#### SHIP E-LEARNING

How to identify and report on specific agency programs





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#### SHIP E-Learning module:

How to identify and report on specific agency programs

This module is divided into sections and we recommend that you work your way through them all.

However, once completed, you can review a topic by clicking on the tabs at right to return directly to that section.

Use arrow keys or click your mouse to navigate through this presentation.

**Adding list of Programs** 

Adding Programs to client records

Recording Programs on Notes tab

Running reports on Programs

**Exporting Program Lists** 

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#### Learning objectives



### After you complete this module you will know how to:

- add specific programs or client groups to your SHIP workgroup
- record specific programs for each client
- run reports on specific programs
- output lists about specific programs.

**Adding list of Programs** 

Adding Programs to client records

Recording Programs on Notes tab

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on Programs

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#### Introduction



#### Why did the AIHW implement this enhancement?

- The need to identify and report on particular client groups and agency programs was often raised by participants at SHIP training.
- This function was also requested by respondents to the SHIP User Satisfaction Survey.
- We noticed that agencies were using SHIP in innovative ways to identify and report on programs and we saw the need to provide more capacity to enable you to do this.

### Adding list of Programs to SHIP





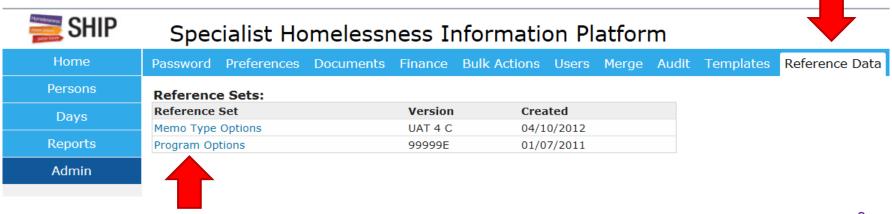
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#### Where to add new programs

- New programs are added on the Reference Data tab of the Admin page – click on Program Options link
- Only users with coordinator level access will be able to add programs
- Think carefully about your reporting needs before adding your programs or client groups – what do you need to collect?

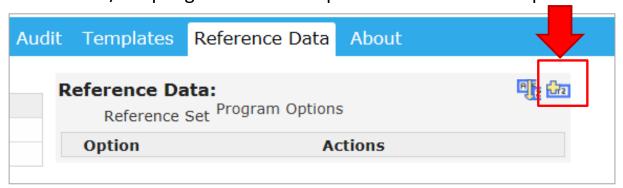






#### Adding programs on the Admin> Data Reference tab

- Click on the + sign icon to begin adding your programs
- In this example we will add 3 types of client groups plus an option for clients who have not been allocated to a program:
  - Court support
  - Private rental brokerage
  - Counselling
  - Refuge
  - Don't know/no program it is important to add this option



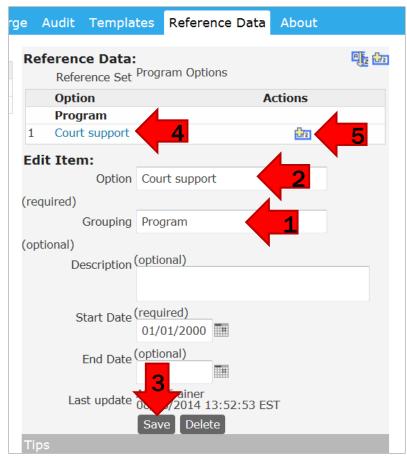




#### Adding programs on the Admin> Data Reference tab

- 1. Enter **Grouping** (this can be optional)
- 2. Enter **Option** (Face to face support in this example)
- 3. Click on Save
- 4. Note that Option 1 now appears in blue font (this can be edited)
- 5. Click on + sign icon to add your next program

**Note:** Description, Start and End Date are optional fields.

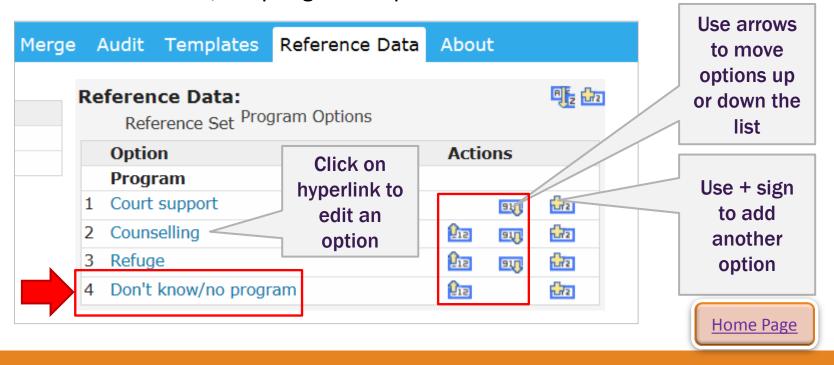






#### Adding programs on the Admin> Data Reference tab

- See completed list of programs in example below
- If all clients cannot be assigned to a program, be sure to include a 'Don't know/no program' option.







