Australian Government
Department of Health

CHSP Organisation Overview Report Guide

Version 1, October 2017

Contents

Overview

The Data Exchange uses de-identified, aggregate information to demonstrate both short and long term outcomes achieved for clients across programs. This information is accessible to users of the Data Exchange via the self-service reports.

These reports have a variety of themes and have been created to give insight into best practice, early intervention approaches, and overall performance. The reports provide users unprecedented access to program, client survey, geospatial, performance and population data from other government data sets as well as the Data Exchange itself.

Reports content is refreshed every 24 hours. This means that the more regularly a user enters their data, the more relevant their reports will be throughout the year.

This document is intended to provide guidance to users about how they might interpret and analyse their self-service reports. For detailed instruction on navigation, tutorials about Qlik can be found on YouTube.

All reports contain an 'Information Page' with a glossary of terms found in that report. This includes definitions on what terms mean and how counts are measured or sourced.

Report Permissions

A user's access to their standard report will mirror their access to the Data Exchange. For example, if a user can only enter data against one outlet, only that outlet will show in the report even if the organisation they work for has multiple outlets.

If a user has entered data under the partnership approach, they will also be able to access the following reports:

- Resource Planning
- Service Footprint
- Community Profiles (Coming Soon)
- SCORE Outcomes (Coming Soon)
- Client Pathways (Coming Soon)

Organisations are free to share their reports and the information therein with whomever they choose, due to the copyright and licensing that covers their use of Data Exchange self-service reports.

Funding agency agreement managers with access to reports for performance assessment requirements do not have the same permissions, and will never share an organisation's report, even with staff employed within that organisation.

The full license terms and conditions are available from the Department of Social Services (DSS) website and listed under the DSS Data Exchange Reports Commonwealth Copyright.

CHSP Organisation Overview

The CHSP Organisation Overview report provides users with a visual representation of the data that has been reported under the Data Exchange and is only available to users that report CHSP services under the Data Exchange.

A user's access to their standard report will mirror their access to the Data Exchange. For example, if a user can only enter data against one outlet, only that outlet will show in the report even if the organisation they work for has multiple outlets.

This section provides additional information on how to use and navigate through the CHSP Organisation Overview. Webinars and additional guidance material for how to use reports released in the Qlik environment is available on the Data Exchange website.

A full list of glossary terms used in the CHSP Organisation Overview report is available at the Information Sheet of the report.

Additional Support

If you cannot find the answer to your questions within the resources provided on the Data Exchange website, contact:

- Your Grant Agreement Manager for general grant and program enquiries;
- The Data Exchange Helpdesk for general Data Exchange enquiries, including how to navigate the CHSP Organisation Overview. Contact details are available on the Data Exchange website.

CHSP Overview

CHSP Overview

Information included in this sheet includes:

- Number of outlets
- Total clients and support persons
- Number of clients and support persons, by state
- Number of sessions reported, by state
- Total outputs (including quantity, hours and costs)
- Total fees/CHSP client contributions

How to navigate and filter the information in this sheet

This sheet gives a user a snapshot of service delivery over time. On this sheet, users can filter the data by:

- **State:** Data can be filtered by clicking on one or more columns in the graphs to gain insight on service delivery trends in the state/s selected.

- **Reporting Period:** Data can be filtered by using the filters under the reporting period heading to gain insight on trends in service delivery for a financial year or selected reporting periods. To filter by financial year, select the financial year you are interested in looking at under the 'Reporting Period' heading. Once you have selected a financial year, a user could further filter the data so that it only relates to a single reporting period, by selecting the reporting period of interest which will now appear under the 'Reporting Period' heading.

- **Service type:** Data can be filtered by using the filter titled 'Service Type Drill Through' to gain insight to trends in service delivery relating to the selected service type/s.

- **Activity (CHSP sub-programme):** Data can be filtered by using the Activity Filter, to gain insight into information that relates to one of more Activity (CHSP sub-programme).

- **Client type:** Data can be filtered by client type. By selecting the 'individual client' filter, the data will show only those clients with a client record. In contrast, the 'group client' filter shows unidentified 'group' clients. 'Support persons' can also be used as a separate filter. Using one or a combination of these filters can reveal differences in service usage and other trends for the different client types. The CHSP provides face-to-face support where clients are known to the service, therefore it is expected that only 5% of your clients or less should be recorded as unidentified 'group' clients in each reporting period.

Quick Tips:

Tip 1: Once a filter has been applied, the fields that the data is filtered by can be changed by clicking on the chart, filter, or table (used to apply the filter) to select or de-select the fields of interest. Alternatively, you can click on the filter button located in the dark grey bar at the top of the screen (and a list of the alternative fields will appear). For example, if the data is filtered by financial year, click on 'Session Financial Year'. A list of financial years will appear. Fields highlighted green indicate the data in the sheet is being filtered by that field (in this example, year). Clicking on a field (e.g. year) will add or remove the field from being filtered.

Note on fees/CHSP client contributions: To ensure accurate fees/CHSP client contributions information is shown in the report, fees/CHSP client contribution information must be reviewed with all 'client types' selected at the same time. This is required as the fees/CHSP client contribution information is reported at a session level, and not at the client or support person level.

Note: Any filters selected will automatically refresh the report across all sheets (i.e. the filter is applied to data in each sheet). When navigating to different sheets of the report, check that you have only selected the fields that you want the data to be filtered by. Filters can be removed by selecting the **Clear filter** or **Clear selections** functions located across the dark grey bar at the top of the screen.

Select or hover over parts of the bar graph to see specific counts.

CHSP Overview

Glossary of terms used in this sheet

Individual client: A client who has had a client record created within the Data Exchange and attended a session within the reporting period.

Group client: A client attending a session without a client record. Attendance is recorded as an 'unidentified client' in the Data Exchange. No demographic data is recorded against this client.

Support person: A person attending a session that does not meet the definition of a client. They could be a carer of the client, a family member or young children.

Fees/CHSP client contributions: The fees/CHSP client contributions *actually* received.

Calculations used in this sheet

Number of clients and support persons: The sum of individual clients, group clients and support persons.

