

**Quarterly Data Collection
QDC Tool – User Manual
Version 2.0
February 2004**

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Getting help

This document provides a step-by-step guide to loading QDC Tool onto your computer and detailed instructions on how to use the software.

It is not intended as a training guide for QDC Tool and users are strongly advised to attend a QDC Tool training course.

If you have any other queries about QDC Tool or are having problems using it, contact the QDC Helpdesk.

QDC Helpdesk

The helpdesk can be reached by telephone, email or facsimile:

Telephone: 1800 352 561
Facsimile: (03) 9616 7272
Email: QDChelp@dhs.vic.gov.au

Postal address:

QDC Helpdesk
Disability Services Division,
Department of Human Services
Level 19A 555 Collins Street
Melbourne Vic 3000

QDC website

A website dedicated to the QDC information system has been established and contains the following:

- QDC Data Guide
- QDC Data Transmission Specifications
- QDC Service User Forms for each quarter
- Frequently Asked Questions
- Privacy Information
- QDC Newsletters

The QDC web address is: <http://www.dhs.vic.gov.au/qdc>

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Part I:

Overview of QDC Tool

What is Quarterly Data Collection?

The Quarterly Data Collection (QDC) is an initiative of the Department of Human Services to collect statistical information about service users and service providers to meet the following Commonwealth and State Government reporting requirements:

- the Agency Performance and Data Collection (AP&DC), which applies to Disability Services Division (DSD) funded agencies;
- the Psychiatric Disability Rehabilitation Support Services (PDRSS) Minimum Data Set, which applies to PDRSS funded agencies;
- the Home and Coordinated Care (HACC) Minimum Data Set, which applies to HACC funded agencies;
- the Commonwealth State/Territory Disability Agreement (CSTDA) National Minimum Data Set, which applies to DSD and PDRSS funded agencies.

The information is collected from agencies receiving DSD, PDRSS and HACC funding (this includes funded agencies as well as DHS run organisations) on a quarterly basis.

Agencies should collect QDC data on an ongoing basis and collate and send it to DHS at the close of each quarter. They must report specific details for each DHS activity type that they are funded to provide according to the:

- *Service type outlet* providing the service, and
- *Service users* accessing each service type outlet.

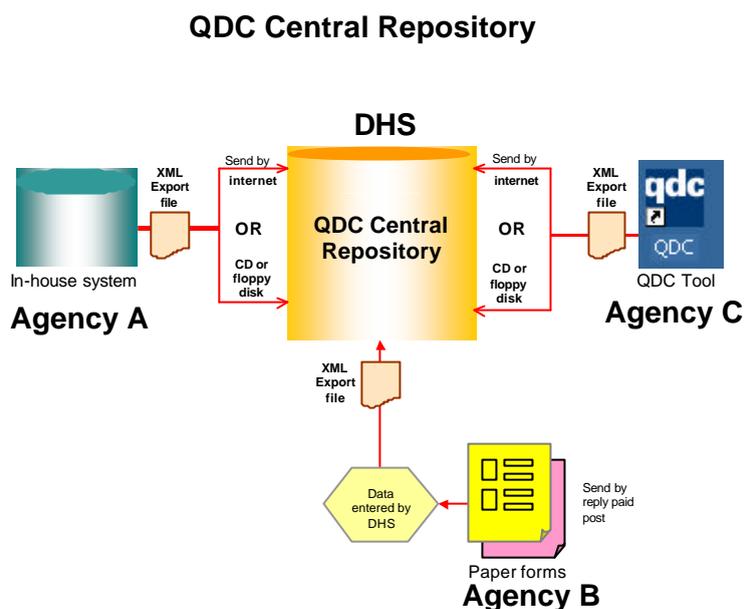
The QDC information system

DHS has developed an electronic system to streamline data collection, which consists of two main components:

- QDC Central Repository
- QDC Tool.

QDC Central Repository...

is a central database located at DHS that stores the data collected from agencies. This is designed to receive electronic data input files of client and service information from agencies.



Central Repository stores a current list of all agencies delivering services, their address, contact details, DHS activity types for which they are funded and their respective service type outlets. It also stores all the QDC questions and their relevant response codes.

QDC Tool...

is a PC-based software application that DHS provides free to agencies so that they can capture, collate and transmit QDC information to the Central Repository electronically. Agencies may develop their own systems to do the same; however QDC Tool is already designed to meet QDC reporting requirements.

The application allows you to collect data about your agency, your service users and the services provided to them for each service type outlet.

When you use the QDC Tool, you are asked questions that are relevant to the particular DHS activity types received by your service users. Once your service users demographic details are entered into the application, these only have to be maintained each quarter. This reduces the administrative effort of recording this information quarterly.

At the end of each quarter you can use QDC Tool to extract each quarter's service user, service outlet and service provision data in the form of an XML file and send this to DHS via the Internet or on CD or floppy disk. DHS then loads that information to the QDC Central Repository.

Understand your agency structure *first*

All of the data items recorded for each service user on QDC Tool must be related to your agency and to your service type outlets as follows:

- your agency is identified by an agency code assigned by DHS;
- your service type outlets are identified by codes assigned by DHS.

You need to understand what your service type outlets are and agency structure is **before** you install QDC Tool on your PCs.

This information is stored on the Central Repository at DHS initially. DHS then provides these details to you on the installation disk when you set up QDC Tool for the first time. Updates to this information will be sent to you periodically in the form of an **Agency_Export.xml** file via Internet or on disk.

If your agency details (your address, contact details, funded DHS activity type) change, you must advise QDC Helpdesk. They will make the changes to QDC Central Repository and provide you with an updated Agency_Export file, which you can then import to QDC Tool (see *Importing the Agency_Export data file* on page 122). This ensures that your location records are consistent with those in Central Repository.

When you send to DHS the quarterly QDC data export file, Central Repository will compare the agency structure with the structure in the quarterly export file generated by QDC Tool. If a difference is detected, the quarterly export file cannot be imported. It is critical therefore that the agency structure you have in QDC Tool matches the one in Central Repository.

If changes occur to the QDC questions and response codes, DHS will send you a new reference data file. You can then import this to QDC Tool to update the question and response code data in QDC Tool (see *Importing the reference data file* on page 121).

Data is collected by *service type outlet*

The QDC information system collects data by *service type outlet*. Remember this when you install and set up QDC Tool at various agency locations.

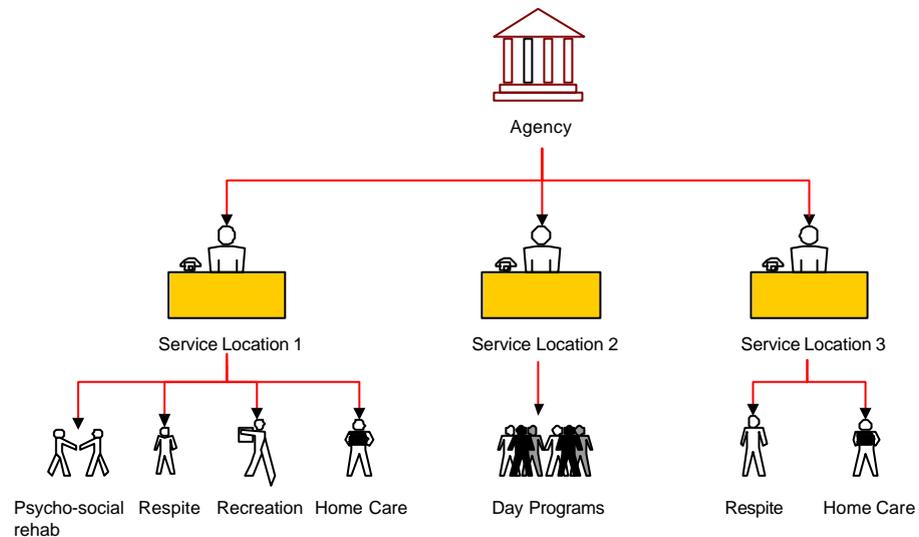
A *service type outlet* is a particular DHS activity type delivered at or from a specific service location. Each service type outlet is identified by means of a DHS assigned code.

If an agency delivers one DHS activity type from multiple locations, each location is treated as a separate identity and assigned its own service type outlet code. Likewise, if two or more different DHS activity types take place at the same location, each DHS activity type is also assigned its own service type outlet code.

For example, where an agency location is funded to provide *17035 DSD-Recreation* and *17010 DSD-Respite*, it will be known to operate two service type outlets, each with a separate code and each having to complete separate service type outlet information.

The following diagram shows an agency that delivers services to the community from three different locations. Note that service locations 1 and 3 both offer respite and home care. This agency has seven service type outlets:

- four at service location 1,
- one at service location 2 and
- two at service location 3.



DHS requires that data be returned for each of these seven service type outlets.

How QDC Tool operates

QDC Tool has been designed to run either on:

- one or more standalone computers or
- a network of computers (i.e. a local area network).

Note that QDC Tool will not be able to function on a wide area network (WAN).

Assigning a computer to a service type outlet

When you install QDC Tool be aware that you:

- can use one computer to collect data from many service type outlets at a service location;
- **must not** store information relating to one service type outlet on more than one computer.

QDC Tool and database

QDC Tool consists of two main components:

- The QDC Tool application, which you use to collect and process the information;
- The QDC Tool database, which stores all information relating to: your service users and the delivery of services; all of the QDC codes and questions; and agency administration information.

It is possible to install the application on a PC without having to install the database. It is important you know this if you intend, for example, to use QDC Tool on a *network*, as will be shown on page 18 below.

In keeping with privacy requirements, the following data items relating to the service user are encrypted when they are stored in the database.

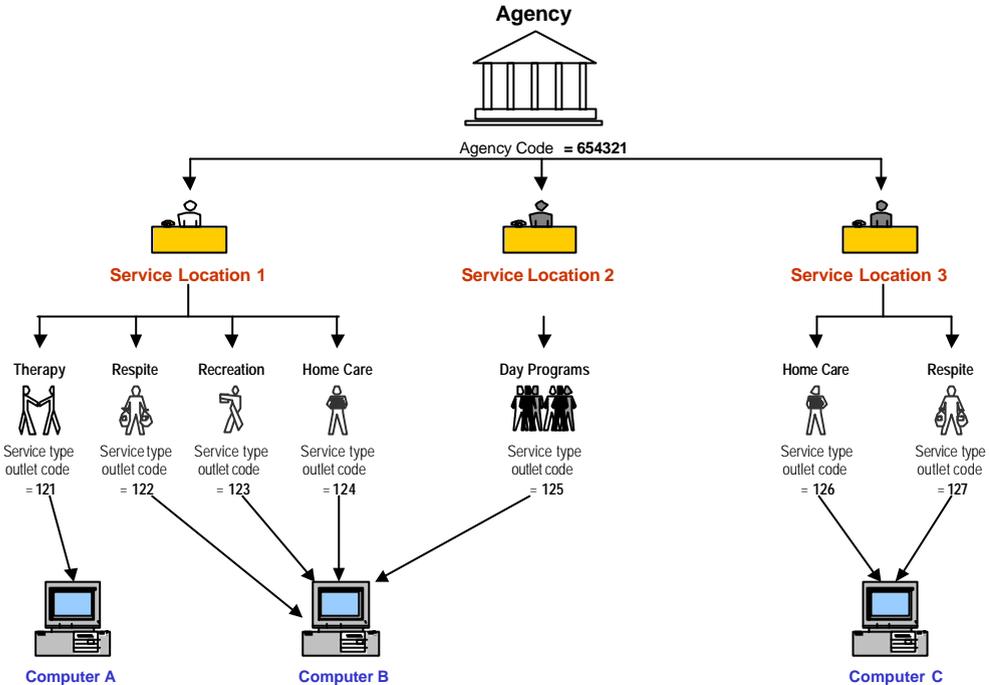
- Surname
- Given Name
- Usual Name
- Address1
- Address2
- Suburb
- Phone
- Statistical Linkage Key.

When information is encrypted it is turned into a code that makes no sense if it is viewed directly.

Installing on standalone computers

In the example below an agency (agency code = 654321) delivers different DHS activities from three separate locations, with a total of seven service type outlets.

The agency has three computer systems, which are not interconnected.



One computer for many service type outlets/service locations

Computer B above shows that QDC data for more than one service type outlet or service location can be stored on the one computer.

Many separate computers at one service location

If you have more than one computer at one service location and these operate separately (i.e. they are not part of a local area network) you need to decide the computer that is to be used to collect data for a particular service type outlet.

For example, if Peter uses Computer A to write letters or keep information about his Therapy service users and Mary uses Computer B for the same purpose, the QDC Tool data relating to all Therapy service users at Service Location 1 should be maintained on one computer: either Computer A or B.

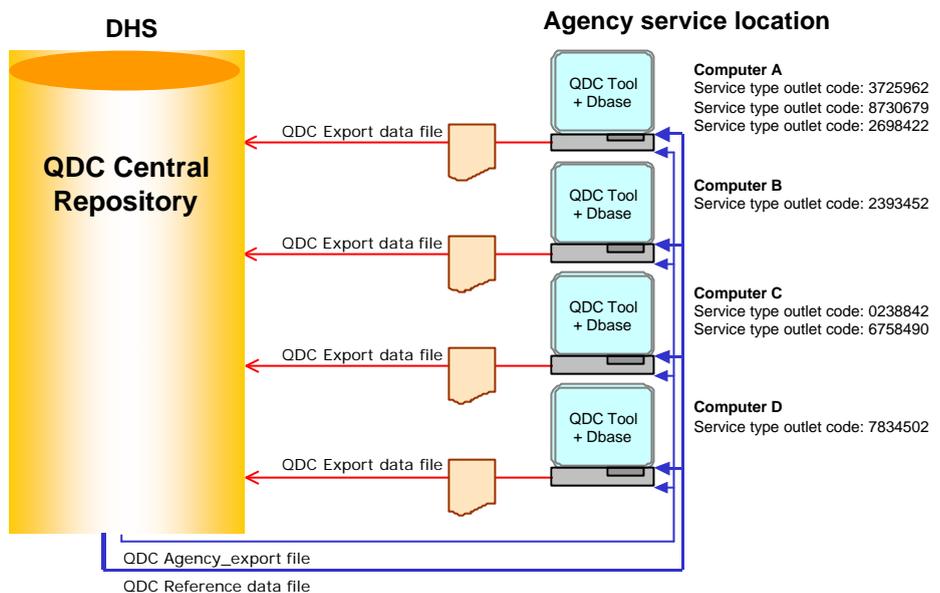
If your service location deals with a number of DHS activity types (i.e., you have a number of service type outlets) and you have several computers at this location, then you may be able to assign a separate service type outlet to each computer.

Example

In the example below there are four computers and seven service type outlets at a service location. Each computer is being used to collect QDC data, however this can only be done by assigning to it specific service type outlets. The number of service type outlets does not matter, so long as no other computer is used to collect data for the same ones. One export data file is sent to DHS for each quarter by each computer. That file should contain the data for all the service type outlets assigned to that computer.

QDC Tool and Tool Database has therefore been installed on each computer. When DHS issues new *reference data* or *Agency_Export* files to the agency, the files must be loaded on each computer.

Agency with four stand-alone systems at a service location



Installing on networked computers

QDC Tool will operate successfully on a local area network (LAN) but we do not recommend it for use on a wide area network (WAN).

In a LAN, the QDC Tool *database* is installed on one PC only and a copy of the QDC Tool *application* only is installed on other PCs connected to it. Since all QDC Tool users share the database, only one copy of the QDC Tool *database* is required on the network.

If you are working in a network environment, do not try to install QDC Tool while QDC Tool is being used on one of the PCs on that network.

Shut down QDC Tool on all computers on the network **before** you install.

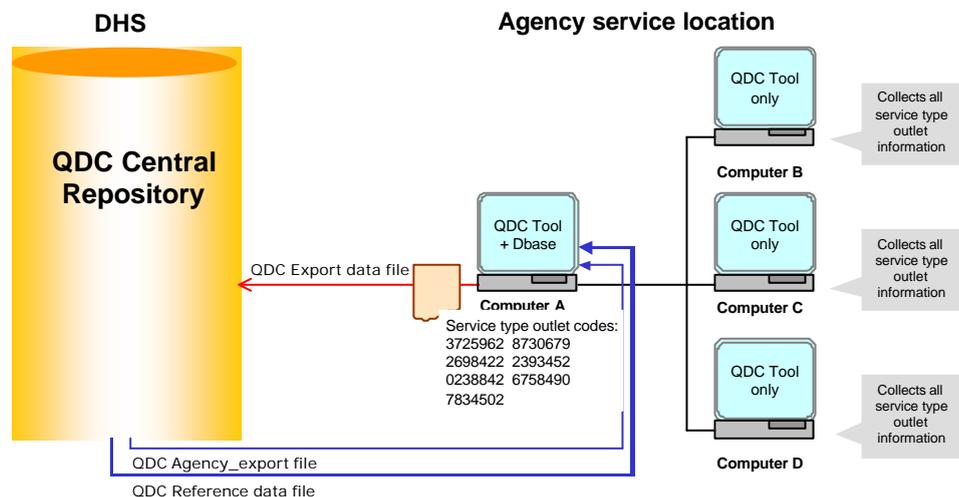
Example

In the example below, there are four networked computers and seven service type outlets at a service location. The QDC Tool application has been installed on all four of the computers but the Tool database has only been installed on Computer A. Each computer can be used to collect the QDC data **for all service type outlets**, but the data must be saved to the database on Computer A.

Note that a service type outlet can only be set up once on a computer. If you want to move the service type outlet to another computer, contact QDC Helpdesk

One export data file is sent to DHS for each quarter by Computer A only. The same file contains the data for all the service data outlets at the service location. When DHS issues new reference data or Agency_Export files to the agency, the files must be loaded on Computer A only.