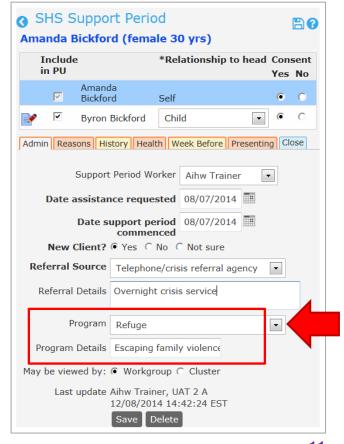
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#### Adding a Program to a Support Period

- Open a support period
- In this example, we have opened a support period for Amanda and her son Byron
- Go to Admin tab
- If programs have been added to your workgroup, then you will see a **Program** field with a list of programs to select from
- Select a Program from the list
- Note: If no programs have been set up, then only the Program Details free-text field will be visible.

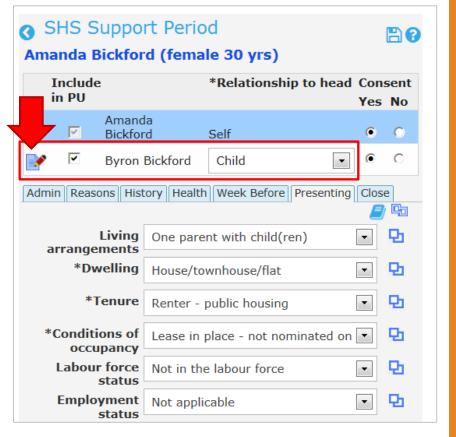






#### Adding a Program to the PU member's Support Period

- Complete the support period tabs for the PUH (Amanda in this example)
- Click on the Edit pencil next to PU member's name to begin to enter data for his support period (Byron).







#### Adding a Program to the PU member's Support Period

- Click on the copy-over icon to copy over data from the PUH record (from Amanda to Byron)
- Note: Much of the child's housing situation has been copied over based on the PUH's situation
- Note: Employment and income fields have been auto-filled as 'Not applicable' because the child is so young (under 15).

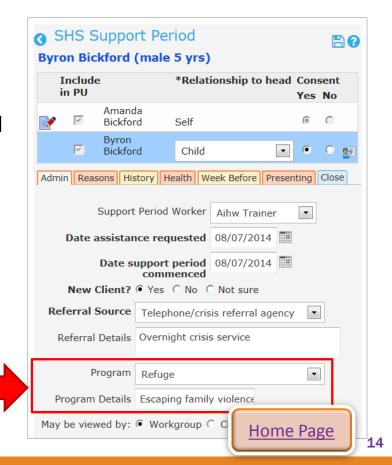






#### Adding a Program to the PU member's Support Period

- Go to the Admin tab to complete the child's support period
- Note: Both of the Program fields have been copied over from the PUH
- Note: If the child/PU member is not part of this Program, then select the correct Program
- Move from left to right to complete the rest of the fields – all of the coloured Support Period tabs should go back to blue.







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#### Why do we record Programs on the Notes tab?

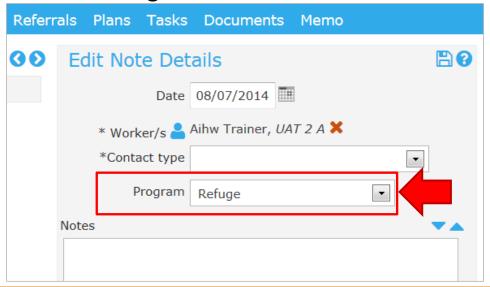
- SHIP refers to the Program selected in the Notes tab to output reports about Programs
- When generating reports SHIP does NOT generally refer to the Program that was selected on the Admin tab of the Support Period
- Therefore, it is important to create a **Note** and select a **Program** in order to have these details included in a SHIP report or list
- It is possible to select different Programs for different Notes if a client is involved in more than one program. Reports will then include the client in more than one program.





#### Adding a Program to the PUH Notes tab

- Go to the Notes tab to create a note for your PUH client and record any services needed, provided and/or referred
- For the PUH record SHIP automatically populates the Program field with the Program you selected at the beginning of the support period – it also fills Program fields on associated Notes.