Outputs – Quantity: For every session, the reported outputs (measured in quantity) are multiplied by the number of clients and support persons that attended the session. The total reflected is the sum of the calculated outputs. For example, if the amount of assistance provided was recorded as 1 trip in the Data Exchange and 12 clients were attached to the session, the outputs reflected in the CHSP Organisation Overview for this session are 12 (trips).

Outputs – Hours: For every session, the reported outputs (measured in hours and minutes) are multiplied by the number of clients and support persons that attended the session. The total reflected is the sum of the calculated outputs. For example, if the amount of assistance provided was recorded as 2 hours in the Data Exchange and 5 clients were attached to the session, the outputs reflected in the CHSP Organisation Overview for this session are 10 hours.

Outputs – Cost: The sum of the costs, as reported in the Data Exchange.

Fees/CHSP client contributions: The sum of the fees/CHSP client contributions as reported in the Data Exchange.

Outlets	
Outlets	Information included in this sheet includes: • Number of outlets, by state, and by Activity (CHSP sub-programme) • Number of clients (by client type), by outlet • Number of sessions reported by outlet • A map of the outlet location

How to navigate and filter the information in this sheet

This sheet gives a user a snapshot of service delivery over time. On this sheet, users can filter the data by:

• **Outlet name:** Data can be filtered by selecting the outlet/s of interest in the table to provide an overview of data that relates to the outlet/s. Alternatively the user could click on the outlet/s on the map to filter the information by outlet.

• **State:** Data can be filtered by clicking on one or more columns in the graphs to gain insight on service delivery trends in the state/s selected.

• **Reporting Period:** Data can be filtered by using the filters under the reporting period heading to gain insight on trends in service delivery for a financial year or selected reporting periods. To filter by financial year, select the financial year you are interested in looking at under the 'Reporting Period' heading. Once you have selected a financial year, a user could further filter the data so that it only relates to a single reporting period, by selecting the reporting period of interest which will now appear under the 'Reporting Period' heading.

• **Activity (CHSP sub-programme):** Data can be filtered by using the Activity Filter, to gain insight into information that relates to one of more Activity (CHSP sub-programme).

• **Client type:** Data can be filtered by client type. By selecting the 'individual client' filter, the data will show only those clients with a client record. In contrast, the 'group client' filter shows unidentified 'group' clients. 'Support persons' can also be used as a separate filter. Using one or a combination of these filters can reveal differences in service usage and other trends for the different client types. The CHSP provides face-to-face support where clients are known to the service, therefore it is expected that only 5% of your clients or less should be recorded as unidentified 'group' clients in each reporting period.

Outlet Map Navigation

• Users can also zoom in or out on the map using the icons
• Providers can use the arrows to navigate on the map. Select the button of a house to revert back to the original view of the map. Alternatively, providers can click on the map and at the same time drag the map around to change the area that the map in view.

Quick Tips:

Tip 1: Once a filter has been applied, the fields that the data is filtered by can be changed by clicking on the chart, filter, or table (used to apply the filter) to select or de-select the fields of interest. Alternatively, you can click on the filter button located in the dark grey bar at the top of the screen (and a list of the alternative fields will appear). For example, if the data is filtered by financial year, click on 'Session Financial Year'. A list of financial years will appear. Fields highlighted green indicate the data in the sheet is being filtered by that field (in this example, year). Clicking on a field (e.g. year) will add or remove the field from being filtered.

Outlets

Tip 2: If there are other reporting elements that you would like the data to be filtered by (for example, so that you can only see outlets that relate to a particular service type), you can navigate to the sheet in the report that contains the data parameter (in this example, the CHSP Overview sheet) and select the service type/s or other field of interest. Once the additional filter has been selected, navigate back to the Outlets sheet. The filters being applied will appear on the grey bar at the top of the screen.

Note: Any filters selected will automatically refresh the report across all sheets (i.e. the filter is applied to data in each sheet). When navigating to different sheets of the report, check that you have only selected the fields that you want the data to be filtered by. Filters can be removed by selecting the **Clear filter** ⊗ or **Clear selections** ⌞⊗⌝ functions located across the dark grey bar at the top of the screen.

Glossary of terms used in this sheet

Individual client: A client who has had a client record created within the Data Exchange and attended a session within the reporting period.

Group client: A client attending a session without a client record. Attendance is recorded as an 'unidentified client' in the Data Exchange. No demographic data is recorded against this client.

Support persons: A person attending a session that does not meet the definition of a client. They could be a carer of the client, a family member or young children.

Calculations used in this sheet

Number of clients and support persons: The sum of individual clients, group clients and support persons.

Number of individual clients: The sum of individual clients.

Number of group clients: The sum of group clients.

Number of support persons: The sum of support persons.

Sessions: The number of sessions reported where at least one individual client, group client or support person attended.

Outlets: The sum of the number of outlets. Note that in the graph of the number of outlets by state, if an outlet has reported services from more than one 'Activity' (CHSP sub-programme) the outlet will be counted twice. The unique list of outlets is provided below table below. Providers can review the number of unique outlets for an Activity by hovering over the graph or filtering the data by the Activity of interest. Alternatively, a unique count of the outlets is included on the CHSP Overview sheet.

Hours & Quantity by Service Type

Hours & Quantity by Service Type

Information included in this sheet includes:

- Outputs – Hours reported, by service type (reported outputs for service types where the output measure is hours)
- Outputs – Quantity reported, by service type (reported outputs for service types where the output measure is quantity)

How to navigate and filter the information in this sheet

This sheet gives a user a snapshot of service delivery over time. On this sheet, users can filter the data by:

- **Service type:** Data can be filtered by selecting a service type on the Service Type Drill Through filter or alternatively by clicking on a service type of interest in the graph. If a user filters the data by a service type, for example Domestic Assistance, the graph will update to show the outputs at a service sub-type level (in this example, for General House Cleaning, Linen Services, Unaccompanied Shopping).

- **Reporting Period:** Data can be filtered by using the filters under the reporting period heading to gain insight on trends in service delivery for a financial year or selected reporting periods. To filter by financial year, select the financial year you are interested in looking at under the 'Reporting Period' heading. Once you have selected a financial year, a user could further filter the data so that it only relates to a single reporting period, by selecting the reporting period of interest which will now appear under the 'Reporting Period' heading.