Agency with one networked system at a service location



No more than five QDC Tool users per QDC Tool database

The recommended maximum number of PCs connecting to any QDC Tool database concurrently is five. Use by any more than this will severely impact QDC Tool performance.

This may not prove a problem if your LAN is small. If it consists of six or more computers, then you may consider setting up one database for clusters of up to five computers. In this case the data collected by each cluster must relate to a specific or set of service type outlets.

If you are operating on a LAN and two or more staff members are responsible for entering QDC data using QDC Tool, try to ensure that you assign them distinct data entry responsibilities. It is better to make one person responsible for a specific set of DHS activity types or a group of service users rather than have both entering the same types of data.

QDC Tool system administrator and user roles

QDC Tool allows two types of user roles, each with varying levels of access to features:

- the *system administrator* role, which allows you to use all menu options available in QDC Tool and perform more critical or elaborate functions such as importing and exporting data.
- the *user* role, which allows you to use QDC Tool for the purpose of entering, maintaining and viewing QDC information.

Whether you wish to assign specific roles to users will depend on the size of your agency or service location. If there are no more than one or two persons using QDC Tool in the agency then it would be better for all to have administrator access.

Where an agency has many users of QDC Tool, it would be wise to limit the number of those with administrator access to 1 or 2.

All workers who use the system should have their own user name and password. The sharing of this information can have privacy and security implications. This is especially important where the service user's records are flagged as *restricted access*.

Part II:

Installing and setting up QDC Tool

1. Installing QDC Tool

Read this section of the manual thoroughly **BEFORE** you start copying QDC Tool onto your computer.

Before you install

The QDC Tool CD you have been issued with contains:

- The QDC Tool software program
- The QDC Tool database
- Current agency data
- Current reference data
- Internet Explorer 6
- The HACCC E-Form Conversion program

Minimum system requirements

These are the minimum requirements your system must meet in order to be able to use QDC Tool.

Operating system	Microsoft Windows 95, 98, 2000 and later
Internet Browser	Internet Explorer 6.0 and later
CPU	Pentium II and above
Disk space	100 MB

On a standalone

The instructions that follow apply only to a standalone installation where QDC Tool application and database are installed.

The QDC Tool database will contain the latest version of all the QDC questions and response codes as well as other details such as agency and outlet information, sufficient for you to start using the QDC Tool. It will **not** contain any information about your service users. You will need to enter these details after the application is installed.

Installing for the first time

The instructions below are written for when you are installing QDC on a PC for the first time. The installation wizard will step you through all of the tasks you need to complete to start using QDC Tool.

- When you complete a step, press **Next** to move to the next.
- To return to a previous step press **Back**.
- To cancel the installation at any time press **Cancel**.

Installing an upgrade

If you are installing over an existing version you may not see all of the steps outlined below. The installation wizard will check to see if you already have a copy of the QDC Tool on your computer.

This will also be the case if you tried to install QDC Tool and did not complete the process or selected wrong options during the process and had to start again.

On a network

If you intend using the QDC Tool on a network the installation wizard on this CD will not be able to step you through the entire process.

Contact your system administrator as they will need to make some changes to your system or contact the QDC Helpdesk for further information.

Do not try to install QDC Tool while QDC Tool is being used on one of the computers on a network.

Shut down QDC Tool on all computers on the network **before** you install.

Check your computer's date and time

Ensure that the date and time in your computer are correct.

QDC Tool automatically retrieves the day's date from the computer for some functions that it performs. If it is not correct you might find, for example, that you cannot enter data for a quarter because the quarter has been closed early.

Check your computer's regional settings

Ensure that the regional settings are correct so that time zone variations and daylight saving periods are accounted for.

Install Internet Explorer 6.0 first

QDC Tool requires some of the functions in Internet Explorer 6 to run some of its processes. Depending on the Windows operating system you are using (especially if it is Windows 95, 98, and 2000) you may have earlier versions of Internet Explorer on your system.

To check you have the right version of Internet Explorer:

1. Open Internet Explorer.
2. Select *Help* and then *About Internet Explorer*.
3. Check the version number.

If it is earlier than 6.0 then install the version of Internet Explorer 6.0 on the QDC Tools installation CD and restart your computer.

Do not run any other program while you install QDC Tool

To ensure that the system operates correctly do not use your computer for any other purpose while QDC Tool is being installed.

You must be a QDC Tool system administrator

In order to install QDC Tool you must have system administrator access to the computer.

Converting the HACC E-form database to QDC Tool format

The QDC Tool installation CD also contains the HACC E-Form database conversion executable. This program allows you to import data from the existing HACC database to QDC database format.

If you **already have QDC Tool** installed we recommend that **you do not** attempt HACC database conversion. This is because the conversion will overwrite any existing information in your QDC Tool database.

If you are installing QDC Tool **for the first time** run the HACC E -form conversion tool:

- **immediately after you have installed and initialised QDC Tool** but
- **before** you enter any information in the database.

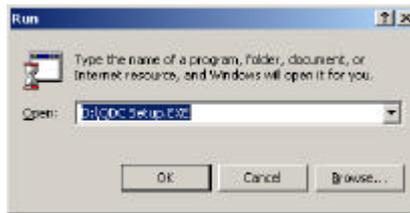
To see how you install HACC conversion tool and process the database conversion, see page 40, *Converting HACC E-form* .

1. Start the installation wizard

Do **not** start this step unless:

- You have installed Internet Explorer 6 or checked that it is installed.
- You have checked that the date and time on your PC is correct.
- You have checked that the regional settings on your PC are correct.
- You have made sure that no other programs are running.
- You have a system administrator's level of access to your system (if there is a distinction at your agency between normal computer users and system administrators).

1. Place the QDC Tool CD into the CD drive of your computer.
2. Click on **Start** at the bottom left of your screen and select *Run...* to open this dialogue box:

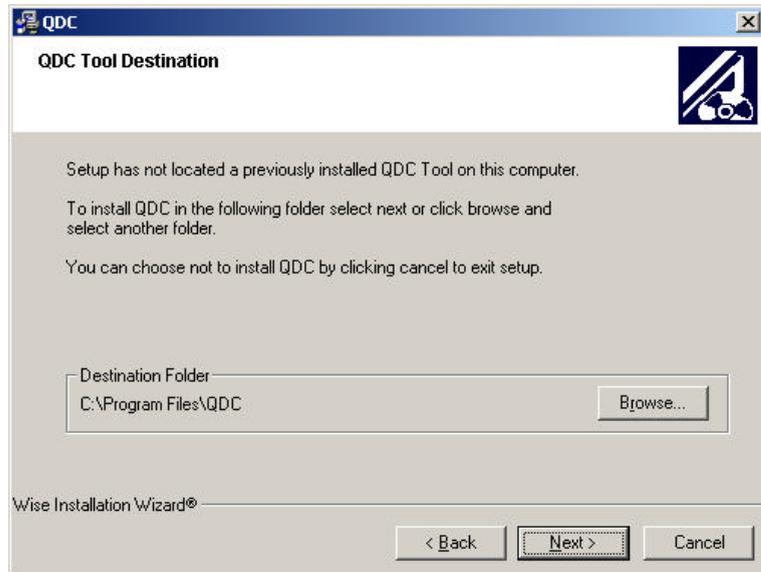


3. Next to *Open*, type the letter of your CD drive (usually it is D: or E:) followed by QDC_Setup.exe as follows:
 - **D:\QDC_Setup.exe**
4. Press **OK** to open this screen:



5. Press **Next**
The system will check if you have a previously installed version of QDC Tool.
 - If you do have a previous version installed the *Finished* screen appears.
 - If not the *Destination Location* screen appears.

2. Select the destination folder



The destination folder is where the QDC Tool and QDC Tool database will be stored on your computer.

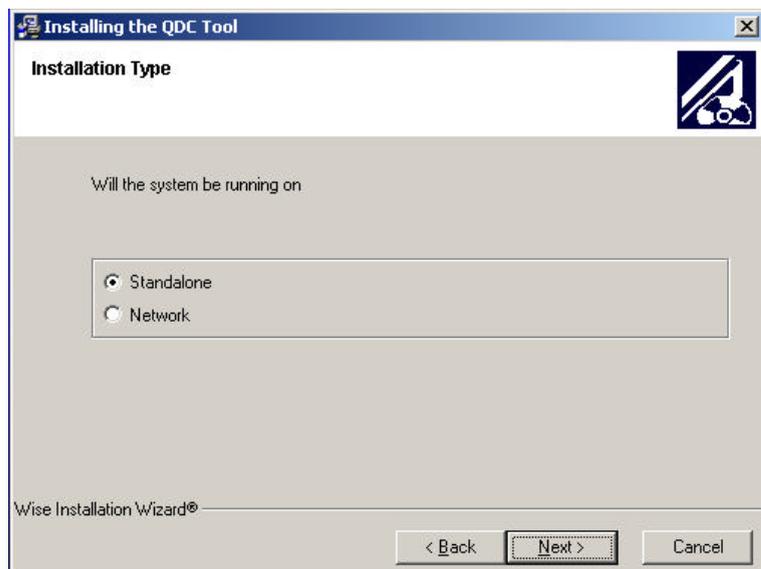
If you wish to use the default location: C:\Program Files\QDC suggested by the system:

- Click **Next**.

If you have a reason not to use this location:

- Click **Browse...** to open the Browse box and select a different location.
- Click **OK**
- Click **Next**.

The *Initialisation Type* screen appears.



3. Select the Installation type

On this screen, you indicate whether you want the QDC Tool to run on a standalone computer or via a network (LAN).

- Select *Standalone* and click **Next**.

The *Select Program Manager Group* screen appears.

If your computer is connected to a network you should request your Systems Administrator to install the QDC Tool for you. Press **Cancel** to exist the installation process.

4. Select the Program Manager Group

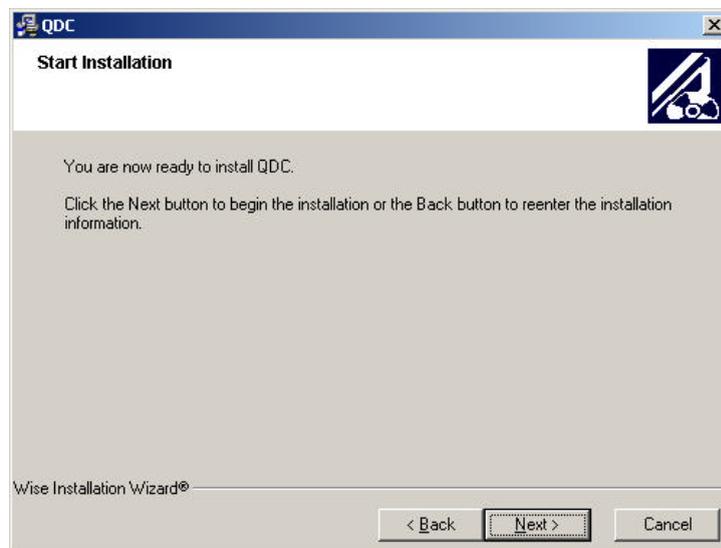
The *Select Program Manager Group* screen allows you to place QDC Tool within a specific Windows group. This indicates where you can start the application after it is installed.



This is a Windows setting that defines which Start menu group you can start the application from.

- Use the default provided (a new group called QDC) and click **Next** or
- Select an existing group name from the list and click **Next**.

The *Start installation* screen appears.



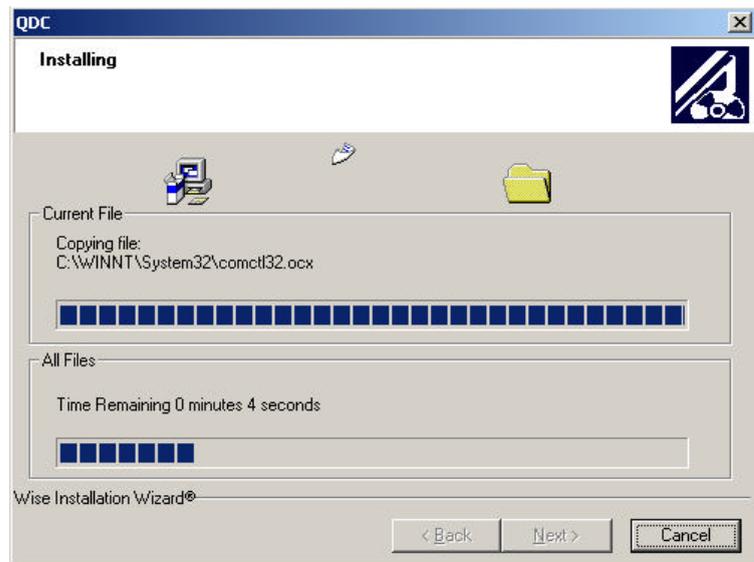
5. Start the installation

You are now ready to load the components of the QDC Tool onto your computer.

This is your last chance to alter any of the options you have chosen so far. Press **Back** if you want to make changes to any previous selected options.

1. Press **Next** to continue.

First this message appears: *Updating system configuration. Please wait.* Then the progress screen below appears as the QDC Tool and skeleton database are copied from the CD on to your computer. This could take as long as two hours if you have an older, slower computer.



When all the files are loaded onto your system the *Finish* screen appears.

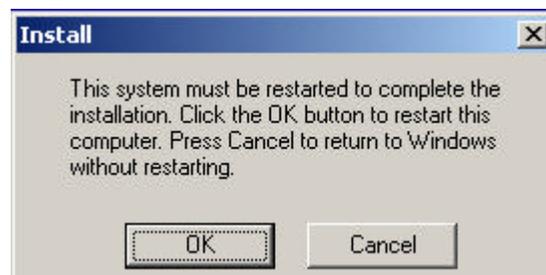
2. Click **Finish** to continue.

At this point, depending on the system you are using and your computer set-up, either:

- the installation will be complete or
- your computer may need to restart for additional software to be installed.

If the installation has to continue:

A message like the following will appear:



1. Click **OK** to restart your system.

Your computer will close down and restart automatically.

After it restarts, a series of additional installation screens may appear. This will differ according to the system you are using and what additional programs need to be installed to support the functioning of QDC Tool. For example a *Microsoft XML Parser Setup* screen may appear or a message relating to MDOC.

2. Step through the remaining process according to the instructions provided on each screen.

In certain cases the entire installation process may have to be gone through again.

3. Click **Finish** on the final screen to complete the installation.

If the installation is complete:

The QDC Tool icon will appear on your computer desktop.



Before you can begin entering QDC data however, you need to initialise QDC Tool on your computer. How you do this is explained in the next section.

2. Initialising QDC Tool

Once you have installed QDC Tool, you need to enter certain details into the program before you can start using it. These include: your agency details, your contact details and the service type outlets your computer is collecting data for.

The process of entering this information is known as **initialising** the QDC Tool.

QDC Tool stores this information in its database and uses it to streamline how you use the program. For example if your organisation does not deliver certain funded activities you will not have to see or answer questions relating to these.

1. Start QDC Tool

To start QDC Tool for the first time you need to have a **username** and **password**. The CD you receive from DHS will come with a letter advising you what these are. Later on you can create additional user ID's and change your password if required.

1. To open QDC Tool either:

- Double click on the QDC Tool icon on your desktop:



OR

- Click *Start*, then *Programs*, then *QDC*, then *QDC_Tool* (unless you chose another location during installation).

The *Login* screen appears:



2. Enter your user name.
(This will appear in upper case even if you type it in lower case).
3. Enter your password.

Note that passwords are case sensitive. This means they can be in both upper and lower case. Make sure you use the exact pattern of letters advised (e.g., if the password is **Alpha** do not key in **alpha**, **alpHa**, or **ALPHA**) otherwise you will not be able to login.

4. Click **Login**.
A welcome screen appears briefly and then the *Initialisation* screen appears.

2. Import your agency details

The *Initialisation* screen appears when you login for the first time and will not appear again after you have completed the *initialisation* process.

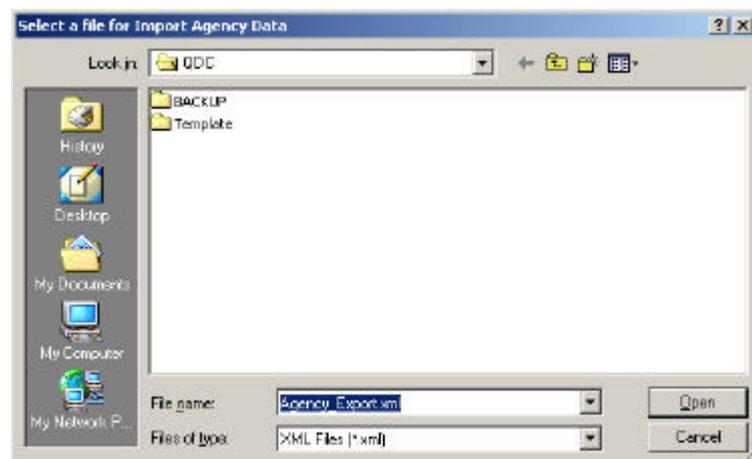
To complete the details on this screen, you need to have your agency code. This will have been provided to you in the letter from DHS accompanying the QDC Tool installation CD.

You must import the reference data file before you import your agency details.

1. Click **Reference Data Import** to open the *Select a file for Import Reference Data* screen.
2. Locate the reference data file on the DHS-supplied CD or diskette (this will be in the format: **Ref_Data_Export_vx.xml**, where **vx** refers to the version number of the file).

DHS will normally provide you with this file on a diskette or a CD. The accompanying letter will give the name of the import file as this may change with each re-issue.

- Click **Open** to import the **reference data** into QDC Tool.
3. In the *Agency Code* field type the agency number provided to you in the letter from DHS.
 4. Click **Import Details** to open the *Select a file for Import Agency Data* screen.



- Locate the CD drive on your system containing the QDC Tool installation disk and select *Agency_Export.xml* file.
5. Click **Open**.
 - When the Import agency data process is complete click **OK**.
 6. Click **Retrieve Details**.
Your agency details now appear in the *Address* section of the screen.