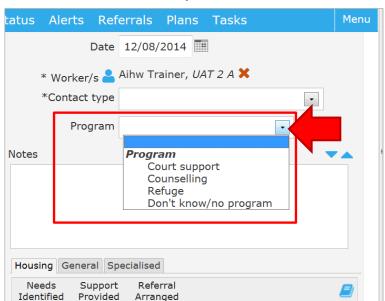






#### Adding a Program to the PU member Notes tab

- If your PU member received separate services, go to their Notes tab to create a separate note (in this example, for Byron)
- For PU members, select a Program from the drop-down list
- A Program MUST be selected when you create a Note
- Therefore, if you have clients who are NOT part of a Program, then you must provide the option 'Don't know/no program' when setting up Programs on Data>Reference tab.







#### Clients who are serviced by more than one Program

- If your client is associated with more than one Program, then create another Note for them and select the relevant Program that the services and assistance are associated with.
- This way, the client can be reported as having services provided by more than one Program.





#### **Program Facts**

- ✓ A Program MUST be selected when you create a Note
- √ Therefore, if you have clients who are not part of a Program, then you
  must provide the option to select 'Don't know/no program'
- ✓ A **Note** must be completed before a client can be included in a Program report or list
- ✓ SHIP automatically populates the Program field with the Program you selected at the beginning of the support period
- ✓ If the client is associated with more than one Program, then create another Note and select the relevant Program that the services and assistance are associated with
- ✓ SHIP mostly uses the data collected in the Notes tab to output reports about Programs (not from the Admin tab of the Support Period)

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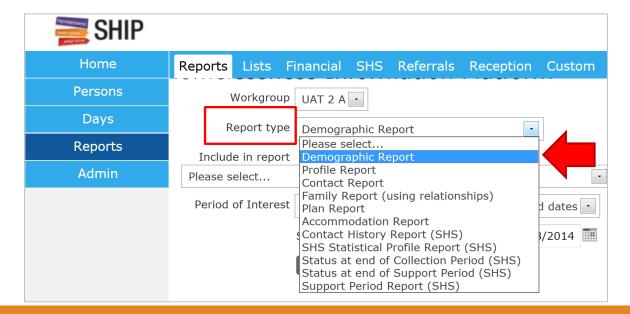


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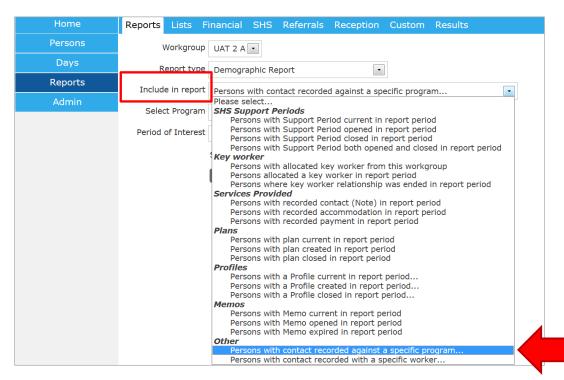
- Go to Reports tab on the Reports page
- View the list of Report types available and select the report which best meets the reporting needs of your Program
- In this example we have selected 'Demographic Report'







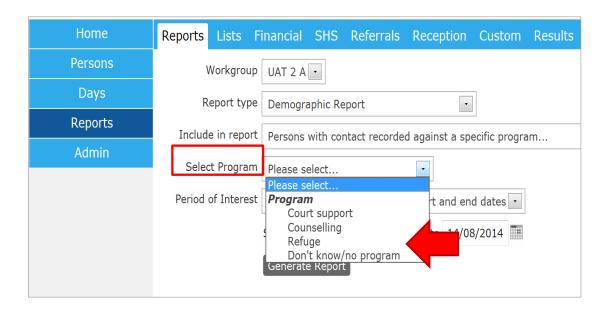
- Drop down list for 'Include in report'
- Select 'Persons with contact recorded against a specific program'







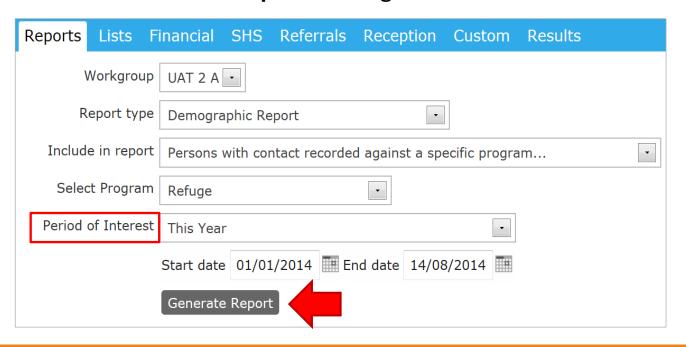
- Drop down list for 'Select Program'
- Select program of interest in this example 'Refuge'