- **Activity (CHSP sub-programme):** Data can be filtered by using the Activity Filter, to gain insight into information that relates to one of more Activity (CHSP sub-programme).

- **Client type:** Data can be filtered by client type. By selecting the 'individual client' filter, the data will show only those clients with a client record. In contrast, the 'group client' filter shows unidentified 'group' clients. 'Support persons' can also be used as a separate filter. Using one or a combination of these filters can reveal differences in service usage and other trends for the different client types. The CHSP provides face-to-face support where clients are known to the service, therefore it is expected that only 5% of your clients or less should be recorded as unidentified 'group' clients in each reporting period.

Quick Tips:

Tip 1: Once a filter has been applied, the fields that the data is filtered by can be changed by clicking on the chart, filter, or table (used to apply the filter) to select or de-select the fields of interest. Alternatively, you can click on the filter button located in the dark grey bar at the top of the screen (and a list of the alternative fields will appear). For example, if the data is filtered by financial year, click on 'Session Financial Year'. A list of financial years will appear. Fields highlighted green indicate the data in the sheet is being filtered by that field (in this example, year). Clicking on a field (e.g. year) will add or remove the field from being filtered.

Tip 2: If there are other reporting elements that you would like the data to be filtered by (for example, so that you can only see the outputs reported by service type that relate to a particular outlet), you can navigate to the sheet in the report that contains the data parameter (in this example, the Outlets sheet) and select the outlet/s or other field of interest. Once the additional filter has been selected, navigate back to the Hours & Quantity by Service Type sheet. The filters being applied will appear on the grey bar at the top of the screen.

Note: Any filters selected will automatically refresh the report across all sheets (i.e. the filter is applied to data in each sheet). When navigating to different sheets of the report, check that you have only selected the fields that you want the data to be filtered by. Filters can be removed by selecting the **Clear filter** or **Clear selections** functions located across the dark grey bar at the top of the screen.

Hours & Quantity by Service Type
Glossary of terms used in this sheet
Service type descriptions are outlined in the CHSP Manual.   Refer to the Calculations section below for information on 'Outputs – Hours' and 'Outputs – Quantity'
Calculations used in this sheet
Outputs – Quantity: For every session, the reported outputs (measured in quantity) are multiplied by the number of clients and support persons that attended the session. The total reflected is the sum of the calculated outputs. For example, if the amount of assistance provided was recorded as 1 trip in the Data Exchange and 12 clients were attached to the session, the outputs reflected in the CHSP Organisation Overview for this session are 12 (trips).   **Outputs – Hours:** For every session, the reported outputs (measured in hours and minutes) are multiplied by the number of clients and support persons that attended the session. The total reflected is the sum of the calculated outputs. For example, if the amount of assistance provided was recorded as 2 hours in the Data Exchange and 5 clients were attached to the session, the outputs reflected in the CHSP Organisation Overview for this session are 10 hours.

Fees & Costs by Service Type

Fees & Costs by Service Type

Information included in this sheet includes:

- Fees/CHSP client contributions reported by service type
- Outputs – Cost reported, by service type (reported outputs for service types where the output measure is cost)

How to navigate and filter the information in this sheet

This sheet gives a user a snapshot of service delivery over time. On this sheet, users can filter the data by:

- **Service type:** Data can be filtered by selecting a service type on the Service Type Drill Through filter or alternatively by clicking on a service type of interest in the graph. If a user filters the data by a service type, for example Domestic Assistance, the graph will update to show the outputs at a service sub-type level (in this example, for General House Cleaning, Linen Services, Unaccompanied Shopping).

- **Reporting Period:** Data can be filtered by using the filters under the reporting period heading to gain insight on trends in service delivery for a financial year or selected reporting periods. To filter by financial year, select the financial year you are interested in looking at under the 'Reporting Period' heading. Once you have selected a financial year, a user could further filter the data so that it only relates to a single reporting period, by selecting the reporting period of interest which will now appear under the 'Reporting Period' heading.

- **Activity (CHSP sub-programme):** Data can be filtered by using the Activity Filter, to gain insight into information that relates to one of more Activity (CHSP sub-programme).

- **Client type:** Data can be filtered by client type. By selecting the 'individual client' filter, the data will show only those clients with a client record. In contrast, the 'group client' filter shows unidentified 'group' clients. 'Support persons' can also be used as a separate filter. Using one or a combination of these filters can reveal differences in service usage and other trends for the different client types. The CHSP provides face-to-face support where clients are known to the service, therefore it is expected that only 5% of your clients or less should be recorded as unidentified 'group' clients in each reporting period.

Quick tips:

Tip 1: Once a filter has been applied, the fields that the data is filtered by can be changed by clicking on the chart, filter, or table (used to apply the filter) to select or de-select the fields of interest. Alternatively, you can click on the filter button located in the dark grey bar at the top of the screen (and a list of the alternative fields will appear). For example, if the data is filtered by financial year, click on 'Session Financial Year'. A list of financial years will appear. Fields highlighted green indicate the data in the sheet is being filtered by that field (in this example, year). Clicking on a field (e.g. year) will add or remove the field from being filtered.

Tip 2: If there are other reporting elements that you would like the data to be filtered by (for example, so that you can only see the outputs and fees/CHSP client contributions that relate to a particular outlet), you can navigate to the sheet in the report that contains the data parameter (in this example, the Outlets sheet) and select the outlet/s or other field of interest. Once the additional filter has been selected, navigate back to the Fees & Costs by Service Type sheet. The filters being applied will appear on the grey bar at the top of the screen.

Note on fees/CHSP client contributions: To ensure accurate fees/CHSP client contributions information is shown in the report, fees/CHSP client contribution information must be reviewed with all 'client types' selected at the same time. This is required as the fees/CHSP client contribution information is reported at a session level, and not at the client or support person level.

Note: Any filters selected will automatically refresh the report across all sheets (i.e. the filter is applied to data in each sheet). When navigating to different sheets of the report, check that you have only selected the fields that you

Fees & Costs by Service Type
want the data to be filtered by. Filters can be removed by selecting the **Clear filter** ⊗ or **Clear selections** ⌐⊗ functions located across the dark grey bar at the top of the screen.
Glossary of terms used in this sheet
Service type descriptions are outlined in the CHSP Manual.
Outputs – Cost: The total cost of the services provided (only applicable for home modifications; home maintenance; and goods and equipment).
Fees/CHSP client contributions: The fees/CHSP client contributions *actually* received.
Calculations used in this sheet
Outputs – Cost: The sum of the costs, as reported in the Data Exchange.
Fees/CHSP client contributions: The sum of the fees/CHSP client contributions as reported in the Data Exchange.