If your Agency's details do not appear it could mean either that:

- you did not key in the correct number or
- DHS has not included your information correctly in QDC Central Repository.

Contact Helpdesk if the details are not loading correctly.

7. If the details load successfully, press **View Contact Details**.

The *Agency Contact Details* screen appears.

8. Check that the details are correct and click **Close** to close the *Agency Contact Details* screen.

If the details are incorrect click **Cancel** on the *Initialisation* screen and exit QDC Tool. Contact the QDC Helpdesk so that they make the necessary corrections in the QDC Central Repository.

Helpdesk will then prepare and send to you an *Agency_Export* file containing the updated agency data.

You must then load this file onto your PC and then import the details into your QDC database.

See *Loading a new Agency_Export file* on page 38 for instructions on how to do this.

9. If the details are correct, click **Next** on the *Initialisation* screen.

The *Select Outlets* window appears.

Agency: Bill and Ben Inc

Service Location		
Location code	Address	Selected
7242773195	HAWTHORN 210 Holden ST 2	N
8681339681	FITZROY 27 Ford St 2	N
1686370343	LAVERTON 43 Lexus Ptd 2	N

Agency Outlets

Available Outlets		Selected Outlets	
Outlet code	Name	Outlet code	Name

Buttons: Add ALL >>, >> Add, < Remove, << Remove ALL

Bottom Buttons: Cancel, < Back, Next >, Finish

3. Select your location and service type outlets

On the *Select Outlets* window you must identify:

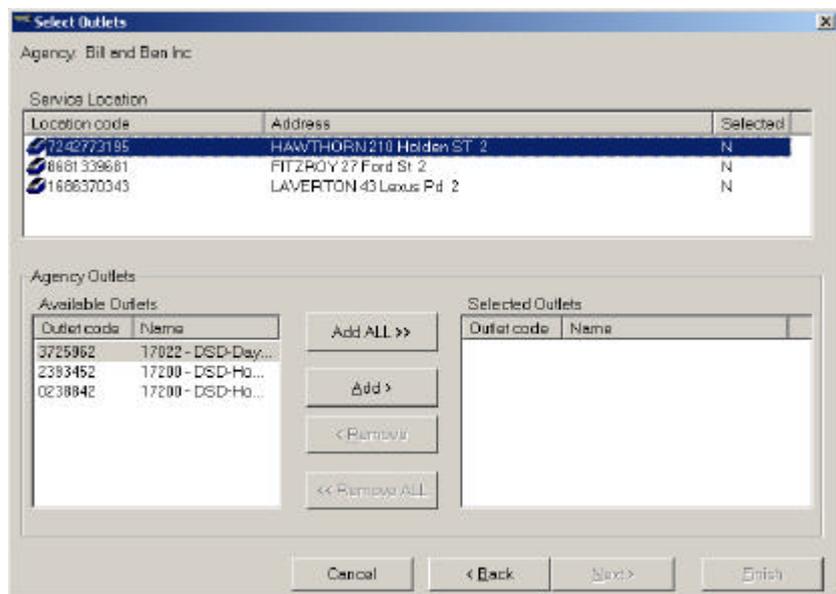
- the service locations you are using your computer to enter data for and
- the service type outlets you are assigning to this computer.

Once you select the service type outlets these are the only ones for which you will be able to enter data in the QDC Tool.

All service locations available to your agency are listed in the *Service Location* list on the screen.

1. Click on a location for which you will be collecting data on this computer.

All the service type outlets for that location are displayed in the *Available Outlets* column in the bottom half of the screen. If you select another location the list in the *Available Outlets* column will change to reflect the service type outlets available at that location.



Only select the service type outlets for which you will be entering data using this copy of QDC Tool.

2. If you are collecting data for one service type outlet only:
 - Click on the name of the outlet listed under *Available Outlets* and click **Add>**

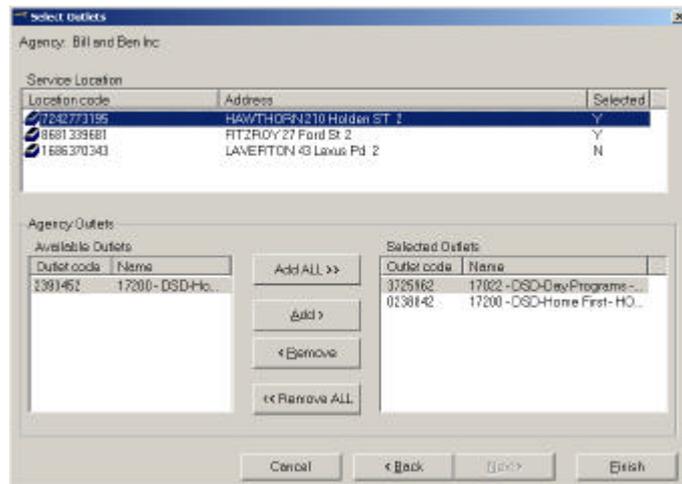
If you are collecting data for two or more service type outlets:

- Press **<Ctrl>** on your keyboard, click on each service type outlet that you want to select, and click **Add>**

If you are collecting data all service type outlets at this location:

- Click **Add ALL>>**

The service type outlets you have selected are transferred under the *Selected Outlets* column.



If you select a service type outlet by mistake:

- click on the service type outlet under *Selected Outlets* and click **<Remove** to return it to the *Available Outlets* column.

To delete all selected outlets:

- click **<<Remove ALL**.

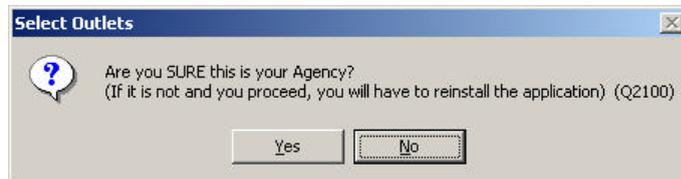
3. Complete steps 1 and 2 above for each service location that you will be entering data for on this computer.

If you select service type outlets from one location and click on a new location, this message appears: *You have changed the configuration for the location. Do you want to save changes?*

- Click **Yes** if you wish to confirm that your selections are saved.

4. Click **Finish**.

The following message appears:

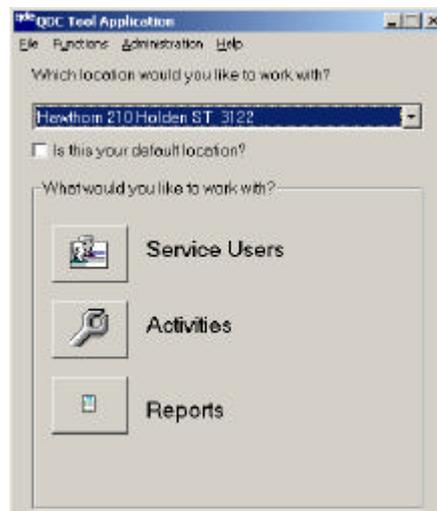


If your selections are **incorrect**:

- click **N** to return to the *Select Outlets* screen.

If your selections are correct, click **Y** to open the QDC Tool Main Menu.

- You may receive one or two start-up messages (see next chapter, page 45), click **OK** until the *Main Menu* screen appears.



Your computer has now been initialised to receive data for the service type outlets you selected. You cannot enter data for any other service type outlet other than those you selected.

If you think you may have to re-initialise QDC Tool see below *If details are incorrect or change after initialisation* on page 39.

From here you can either:

- begin to enter service user data; or
- exit from QDC Tool by clicking  in the top right of the screen.

Loading a new *Agency_Export* file

If your agency details in QDC Tool do not exist or are incorrect, you must contact QDC Helpdesk to advise them of the problem.

They will enter the new details on QDC Central Repository and generate and send to you a new *Agency_Export* file.

This is an XML file that contains all agency details such as address, service locations and associated service type outlets for all agencies involved in quarterly data collection.

When you receive the file, you must load it into your copy of QDC Tool. The file will replace all existing agency data on your QDC Tool database.

If you receive the file by email or floppy disk

If you receive the file by email or disk it will be in Winzip format.

- Unzip the file and copy it to a location on your computer so that it is stored in the format: **Agency_Export.xml**

If you receive the file on CD

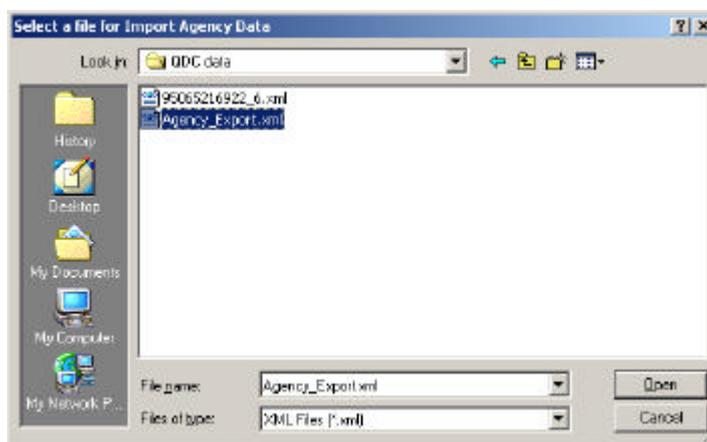
If you receive the file on CD it will already be in the format: **Agency_Export.xml**.

- You can either load the file directly from the CD or copy it first to a folder on your PC.

Uploading the file into your QDC database

To upload the file to your QDC database:

1. Login to QDC Tool and select *Administration*, then *Import Agency Data* to open the following screen.



2. Locate the folder where you placed the **Agency_Export.xml** file.
3. Click on the file name **Agency_Export.xml** and click **Open**.

The system copies the updated information into your QDC database. When process is complete the message *The import agency data process has finished (12010)* appears.

4. Press **OK** to continue.
5. Complete the steps outlined in **2. Import your agency details** on page 32 to continue initialising QDC Tool.

If details are incorrect or change after initialisation

Once the QDC Tool is initialised on this computer you cannot enter data for any other service type outlet other than those you selected.

The initialisation process will not have to be completed again unless:

- you have to re-install QDC Tool due to your computer or the software system being replaced (upgrades of QDC Tool should not require initialisation);
- you discover that the service type outlet details you entered are incorrect;
- you find that your service type outlet details have to be changed.

If you complete the initialisation and discover that the service type outlet details you entered are incorrect, or that later on they have changed, **contact QDC Helpdesk** and discuss what has to be done to make the necessary corrections.

Converting HACC E-form database to QDC Tool format

The *HACC E-form Conversion Tool* allows you to import data from an existing HACC database to QDC database format. The *Conversion Tool* software is also available on your QDC Tool installation CD.

You should only use the program if you are installing QDC Tool **for the first time**.

If you are installing QDC Tool **for the first time**, run the HACC E-form conversion tool:

- **immediately after you install and initialise QDC Tool** but
- **before** you enter any information in the database.

Do not use this program if you have already installed QDC Tool on your PC and have used it to collect QDC data. The conversion will overwrite any existing information in your QDC Tool database.

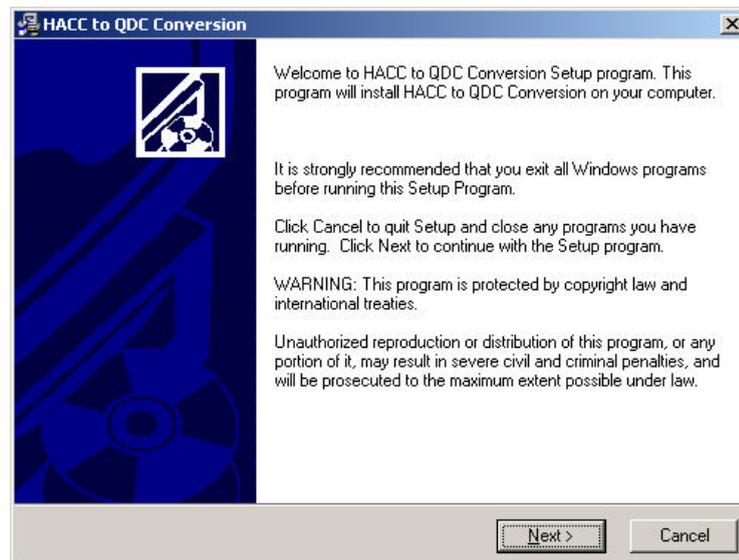
There are two steps involved in converting your HACC database to QDC database format:

- First you install the *HACC E-Form Conversion Tool*
- Then you open the *HACC E-Form Conversion Tool* and import the HACC E-form data.

1. Install the HACC E-Form Conversion Tool

To install the program:

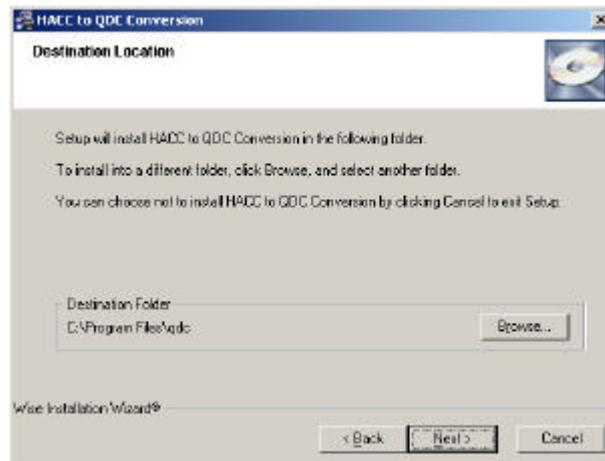
1. Place the QDC Tool CD into the CD drive of your computer.
2. Click on **Start** at the bottom left of your screen and select *Run...*
3. Next to *Open*, type the letter of your CD drive (usually it is D: or E:) followed by **Hacc\HACC.EXE** as follows:
 - **D:\Hacc\HACC.EXE**
4. Press **OK** to open this screen:



5. Press **Next** to open the destination folder screen.

The destination folder is where the conversion tool is stored on your computer. If you wish to use the default location: C:\Program Files\QDC suggested by the system:

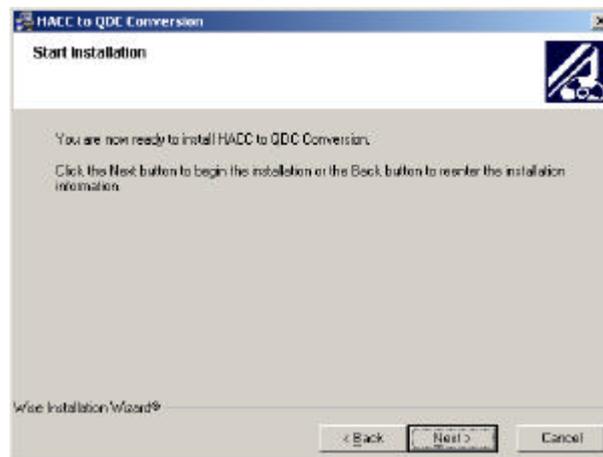
- Click **Next**.



If you have a reason not to use this location:

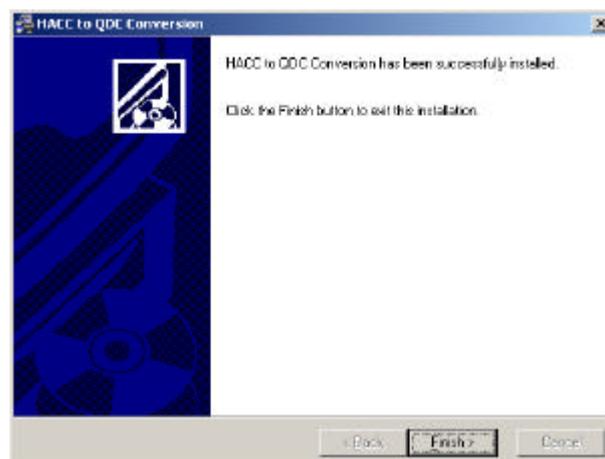
- Click **Browse...** to open the Browse box and select a different location.
- Click **OK**
- Click **Next**.

The *Start Installation* screen appears.



6. Click Next.

The installation proceeds and the *Finish* screen appears. You are now ready to complete the installation.



7. Click Finish.

The conversion tool is now installed on your system with the file name: *HACCToQDC.exe*

You should now close down and restart your computer.

2. Import the HACC E-form data into QDC Tool

After you install the *HACC E-Form Conversion Tool* you must import the E-form database into QDC Tool.

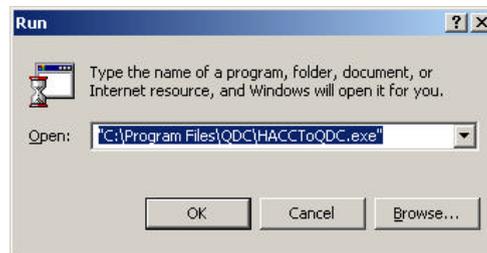
The process involves opening the *HACC E-Form Conversion Tool* and copying the E-form database file into your QDC Tool database.

You need to know therefore where the E-form database is stored on your computer or network. It normally has the file name: **eform.mdb**

Do not complete this process if you have already been using QDC Tool to enter data.

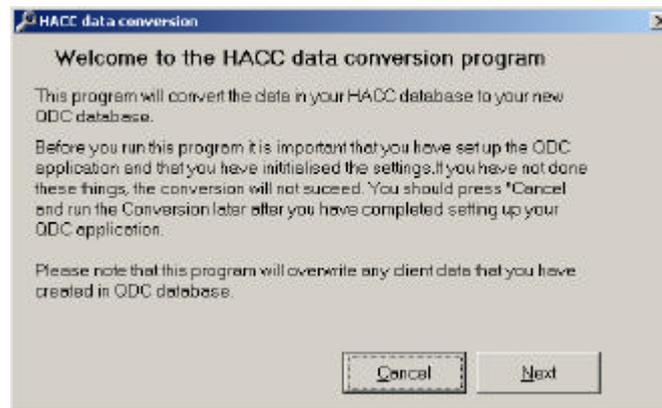
It will overwrite everything you have already entered.