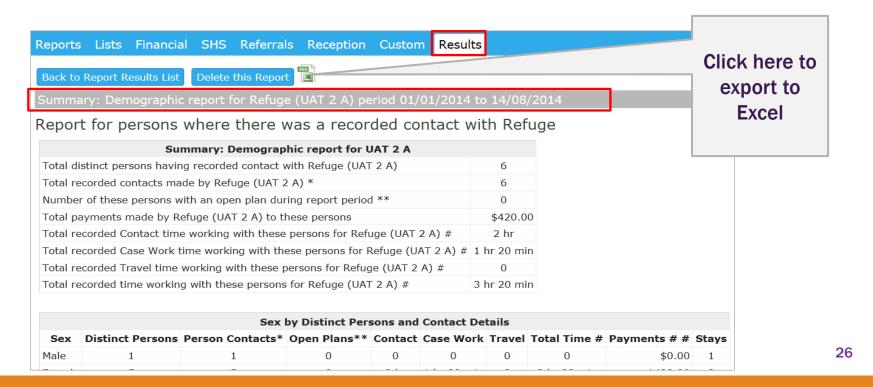
- See example below of completed report parameters
- Select your 'Period of Interest' or enter your own dates
- Click on Generate Report and go to Results tab.







- Go to Results tab and view the report (generally at bottom of list)
- Note that reports can be exported to Excel using Excel icon







#### Which Program report should I run?

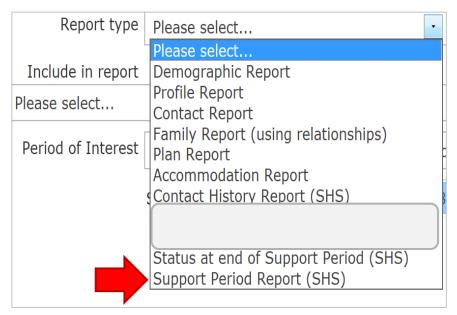
The report type you select will depend upon your needs

 Reports about specific Programs are available when there is the option to include in report 'Persons with contact recorded against

a specific program'

 Outcomes for closed support periods are available in 'Status at end of Support Period Report (SHS)'

'Support Period
 Report (SHS)' will
 include all data
 entered at the start
 of the support period.

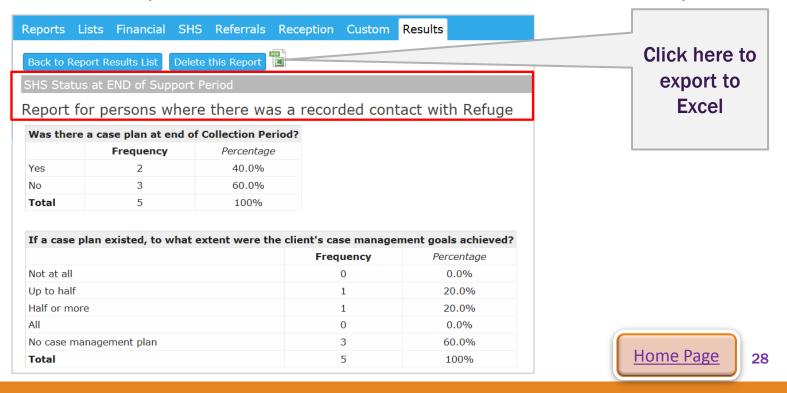






#### Example of SHS Status at end of Support Period Report

- Go to Results tab and view the report
- Read title of report to confirm that it has been run correctly.



# **Exporting Program Lists**





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#### **Exporting Program Lists**



#### What is a List?

- For almost every report on the Reports tab there is a corresponding list of the individual records that were used to generate the report.
- Lists can be exported to Excel and sorted and filtered to enable further analysis of various client groups.
- Lists allow you to include client names.
- Lists contain more information than tables and also allow notes from free text fields to be included in the output.
- Demographic information about each client is generally included in lists.

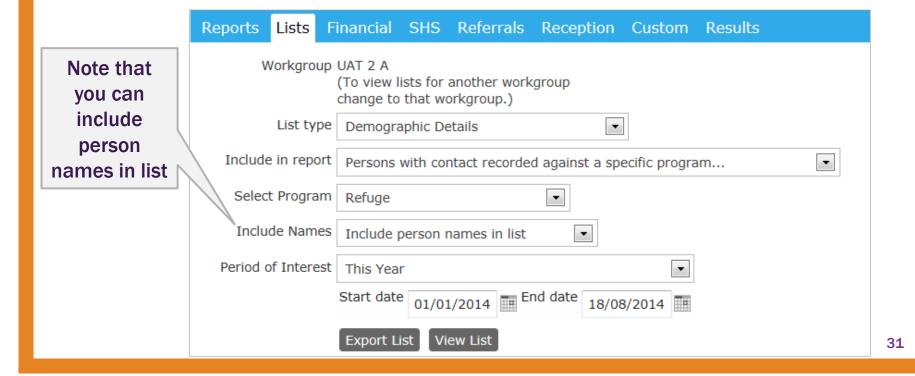


#### **Exporting Program Lists**



#### How to run a Demographic Details List:

- Run a Demographic Details list using the parameters below
- Click on Export List