Hours & Quantity by Period

Information included in this sheet includes:

- Outputs – Hours reported by service type and time period (reported outputs for service types where the output measure is hours)
- Outputs – Quantity reported by service type and time period (reported outputs for service types where the output measure is quantity)

How to navigate and filter the information in this sheet

This sheet gives a user a snapshot of service delivery over time. On this sheet, users can filter the data by:

- **Time period:** Users can filter the data by month or day to view outputs reported for services delivered within the time period/s selected. To filter the data by month, click on the month of interest. This will produce a chart with outputs reported for each day for the selected month. Users can also choose to then filter the data for a particular day. To navigate back to the chart with total outputs for a month, click on the 'MonthYear' icon.

  ⤶ =MonthYear ▶ date([Session Conducted Date]).

- **Service type:** Data can be filtered by selecting a service type on the Service Type Drill Through filter or alternatively by clicking on a service type of interest in the graph. If a user filters the data by a service type, for example Domestic Assistance, the graph will update to show the outputs at a service sub-type level (in this example, for General House Cleaning, Linen Services, Unaccompanied Shopping).

- **Reporting Period:** Data can be filtered by using the filters under the reporting period heading to gain insight on trends in service delivery for a financial year or selected reporting periods. To filter by financial year, select the financial year you are interested in looking at under the 'Reporting Period' heading. Once you have selected a financial year, a user could further filter the data so that it only relates to a single reporting period, by selecting the reporting period of interest which will now appear under the 'Reporting Period' heading.

- **Activity (CHSP sub-programme):** Data can be filtered by using the Activity Filter, to gain insight into information that relates to one of more Activity (CHSP sub-programme).

- **Client type:** Data can be filtered by client type. By selecting the 'individual client' filter, the data will show only those clients with a client record. In contrast, the 'group client' filter shows unidentified 'group' clients. 'Support persons' can also be used as a separate filter. Using one or a combination of these filters can reveal differences in service usage and other trends for the different client types. The CHSP provides face-to-face support where clients are known to the service, therefore it is expected that only 5% of your clients or less should be recorded as unidentified 'group' clients in each reporting period.

Quick tips:

Tip 1: Once a filter has been applied, the fields that the data is filtered by can be changed by clicking on the chart, filter, or table (used to apply the filter) to select or de-select the fields of interest. Alternatively, you can click on the filter button located in the dark grey bar at the top of the screen (and a list of the alternative fields will appear). For example, if the data is filtered by financial year, click on 'Session Financial Year'. A list of financial years will appear. Fields highlighted green indicate the data in the sheet is being filtered by that field (in this example, year). Clicking on a field (e.g. year) will add or remove the field from being filtered.

Tip 2: If there are other reporting elements that you would like the data to be filtered by (for example, so that you can only see the outputs reported by people that identify as Aboriginal and Torres Strait Islander), you can navigate to the sheet in the report that contains the data parameter (in this example, the Demographics sheet) and select the Aboriginal and Torres Strait Islander status or other field of interest. Once the additional filter has been selected, navigate back to the Hours & Quantity by Period sheet. The filters being applied will appear on the grey bar at the top of the screen.

Hours & Quantity by Period

Note: Any filters selected will automatically refresh the report across all sheets (i.e. the filter is applied to data in each sheet). When navigating to different sheets of the report, check that you have only selected the fields that you want the data to be filtered by. Filters can be removed by selecting the **Clear filter** ⊗ or **Clear selections** ⟦⊗⟧ functions located across the dark grey bar at the top of the screen.

Glossary of terms used in this sheet

Service type descriptions are outlined in the CHSP Manual.

Refer to the Calculations section below for information on 'Outputs – Hours' and 'Outputs – Quantity'.

Calculations used in this sheet

Outputs – Quantity: For every session, the reported outputs (measured in quantity) are multiplied by the number of clients and support persons that attended the session. The total reflected is the sum of the calculated outputs. For example, if the amount of assistance provided was recorded as 1 trip in the Data Exchange and 12 clients were attached to the session, the outputs reflected in the CHSP Organisation Overview for this session are 12 (trips).

Outputs – Hours: For every session, the reported outputs (measured in hours and minutes) are multiplied by the number of clients and support persons that attended the session. The total reflected is the sum of the calculated outputs. For example, if the amount of assistance provided was recorded as 2 hours in the Data Exchange and 5 clients were attached to the session, the outputs reflected in the CHSP Organisation Overview for this session are 10 hours.

Fees & Costs by Period

Information included in this sheet includes:

- Fees/CHSP client contributions reported by service type and time period
- Outputs – Cost reported, by service type and time period (reported outputs for service types where the output measure is cost)

How to navigate and filter the information in this sheet

This sheet gives a user a snapshot of service delivery over time. On this sheet, users can filter the data by:

- **Time period:** Users can filter the data by month or day to view outputs reported for services delivered within the time period/s selected. To filter the data by month, click on the month of interest. This will produce a chart with outputs reported for each day for the selected month. Users can also choose to then filter the data for a particular day. To navigate back to the chart with total outputs for a month, click on the 'MonthYear' icon

  ⤵ =MonthYear ▶ date([Session Conducted Date]).

- **Service type:** Data can be filtered by selecting a service type on the Service Type Drill Through filter or alternatively by clicking on a service type of interest in the graph. If a user filters the data by a service type, for example Domestic Assistance, the graph will update to show the outputs at a service sub-type level (in this example, for General House Cleaning, Linen Services, Unaccompanied Shopping).

- **Reporting Period:** Data can be filtered by using the filters under the reporting period heading to gain insight on trends in service delivery for a financial year or selected reporting periods. To filter by financial year, select the financial year you are interested in looking at under the 'Reporting Period' heading. Once you have selected a financial year, a user could further filter the data so that it only relates to a single reporting period, by selecting the reporting period of interest which will now appear under the 'Reporting Period' heading.