1. Click on **Start** at the bottom left of your screen and select *Run...*
2. Next to *Open*, type the letter of the drive where you installed the conversion tool (usually it is C:) and type the following:
 - **C:\Program Files\QDC\HACCToQDC.exe**

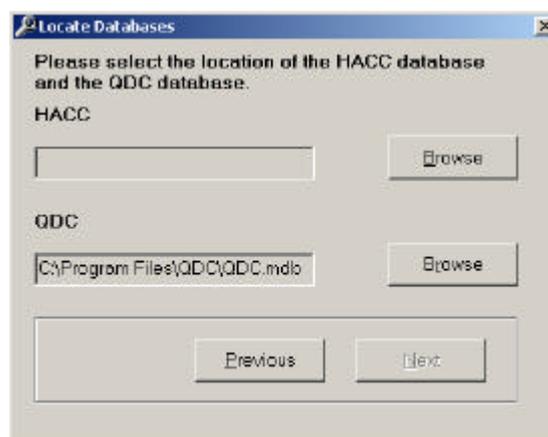


- Click **OK**.

A welcome screen appears.

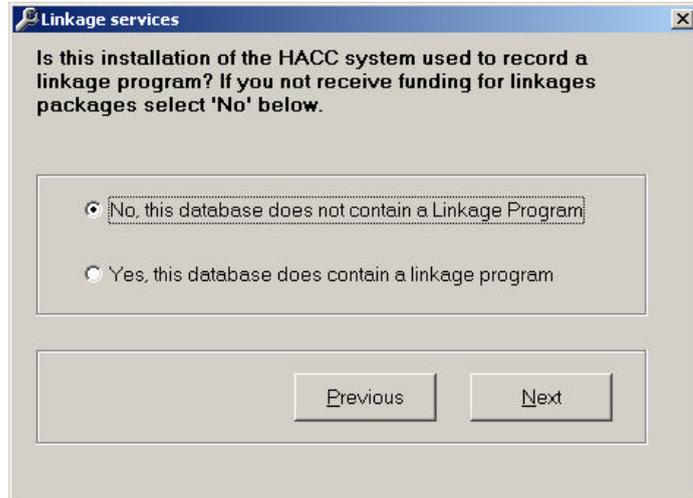


3. Click **Next** to open the *Locate Database* screen.



4. Next to HACC, Click **Browse...** to open the *Browse* box.
 - On the *Browse* box, locate and click on your E-form database (**eform.mdb**).
 - Click **OK**.
5. On the *Locate Database* screen, click **Next**.

The linkage services screen appears.



6. If your database contains a HACC Linkages program select **No**.
If it does contain a HACC Linkages program select **Yes**.
If you have data in the QDC database you are warned that the conversion will overwrite it. Click YES if you still wish to proceed.
The conversion process begins. A message advises when it is complete.
7. Click **OK**.
You may now login to QDC Tool and use it to enter your QDC data.

3. Logging in and start-up messages

After you initialise QDC Tool the *Initialisation* screen no longer appears after you log in; however you may receive one or more start messages.

What are start messages?

Start messages appear whenever you have to be reminded of key dates established by DHS, which specify when certain QDC reporting events are to take place.

QDC Tool stores the list of key dates within the database and compares this with the date on your computer whenever you log in. If it determines that key dates are approaching or that certain activities are overdue, a start message will appear to advise or remind you what you need to do.

The start check occurs no matter how many times you log in to QDC Tool in a day.

Examples of the checks that are made during this process are:

- Does an open quarter exist for the current date?
- Is the previous quarter open or closed?
- Has the previous quarter ended but not closed?
- Will a snapshot date occur in the current quarter?

It is for this reason that your computer's calendar must be correct. If it is not, you run the risk of not being able to enter data when you should be able to.

Another problem could be that a quarter is closed off at the wrong time. For example, if you start the QDC Tool in the morning and a quarter becomes closed as you are working, QDC Tool will know that it does not need to close the quarter again. If you then shut QDC Tool down and login again in the afternoon, the quarter will remain closed and you will not be able to include any more data in the export file for that reporting period.

Logging in after initialisation

To open QDC Tool:



1. Double click on the QDC Tool icon on your desktop, OR Click *Start*, then *Programs*, then *QDC*, then *QDC_Tool*.
2. In the *Login* screen, enter your user name in upper case (capital letters).
3. Enter your password using the appropriate upper and lower-case letters.
4. Click **Login**.

A splash screen appears briefly and then you may either:

- open directly on the QDC Tool *Main Menu* screen.
- receive one or two of the start messages outlined over the page. Click **OK** once or twice if necessary to open the *Main Menu* screen.

Logging out after initialisation

You can close the QDC Tool at any time either by:

- clicking the top right **Close** button
- selecting **Exit** from the *File* menu.

Types of start messages

Message	Description
Open quarter for the computer's system date	<p>This indicates that you will be able to enter data for the current quarter. QDC Tool tries to match your computer's current date with the current quarter. For example, if today's date is 7 October 2002, it will determine that this is the QDC quarter between 1 Oct 2002 and 31 Dec 2002.</p> <p>In the unlikely event that the system cannot find an open quarter, you are shown an error message and QDC Tool shuts down. This most likely means that your computer's date has been reset incorrectly since QDC Tool was last used. Check the date on your computer and fix it, then run QDC Tool again.</p>
The previous quarter must be closed	<p>This indicates that today's date is past the closure date for a quarter that is still open. QDC Tool will process the closure for that quarter before you are permitted to do any data entry for the current quarter. QDC Tool will warn you when the end of the quarter is approaching and tell you how many days are left to go.</p>
The previous quarter has ended but not closed	<p>This indicates that you are within the window of 2 weeks from the end of the quarter and the date when it is officially closed. During this period you can enter data for the current quarter and the previous quarter. QDC Tool knows when this happens and will allow you to enter data into both quarters without you having to indicate.</p> <p>In your first months of using QDC Tool you can backdate data for up to 8 months from the date on which it is installed on your computer.</p>
The snapshot date is in this quarter	<p>This indicates that a snapshot date is in this quarter and the at snapshot date flag will be displayed for service users and a snapshot date button will appear on your service user and activities screens. These fields and buttons do not appear in any quarter where there is no snapshot date and will not apply to HACC users.</p>

Selecting a location to work with

When you initialised QDC Tool you will have selected:

- an agency
- one or more service locations
- one or more service type outlets for each service location.

If you have more than one service location installed, then you will need to select the relevant service location whenever you intend to view or enter activity or service hours details.

After you select a location everything you do thereafter that relates to services will apply to that location.

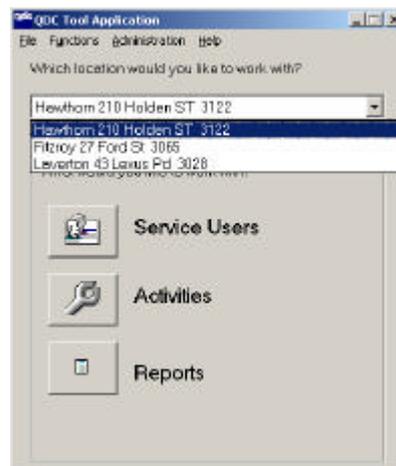
This does not apply to service users however as these are common to all locations and activities stored on your system. For instance, if Mr Smith receives services from Fitzroy and Hawthorn, you do not need to create his record twice if all his service records are on your computer.

Selecting a location

Selecting a service location is done on the Main Menu screen, which appears after you have logged in.

To select a service location:

1. Click on the drop-down list at the top of the Main Menu screen.
2. Select the location from the list.



Selecting a default location

If you mostly maintain details for *one* location, you can set this as the default. This means that whenever you log in this is the location that will be selected automatically in QDC Tool main menu.

You will know the current default location because when you select it, the checkbox next to **Is this your default location?** is ticked.

To set a new default location:

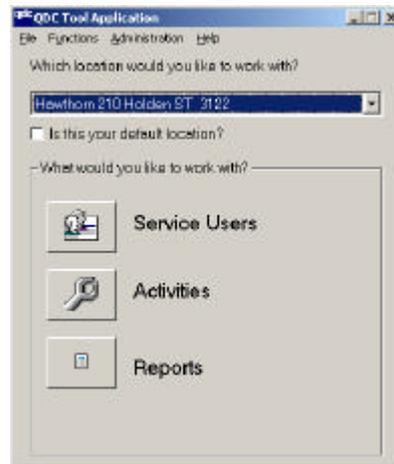
1. Select the location from the drop-down list.
2. Click the checkbox next to: **Is this your default location?**

Part III:

Entering data in QDC Tool

QDC Tool menu and tool bar

The Main Menu screen is the first screen that appears after you log in. From here, you select what you want to do and options are available.



System administrator and user access

QDC Tool allows for two user roles to exist:

- the role of **system administrator**, where all of the functions of QDC Tool will be available to you.
- the role of **user**, where you will not be able to access certain menu options. Menu options that you cannot access will appear grey in the menu list. All of the options in the Administration menu, for example, will be grey except for *Change Password*.

QDC Tool functions

The main QDC Tool functions include:

Button	This option allows you to:
Service Users	search and view details for service users (activities, hours, HACC equipment received, etc); add, delete or maintain their personal and address details, their consent status; their equipment details, characteristics, activities and service hours.
Activities	view information about how an activity is being used; enter information about one activity for a number of service users; enter the same service hours information for a number of service users; enter all service users present on snapshot day for one activity.
Reports	Generate standard reports. QDC Tool allows these basic reports: service delivery, client list, client summary, missing data and SCTT.

These functions can be accessed as follows:

For	click	or press	or click on the
Service Users		<Ctrl> + S	Functions menu and select <i>Service Users...</i>
Activities		<Ctrl> + A	Functions menu and select <i>Activities...</i>
Reports		<Ctrl> + R	Functions menu and select <i>Reports...</i>

Administration menu options

Options in the *Administration* menu are only available to those with system administrator access. The only exception to this is *Change Password*, which allows users and system administrators to change their own password.

Options in the *Administration* menu include:

Menu item	Use this to
Export Quarterly Data...	create the QDC XML export file that is to be sent to DHS at the end of each quarter.
Export Data to Excel...	export data from the QDC database as a comma delimited file (.csv) so that it can be imported into another software package such as MS Excel or Access.
Import Reference Data...	import details from the <i>Reference Data</i> XML file that is sent to you periodically by DHS. This will contain details of QDC questions and reference codes.
Import Agency Data...	import the <i>Agency_Export</i> XML file that is sent to you by DHS in order to update your agency and service type outlet details.
Internet Transfer...	send your quarterly export file to DHS over the Internet using the DHS Secure Data Exchange.
SCTT Report...	run a service coordination tool template for a selected service user. Only system administrators can access this report from this menu. Users can access this report from the <i>Reports</i> menu.
System User Maintenance...	maintain information about users of QDC Tool.
Change Password...	change your password whenever you like.
Backup Database...	run a backup of the QDC Tool database at any time.
Restore Database...	restore the QDC Tool database from a backup copy.
View Agency Details...	check agency address and contact details.
Agency Location Maintenance...	modify details of your agency locations and service type outlets (as performed during initialisation).

Help menu options

Options in the Help menu are available to all users and include:

Menu item	Use this to
Contents	Not available
Search for help on	Not available

About

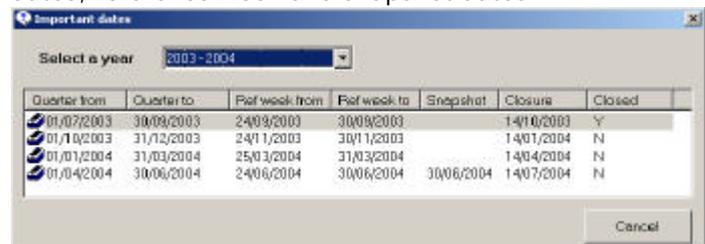
find out what your system's registration number is and what version of the QDC Tool has been installed on your computer. You may need this information when you talk to the help desk.



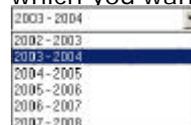
If you click **System Info...** a screen providing details about your computer and the operating system you are using appears. You may also need this information when you talk to the help desk.

Important Dates

obtain a list of QDC quarters, their start and close dates, reference week and snapshot dates.



Click on the drop-down list arrow to select the year for which you want to view QDC quarterly details.



Entering data in QDC Tool

The two functions which you can use to enter data into QDC Tool are the:

- **Service User** feature and the
- **Activities** feature.

Deciding whether to enter data using the *Service User* or the *Activities* feature will depend upon what you want to do. In some cases you can enter precisely the same data via either function.

Entering Service User data

In general, you should use *Service User* to:

- create or edit service user records;
- view the details (activities, hours, HACC equipment received, etc) of a service user;
- enter service user characteristics;
- enter service hours for one service user, perhaps for a number of activities from the same service location;
- enter HACC equipment received.

All these functions are available on or from the *Working with Service Users* screen, which appears when you click the *Service Users* button on the main menu screen.

From here you can view a list of all service users in your database or set limits to who is listed by searching for a specific service user or group of service users. The search results are displayed in the window in the middle of the screen.

The buttons on this screen perform the following functions.

Button	Click this:
New Search	If you wish to carry out a new search with different selection criteria. All search fields are cleared or set to defaults. Enter new search criteria and press Find .
Add User	If you want to create a new service user record.
Edit Details	If you wish to change any information you have recorded about this service user.
Activities	To connect the service user with the activity (or activities) you are providing them from the selected location.
Characteristics	To enter answers to all questions asked about service users for QDC collection based on the activities provided.
Service Hours	To enter service hours provided for the activities this service user received from your selected location.
Equipment	To record any HACC equipment you have provided to this service user. At this time you cannot record any other types of aids and equipment in this system.
Delete User	If you want to delete a service user record.
Back to main menu	If you want to exit this screen.

For directions on how to work with service users see below:

- *Service users: Searching for service users* on page 59
- *Service users: Adding a new service user* on page 63
- *Service users: Maintaining service user details* on page 77.

Entering Activities data

In general, you should use *Activities* to:

- view information about a DHS activity type;
- enter all the information you have about one DHS activity type for a number of different service users;
- enter the same service hours information for a number of different service users;
- enter all service users present on snapshot day for one DHS activity type.

All these functions are available on or from the *Working with Activities* screen, which appears when you click the *Activities* button on the main menu screen.

Activity	DHS No.
DSD-Day Programs	17022
DSD-Home First	17200

When you use this feature the information you provide must relate to a specific service location. If your copy of QDC Tool is being used for more than one location, you must **select the location** on the main menu screen **before** you click the **Activities** button.

The middle part of the screen displays the activities associated with this location. The buttons on this screen perform the following functions.

Button	Click this:
View location details	To verify that the address details recorded for the selected location are correct.
Statistics	To enter your responses to service type outlet questions for the selected activity
Service users	If you wish to list all service users receiving services for the selected activity or add a service user to this activity. This is the same screen as the one that you access when you click the Activities button on the <i>Working with Service Users</i> screen.
Service hours	To enter service hours received by service users for the selected activity.
Close	If you want to exit this screen.

For directions on how to work with service users see below:

- Activities: Viewing location/contact details on page 85.
- Activities: Entering statistics on page 87.
- Activities: Adding service users to activities on page 89.
- Activities: Adding service hours to activities on page 91.

Service users: Searching for service users

You can search for a specific service user or range of service users existing in your QDC Tool database. You can do this by entering details in any of the fields in the top part of the *Working with System Users* screen and then pressing **Find**.

You can therefore search by *Family Name, Usual Name, Statistical Linkage Key, Your Agency's Client Reference No, Date of birth, Postcode, Gender and Status*.

Remember that this will allow you to search for all service users in the database. The search will not be restricted by the location you selected in the Main menu.

You can search on more than one field if you wish, but if you over-refine the search you may not pick up the items you are looking for.

Remember you can search active and inactive records

The default value for the *Status* field is ACTIVE.

If you are searching for a specific service user, chances are they may be inactive. If you want to check all records in your QDC Tool database remember to set the *Status* field to **[All]**.

Using the wildcard character

If you wish to search by *Family Name, Usual Name, Statistical Linkage Key* and *Your Agency's Client Reference No*, you can use an asterisk (*) as a wild card character to list all items sharing an initial set of letters or numbers.

For example:

- if you wish to list all service users whose names start with S, enter **S*** into the Family Name field.
- If you wish to search for all agency client reference numbers beginning with 915 then enter **915*** in *Your Agency's Client Reference No* field.

You cannot use the wildcard to search by *date of birth* or *postcode*.

Open the search screen

1. Open the QDC Tool Main menu screen.
2. Click on the **Service Users** button to open the *Working with Service Users* screen.

Working with Service Users

Find a Service User

Family Name Usual Name

Date of Birth Postcode Gender

Statistical Linkage Key Status

Your Agency's client reference No.

Statistical Linkage Key	Name	DOB	Gender	Postcode	Address
-------------------------	------	-----	--------	----------	---------

Operations

3. Enter the details you wish to search on.
4. Click **Find**.
A list of all service users matching those details appears in the middle of the screen.

Working with Service Users

Find a Service User

Family Name Usual Name

Date of Birth Postcode Gender

Statistical Linkage Key Status

Your Agency's client reference No.

Statistical Linkage Key	Name	DOB	Gender	Postcode	Address
ITZAP180619342	CITZEN Daphne	18/06/1934	Female	3060	FAWKNER 27 Ford Rd Victoria
INSLD30919422	WINDSOR Elizabeth	03/09/1942	Female	3066	COLLINGWOOD 45 Commodore .
OSPL0010118581	JOSEPH Bloggs	01/01/1858	Male	3011	FOOTSCRAY 5 Festive Rd Victor.
9999999919821	NERK Frederick	12/05/1982	Male	3065	FITZROY 27 Ford St Victoria

Operations

4 Service User(s) found

When you click on an item in the list all the buttons in the bottom part of the screen become available for use.