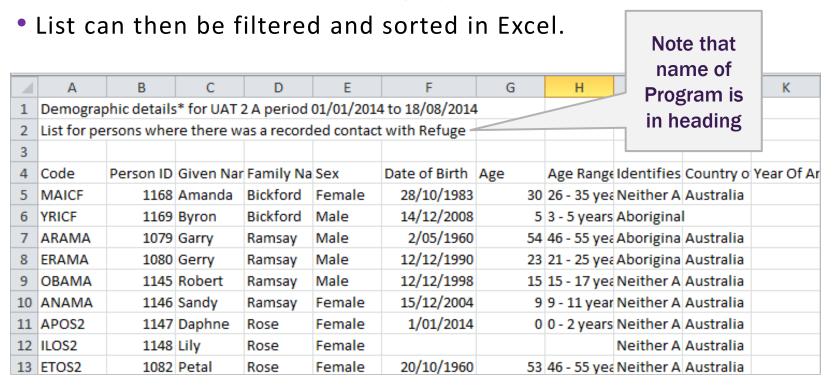






#### How to run a Demographic Details List:

Example of output from Demographic Details List





#### **Exporting Program Lists**



#### How to run a Support Period (SHS) List:

 This list contains client demographics and all of the SHS data that is entered on the Support Period form at the beginning of the support period.

### This list can be run in 2 different way by selecting different parameters:

1. Include in report 'Persons with Support Period current in report period – useful for outputting all of the Program types at once.

**Note:** This list only reports the Program recorded in Admin tab of the Support Period form – if multiple different Programs are associated with the same client in Notes tab then this will not be reported in this list.

2. Include in report 'Persons with contact recorded against a specific program' – this operates the same as other lists and outputs lists per Program.

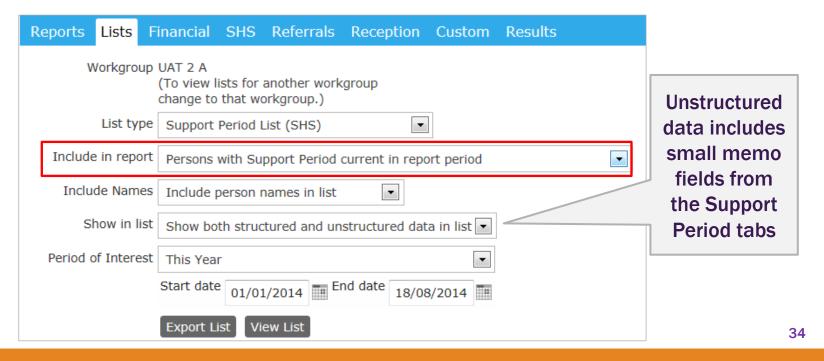


#### **Exporting Program Lists**



#### How to run a Support Period (SHS) List #1:

- 1. Include in report 'Persons with Support Period current in report period'
- Enter the parameters below and click on Export List





#### Reporting on programs



#### SHS Support Period List for all Programs (#1)

- Program is in 'Column W' and 'Program Details' are in Column X
- This list only outputs the Program fields recorded on the Admin tab of the Support Period form.
- If clients are associated with multiple programs on Notes tab then this will not be reported in this list.

R	S	Т	U	V	W	X	Υ	Z	AA
								Presentin	g Reasons
Age Range	Sex	Indigenous Stat	New Client	Referral S	Program	Program Detai	Referral D		_
46 - 55 years	Male	Aboriginal	Not sure	No forma	Court support	Avoid eviction		1	. 0
21 - 25 years	Male	Aboriginal	Not sure	No forma	Don't know/n	With parent	Self	1	. 0
9 - 11 years	Female	Neither Aborigi	Not sure	No forma	Don't know/n	Avoid eviction		1	. 0
15 - 17 years	Male	Neither Aborigi	Not sure	No forma	Court support	Avoid eviction		1	. 0
66 - 85 years	Female	Neither Aborigi	Not sure	Telephon	Refuge	Domestic viole	nce	0	0
46 - 55 years	Female	Neither Aborigi	Not sure	Telephon	Refuge	Domestic viole	nce	0	0
3 - 5 years	Female	Neither Aborigi	Not sure	Telephon	Refuge	Domestic viole	nce	0	0
26 - 35 years	Female	Neither Aborigi	Yes	Telephon	Refuge	Escaping famil	Overnight	1	. 0
3 - 5 years	Male	Aboriginal	Yes	Telephon	Refuge	Escaping famil	Overnight	1	. 0