- **Activity (CHSP sub-programme):** Data can be filtered by using the Activity Filter, to gain insight into information that relates to one of more Activity (CHSP sub-programme).

- **Client type:** Data can be filtered by client type. By selecting the 'individual client' filter, the data will show only those clients with a client record. In contrast, the 'group client' filter shows unidentified 'group' clients. 'Support persons' can also be used as a separate filter. Using one or a combination of these filters can reveal differences in service usage and other trends for the different client types. The CHSP provides face-to-face support where clients are known to the service, therefore it is expected that only 5% of your clients or less should be recorded as unidentified 'group' clients in each reporting period.

Quick tips:

Tip 1: Once a filter has been applied, the fields that the data is filtered by can be changed by clicking on the chart, filter, or table (used to apply the filter) to select or de-select the fields of interest. Alternatively, you can click on the filter button located in the dark grey bar at the top of the screen (and a list of the alternative fields will appear). For example, if the data is filtered by financial year, click on 'Session Financial Year'. A list of financial years will appear. Fields highlighted green indicate the data in the sheet is being filtered by that field (in this example, year). Clicking on a field (e.g. year) will add or remove the field from being filtered.

Tip 2: If there are other reporting elements that you would like the data to be filtered by (for example, so that you can only see the outputs and fees/CHSP client contributions reported by people that identify as Aboriginal and Torres Strait Islander, you can navigate to the sheet in the report that contains the data parameter (in this example, the Demographics sheet) and select the Aboriginal and Torres Strait Islander status or other field of interest. Once the additional filter has been selected, navigate back to the Fees & Costs by Period sheet. The filters being applied will appear on the grey bar at the top of the screen.

Fees & Costs by Period

Note on fees/CHSP client contributions: To ensure accurate fees/CHSP client contributions information is shown in the report, fees/CHSP client contribution information must be reviewed with all 'client types' selected at the same time. This is required as the fees/CHSP client contribution information is reported at a session level, and not at the client or support person level.

Note: Any filters selected will automatically refresh the report across all sheets (i.e. the filter is applied to data in each sheet). When navigating to different sheets of the report, check that you have only selected the fields that you want the data to be filtered by. Filters can be removed by selecting the **Clear filter** ⊗ or **Clear selections** ⬚⊗ functions located across the dark grey bar at the top of the screen.

Glossary of terms used in this sheet

Service type descriptions are outlined in the CHSP Manual.

Outputs – Cost: The total cost of the services provided (only applicable for home modifications; home maintenance; and goods and equipment).

Fees/CHSP client contributions: The fees/CHSP client contributions *actually* received.

Calculations used in this sheet

Outputs – Cost: The sum of the costs, as reported in the Data Exchange.

Fees/CHSP client contributions: The sum of the fees/CHSP client contributions as reported in the Data Exchange.

Client Location

Client Location

Information included in this sheet includes:

- Number of clients and support persons (by state and Aged Care Planning Region (ACPR))
- A heat map of the distribution of individual clients and support persons

How to navigate and filter the information in this sheet

This sheet gives a user a snapshot of service delivery over time. On this sheet, users can filter the data by:

- **Region (State and ACPR):** Data can be filtered by the 'Client State' to narrow in the view of the client distribution for one or more state. Data can also be filtered by selecting the ACPR of interest on the 'Client ACPR' filter or using searching the name of an ACPR by clicking on the magnifying glass icon (shown below). Alternatively, a provider can select the ACPR of interest on the map or use the Qlik 'lasso' feature. Note: The map uses Statistical Area 2 (SA2) mapping, which closely correlates to ACPR, however the names of the SA2 regions do vary to the ACPR names.

    $\mathcal{Q}$ **Client ACPR**

- **Reporting Period:** Data can be filtered by using the filters under the reporting period heading to gain insight on trends in service delivery for a financial year or selected reporting periods. To filter by financial year, select the financial year you are interested in looking at under the 'Reporting Period' heading. Once you have selected a financial year, a user could further filter the data so that it only relates to a single reporting period, by selecting the reporting period of interest which will now appear under the 'Reporting Period' heading.

- **Client type:** Data can be filtered by client type. By selecting the 'individual client' filter, the data will show only those clients with a client record. In contrast, the 'group client' filter shows unidentified 'group' clients. 'Support persons' can also be used as a separate filter. Using one or a combination of these filters can reveal differences in service usage and other trends for the different client types. The CHSP provides face-to-face support where clients are known to the service, therefore it is expected that only 5% of your clients or less should be recorded as unidentified 'group' clients in each reporting period.

Quick tips:

Tip 1: Once a filter has been applied, the fields that the data is filtered by can be changed by clicking on the chart, filter, or table (used to apply the filter) to select or de-select the fields of interest. Alternatively, you can click on the filter button located in the dark grey bar at the top of the screen (and a list of the alternative fields will appear). For example, if the data is filtered by financial year, click on 'Session Financial Year'. A list of financial years will appear. Fields highlighted green indicate the data in the sheet is being filtered by that field (in this example, year). Clicking on a field (e.g. year) will add or remove the field from being filtered.

Tip 2: If there are other reporting elements that you would like the data to be filtered by (for example, so that you can only see the client location information reported that relate to clients accessing a particular service type), you can navigate to a sheet in the report that contains the data parameter (in this example, the CHSP Overview sheet) and select the service type/s or other field of interest. Once the additional filter has been selected, navigate back to the Client Location sheet. The filters being applied will appear on the grey bar at the top of the screen.

Note: Any filters selected will automatically refresh the report across all sheets (i.e. the filter is applied to data in each sheet). When navigating to different sheets of the report, check that you have only selected the fields that you want the data to be filtered by. Filters can be removed by selecting the **Clear filter** [icon] or **Clear selections** [icon] functions located across the dark grey bar at the top of the screen.

Client Location
Glossary of terms used in this sheet
ACPR: Aged Care Planning Region **Client SA2, SA3, SA4:** Statistical Area Levels from the Australian Statistical Geography Standard (ASGS). The Statistical Area Levels are part of the main structure and based on the concept of a functional area. The descending order of the levels according to size is SA4, SA3, SA2. Reference: http://www.abs.gov.au/ausstats/abs@.nsf/Lookup/by%20Subject/1270.0.55.001~July%202016~Main%20Features~Main%20structure~10002 **Individual client:** A client who has had a client record created within the Data Exchange and attended a session within the reporting period. **Support person:** A person attending a session that does not meet the definition of a client. They could be a carer of the client, a family member or young children.
Calculations used in this sheet
Number of individual clients and support persons: The sum of individual clients and support persons.