If you search by **Family name** and **Usual Name** the Name column in search results list will only display the Family name and Formal Given name.

To sort a list

Any list of names in the *Working with Service Users* screen can be sorted in any sequence.

Do this by clicking on the headings at the top of the list: Statistical Linkage Key, Name, Date of birth, Gender, Postcode and Address.

To list all service users

1. Click **New Search** to clear all existing values on the screen.
2. Click **Find**.

All service users in your database with active status are listed.

To search by name, SLK, agency reference

1. Click **New Search** and type a character or string of characters (followed by *) in either *Family Name*, *Usual Name*, *Statistical Linkage Key* and *Your Agency's Client Reference No* fields.
2. Click **Find** to list all users matching those details.

To search by date of birth or postcode

1. Click **New Search** and type a full number in the *Date of Birth* or *Postcode* fields.

You cannot use a wildcard in these fields.

2. Click **Find** to list all users matching those details.

To search by gender or status

1. Click **New Search** and
 - If you wish to search by gender: Click on the *Gender* dropdown list and select an option.
 - If you wish to search for active, inactive or all service users: Click on the *Status* dropdown list and select an option.
2. Click **Find** to list all users matching those details.

Service users: Adding a new service user

1. Search for an existing record

Remember that QDC Tool is not able to tell if the details you are entering are already duplicated. It will only alert you to a second service user with the same Statistical Linkage Key (SLK).

Always search to ensure that this service user's details are not already in the database, **before** you attempt to add them.

1. On the QDC Tool Main menu:
 - click **Service Users** to open the *Working with Service Users* screen.
2. Click **New Search** to clear all existing values on the screen.

When you search, always make sure that *Status* is set to **ALL**.

3. Type a value (followed by * if necessary) in any of the fields in the top half of the screen: e.g. *Family Name*, *User Name* etc.
4. Click **Find**.

A list of all users with the name you selected appears.

If no person with the same details exists then you can enter the person as a new service user.

2. Add the service user's *personal details*

On the *Working with Service Users* screen,

- click **Add User** to open the following screen.

1 Add the Service user personal details

1. Enter the service user's *Family name* (these are automatically displayed in capitals).
2. Enter the *Formal given name* (this will automatically fill the usual name field).
3. Enter the *Usual name* if there is one (e.g. Bob for Robert, or Beth for Elizabeth), otherwise leave as the default (copy of *Formal given name*)
4. Select a *Sex*.
5. Enter the *Date of birth* if it is given.

If it is not, you will have to estimate what it is.

- Click the box next to *Is the person's date of birth an estimate?*
The *Estimate the person's age* field becomes active and the *Date of birth* field inactive (greyed out).
 - Type the estimated age of the service user.
ODC Tool fills *Date of birth* with the date 01/01 followed by the year that service user might have been born based on the estimated age. For example, if this is 2002 and the service user is estimated to be 52 years old, then the date of birth would be recorded as 01/01/1950.
6. If the service user has an informal carer,
 - click on the box next to *Does the person have a carer?*

2 Add the Service user address

1. Add the street address details in the *Address* fields.
You can leave these fields blank if the address is unknown.
2. Enter the *Suburb*.
3. Click on the *Postcode* dropdown list and select the correct postcode.
The postcodes for the suburb will be shown. Usually, there is only one.
4. Enter the service user's telephone numbers in the appropriate fields.

Do not enter brackets or spaces in the phone fields on this screen.

3 Enter additional contact details

1. Click **Additional Contact Details** to open the following screen.

The screenshot shows a dialog box titled "Additional Contact Persons Details". It is divided into two sections: "Person 1 Contact Details" and "Person 2 Contact Details". Each section contains the following fields: Name, Address, Suburb, Postcode, Relationship to Client, and Phone. At the bottom of the dialog are "OK" and "Cancel" buttons.

2. Enter the name, address and phone details of the contact or contacts.

Do not enter brackets or spaces in the phone fields on this screen.

3. Enter what is the contact's relation to the service user.
4. Click **OK** to save the details and return to the *Working with Service Users* screen.

4 Enter GP Contact details

1. Click **GP Contact Details** to open the following screen.

The screenshot shows a dialog box titled "General Practitioner Contact Details". It contains a single section: "General Practitioner Details". This section includes input fields for Name, Address, Suburb, Postcode, Phone, Fax, and Email. At the bottom of the dialog are "OK" and "Cancel" buttons.

2. Enter the name, address and phone details of the GP.

Do not enter brackets or spaces in the phone fields on this screen.

3. Click **OK** to save the details and return to the *Working with Service Users* screen.

5 Indicate if consent is given or withdrawn

Victorian and Commonwealth privacy legislation demands that you must seek explicit consent from service users, or their authorised representative if they are not capable of providing it.

See the QDC web site (www.dhs.vic.gov.au/qdc) for detailed guidelines about consent.

If they **provide** consent:

- Click on the checkbox next to *Given*.

If they **refuse** consent:

- Click on the checkbox next to *Withheld*.

The option you choose will determine how the *Statistical Linkage Key* at the bottom of the screen is presented.

If you select given, the SLK is calculated for you, according to the rules established by CSTDA.

If consent is withdrawn, the characters from the service user's name and the month and day of birth are replaced with 9s.

6 Select the appropriate status

1. Select **active** in the *Status* field.

If you are entering a new service user they are likely to be actively receiving services.

2. If the service user details are not to be viewed by anyone other than the person entering them (e.g. for sensitive cases):

- Click the *Restricted Access* field.

Once checked, the record will only appear in the service user search screen list if the person using QDC Tool is the last user who entered the details or a system administrator.

The name will still appear in the lists for entering service hours from the Activities area. This enables other users of QDC Tool to do tasks like adding service hours for the service user.

Restricted Access can only be withdrawn by a system administrator or the last person to update the record.

3. Enter *Your Agency's service user reference number* if you have one.

Enter this if you use a reference number for this service user in some other system. It may make help you to cross-reference both systems.

7 Save the new record

- Click **Save User's Details** to save the new record. You are returned to the *Working with Service Users* screen.
- Press **Cancel** if you do not want to add the new record.

3. Add the *activities* for a service user

Adding the activities for a service user means defining the relationship between a service user and the services you provide. You can add activities to a service user any time after you add their personal details.

You must add activities to a service user before recording their characteristics and service hours, as these will depend on the type of activity (service) received by the service user.

Adding an activity must be related to a specific service location.

If you are using QDC Tool for more than one location, **select the location** on the main menu screen **first**:

- Open the Main Menu screen, and select the *service location*.
 - Click **Service User** to open the *Working with Service Users* screen.
1. On the *Working with Service Users* screen, search for and click on the name of the service user to whom you wish to add activities (the **Activities** button is now active).
 2. Click **Activities** to open the following screen.

Activity	Start Date	Last Service	Referral Source	End Date	Reason
13026 - HACC-H...	05 Dec 2003	05 Dec 2003	GP/medical pra...	02 Jan 2004	Client does not

All activity records for the service user are listed in the lower half of the screen.

3. Click on *Activity* and select the activity you want from the drop-down list (only those available at this location will be listed).
4. If the start date is not the current day, click on *Start date* and select a date using the calendar or type over the existing date.
5. Click on *Referral Source* and select a referral option.

This is only relevant to PDRSS and HACC funded activities.

6. If the end date is known, click on *End date* and select a date using the calendar or type it in.

You cannot have the same activity open for one service user at the same location more than once. For example, you cannot add another *15037 – PDRSS Planned Respite* if no end date exists. Once you enter an end date you can add the same activity again.

You must record all service hours received before adding the end date for an activity. If an end date is recorded, QDC Tool assumes the service user is no longer receiving services and will not allow you to add or edit service hours.

7. If you enter a value for end date, click on *End reason* and select an appropriate option.

In quarters where there is a snapshot date a *Present on snapshot flag* is shown. If there is a snapshot date in this quarter and you know the service user received (or will receive) the service on the snapshot date, click on the box.

8. Click **Add**.

4. Enter the *characteristics* for a service user

Service user *Characteristics* are the questions you are asked about service users.

Service user characteristics must be entered for each service user for every DHS activity type (service) they receive during the quarter. Although some questions pertain to more than one activity, QDC Tool will display any question you need to answer only once for the service user.

Before adding characteristics data, you must link the service user to an activity (see 3. *Add the activities for a service user* on page 67).

It is probably simplest to enter what you know when you first create the record for a particular service user, then check each service user's record before the end of each quarter.

Most responses to questions are kept from one quarter to the next. In some instances, such as indigenous status, the response would not change over time but in other instances, such as housing, these responses may change over time and should be checked, and updated accordingly.

Some fields, such as last assessment date, will not retain the response from the previous quarter and will need to be answered each quarter. Also, age related questions may appear if the service user has a birthday in the quarter (e.g. if they turned 15 years of age the labour status question would now be relevant).

To enter characteristics for a service user:

1. On the *Working with Service Users* screen, search for and click on the name of the service user for whom you wish to enter *characteristics* (the **Characteristics** button is now active).
2. Click **Characteristics** to open the following screen.

This screen consists of questions organised into groups and displayed with tabs headings such as *Carer*, *Culture*, *Disability*, *Housing*, *Income/Work*, etc.

If there are too many questions in one group to fit on one tab, a second tab is created with the same name.

If this service user has an informal carer, there will be a tab asking for Carer information. If questions should only be answered for service users of a particular age, the question will only appear if the service user's age warrants it.

Moving between tabs

To move between tabs:

- click on the tab heading;
- move to the next tab by clicking **Next**
- move to the previous tab by clicking **Previous**.

Answering questions

Questions can be answered in various ways.

You can:

- Click on a drop-down list and select an option.
- Enter a date by typing it directly or clicking on the field and selecting it from a calendar.
- Enter a number.

Your answers are saved whenever you move to another tab.

To save your answers on the tab you are working on:

- Click **OK**, and you are returned to the *Working with Service Users* screen.

Data item references



If you wish to find out which data item a question refers to:

- Click on the **?** button next to the question.

The associated data item is listed in a screen like this one.



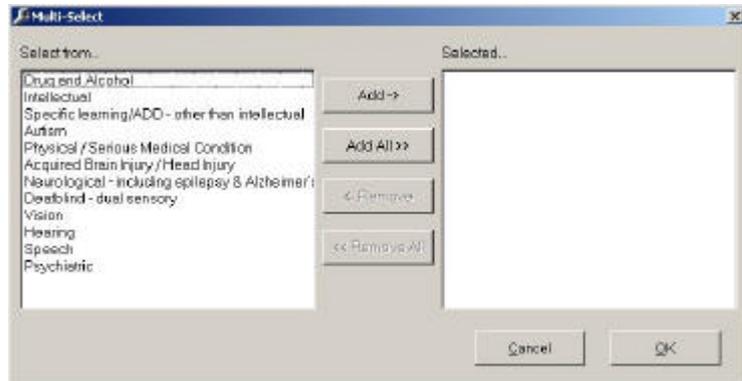
- Click close to return to the *Characteristics* screen.

Questions with multiple answers



When responding to questions with multiple answers you will need to click this button:

- A multi-select screen appears, which enables you to select from the list on the left column to the *Selected* column on the right.



1. If you are selecting one item only:

- Click on the item in the left column and click **Add>**

If you are selecting two or more items:

- Press **<Ctrl>** on your keyboard, click on each item that you want to select, and click **Add>**

If you are selecting all items:

- Click **Add ALL>>**

The items you have selected are transferred to the *Selected* column.

To remove items from the right column, use the same method outlined but click **<Remove** or **<<Remove all** instead.

2. Click **OK**.

All the items you have selected will be recorded for this service user.

5. Record the *service hours* for a service user

This function allows you to enter service hours for any activity this service user receives from your selected location.

Service hours must be entered according to guidelines outlined for data item **U 075 - Hours received** in the *Quarterly Data Collection Data Guide*.

If you make a mistake, QDC Tool will place a **Y** in the *Error* column.

If you select a record marked **Y** in the *Error* column, and click on **Update**, the system provides an error message advising you what the problem is.

Guidelines to recording hours

Service hours can be entered daily, weekly, or however often you need to accord with your work practices. The minimum is a monthly record for every service user who received services during the reporting quarter.

Hours need to be recorded for at least every calendar month of service received during the quarter. Although QDC reporting is for a three-month period, the QDC system requires that the interval during which the services hours are recorded (the *from* and *to* dates) must be no longer than a calendar month.

For example, a service user may have received a total of 15 hours over the quarterly period (1 January to 30 March).

- if all of this takes place within January then record this as 15 hours for January.
- if 5 hours take place in January and 10 hours in March then record 5 hours for January and 10 hours for March.
- if 5 hours of service were received in January, February and March respectively, then record this as 5 hours for January, 5 hours for February and 5 hours for March.

Be as accurate as possible in defining the period within each month. For example, if the 5 hours occurred from 17 to 18 January, report 17 and 18 January as the *from* and *to* dates.

Hours received must relate to support received by the service user from this service type outlet.

Where service users receive support in a group setting record the hours received in this setting for all attending service users (i.e. do not divide group hours by the number of service users attending). For example, where one worker is supplying services to three service users for four hours, count each service user as receiving four hours of service.

Include the hours during sleepover duties in the total hours received by the service user.

Recording the *service hours*

Adding service hours must be related to a specific service location. If you are using QDC Tool for more than one location, **select the location** on the main menu screen **first**:

- Open the Main Menu screen, and select the *service location*.
- Click **Service User** to open the *Working with Service Users* screen.

Before adding service hours, you must have selected the activity the service user is receiving (see 3. *Add the activities for a service user* on page 67).

To enter service hours for a service user:

1. On the *Working with Service Users* screen, search for and click on the name of the service user for whom you wish to enter service hours (the **Service Hours** button is now active).
2. Click **Service Hours** to open the following screen.

The screen title identifies the service user for whom the hours are to be entered. The service location is indicated under the title.

In the *Hours* area, you enter the service hours delivered for a particular activity.

The *Service Hours Details* window lists all activities for the service user for which service hours have been entered during a specified date range. The default date range is always the beginning of and the end of the current quarter. You can change this as required.

3. If required, set the date range for which you wish to view service hours details.
 - Click **Change Date Range** to open this screen.

- Click the *From date* and enter a date by typing it or selecting it from the calendar.
- Click the *To date* and enter a date.
- Click **OK**.

4. Click on the *Activity* drop down list and select the activity type for which you want to enter service hours.

The *Activity* drop down list will only show those activities that this service user receives from the selected location.

If a sub-activity exists for this activity:

- Click on the *Sub Activity* drop down list and select the appropriate option.

5. Enter the *from* and *to* dates for the activity.

- Click *From date* and enter a date by typing it or selecting it from the calendar.
- Click *To date* and enter a date.

If you are recording service hours for the first time for this activity and the selected user, the *From Date* will default to the start date you recorded for that activity for that service user. If you are adding more service hours for this activity and this service user, then the *From Date* will default to the day after the last *To Date* entered for that service user for that activity.

- For every service hours record the *From Date* and the *To Date* must both be within the same calendar month. DHS expects at least one record for each month, for each quarter. Even if a service user received no service hours in one or two of those months, you must still create a record with zero hours for those months where there is no end date for the activity for the service user.
- You cannot enter a *From Date* before the start date for the activity, or a *To Date* after the end of the current quarter.
- You cannot enter more than 24 hours of service for each day.

6. Enter the number of hours and minutes in the *Service Hours* fields.

When entering minutes: **do not use the decimal system**, i.e. 45 minutes is 0.45, not 0.75 of an hour.

7. Click **Add**.

The name of the *Activity*, the *date range* of when the hours of service were received and the number of *hours of service* appear in the list underneath.

Snapshot date

If there is a snapshot date in the quarter, there is a *Present at Snapshot Date* indicator and a **Snapshot Date** button on the screen.

Activity	From Date	To Date	Hours	Sub Activity	Error
DSD-Day Programs	13 Feb 2004	12 Feb 2004	5.00		
DSD-Day Programs	20 Feb 2004	29 Feb 2004	12.00		
DSD-Home First	16 Feb 2004	16 Feb 2004	5.00		
DSD-Home First	17 Feb 2004	29 Feb 2004	19.00		

To indicate that a service user was present for the snapshot date:

- click on the *Present at Snapshot Date* box.

To select the activities for which the service user received service on the snapshot date:

1. Click on an activity in the window list.
 - Click **Snapshot Date** to open this screen.

This lists all the activities that this service user receives.

2. If you are selecting one only:
 - Click on the activity in the left column and click **Add>**

If you are selecting two or more:

- Press **<Ctrl>** on your keyboard, click on each activity that you want to select, and click **Add>**

If you are selecting all activities:

- Click **Add ALL>>**

The activities you have selected are transferred to the *Selected* column.

To remove activities from the right column, use the same method outlined but click **<Remove** or **<<Remove all** instead.

3. Click **OK**.
All the activities you have selected will be recorded for this service user.

6. Add the *equipment* for a service user

Although this function is available for any service user, it can only be used for HACC equipment at this stage.

Do not use this to enter aids and equipment for **Disability** service users.

To **enter** equipment details for HACC service users:

1. On the *Working with Service Users* screen, search for and click on the name of the service user for whom you wish to enter HACC equipment details (the **Equipment** button is now active).
2. Click **Equipment** to open the following screen.

Equipment Type	Issue Date
Car Modifications	05 Dec 2003

2. Set the date range for which you wish to view equipment details.
 - Click **Change Date Range** to open this screen.

- Click the *From date* and select a date using the calendar or type over the existing date.
- Click the *To date* and select a date using the calendar or type over the existing date.
- Click **OK**.

Only items issued within the date range you selected will be listed in the window.

2. Click *Equipment Type* and select an option from the drop-down list.
3. Click on *Issue Date* and type a date or select it from the calendar
4. Click **Add**.
The name of the equipment and date of issue appear in the list underneath.

