DSS Data Exchange Task Card 5
Finding, Viewing & Editing Cases & Sessions

This task card takes users of the DSS Data Exchange web based portal through the process required to find an existing case record and associated session records, and understand the functions available to be undertaken once a case record and its associated sessions have been found.

If you are wanting to create a new case record, please refer to: Task Card 3 – Adding a New Case and Sessions.

Step 1 - Searching for an existing case

From the DSS Data Exchange home screen click on the link titled “Case” in the “Find” menu.

Once you click on the “Case” link the “Find Client” screen will appear.

Step 2 - Finding an existing case

The “Find a case” screen will allow you to search for any existing case records. There are two ways you can search for an existing case.
A – Find a case using keyword searches

This section allows you to use one or more key items to find or narrow down the list of available case records. You can search by:

- Case ID
- The outlet and programme activity the case was created under
- The date period it was created between
- Cases created by you

B – Search button

Once one or more search criteria have been entered click on the “Search” to run the search. Results matching the criteria you have selected will be returned. Please note only exact matches to the criteria will be shown.

C – Results area

This part of the screen shows all records matching the search criteria you have entered. If the search results are left blank, the search result field will default to show all case records within your organisation, with the most recently created case records at the top. Ten records are shown in this area as a default. You can adjust the number of records shown per page using the “Show” button to show 20 or 50 records if desired.

You can move through your search results to show additional client records by using the paging function below the search results area.

If you wish to view further details about a case you can select the blue arrow at the end of the case record. To select a case, click on the underlined case ID.
Step 3 - Viewing an existing case

Once you have selected a case ID from the “Results” area you will be taken to the case screen. From this screen a number of actions can be undertaken.

A – Delete case button

In order to delete a case, all session records must be deleted first. This can only be done during the reporting period the case is created in (an active reporting period). If a case was recorded in a reporting period that has been finalised you cannot delete this case.

If the case has been created within an active reporting period and needs to be deleted, you can do so once all the sessions have been removed that are associated with the case (see step 4). If a session has not yet been recorded, then the case may be deleted immediately by pressing the delete case button.

A warning prompt will appear advising that all details of the case will be deleted. Selecting “Yes” to this prompt will delete the case record. Selecting “No” will return you to this screen.

B – Edit case details button

Selecting the “Edit case details” button will allow you to change or modify the name of the case, or adjust the “Total number of unidentified clients associated with the Case” fields (see task card 3 Creating a Case).

C – Attach/detach clients button

The “Attach/Detach clients” button allows you to add additional clients to the case where relevant or to remove a client record from the case if added in error.

Adding clients

Once this button is selected you will be taken to the “Search clients” screen which allows you to search for additional client records by using either the key search function or by selecting the client record from the results area. Further information about searching for clients can be found in Task Card 4 - Finding, Viewing & Editing Existing Clients.
Detaching clients

You can only detach a client from the case if they have not been recorded as attending a session within this case. If the client you wish to detach has already been marked as attending a session in this case you will need to edit the session record first to remove the client from the session (see step 4).

If the client has not been associated with a session within this case, you can remove the client from the case. To do this, find the clients details within the “Clients attached to the case” and select the tick box next to the client’s name. Next, click on the “Remove selected client” button and the client record will be moved back into the “Search results area”. This client record is now disassociated with the case.

D – Add session button

If you wish to record a new session against this case select the “Add session” button, which will take you through the session creation process. Details of this process are further outlined in Task Card 2 - Creating Cases and Sessions. There is no limit to the number of sessions that can be recorded under a case.

E – Editing/deleting an existing session

If you wish to make changes to a session record you have already created within this case you can do so by selecting the session ID. This will open the session record.

Step 4 – Editing a session

From this screen you can:

A – Delete the session record

If a session record has been created in error within the current reporting period, you can delete the session record, to do so select the “Delete session” button. You will be given a confirmation message; selecting “Yes” will delete the session record. Selecting “No” will return you to this screen. You cannot delete a session that was recorded in a previous reporting period.

B – Edit the session details

If you need to make changes to the details of the session, such as changing the date the session was recorded on, or the service type delivered, select the “Edit Session details” button. Once you have made the changes select the “Save” button.

C – Edit the session attendees

If you need to add or remove clients recorded against the session, or change the participation type for a client select the “Edit attendees” button (see C). This will take you to the “Edit attendees” screen. From here you can
disassociate a client marked as attending the session by selecting the tick box next to the clients name (see C1) and selecting the “Remove clients/support persons” button (see C2). This will move the client record back to the “Clients associated with the case” area.

Alternatively if you need to record a client as attending the session, select the tick box next to the clients name in the “Clients associated with the case” area (see C3). Next, click on the “Attach selected clients” button to record them as attending the session as a client (see C4).

To attach a client as a “Support person”, select the tick box next to the clients name in the “Clients associated with the case” area (see C3). Next, click the “Attach selected support persons” button (see C5).

### D – Record referrals made from this session

To add a referral made within this session select the pink person icon, next to the relevant client marked as attending this session (see D). From here you will be taken to the “Referrals to other services” screen.

From this screen you can edit existing records of referrals made (see D1), or add new ones (see D2). Further information about how to record referrals made can be found in Task Card 2 – Adding a New Client.

### E – Record Client SCORE assessments for clients attached to the session

If you would like to add a Client SCORE assessment for a client within the session, select the ribbon icon (see E). This will take you to the Client SCORE assessment page. The provision of this information is entirely voluntary and can be provided as part of the partnership approach (see the DSS Data Exchange Protocols).

From here you can edit an existing SCORE assessment by selecting the pen icon (see E1) or add new assessments by selecting the “Add client Score” button (see E2). Further information about how to undertake these processes are outlined in Task Card 2 – Adding a New Client.
F – Record Community SCORE assessments

To add a Community SCORE assessment against the session, select the “Add community SCORE” button (see F in “Session details” screen above). This will take you to the Community SCORE assessment page.

From here you can edit an existing SCORE assessment or add new ones. Detailed steps to undertake these processes are outlined in Task Card 2 – Adding a New Client.