Demographics

	Information included in this sheet includes:
[Client Demographics icon] Client Demographics	• Number of clients and support persons by aged group • Percentage of clients and support persons by Aboriginal and Torres Strait Islander status • Clients and support persons, by gender • Percentage of clients and support persons by disability status • Percentage of clients and support persons by disability type

How to navigate and filter the information in this sheet

This sheet gives a user a snapshot of service delivery over time. On this sheet, users can filter the data by:

- **Age Group:** Data can be filtered by age range to gain insight on the data trends for people in a chosen age range. Users can click on the age range/s of interest in the graph to filter the information.

- **Aboriginal and Torres Strait Islander Status:** Data can be filtered by Aboriginal and Torres Strait Islander status to gain insight on the data trends for people by Aboriginal and Torres Strait Islander status. Users can click on the status of interest in the pie chart to filter the information.

- **Gender:** Data can be filtered by gender to gain insight on the data trends for people by the gender/s selected. Users can click on the gender/s of interest in the graph to filter the information.

- **Disability Status:** Data can be filtered by Disability status to gain insight on the data trends for people by Disability Status and disability type selected. Users can click on the status of interest in the pie chart to filter the information. If a user selects the Disability Status 'Yes', the data pie chart will filter the information to relate only to clients where a disability has been recorded in the Data Exchange. The chart will be updated to reflect the percentage of clients and support persons by disability type.

- **Reporting Period:** Data can be filtered by using the filters under the reporting period heading to gain insight on trends in service delivery for a financial year or selected reporting periods. To filter by financial year, select the financial year you are interested in looking at under the 'Reporting Period' heading. Once you have selected a financial year, a user could further filter the data so that it only relates to a single reporting period, by selecting the reporting period of interest which will now appear under the 'Reporting Period' heading.

- **Activity (CHSP sub-programme):** Data can be filtered by using the Activity Filter, to gain insight into information that relates to one of more Activity (CHSP sub-programme).

- **Client type:** Data can be filtered by client type. By selecting the 'individual client' filter, the data will show only those clients with a client record. In contrast, the 'group client' filter shows unidentified 'group' clients. 'Support persons' can also be used as a separate filter. Using one or a combination of these filters can reveal differences in service usage and other trends for the different client types. The CHSP provides face-to-face support where clients are known to the service, therefore it is expected that only 5% of your clients or less should be recorded as unidentified 'group' clients in each reporting period.

Quick tips:

Tip 1: Once a filter has been applied, the fields that the data is filtered by can be changed by clicking on the chart, filter, or table (used to apply the filter) to select or de-select the fields of interest. Alternatively, you can click on the filter button located in the dark grey bar at the top of the screen (and a list of the alternative fields will appear). For example, if the data is filtered by financial year, click on 'Session Financial Year'. A list of financial years will appear. Fields highlighted green indicate the data in the sheet is being filtered by that field (in this example, year). Clicking on a field (e.g. year) will add or remove the field from being filtered.

Tip 2: If there are other reporting elements that you would like the data to be filtered by (for example, so that you can only see Demographics that relate to a particular service type), you can navigate back to the CHSP Overview

Demographics

sheet and select the service type/s or other field of interest. Once the additional filter has been selected, navigate back to the Demographics sheet. The filters being applied will appear on the grey bar at the top of the screen.

Note: Any filters selected will automatically refresh the report across all sheets (i.e. the filter is applied to data in each sheet). When navigating to different sheets of the report, check that you have only selected the fields that you want the data to be filtered by. Filters can be removed by selecting the **Clear filter** ⊗ or **Clear selections** ⊡⊗ functions located across the dark grey bar at the top of the screen.

Glossary of terms used in this sheet

Individual client: A client who has had a client record created within the Data Exchange and attended a session within the reporting period.
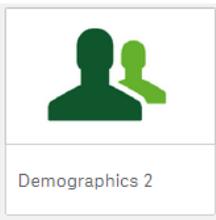
Support person: A person attending a session that does not meet the definition of a client. They could be a carer of the client, a family member or young children.

Calculations used in this sheet

Number of individual clients and support persons: The sum of individual clients and support persons.

Percentage of individual clients and support persons: The sum of individual clients and support persons with the relevant status reported divided by the sum of individual clients and support persons.

Demographics 2	
Demographics 2	Information included in this sheet includes: • Percentage of clients and support persons by CALD Status • Percentage of clients and support persons by Country of Birth • Percentage of clients and support persons by Main Language Spoken at Home

How to navigate and filter the information in this sheet

This sheet gives a user a snapshot of service delivery over time. On this sheet, users can filter the data by:

- **CALD Status:** Data can be filtered by culturally and linguistically diverse (CALD) status to gain insight on the data trends for people by CALD status. Users can click on the status of interest in the pie chart to filter the data.

- **Country of Birth:** Data can be filtered by Country of Birth to gain insight on the data trends for people by country of birth. The most common 9 countries of birth and 'others' are included in the chart. Users can click on the pie chart to select one of more countries of interest.
  Note: By clicking on 'others' in the pie chart, the next most common countries of birth will appear in the chart (i.e. countries 10 to 18 and 'others'). When the data is filtered by 'others', the percentages shown represent the proportion of clients and support persons by country of birth as it applies to that graph only, and not as a proportion of the total clients for the provider (i.e. once the data is filtered by 'others', the top 9 countries of birth are not factored into the percentages shown as they have been removed from the filter).

- **Main Language Spoken at Home:** Data can be filtered by the Main Language spoken at home to gain insight on the data trends for people by language spoken at home. The most common 9 main languages spoken at home and 'others' are included in the chart.
  Note: By clicking on 'others' in the pie chart, the next most common languages spoken at home will appear in the chart (i.e. languages 10 to 18 and 'others'). When the data is filtered by 'others', the percentages shown represent the proportion of clients and support persons by language as it applies to that graph only, and not as a proportion of the total clients/support persons for the provider (i.e. once the data is filtered by 'others', the top 9 languages are not factored into the percentages shown as they have been removed from the filter).