Service users: Maintaining service user details

Maintaining service user details refers to:

- Updating information relating to service users after you have added their details into QDC Tool.

In most cases you use exactly the same screens as you do to add the information.

Deleting or updating service user's *personal details*

Once you add a service user to QDC Tool you can:

- **update** their personal details
- **delete** their record or
- make them **inactive**.

Deleting

Means permanently removing a service user's record from QDC Tool.

You can only *delete* a service user if no data has been reported to DHS for that service user in a previous quarter or if you added them to QDC Tool during the current quarter and the information you entered for them has not yet been reported to DHS.

Once a quarter has been closed, you will **not be able to delete** a service user, you can only make them **inactive**.

Making inactive

You can make a service user inactive at any time. Generally you would do this when your agency no longer provides services to them.

Setting service user records to inactive on QDC Tool allows you to view details of only those service users who are currently receiving services.

Updating service user personal details

1. On the *Working with Service Users* screen, search for and click on the name of the service user whose personal details you wish to change.
2. Click **Edit User**.
The *Working with Service Users* screen appears showing you the data you have entered for the service user whose record you selected.

3. Re-enter or change any of the information on the screen (see above 2. Add the service user's *personal details*, pages 64-66 for details).
4. Click **Save User's Details**.
The information is saved and you are returned to the *Working with Service Users* screen.

To delete a service user

1. On the *Working with Service Users* screen, search for and click on the name of the service user you wish to delete.
2. Click **Delete User**.
The system checks if there are any related history records for that service user.
 - If there is a history, you are advised that the record cannot be deleted.
 - If there is no history, you are asked to confirm the deletion.
3. Click **Yes**.
The record is deleted from the main window and cannot be recovered. All details associated with the service user such as characteristics and service hours are also deleted.

To make a service user inactive

1. On the *Working with Service Users* screen, search for and click on the name of the service user.
2. Click **Edit User** to open *Working with Service Users* screen.
3. In the *Status* field in the bottom section of the screen, select **inactive**.
Generally you would do this when your agency no longer provides services to that person. If that person returns to your agency you simply have to change the status back to active.
4. Click **Save User's Details**.
The information is saved and you are returned to the *Working with Service Users* screen.

Updating service user *characteristics*

1. On the *Working with Service Users* screen, search for and click on the name of the service user whose *characteristics* details you wish to change.
2. Click **Characteristics**.
3. Re-enter or change any of the information on the screen (see above 4. Enter the *characteristics* for a service user, pages 69-71 for details).
4. Click **OK**.
The information is saved and you are returned to the *Working with Service Users* screen.

Deleting or updating an *activity*

Updating or deleting an *activity* must be related to a specific service location.

- You can only change or delete *activity* data if the record has not already been reported to DHS.
- You can only delete an *activity* record within the quarter in which it was created.

To update an activity

Select the location on the main menu screen **first**:

1. On the *Working with Service Users* screen, search for and click on the name of the service user.
2. Click **Activities** to open the *Activities provided to [service user name]* screen.
3. Click on the activity whose details you wish to change.
The details appear in the *Activity Details* area at the top of the screen.

Changing data

You can change any of the fields except the activity itself. If the activity is wrong, you must delete the record and start again.

You cannot change data that has already been sent to DHS. For example, if an activity started in the previous quarter and the start date was sent to DHS at the end of that quarter, you will not be allowed to change that date now.

The same is true of end date, end reason and referral source. However, you can change any of those fields **BEFORE** they are reported to DHS (that is during the quarter in which they were first entered).

Date service last received

Date service last received is not a fixed field. It changes as the service user receives services, so it is not subject to the same limitations. It must be after the start date and before the end of the quarter.

Ending activities

To **end** an activity for a service user:

- select an *end date* **and** an *end reason*.

If you end an activity erroneously, clear the date (highlight the whole date and press **Delete**) and select a blank response as the end reason.

Changing end dates

If you add an end date to an activity you will not be able to add or modify service hours records for that activity for that service user. Before adding an end date make sure all service hours have been recorded.

4. Re-enter the information as required.
5. Click **Update**.
The changed details appear in the main window.

If you are ending an HACC activity, see the following page.

6. Click **Close** to return to the *Working with Service Users* screen.

Ending HACC services

When ending HACC services you must record why this service user has stopped using HACC services and where they will be living after the service has ended.

Accordingly, when you enter the end date for an HACC activity, and you click **Update**, the following screen appears, which allows you to record this information.

You can close this window without entering any data, but if you do and wish to enter a selection (or change your selection) you must find the appropriate questions when you enter service user characteristics and enter the details there.

1. Click on *Reason* and select an option.
2. Click on *Accommodation on exit* and select an option.
3. Click **OK** to return to the *Activities provided to [service user name]* screen.

To delete an activity

- You can only delete an activity record within the quarter in which it was created.
- If data about the activity has been reported to DHS, you will not be able to delete and you will receive an error message.
- When you delete an activity any service hours you may have entered for this activity for this service user will also be deleted.

Select the location on the main menu screen **first**:

1. On the *Working with Service Users* screen, search for and click on the name of the service user.
2. Click **Activities** to open the *Activities provided to [service user name]* screen.
3. Click on the activity record you wish to delete.
4. Click **Delete**.
 - You are asked to confirm the deletion.

If the quarter has been closed, a message advises that you cannot delete the activity record for this service user.

5. Click **Yes**.
The item no longer appears in the list.
6. Click **Close** to return to the *Working with Service Users* screen.

Deleting or updating *service hours* for a service user

You **cannot**:

- change or delete service hours data if the record has already been reported to DHS.
- delete a service hours record unless you are still within the quarter in which it was created.

To update a service hours record

Updating a service hours record is done on the *Hours for [service user name]* screen.

Activity	From Date	To Date	Hours	Sub Activity	Error
DSD-Day Programs	01 Feb 2004	12 Feb 2004	5:00		
DSD-Day Programs	20 Feb 2004	29 Feb 2004	12:00		
DSD-Home First	06 Feb 2004	16 Feb 2004	5:00		
DSD-Home First	17 Feb 2004	29 Feb 2004	19:00		

There are **two** update buttons on this screen:

- One relating to *Hours* information
Changes to this information, affect only the record you select.
- One relating to *Last service received*.
Changes to this information, affect all records for the selected *activity*.

If you are using QDC Tool for more than one location, **select the location** on the main menu screen **first**:

- Open the Main Menu screen, and select the *service location*.
 - Click **Service User** to open the *Working with Service Users* screen.
1. On the *Working with Service Users* screen, search for and click on the name of the service user.
 2. Click **Service Hours** to open the *Hours for [service user name]* screen.
 3. In the list of activities click on the activity you wish to update.
The details appear in the *Hours* area.

If the record is already reported to DHS, the **Update** button will not be active.

4. To make changes relating to hours:
 - Click on the line in the *Service Delivery Details* list that you wish to update.
 - Re-enter the information in the *Hours* area.
 - Click the top **Update** button to save the changes.
These will now appear in the main window.

To make changes relating to *Last service received*:

- Select a date using the calendar or type over the existing date.

The entire screen is greyed out.

- Click the lower **Update** button to save the changes. These affect all items of the same activity type in the main window for the selected service user.

Service hours must be entered according to guidelines outlined for data item **U 075 - Hours received** in the *Quarterly Data Collection Data Guide*.

If you make a mistake, QDC Tool will place a **Y** in the *Error* column.

If you select a record marked **Y** in the *Error* column, and click on **Update**, the system provides an error message advising you what the problem is.

To delete a service hours record

Select the location on the main menu screen **first**:

1. On the *Working with Service Users* screen, search for and click on the name of the service user.
2. Click **Service Hours** to open the *Hours for [service user name]* screen.
3. Click on the activity you wish to delete.

If the record has already been reported to DHS, the **Delete** button is not active.

4. Click **Delete**. You are asked to confirm the deletion.
5. Click **Yes**. The item no longer appears in the list.
6. Click **Close** to return to the *Working with Service Users* screen.

Deleting or updating *equipment* details

You can only update the date an equipment type has been issued, but not the equipment type. If you entered the wrong equipment type you must delete it first and then re-enter the details.

You cannot update equipment details for HACCC service type outlets.

To update the *equipment* issue date

Select the location on the main menu screen **first**:

1. On the *Working with Service Users* screen, search for and click on the name of the service user.
2. Click **Equipment**.
3. Click on the equipment type for which you wish to change the issue date.
4. Click on *Issue Date*, and select a date using the calendar or type over the existing one.
5. Click **Update**.
6. Click **Close** to return to the *Working with Service Users* screen.

To delete *equipment* details

Select the location on the main menu screen **first**:

1. On the *Working with Service Users* screen, search for and click on the name of the service user.
2. Click **Equipment**.
3. Click on the record of the equipment type you wish to delete.
4. Click **Delete**.
 - You are asked to confirm the deletion.
5. Click **Yes**.

The item no longer appears in the list.
6. Click **Close** to return to the *Working with Service Users* screen.

Activities: Viewing location/contact details

You can view the address and contact details of a location to check whether the details held in the QDC Central Repository are correct.

Although you can view the address and contact details, you cannot update the data on the QDC Tool. You must contact the QDC helpdesk at DHS to have the information changed.

If you are using QDC Tool for more than one location, **select the location** on the main menu screen **first**:

- Open the Main Menu screen, and select the *service location*.
- Click **Activities** to open the *Working with Activities* screen.

To view the location details:

1. On the *Working with Activities* screen, click **View location details** to open the following screen.

Location Details

Address

Name: HACC Services

Address: 43 Lexus Pd

Suburb: LAVERTON

State: Victoria Postcode: 3028

Please advise DHS immediately if any of the details are incorrect.

Operations

Name	Position	Phone	Primary Contact
Jane Blackboard	HACC Manager	9786 9786	Yes

View Contact Details

Close

The address details are in grey at the top of the screen.

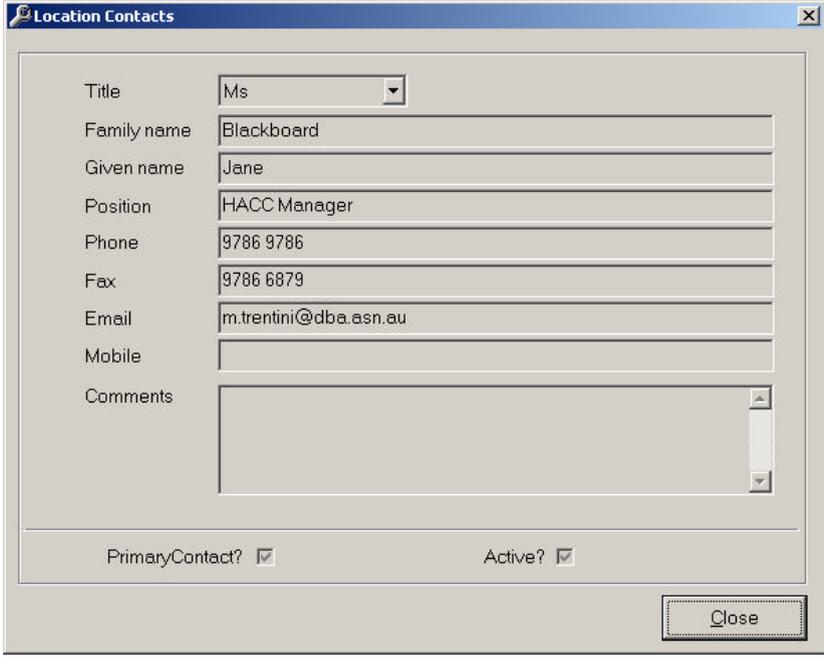
The *Operations* window lists all the activities provided at this location.

2. Check the address details.

If any details are not correct, contact the QDC helpdesk at DHS to have the data updated.

3. Select a name under *Operations* and click **View Contact Details** to check the contact details.

The following screen appears.



Title	Ms
Family name	Blackboard
Given name	Jane
Position	HACC Manager
Phone	9786 9786
Fax	9786 6879
Email	m.trentini@dba.asn.au
Mobile	
Comments	

PrimaryContact? Active?

Close

4. Check the contact details.

If any details are not correct, contact the QDC helpdesk at DHS to have the data updated.

5. Click **Close** to return to the *Location Details* screen.

6. Click **Close** on the *Location Details* screen to return to the *Working with Activities* screen.

Activities: Entering statistics

Statistics refers to the QDC questions that you are asked that relate to service type outlets. QDC Tool collects your answers to questions about a selected service type outlet on the *Statistics* tabs that you access from the *Working with Activities* screen.

Service type outlet statistics were originally captured on pink forms for each service type outlet. This data is mainly about staff hours worked, operating patterns, etc.

If you are using QDC Tool for more than one location, **select the location** on the main menu screen **first**:

- Open the Main Menu screen, and select the *service location*.
- Click **Activities** to open the *Working with Activities* screen.

To enter statistics for a service type outlet:

1. On the *Working with Activities* screen, click on the activity for which you are entering statistics (this is in fact a *service type outlet*).
2. Click **Statistics** to open the following screen.

This screen consists of questions organised into groups and displayed with tabs headings such as *Operating Patterns*, *Staffing*, *Waiting Lists* etc. The screen will have different tab headings for each activity type. Some will have more, some will have less.

If there are too many questions in one group to fit on one tab, a second tab is created with the same name.

Moving between tabs

To move between tabs:

- click on the tab heading;
- move to the next tab by clicking **Next**;
- move to the previous tab by clicking **Previous**.

Answering questions

Questions can be answered in various ways.

You can:

- Click on a drop-down list and select an option.
- Enter a date by typing it directly or clicking on the field and selecting it from a calendar.
- Enter a number.

Your answers are saved whenever you move to another tab.

To save your answers on the tab you are working on:

- Click **OK**, and you are returned to the *Working with Activities* screen.

Data item references



If you wish to find out which data item a question refers to:

- Click on the ? button next to the question.
The associated data item is listed in a screen like this one.



- Click close to return to the *Statistics* screen.

Activities: Adding service users to activities

Adding service users to a selected activity allows you to maintain the relationship between service users and this activity (service type outlet).

If you are using QDC Tool for more than one location, **select the location** on the main menu screen **first**:

- Open the Main Menu screen, and select the *service location*.
- Click **Activities** to open the *Working with Activities* screen.

To enter service users to an activity (service type outlet):

1. On the *Working with Activities* screen, click on the activity to which you are adding service users (is in fact a *service type outlet*).
2. Click **Service Users** to open the *People Receiving a service* screen. The service type outlet, activity and location is listed under the title bar.

Service User	Start Date	Last Service	Referral Source	End Date	Reason
WINDGOLF, Eliza	05 Dec 2003	31 Dec 2003	Not applicable		
NEPK, Frederick	05 Dec 2003	31 Dec 2003	Not applicable		

If there is a snapshot date in this quarter a **Snapshot Date** button and *Present on snapshot* flag will also appear on this screen.

3. Click on *Service User* and select a service user name (only those with active status are listed).
4. Click on *Start Date* and enter a date by typing it directly or selecting it from a calendar.
5. Click on *Referral source* and select an option (this does not apply for Disability service type outlets).
6. Click on *End Date*, if applicable, and enter a date by typing it directly or selecting it from a calendar.

Only record the end date after all service hours have been added.

7. Click on *End Reason* if you entered an end date, and select an option.
8. Click on *Date Service Last Received*, if applicable, and enter a date by typing it directly or selecting it from a calendar (the default date is the current day).
9. Click **Add**.

The service user appears in the list below.

- Click **Close** to exit the screen.

- If you forget to select the referral source or enter a date service last received before the start date an error message appears.
- You cannot have the same activity open for a service user more than once.

Activities: Adding service hours to activities

This function allows you to enter service hours for service users receiving a particular activity at a selected location.

Where an *activity type* requires that service hours be entered for a service user, and there is no end date, there must be a **minimum** of one record for each calendar month in the quarter, even if the service user did not receive hours in every month.

Adding service hours must be related to a specific service location.

If you are using QDC Tool for more than one location, **select the location** on the main menu screen **first**:

- Open the Main Menu screen, and select the *service location*.
- Click **Service User** to open the *Working with Activities* screen.

To enter service hours:

1. On the *Working with Activities* screen, click on the activity for which you wish to enter service hours.
2. Click **Service Hours** to open the following screen.

The screen title identifies the activity selected and the service location selected is indicated under the title.

In the *Hours* area, you select the service users for whom you wish to enter the service hours delivered for the selected activity.

The *Activity Details* window lists all service users for whom service hours have been entered for this activity during the specified date range. The default date range is always the beginning of and the end of the current quarter. You can change this as required.

3. To change the date range for which you wish to view service hours details.
 - Click **Change Date Range** to open this screen.



- Click the *From date* and enter a date by typing it or selecting it from the calendar.
 - Click the *To date* and enter a date.
 - Click **OK**.
4. Click on the *Service User* drop down list and select the service user for whom you want to enter service hours.

Only those service users that currently receive service for the activity you are working with are displayed.

If a sub-activity exists for this activity:

- Click on the *Sub Activity* drop down list and select the appropriate option.
5. Enter the *from* and *to* dates for the activity.
 - Click the *From date* and enter a date by typing it or selecting it from the calendar.
 - Click the *To date* and enter a date.

If you are recording service hours for the first time for this activity and the selected user, the *From Date* will default to the start date you recorded for that activity for that service user. If you are adding more service hours for this activity and this service user, then the *From Date* will default to the day after the last *To Date* entered for that service user for that activity.

- For every service hours record the *From Date* and the *To Date* must both be within the same calendar month. DHS expects at least one record for each month, for each quarter. Even if a service user received no service hours in one or two of those months, you must still create a record with zero hours for those months where there is no end date for the activity for the service user.
 - You cannot enter a *From Date* before the start date for the activity, or a *To Date* after the end of the current quarter.
 - You cannot enter more than 24 hours of service for each day.
6. Enter the number of hours and minutes in the *Service Hours* fields.