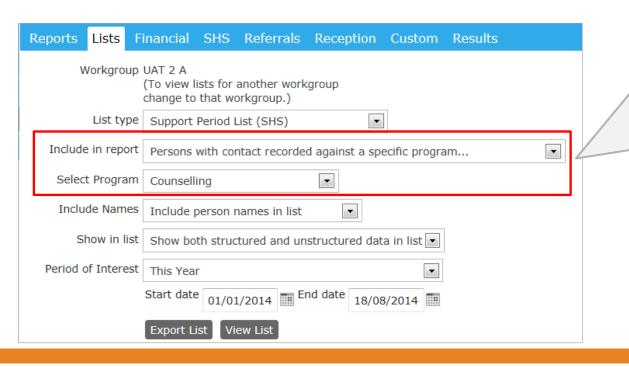


#### **Exporting Program Lists**



#### How to run a Support Period (SHS) List #2:

- Include in report 'Persons with contact recorded against a specific program'
- Enter the parameters below and click on Export List



This time select a specific program. In this example we have selected 'Counselling' instead of 'Refuge'



#### **Exporting Program Lists**



#### Support Period (SHS) List by Program (#2):

- Example of output for 'Counselling' program below
- Note that the 2 clients listed below were also associated with the 'Refuge' program (see slide 33)
- #2 method allows you to identify and report on clients who are associated with more than one program.

4	А	В	С	D	Е	F	G	Н	I	J	K	L
1	Report on Su	pport Perio	ds for 01/01/	2014 to 18								
2	List for perso	ns where th	ere was a re	corded co	ntact with	Counsellin	g					
3												
4	Date Suppor	Date Suppo	Date Assista	Worker	Person ID	Alpha Cod	Given Nar	Family Na	Date of Birth	Date of Bi	Age	Language
5	1/07/2014	17/07/2014	1/07/2014	Worker O	1080	ERAMA	Gerry	Ramsay	12/12/1990	AAA	23	
6	8/07/2014	24/07/2014	8/07/2014	Aihw Trair	1169	YRICF	Byron	Bickford	14/12/2008	AAA	5	

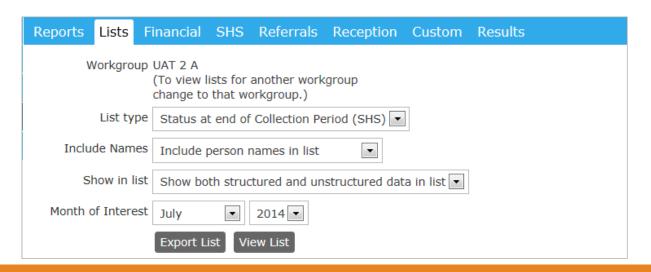




#### Status at end of Collection Period (SHS)

This list contains all of the data entered at the end of a particular collection period and is useful for measuring the following:

- Progress made by ongoing clients
- Outcomes achieved by clients with closed support periods
- Enter the parameters below and click on Export List







#### Status at end of Collection Period (SHS)

This list contains some demographics, case management plan data, housing, income education data for the end of a month

- Program type is located in Column Q
- Use Column J (Date Support Period finished) to identify whether the support period is closed – blank fields indicate that support period is ongoing.

A	Α	В	С	D	Е	F	G	Н	1	J	K	L	M	N	0	Р	Q
1	SHS Status	Update Li	st for UAT	2 A for July	/ 2014												
2																	
3	SHIP clien	Alpha Cod	Given Nar	Family Na	Support P	Presentin	Relations	Oth	Date Suppor	Date Support	Sex	Date of Birth	Date of Bi	Case plan	If plan exi	If plan do	Program
4	964	AYERN	Raymond	Beron	1023	1023	Self		8/05/2014		Male	10/10/1980	AAA	No	No case m	Client die	not agree
5	1079	ARAMA	Garry	Ramsay	1092	1092	Self		1/07/2014	17/07/2014	Male	2/05/1960	AAA	Yes	Up to half	Not appli	Court sup
6	1080	ERAMA	Gerry	Ramsay	2965	1092	Child		1/07/2014			12/12/1990	AAA	No	No case m	Part of an	Don't kno
7	1146	ANAMA	Sandy	Ramsay	2966	1092	Foster chi	ld	1/07/2014	17/07/2014	Female	15/12/2004	AAA	No	No case m	Part of an	Don't kno
8	1081	ETOS2	Petunia	Rose	2961	2961	Self		8/07/2014		Female	10/10/1930	AAA	Yes	Up to half	Not appli	Refuge
9	1082	ETOS2	Petal	Rose	2963	2961	Child		8/07/2014		Female	20/10/1960	AAA	Yes	Up to half	Not appli	Refuge
10	1143	OPOS2	Рорру	Rose	2962	2961	Grandchil	d	8/07/2014		Female	21/08/2008	AAA	No	No case m	Part of an	Refuge
11	1168	MAICF	Amanda	Bickford	3026	3026	Self		8/07/2014	14/08/20		28/10/1983	AAA	Yes	Up to half	Not appli	Refuge
12	1169	YRICF	Byron	Bickford	3027	3026	Child	RI:	ank fiolds	in colum	n Lind	licato B	AAA	No	No case m	Part of an	Refuge
								Blank fields in column J indicate support period is ongoing									3