- **Reporting Period:** Data can be filtered by using the filters under the reporting period heading to gain insight on trends in service delivery for a financial year or selected reporting periods. To filter by financial year, select the financial year you are interested in looking at under the 'Reporting Period' heading. Once you have selected a financial year, a user could further filter the data so that it only relates to a single reporting period, by selecting the reporting period of interest which will now appear under the 'Reporting Period' heading.

- **Activity (CHSP sub-programme):** Data can be filtered by using the Activity Filter, to gain insight into information that relates to one of more Activity (CHSP sub-programme).

- **Client type:** Data can be filtered by client type. By selecting the 'individual client' filter, the data will show only those clients with a client record. In contrast, the 'group client' filter shows unidentified 'group' clients. 'Support persons' can also be used as a separate filter. Using one or a combination of these filters can reveal differences in service usage and other trends for the different client types. The CHSP provides face-to-face support where clients are known to the service, therefore it is expected that only 5% of your clients or less should be recorded as unidentified 'group' clients in each reporting period.

Quick tips:

Tip 1: Once a filter has been applied, the fields that the data is filtered by can be changed by clicking on the chart, filter, or table (used to apply the filter) to select or de-select the fields of interest. Alternatively, you can click on the filter button located in the dark grey bar at the top of the screen (and a list of the alternative fields will appear). For example, if the data is filtered by financial year, click on 'Session Financial Year'. A list of financial years will appear.

Demographics 2

Fields highlighted green indicate the data in the sheet is being filtered by that field (in this example, year). Clicking on a field (e.g. year) will add or remove the field from being filtered.

Tip 2: *If there are other reporting elements that you would like the data to be filtered by (for example, so that you can only see the Demographics 2 that relate to a particular outlet), you can navigate to the sheet in the report that contains the data parameter (in this example, the Outlets sheet) and select the outlet/s or other field of interest. Once the additional filter has been selected, navigate back to the Demographics 2 sheet. The filters being applied will appear on the grey bar at the top of the screen.*

Note: Any filters selected will automatically refresh the report across all sheets (i.e. the filter is applied to data in each sheet). When navigating to different sheets of the report, check that you have only selected the fields that you want the data to be filtered by. Filters can be removed by selecting the **Clear filter** or **Clear selections** functions located across the dark grey bar at the top of the screen.

Glossary of terms used in this sheet

CALD: Culturally and Linguistically Diverse

Individual client: A client who has had a client record created within the Data Exchange and attended a session within the reporting period.

Support person: A person attending a session that does not meet the definition of a client. They could be a carer of the client, a family member or young children.

Calculations used in this sheet

Number of individual clients and support persons: The sum of individual clients and support persons.

Percentage of individual clients and support persons: The sum of individual clients and support persons with the relevant status reported divided by the sum of individual clients and support persons.

Client Home Situation	
 Client Home Situation	Information included in this sheet includes: • Number of clients and support persons by household composition type • Number of clients and support persons by accommodation type • Percentage of clients and support persons by carer • Number of clients and support persons by DVA card status

How to navigate and filter the information in this sheet

This sheet gives a user a snapshot of service delivery over time. On this sheet, users can filter the data by:

- **Household composition type:** Data can be filtered by household composition type/s to gain insight on the data trends for people by household composition. Users can click on the household composition type/s of interest in the chart to filter the data.

- **Accommodation type:** Data can be filtered by accommodation type to gain insight on the data trends for people by accommodation type. Users can click on the accommodation type/s interest in the chart to filter the data.

- **Carer status:** Data can be filtered by carer status to gain insight on the data trends for people by carer status. Users can click on the status of interest in the chart to filter the data.

- **DVA card status:** Data can be filtered by Department of Veteran's Affairs (DVA) card status to gain insight on the data trends for people by DVA card status. Users can click on the status of interest in the chart to filter the data.

- **Reporting Period:** Data can be filtered by using the filters under the reporting period heading to gain insight on trends in service delivery for a financial year or selected reporting periods. To filter by financial year, select the financial year you are interested in looking at under the 'Reporting Period' heading. Once you have selected a financial year, a user could further filter the data so that it only relates to a single reporting period, by selecting the reporting period of interest which will now appear under the 'Reporting Period' heading.

- **Activity (CHSP sub-programme):** Data can be filtered by using the Activity Filter, to gain insight into information that relates to one of more Activity (CHSP sub-programme).

- **Client type:** Data can be filtered by client type. By selecting the 'individual client' filter, the data will show only those clients with a client record. In contrast, the 'group client' filter shows unidentified 'group' clients. 'Support persons' can also be used as a separate filter. Using one or a combination of these filters can reveal differences in service usage and other trends for the different client types. The CHSP provides face-to-face support where clients are known to the service, therefore it is expected that only 5% of your clients or less should be recorded as unidentified 'group' clients in each reporting period.

Quick tips:

Tip 1: Once a filter has been applied, the fields that the data is filtered by can be changed by clicking on the chart, filter, or table (used to apply the filter) to select or de-select the fields of interest. Alternatively, you can click on the filter button located in the dark grey bar at the top of the screen (and a list of the alternative fields will appear). For example, if the data is filtered by financial year, click on 'Session Financial Year'. A list of financial years will appear. Fields highlighted green indicate the data in the sheet is being filtered by that field (in this example, year). Clicking on a field (e.g. year) will add or remove the field from being filtered.

Tip 2: If there are other reporting elements that you would like the data to be filtered by (for example, so that you can only see the Client Home Situation reported that relate to a particular disability status), you can navigate to the sheet in the report that contains the data parameter (in this example, the Demographics sheet) and select the disability status or other field of interest. Once the additional filter has been selected, navigate back to the Client Home Situation sheet. The filters being applied will appear on the grey bar at the top of the screen.