When entering minutes: **do not use the decimal system**, i.e. 45 minutes is 0.45, not 0.75 of an hour.

7. Click **Add**.

The name of the *service users*, the *date range* and *hours of service* appear in the list underneath.

Entering the same service hours for multiple service users

If you are entering the same service hours for several service users, you can enter the information faster by using the **Bulk Insert** button as follows:

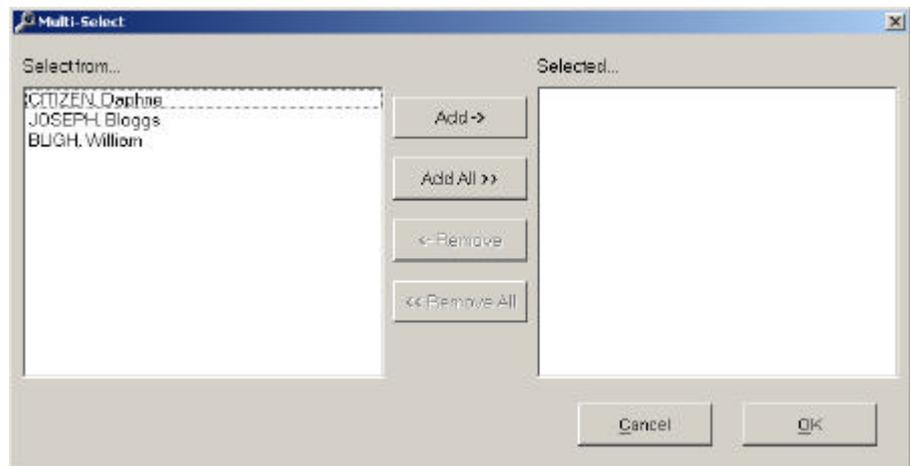
1. Click on the *Service User* drop down list and select a service user for whom you want to enter the service hours in bulk.

If a sub-activity exists for this activity:

- Click on the *Sub Activity* drop down list and select the appropriate option.

2. Enter the *from* and *to* dates for the activity.
 - Click the *From date* and enter a date by typing it or selecting it from the calendar.
 - Click the *To date* and enter a date.
3. Enter the number of hours and minutes in the *Service Hours* fields.
4. Check that the details are correct and click **Bulk Insert**.

The *Multi-select* screen appears, showing all the service users who are receiving services for this activity at your selected location.



5. If you are selecting one service user only:

- Click on the service user in the left column and click **Add>**

If you are selecting two or more:

- Press **<Ctrl>** on your keyboard, click on each activity that you want to select, and click **Add>**

If you are selecting all service users:

- Click **Add ALL>>**

The service users you selected are transferred to the *Selected* column.

To remove service users from the right column, use the same method outlined but click **<Remove** or **<<Remove all** instead.

6. Click **OK**.

The *Multi-select* screen is closed. A new service hours record is written for each of the service users selected and is listed in the *Activity Details* window.

Correcting errors after bulk insert

Bulk insert may create some records that have a mistake. QDC Tool marks the record as being wrong by placing a **Y** in the *Error* column in the list area next to the incorrect record.

The screenshot shows the 'Hours for POSH-Home based outreach support' window. At the top, there are fields for 'Location', 'Address', 'Hours', 'Service User' (BLOGGS, Anthony), 'From Date' (01 Sep 2002), 'To Date' (30 Sep 2002), 'Service Hours' (356:00), and 'Sub Activity' (Intensive Home Based Out...). Below these are buttons for 'Bulk insert', 'Delete', 'Add', and 'Update'.

The main section is titled 'Service Delivery Details from 01 Jul 2002 to 31 Dec 2002' and contains a table with the following data:

Service User	From Date	To Date	Hours	Sub Activity	Error
BLOGGS, Anthony	15 Jul 2002	31 Jul 2002	400:00	Intensive Home Based Out...	
BLOGGS, Anthony	01 Aug 2002	31 Aug 2002	356:00	Intensive Home Based Out...	Y
BLOGGS, Anthony	01 Aug 2002	31 Aug 2002	356:00	Intensive Home Based Out...	
BLOGGS, Anthony	01 Sep 2002	30 Sep 2002	420:00	Intensive Home Based Out...	
BLOGGS, Anthony	01 Oct 2002	31 Oct 2002	40:00	Mother Support	
NERK, Frederik	01 Aug 2002	31 Aug 2002	356:00	Intensive Home Based Out...	Y

Below the table are sections for 'Activity Details' (with a checked 'Present at Snapshot Date' and 'Date Service Last Received' set to 10 Oct 2002) and 'Operations' (with buttons for 'Change Date Range', 'Snapshot Date', and 'Close').

To find out what the error is:

- click on the line with the **Y** and click **Update**.

A message appears advising the nature of the error. Most often it is that you have already recorded hours for *that service user* for *that activity* and at *that service type outlet* for all or some of the date range you specified in your bulk insert record.

You can correct the entry by updating date ranges or deleting duplicated records. When there is no longer an error, the **Y** will disappear.

Snapshot date

If there is a snapshot date in this quarter, there is a *Present at Snapshot Date* indicator and a **Snapshot Date** button on the screen.

To indicate which service users received an activity for the snapshot date:

- click on the *Present at Snapshot Date* box.

To identify the service users for the activity on the snapshot date:

1. Click **Snapshot Date** to open this screen.

This lists all the service users who participate in this activity and who could have been present on the snapshot date. You can then select the service users who received service on the snapshot date.

2. If you are selecting one only:
 - Click on the service user in the left column and click **Add>**

If you are selecting two or more:

- Press **<Ctrl>** on your keyboard, click on each service user that you want to select, and click **Add>**

If you are selecting all service users:

- Click **Add ALL>>**

The service users you selected are transferred to the *Selected* column.

To remove service users from the right column, use the same method outlined but click **<Remove** or **<<Remove All** instead.

3. Click **OK**.
All the service users you have selected will be recorded as having received this activity on the snapshot date.

Activities: Maintaining activities

Maintaining activities refers to:

- updating or deleting information relating to activities after you have added the details into QDC Tool.

In most cases you use exactly the same screens as you do to add the information.

Deleting or updating service user records for an activity

You cannot:

- change or delete service user records for an activity if the record has already been reported to DHS.
- delete a service user activity record unless you are still within the quarter in which it was created.

Updating or deleting service hours must be related to a specific service location.

To update an activity

Select the location on the main menu screen **first**:

1. On the *Working with Activities* screen, click on the activity whose details you are changing.
2. Click **Service Users** to open the *People receiving a service* screen.
3. Click on the service user whose details you wish to change. The details appear in the area at the top of the screen.

Changing data

You can change any of the fields except the activity itself. If the activity is wrong, you must delete the record and start again.

You cannot change data that has already been sent to DHS. For example, if an activity started in the previous quarter and the start date was sent to DHS at the end of that quarter, you will not be allowed to change that date now.

The same is true of end date, end reason and referral source. However, you can change any of those fields **BEFORE** they are reported to DHS (that is during the quarter in which they were first entered).

Date service last received

Date service last received is not a fixed field. It changes as the service user receives services, so it is not subject to the same limitations. It must be after the start date and before the end of the quarter.

Ending activities

To **end** an activity for a service user:

- select an *end date* **and** an *end reason*.

If you end an activity erroneously, clear the date (highlight the whole date and press **Delete**) and select a blank response as the end reason.

Changing end dates

If you add an end date to an activity you will not be able to add or modify service hours records for that activity for that service user. Before adding an end date make sure all service hours have been recorded.

4. Re-enter the information as required.

5. Click **Update**.

The changed details appear in the main window.

If you are ending an HACC activity, see below.

6. Click **Close** to return to the *Working with Activities* screen.

Ending HACC services

When ending HACC services you must record why this service user has stopped using those services and where they will be living after the service has ended.

Accordingly, when you enter the end date for an HACC activity, and you click **Update**, the following screen appears, which allows you to record this information.

You can close this window without entering any data, but if you do and wish to enter a selection (or change your selection) you must find the appropriate questions when you enter service user characteristics and enter the details there.

1. Click on *Reason* and select an option.
2. Click on *Accommodation on exit* and select an option.
3. Click **OK** to return to the *Activities provided to [service user name]* screen.

To delete a service user's activity record

- You can only delete a service user activity record within the quarter in which it was created.
- If the service user activity has been reported to DHS, you will not be able to delete and you will receive an error message.

Select the location on the main menu screen **first**:

1. On the *Working with Activities* screen, click on the activity to which you are adding service users (this is in fact a *service type outlet*).
2. Click **Service Users** to open the *People receiving a service* screen.
3. Click on the service user record you wish to delete.
4. Click **Delete**.
 - You asked to confirm the deletion.

If the quarter has been closed, a message advises that you cannot delete the record.

5. Click **Yes**.

The item no longer appears in the list.
6. Click **Close** to return to the *Working with Activities* screen.

Deleting or updating *service hours* for an activity

You **cannot**:

- change or delete service hours data if the record has already been reported to DHS.
- delete a service hours record unless you are still within the quarter in which it was created.

To update a service hours record

Updating a service hours record is done on the *Hours for [activity name]* screen. There are **two** update buttons on this screen:

- One relating to *Hours* information.
Changes to this information, affect only the record you select.
- One relating to *Last service received*.
Changes to this information, affect all records for the selected *activity*.

If you are using QDC Tool for more than one location, **select the location** on the main menu screen **first**:

- Open the Main Menu screen, and select the *service location*.
- Click **Activities** to open the *Working with Activities* screen.

1. On the *Working with Activities* screen, search for and click on the name of the activity.
2. Click **Service Hours** to open the *Hours for [activity name]* screen.
3. In the list of service users click on the service user whose activity details you wish to update.
The details appear in the *Hours* area.

If the record is already reported to DHS, the **Update** buttons will not be active.

4. To make changes relating to hours, re-enter the information in the *Hours* area.
 - Click the top **Update** button to save the changes.
These will now appear in the main window.

To make changes relating to *Last service received*:

- Select a date using the calendar or type over the existing date.
The entire screen is greyed out.
- Click the lower **Update** button to save the changes.

If you make a mistake, an error message appears.

To delete a *service hours* record for an activity

Select the location on the main menu screen **first**:

1. On the *Working with Activities* screen, search for and click on the name of the service user.
2. Click **Service Hours** to open the *Hours for [activity name]* screen.
3. Click on the service user you wish to delete.

If the record has already been reported to DHS, the **Delete** button is not active.

4. Click **Delete**. You asked to confirm the deletion.
5. Click **Yes**. The item no longer appears in the list.
6. Click **Close** to return to the *Working with Activities* screen.

Part IV:

**Outputting and
exporting QDC data**

Working with reports

QDC Tool offers four standard reports that will enable you to access and view key information stored in your QDC Tool database.

Types of reports

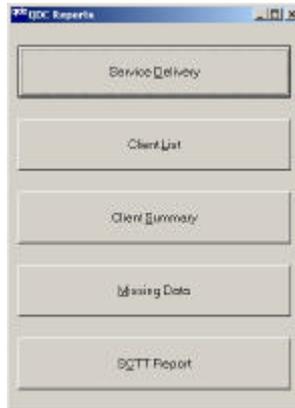
You can run these four reports any time to view details from any quarter for which data exists.

Run this report:	
Service delivery	To provide information about service users and activities at a selected location for a selected quarter. You can run this report to view details by: service user: <ul style="list-style-type: none"> Lists each user at the selected location and the activity with which they are associated at this location. It also provides total monthly service hours for all service users for each activity. activity: <ul style="list-style-type: none"> Lists each activity at the location and each service user associated with it. It also provides monthly totals of service hours for each activity.
Client List	To list each activity at a location and details of each service user associated with that activity. This report also provides totals of the number of service users associated with each activity.
Client summary	To provide a summary of service usage at a selected location. For each activity at a location this report calculates the number of service users by age range and sex.
Missing data	To help you to determine whether there are any missing items in your quarterly collection data. It should be run before you extract your QDC data file at the end of each quarter. The report lists all questions for which no answer has been given. It should be noted that, in some cases, no answer is not necessarily incorrect. For instance, the response to <i>reason for ending HACC activities?</i> can quite legitimately be left empty if the service user still receives services from HACC. However, the service user's indigenous status or country of birth should always be stated. This report can also be run from the Export QDC Data screen.
SCTT report	To create a template to help refer a service user to another agency or service provider. This is not really a report but a template. See section <i>Generating a SCTT template</i> on page 109 below.

Generating a report

All reports are generated from the *QDC Reports* screen.

1. On the QDC Tool Main menu:
 - click **Reports**.
 The *QDC Reports* screen appears.



2. Select the report you wish to run by clicking on the appropriate button. A *Report Parameters* screen appears. This is different for each report. It will allow you to select the range of information you wish to view.
3. Enter the parameters

Service delivery report

- Select the service location for which you wish to run the report.
- Select the quarter for which you wish to run the report.
- Select the report type (i.e., click on the appropriate radio button according to whether you want the report to list in activity order or in service user order).

Client list report

- Select the service location for which you wish to run the report.

Client summary report

- Select the service location for which you wish to run the report.
- Select the quarter for which you wish to run the report.

Missing Data report

- Select the service location for which you wish to run the report.
- Select the quarter for which you wish to run the report.
- Select the report type (i.e., click on the appropriate radio button according to whether you want the report to list in service type outlet data or in service user data).

4. Click **OK**.

The report window screen appears.

DHS000 Collection System

Client Summary Report

Agency: Bill and Ben Inc
Location: HACC Services, 43 Lexus Pk, Laverton, Victoria, 3028
Time Period: 1/10/2003 to 31/12/2003
Activity: HACC-Home Care

Age by Gender	Male	Female	Unknown	Total	%
0 - 14 Yrs	0	0	0	0	0.0
15 - 24 Yrs	1	0	0	1	25.0
24 - 44 Yrs	1	0	0	1	25.0
45 - 65 Yrs	0	1	0	1	25.0
65 Yrs +	0	1	0	1	25.0
Total	2	2	0	4	100.0
Average Age	33.3	65.4	0.0	49.3	

The way information is laid out on this screen will differ according to the report you selected.

However for all reports you can

- view details on screen
- print the details
- save the details to a file.

Viewing the report on screen

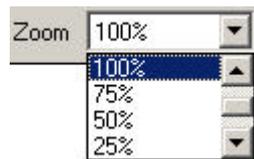
You can view specific details on the screen:

- by changing the zoom setting; or
- adjusting the horizontal and vertical scroll bars; or
- viewing the contents of additional pages.

To alter the amount of data displayed in the report window:

Click on the *Zoom* drop-down list and select a percentage to show:

- more on the screen (choose a figure less than 100%); or
- less on the screen (choose a figure greater than 100%).



To move to another page

If your report consists of more than one page:

- click on  at the bottom of the report window to move to the next page.
- click on  at the bottom of the report window to move to the end of the document.

To close the report window:

- click the top right **Close** button .

Printing a report



To print the report:

- Click the printer icon in the top left of the screen.

The report will either print directly to your default printer or, if you are connected to a network, you may be requested to choose a specific printer.

Saving a report to file

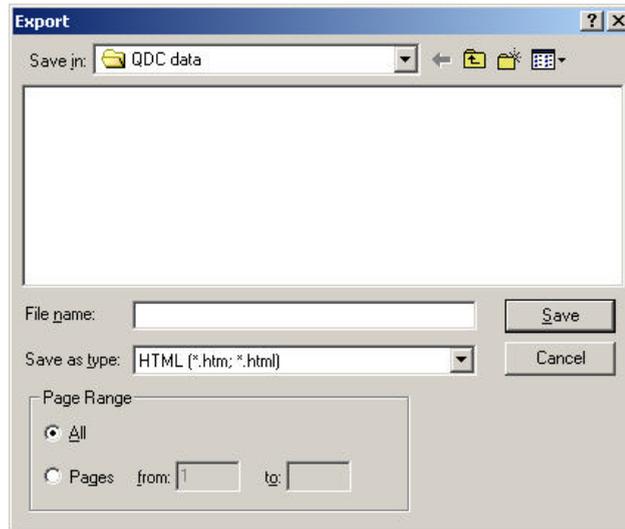
Reports can be saved as text files (.txt) or as HTML (.htm) files. Those saved as text files can later be imported into Microsoft Excel or a number of other Windows programs.



To save the report to a file:

1. Click the *file* icon in the top left of the screen.

The *Export* screen appears.



2. Click on the *Save in* drop down list and select the directory or folder in which you wish to save the report.

You should create a new directory in which to save your reports. That way, you will easily find them and they will not be confused with other files created by or for QDC such as backup files or quarterly export files.

3. Type the name of the file in the *File name* field.
4. Click on the *Save as type* drop down list and select the file type (i.e. .txt or .htm).
5. If you wish to save only specific pages in the report, click on the *Pages* radio button and type in the page range.
6. Click **Save**.
The report is saved to the directory you selected.

Generating a SCTT template

Service co-ordination tool templates (SCTT) are used to help refer a service user to another agency or service provider. These templates are common for agencies participating in Primary Care Partnerships (PCP).