#### Status at end of Support Period (SHS)

This list is useful for measuring outcomes over any reporting period you want to specify — not just over one collection month.

Enter the parameters below and click on Export List

Reports Lists F	nancial SHS Referrals Reception Custom Results	
	UAT 2 A (To view lists for another workgroup change to that workgroup.)	
List type	Status at end of Support Period (SHS)	
Include in report	Persons with contact recorded against a specific program	
Select Program	Refuge	This time select a
Include Names	Include person names in list	specific program. In this example we
Show in list	Show both structured and unstructured data in list 💌	have selected
Period of Interest	This Year	'Refuge'
	Start date 01/01/2014 End date 19/08/2014	
	Export List View List	40





#### Status at end of Support Period (SHS)

- This example includes outcomes for both ongoing clients and those who have ended their support periods.
- Results for ongoing clients are drawn from the most recent Status
   Update within the reporting period selected
- Results for closed clients are drawn from the end of their support period

1	А	В	С	D	E	F	G	Н	1	J	K	L	M	N
1	Report on Support F	Periods for 0	1/01/2014 to	18/08/201	4 for UAT	2 A								
2	List for persons who	ere there wa	s a recorded	contact w	ith Refuge									
3														
4	Date Support Period	Date Suppo	Date Assista	Worker	Person ID	Alpha Cod	Given Nar	Family Na	Date of Birth	Date of Bi	Age	Language	Interprete	Country
5	1/07/2014	17/07/2014	1/07/2014	Aihw Trair	1079	ARAMA	Garry	Ramsay	2/05/1960	AAA	54			Australia
6	1/07/2014	17/07/2014	1/07/2014	Aihw Train	1080	ERAMA	Gerry	Ramsay	12/12/1990	AAA	23			Australia
7	1/07/2014	17/07/2014	1/07/2014	Aihw Trair	1146	ANAMA	Sandy	Ramsay	15/12/2004	AAA	9			Australia
8	1/07/2014		1/07/2014	Aihw Train	1145	OBAMA	Robert	Ramsay	12/12/1998	AAA	15			Australia
9	8/07/2014		º/07/2014	Aihw Train	1081	ETOS2	Petunia	Rose	10/10/1930	AAA	83			Australia
10	8/07/2014		8/07/-	Trail	1082	ETOS2	Petal	Rose	20/10/1960	AAA	53			Australia
11	8/07/2014	14/08/2014	8/07/2014	Amv		MICE	Amanda	Bickford	28/10/1983	AAA	30			Australia
12	8/07/2014	24/07/2014	8/0	N=1= C			mi arata		0.1	D	1.1			
			,r						n Column					
				ce	lls indi	cate th	at sup	port pe	riod is o	ngoing				

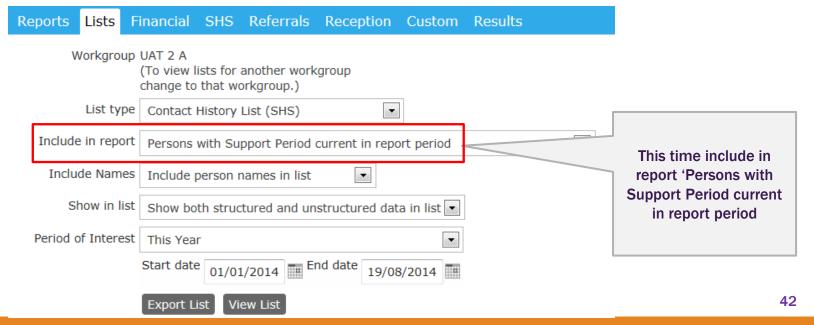


#### **Another useful List**



#### **Contact History List (SHS)**

- This list will output data about every time a Note was recorded for a client and which Program it was associated with.
- It is useful for analysing intensity of support and identifying multiple Programs that a particular client is associated with.





#### **Another useful List**



located in Column P

#### **Contact History List (SHS)**

 This example shows that a number of clients are associated with more than one program.