Client Home Situation
Note: Any filters selected will automatically refresh the report across all sheets (i.e. the filter is applied to data in each sheet). When navigating to different sheets of the report, check that you have only selected the fields that you want the data to be filtered by. Filters can be removed by selecting the **Clear filter** ⊗ or **Clear selections** ⌞⊗⌝ functions located across the dark grey bar at the top of the screen.
Glossary of terms used in this sheet
DVA: Department of Veterans' Affairs **Individual client:** A client who has had a client record created within the Data Exchange and attended a session within the reporting period. **Support person:** A person attending a session that does not meet the definition of a client. They could be a carer of the client, a family member or young children.
Calculations used in this sheet
Number of individual clients and support persons: The sum of individual clients and support persons. **Percentage of individual clients and support persons:** The sum of individual clients and support persons with the relevant status reported divided by the sum of individual clients and support persons.

Information Page	
Information Page	Information included in this sheet: • Information on the Data Exchange, including links to additional information. • Terms and Definitions used in Data Exchange reports.

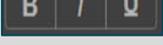| How to navigate and filter the information in this sheet |
|---|
| This sheet gives a user a snapshot of service delivery over time. On this sheet, users can filter the data by:

• **Grouping:** Users can filter the terms and definitions by the groupings provided. Note: There is a Grouping specifically dedicated for CHSP.

Note: Filters can be removed by selecting the **Clear filter** ⊗ or **Clear selections** ⌐⊗ functions located across the dark grey bar at the top of the screen. |

Navigation

Qlik is a reports application that has the same functionality in every report. The below table outlines a range of functions possible in Qlik in alphabetical order.

Item Name	Item Image	Description
A	A	Select the **A** icon to insert text into a story
About	(i)	Select the **About** icon to get information about the application
Actions	(...)	Select the **Actions** button for options to move back, forward and export
Add slide	(+)	Select the **Add slide** button to add a new slide to your story
Alignment	☰ ☰ ☰	Select the **Alignment** options to change the alignment of text
Animation	🪄	Select the **Animation** icon to animate a shape or image in a story
Back	<	Select the **Back** button to go to the previous sheet of the report
Back	<	Select the **Back** button to go to the previous slide in a story
Blank		Select the **Blank** icon to insert a blank sheet
Bookmark	🔖	Select the **Bookmark** icon to save the reference point in the sheet **Note:** This will save the filters you have applied to a report, but will not freeze the data itself
Bring forward	Bring forward	Select **Bring forward** to move an item one layer forward
Bring to front	Bring to front	Select **Bring to front** to move an item to the front
Camera	📷	Select the **Camera** icon to add an item to the snapshot library
Clear selections	⌗	Select the **Clear selections** function to clear all the filters selected
Clear	⊗	Select the **Clear** button to clear a filter selection
Close	⊗	Select the **Close** button to exit the preview
Confirm	✓	Select the **Confirm** button to confirm a filter selection
Create new page	⊕	Select the **Create new page** icon to add a new page to a story

Item Name	Item Image	Description
Create new story	Create new story	Select the **Create new story** button to open a new story template
Cut		Select the **Cut** icon to remove an item from your story slide
Delete		Select the **Delete** icon to remove an item or story
Delete	Delete	Select **Delete** to remove an image or story
Drop down arrow		Select the **Drop down arrow** near the colour box to choose a font colour
Drop down menu		Select the **Drop down menu** to select different sheets available in a report
Duplicate		Select the **Duplicate story** icon to make a copy of the original story
Edit	Edit	Select the **Edit** button to make changes to an image or graph
Effects any value	123	Select the **Effects any value** icon to make a value, that is selected manually, stand out by adding a label to the selected value and dimming other values
Effects highest value		Select the **Effects highest value** icon to make the highest value stand out by adding a label to the highest value and dimming the other values
Effects lowest value		Select the **Effects lowest value** icon to make the lowest value stand out by adding a label to the highest value and dimming the other values
Exploration		Select the **Exploration** menu item to allow a user to make changes to the appearance of the chart or table they are viewing
Export		Select the **Export** to **PDF** button to export a story to PDF or PowerPoint.
Export data		Select the **Export data** button to export a graph to Excel
Export to PDF		Select the **Export** icon to export an image, graph, report or story to PDF or PowerPoint
Font	B I U	Select **B**, *I* or **U** to make text bold, italic or underlined
Font size	L	Select the **Font size** drop down arrow to change the size of text
Forward	>	Select the **Forward** button to go to the next sheet of the report
Forward	>	Select the **Forward** button to go to the next slide in the story
Go to source	Go to source	Select **Go to source** to return to the sheet where the image was found

Item Name	Item Image	Description
Green tick		Select the **Green tick** button to save the new story
Handles		Select the **Handles** on the corner of the text box to resize the text box
Help		Select the **Help** icon to get online help from the Qlik Sense website
Hyperlink		Select the **Hyperlink** icon to link a URL to the text
Information		Select the **Information** icon to display information about the report
Lasso		Select the **Lasso** icon to draw a freehand circle to capture and select data points and items
Media		Select the **Media** icon to select media objects for a story
Menu viewer		Select the **Menu viewer** to display the items in grid or list view
Menu		Select the **Menu** icon to display the different export options
Navigation		Select the **Navigation** icon to return to the Hub home page
Open snapshot library		Select the **Open snapshot library** to select pre-saved snapshots for a story
Outlet map reference		Select the **Outlet map reference** icon to view a selected outlet
Padlock		Select the **Padlock** icon to lock or unlock a snapshot
Pencil		Select the **Pencil** icon to edit the display aspects of a graph / image
Play		Select the **Play** icon to play a story inside the Qlik application
Send backward	Send backward	Select **Send backward** to send an item back one layer
Send to back	Send to back	Select **Send to back** to send an item to the back
Shapes		Select the **Shapes** icon to select different shapes for a story.
Step back		Select the **Step back** function to undo the last selection
Sheet		Select the **Sheet** icon to insert a new sheet into a story
Sheet centre-aligned		Select the **Sheet centre-aligned** icon to insert an image in the middle of a page, and text on the left or right hand side

Item Name	Item Image	Description
Sheet left-aligned		Select the **Sheet left-aligned** icon to insert an image on the left hand side of a page, and text on the right hand side
Sheet right-aligned		Select the **Sheet right-aligned** icon to insert an image on the right hand side, and text on the left hand side
Step forward		Select the **Step forward** function to redo a selection
Story		Select the **Story** icon to create or access stories already created
Take snapshot		Select the **Take snapshot** button to take a picture of a graph or table. This will be saved in the **Open snapshot library**