker: My tasks (8) ▼

Teams: All Teams ▼

☒ Assigned

Duedate	Person Name	Description	Task type	Team
10/08/2023	Wendy Weka	Renew consent form	PersonTask	

1 of 1 pages (1 item)

The task list on the person file has also been updated, but because this is already a more specific list, we have presented the filters in a different way.

filter

[Current tasks \(1\)](#) | [Completed tasks \(0\)](#) | [Deleted tasks \(0\)](#) | [My Tasks \(0\)](#)

Due date	Description	Assigned User	Related Referral	Task type
21/08/2023	Consent review		North Street Community - Received date: 11/08/2023	Edit

1 of 1 pages (1 item)

This list has the same text filter, which should work well in most situations, and we have added an additional My Tasks filter to quickly limit the list to only those the user has been assigned to.

My tasks (next 7 days)

In the last release, we removed the My tasks panel from the main dashboard and replaced it with a set of KPIs. This change worked well for some people, but we received feedback from others that this change was not so welcome.

In this release, we have made it possible to re-enable this panel. It won't come back by default, but you can contact Wild Bamboo support to have this re-enabled.

My tasks (next 7 days)				
	Due date	Person name	Description	
🔴	10/08/2023	Wendy Weka	Renew consent form ###Basic:	🔴
🔴	11/08/2023	Adam Albatross	Fruit - immediate reaction on skin contact Risk review	🔴
	18/08/2023	Adam Albatross	Cleaning skills Goal action due	🔴
	18/08/2023	Wendy Weka	Asthma Risk review	🔴
📅	18/08/2023	Tama Tui	Get CV ready ###Basic:	🔴
📅	18/08/2023	Adam Albatross	Prepare for job interview ###Basic:	🔴
📅	21/08/2023	Terry Tuatara	Consent review ###Basic:	🔴
	22/08/2023	Adam Albatross	Mental Health Act, Section 30 Legal status review	🔴
				1 of 1 pages (8 items)

Notes handover report

Notes are a core part of how we record the details about time spent with a person we are supporting. So, it is no surprise that getting access to a summary of those notes is an important part of working more effectively.

Recordbase has always provided a way to generate a summary of all the notes that have recently occurred, so that it could be used as part of a handover. This works well in cases where a person is only being supported by a single service. Where it can get overwhelming, is when a person is supported across multiple services and all the notes can get added into the mix (dependent of user permissions).

Notes for specific team

We have heard from many of you that an option to filter the notes returned based on a specific team would be a great help. Now, the *Note handover report* allows you to optionally select a team. This means that the report will only include notes that were created as part of an activity that is related to the selected team.

Reports

Details

Report type * Notes handover report ▼

Date range * Choose... ▼

Note type
Choose the note types to include in the report
[Select all](#) [Clear all](#)
☒ Health Related
☒ Include notes with no type

Team Choose... ▼

User relationship Choose... ▼

Run report

Notes for user type

In a similar fashion, the ability to see only the notes for a particular organisational type of user is useful. To enhance this report further, there is now another optional selection that will allow you to select and filter the report for a specific user type.

Reports

Details

Report type * Notes handover report ▼

Date range * Choose... ▼

Note type
Choose the note types to include in the report
[Select all](#) [Clear all](#)
☒ Health Related
☒ Include notes with no type

Team Choose... ▼

User relationship Choose... ▼
Choose...
Trainer
Navigator
Support Worker

Run report

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:

- Colourisation for the PCOMs graph
- Goal plan validation now handles same day linking with new referrals when referral time is enabled.
- The PRIMHD extract now excludes residential referrals that started and ended on the same day. This will prevent PRIMHD errors.
- Recordbase allows capturing up to 5 ethnicities for a person and now all of these are available in reports.
- New version of the following outcome tools:
 - ADOM
 - Hua Oranga
 - SACS
- The areas displayed on the incident report criteria picker have now been reduced to only those areas a user has access to.
- 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/supported-platforms>