Program is located in Column P

															_ \	
A	Α	В	С	D	E	F	G	Н	1	J	K	L	M	N		Р
1	List of conta	ct notes fo	or 01/01/20	014 to 19/0	8/2014 for	UAT 2 A										
2	List for pers	ons with S	upport Pei	riod curren	t in report	period										
3																
4	Contact Dat	Person ID	Alpha Cod	Given Nar	Family Na	Sex	Date of Birt	Date of Bi	Age	Age Range	Language	Interprete	Country o	Indigenou	Contact T	Program
5	8/07/2014	1168	MAICF	Amanda	Bickford	Female	28/10/1983	AAA	30	26 - 35 yea	ars		Australia	Neither A	Accommo	Refuge
6	14/08/2014	1168	MAICF	Amanda	Bickford	Female	28/10/1983	AAA	30	26 - 35 yea	ars		Australia	Neither A	Meeting/	Court sup
7	14/08/2014	953	ENAL2	Benjamin	Hall	Male	1/01/1996	UUE	18	18 - 20 yea	ars		Australia	Neither A	Drop In	Don't kno
8	8/07/2014	1169	YRICF	Byron	Bickford	Male	14/12/2008	AAA	5	3 - 5 years			Australia	Aborigina	Accommo	Refuge
9	10/07/2014	1169	YRICF	Byron	Bickford	Male	14/12/2008	AAA	5	3 - 5 years			Australia	Aborigina	Meeting/	Counsellir
10	14/08/2014	952	LIAL2	Elizabeth	Hall	Female	1/09/1989	UAA	24	21 - 25 yea	ars		Ireland	Neither A	External (	Court sup
11	1/07/2014	1079	ARAMA	Garry	Ramsay	Male	2/05/1960	AAA	54	46 - 55 yea	ars		Australia	Aborigina	Accommo	Refuge
12	1/07/2014	1080	ERAMA	Gerry	Ramsay	Male	12/12/1990	AAA	23	21 - 25 yea	ars		Australia	Aborigina	Accommo	Refuge
13	16/07/2014	1080	ERAMA	Gerry	Ramsay	Male	12/12/1990	AAA	23	21 - 25 yea	ars		Australia	Aborigina	Meeting/	Counsellir
14	15/08/2014	1042	AREA2	Maria	Bear	Female	28/10/1975	AAA	38	36 - 45 yea	French		Canada	Neither A	Informal i	Don't kno
15	8/07/2014	1082	ETOS2	Petal	Rose	Female	20/10/1960	AAA	53	46 - 55 yea	ars		Australia	Neither A	Accommo	Refuge
16	8/07/2014	1081	ETOS2	Petunia	Rose	Female	10/10/1930	AAA	83	66 - 85 vea	ars		Australia	Neither A	Accommo	Refuge
17	1/07/2014	1145	OBAMA	Robert	Ramsay	Male	12/12/1998	AAA	15	15 - 17 yea	ars		Australia	Neither A	Accommo	Refuge
18	15/07/2014	1145	OBAMA	Robert	Ramsay	Male	12/12/1998	AAA	15	15 - 17 yea	ars		Australia	Neither A	Email/tex	Don't kno
19	1/07/2014	1146	ANAMA	Sandy	Ramsay	Female	15/12/2004	AAA	9	9 - 11 year	rs		Australia	Neither A	Accommo	Refuge



#### Assistance available



#### Where can I find more assistance?

- SHIP Support can help you to enter Programs and advise you on which reports to run
- Phone SHIP Support on 1800 627 191 Option 1
- The AIHW has several SHIP and SHOR e-Learning modules that you could find helpful on the <u>SHSC resources website</u>

#### SHIP e-Learning

- Entering a family into SHIP using SHIP copy-over functions (2.7MB PDF)
   This module steps you through how to efficiently enter a family into SHIP making use of SHIP's copy-over functions
- How to add extra family members to an open support period (666KB PDF)
   This module covers how to add new family members to a presenting unit after the support period has been open for some time.
- How to fix Status Update errors (925KB PDF)
   This module outlines where to view status update errors, how to resolve errors and re-run a status update.
- SHIP Tips for Data Entry (736KB PDF)
   This module outlines some general data entry tips that you will find useful.
- SHIP Helpful Hints (1.1MB PDF)

This module outlines some general hints about SHIP client management functionalities.





Thank you for using this SHIP e-Learning presentation

Click on tabs on right to review sections of this module

Please click on links below to learn more about the SHS collection

Specialist Homelessness Services collection (AIHW)

http://www.aihw.gov.au/shsc-resources

For more information: AIHW Hotline: 1800 627 191 Email: homelessness@aihw.gov.au

**Adding list of Programs** 

Adding Programs to client records

Recording Programs on Notes tab

Running reports on Programs

**Exporting Program Lists** 

**Home Page**