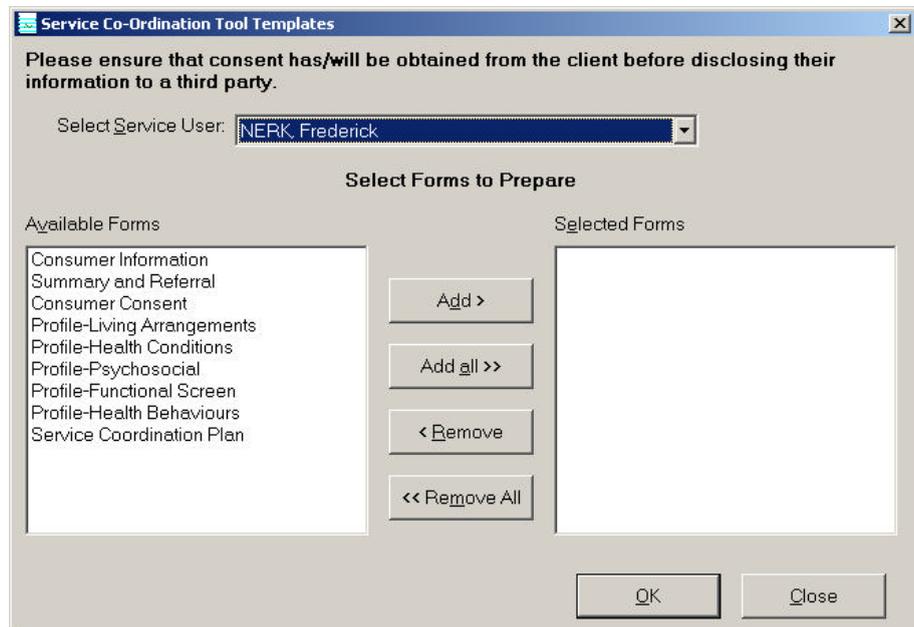
This feature is used by agencies that are members of primary care partnerships. It enables these agencies to create an MS Word form using information already entered on QDC Tool.

1. On the QDC Tool Main menu:
 - click **Reports**.
 The *QDC Reports* screen appears.



2. Click **SCTT Report**

The Service Co-Ordination Tool Templates screen appears.



3. If you are creating one form only:
 - Click on the name of the form listed under *Available forms* and click **Add>**
 If you are creating one two or more forms:
 - Press **<Ctrl>** on your keyboard, click on the name of each form name that you want to select, and click **Add>**
 If you are creating all forms:
 - Click **Add ALL>>**

The forms you select are transferred under the *Selected forms* column.

If you select a form by mistake:

- click on the form under *Selected forms* and click **<Remove** to return it to the *Available forms* column.

To delete all selected forms:

- click **<<Remove ALL**.

4. Click **OK** to open this browse box.



5. Select the drive and directory where you wish to store the form.

6. Click **Save**.

The form is saved as Word document in the directory location you selected.

To open the form for viewing or printing:

- Locate the file in *Windows Explorer* and double click on it. The file opens in *MS Word*.
- You can now view or print the file.

Profile: Health Conditions

If question is irrelevant or information not known, write Not Applicable or N/A.

Record Agency Assigned Consumer Identifier (initial contact agency)

or affix label here

<p>Overall Health In general, how would you say your health is?</p> <p><input type="radio"/> Excellent</p> <p><input type="radio"/> Very Good</p> <p><input type="radio"/> Good</p> <p><input type="radio"/> Fair Consider activities of daily living</p> <p><input type="radio"/> Poor</p> <p>How much bodily pain have you had during the past 4 weeks?</p> <p><input type="radio"/> None</p> <p><input type="radio"/> Very mild</p> <p><input type="radio"/> Moderate</p> <p><input type="radio"/> Severe Consider activities of daily living</p> <p><input type="radio"/> Very Severe</p>	<p>How much did your health interfere with your normal activities (outside and/or inside the home) during the past 4 weeks?</p> <p><input type="radio"/> Not at all</p> <p><input type="radio"/> Slightly</p> <p><input type="radio"/> Moderately</p> <p><input type="radio"/> Quite a bit Cons. of daily living</p> <p>Vision How is your eyesight for reading (with your glasses)?</p> <p><input type="radio"/> Excellent</p> <p><input type="radio"/> Good</p> <p><input type="radio"/> Fair</p> <p><input type="radio"/> Poor</p> <p>How is your long distance eyesight (with your glasses)?</p> <p><input type="radio"/> Excellent</p> <p><input checked="" type="radio"/> Good</p> <p><input type="radio"/> Fair</p> <p><input type="radio"/> Poor</p>	<p>Hearing How is your hearing (with your hearing aid)?</p> <p><input type="radio"/> Excellent</p> <p><input type="radio"/> Very Good</p> <p><input type="radio"/> Good</p> <p><input type="radio"/> Fair</p> <p><input type="radio"/> Poor</p> <p>Falls Have you had a fall inside/outside the home in the past 6 months? <input type="radio"/> Yes <input type="radio"/> No</p> <p>If yes, record number of falls <input style="width: 50px;" type="text"/></p> <p style="font-size: x-small;">Consider both activities of daily living and need for referral if the consumer has any problems with vision, hearing or falls.</p>
---	--	--

Exporting and transferring data

All data collected by your agency using QDC Tool can be exported to either a:

QDC export data file:	This is the XML file you create at the close of each quarter that is to be sent to DHS to meet your agency's reporting obligations.
Excel file:	This is a CSV file you can create at any time to view or analyse data for your own purpose.

Only system administrators have access to these functions.

The quarterly export data file

Once you enter the appropriate settings, QDC Tool will automatically:

- select all of the data for the specified period;
- store it in an XML file in a format appropriate for it to be loaded directly into the QDC Central repository;
- name the XML file;
- store the file in the specified directory on your computer.

The name assigned to the file is based on the Registration ID of the computer that is storing the data and the QDC ID for the quarter you are working in.

The Registration ID	is the combination of your DHS assigned agency number and the number QDC Tool assigns to the computer generating the file.
----------------------------	--

The QDC_ID	is a DHS assigned number that identifies the quarter to which the data relates. This is a one up number for each successive quarter dating from the beginning of QDC. For example, the QDC_ID for the first quarter of the year in which QDC began is 1. The QDC_ID for the last quarter of that year is 4. The QDC_ID for the first quarter of the following year is 5 and for the last quarter it is 8. Quarters are dated according to the financial year, not the calendar year.
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No matter how many times you have to generate the export file for the quarter, QDC Tool will always assign the file exactly the same name and overwrite any existing file in your directory. This ensures there is no duplication of data for the same reporting period.

This process will only create the export file for the specific quarter and store it on your computer. It will not send the file to DHS.

Transmitting data over the Internet

If your agency has access to the Internet you can use QDC Tool to transfer the QDC export data file to DHS electronically.

DHS has a Secure Data Exchange (SDE) system set up which is designed to receive files from agencies over the Internet. The system uses data encryption techniques to ensure that the information you send cannot be read by unauthorised parties.

To use the SDE you must contact the QDC Helpdesk to obtain a username and password.

Creating the quarterly export data file

System administrator access only



Complete this process to generate the QDC data quarterly export file for the current period or for any previous quarterly period for which data exists.

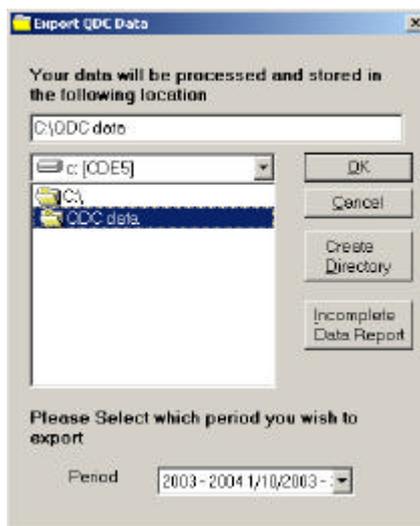
Once you generate the file and store it on your computer you can then send it to DHS.

Before you do however, you should:

- Run a *Missing Data report* to check that the data is correct. The Missing Data report will show every question that can be asked for an activity. Remember that questions without an answer may be perfectly valid.
- Print a *Service Delivery by Service User report* to check that there is at least one record per month for the quarter for each service user.

1. Open the *Export QDC Data* screen

1. Open the QDC Tool *Main menu* screen.
2. Click on the *Administration* menu and select *Export Quarterly Data...* to open this screen.



2. Run the Incomplete Data Report (Missing Data report)

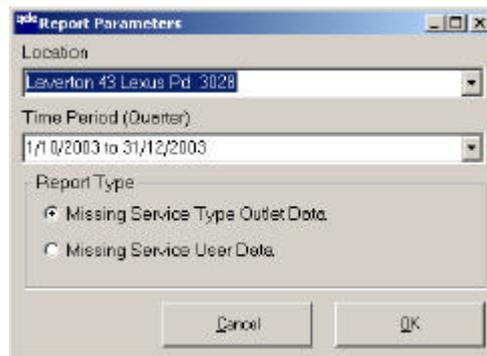
From the current *Export QDC Data* screen you can run the *Incomplete Data Report*.

The *Incomplete Data Report* can also be run as the *Missing Data Report* from the *Reports* menu (see page 103).

Always run this report **before** you create the QDC Data export file.

Viewing this report for the quarter will allow you to identify questions for which no answers have been given and whether you have entered all of the required QDC data for the quarter.

1. Click **Incomplete Data Report** to open the *Report Parameters* screen.



2. Select the service location for which you wish to run the report.
3. Select the quarter for which you wish to run the report (the default is the current quarter).
4. Select the report type (i.e., click on the appropriate radio button according to whether you want the report to list in activity order or in service user order).
5. Click **OK**.

The report window screen appears.

Check the report to see that your data is complete. For further information on viewing or printing a report see page 106 above.

If it is not complete, make the necessary changes before you try to generate the quarterly data export file.

3. Choose the file destination

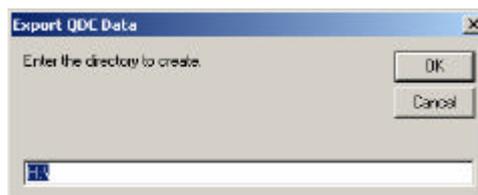
In the browse area of the *Export QDC Data* screen, select the drive and directory location where you wish to save your export file.

Before creating the quarterly export data file set up a new directory in your system in order to store the file.

This directory should be used to hold only data export files created by QDC Tool.

To create a new directory or folder:

1. Click **Create Directory** to open this dialogue box.



2. Type the correct drive (C:\ D:\ etc) followed by the name of the new directory.
 - e.g. **C:\QDC\QDC data\Export files**
3. Click **OK** to return to the *Export QDC Data* screen.

4. Choose the quarterly reporting period

At the bottom of the *Export QDC Data* screen select the quarterly period for which you wish to generate the export file.

The current quarter is automatically listed.

If you wish to create an export file for another quarter:

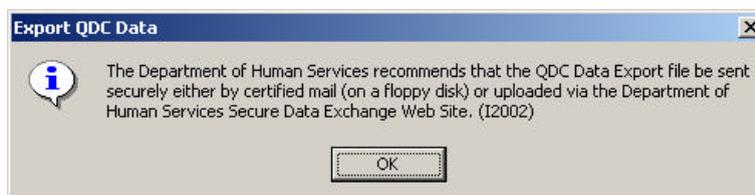
- click on the dropdown arrow and select it from the list.

5. Generate the file

- Click **OK**.

QDC Tool processes all of the data for the quarter and stores it in a single XML file. It automatically names the file and places it in the drive and directory you selected.

The following message appears when the process is complete.



You can now arrange to send the file to DHS in the most convenient way.

DO NOT, under any circumstances, **change the name of the file!**

Transferring the export file via Internet

System administrator access only

This function will send your prepared quarterly extract file to DHS using the DHS Secure Data Exchange over the Internet. To use this function, you must have an Internet connection and be connected before you use QDC Tool to complete this process.

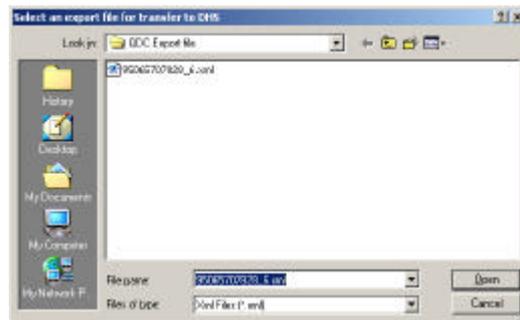
1. Logon to the Internet, or check that your Internet connection is active.

How you do this will depend on what browser you use and on your computer set-up.

2. Open the QDC Tool Main menu screen.
3. Click on the *Administration* menu and select *Internet Transfer...* to open this screen.



4. Click  to open a browse box to find the QDC export data file.



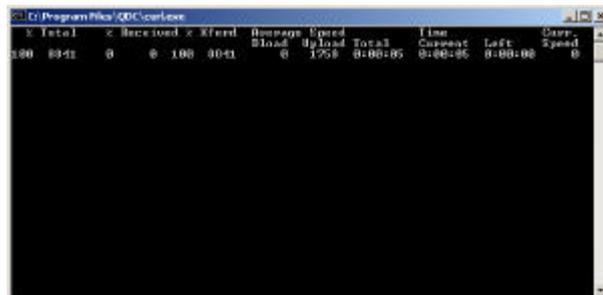
5. Select the directory where the QDC export data file is located and highlight the file name.

6. Click **Open**.

The **Transmit QDC data to DHS** screen is again displayed with the directory and file path specified in the *Export file* field.

7. Click **Upload**.

The following screen appears.



If the file transfer is successful you are advised:

File transfer successful.

Exporting data to Excel

System administrator access only

QDC Tool allows you to export data from the QDC database as a comma delimited file (.csv), which is an appropriate format for import into MS Excel or Access. Once a CSV file is created it can be opened directly as an Excel file.

The purpose of this is to enable you to:

- Perform more detailed analysis of the contents of your database than is possible using the standard reports available in QDC Tool.
- Aggregate data from two or more agency service type outlets to create a single agency wide database.

The export process creates two separate files to make it easier for non technical users to work with the data:

a <i>Service User Demographics</i> file	This contains the name and address details of every service user, with every answer they have given to every question. QDC Tool automatically names the file: SU_demographics.csv.
---	--

a <i>Service Use</i> file	This contains every activity that the service user has received and every service hour record entered as well as any HACC equipment provided. QDC Tool automatically names the file: Service_Use.csv.
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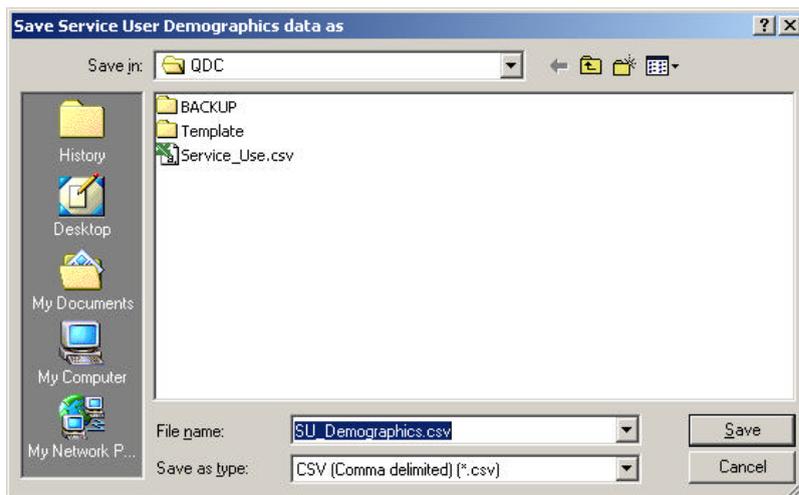
For this file you can elect to export all the data held or you can select a date range. The default date range is the current quarter.

The service use data can be linked to the demographics data using the Service_User_ID, which is the first column on both sheets.

To create CSV export files:

1. Open the QDC Tool main menu screen.
2. Click on the *Administration* menu and select *Export Data to Excel...* to open this screen.

3. Select one or both of the files you wish to export.
The names of both are already checked. If you want to export data for only one then uncheck the other (i.e., either Service User Demographics or Service Use).
4. If you select *Service Use*:
 - Leave the radio button set to **All** if you want all of the data in the database to be exported.
 - Click *Date Range* if you want to export data relating to a specific time period, and enter the from and to dates.
5. Click **OK** to open this browse box.
The file name: either *Service_Use.csv* or *SU_demographics.csv* is automatically assigned to the file. You can change it if you wish.



6. Select the directory where you wish to save the file and click **Save**.
If you are creating two files repeat steps 5 and 6.

The files are created and you are returned to the *Main* menu screen.

Statistical linkage keys in the SU_demographics.csv file

When statistical linkage keys are exported to the .csv file, keys in the format where consent is not given (i.e. 999999999xxxxx) are not formatted correctly.

To ensure statistical linkage keys are in the correct format in the .csv file:

1. Find and open the **SU_demographics.csv** file.
The file will open in your current version of MS Excel.
2. Find the column listing the statistical linkage keys.
(generally Column 1)
3. Click on the entire column, and select *Format*, then *Cells*.
4. Under *Category*, click on *Number* and set the number of decimal places to 0.
5. Click **OK** and save your changes.

Part V:

**QDC Tool System
Maintenance**

Importing data

There are two files that will need to be imported into QDC Tool periodically.

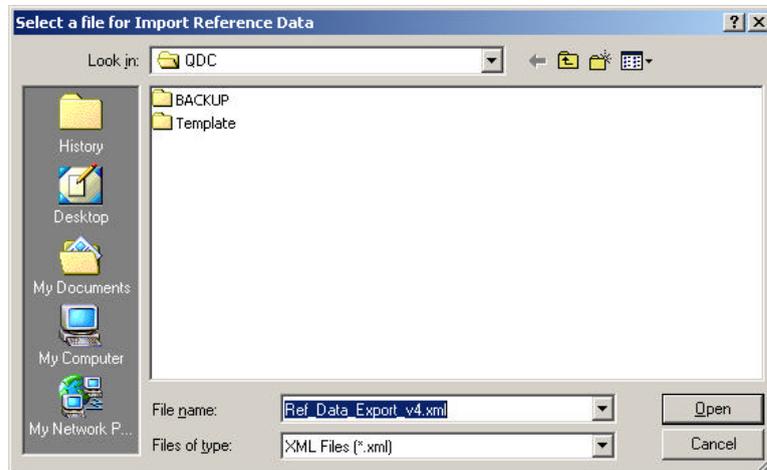
Both are XML files that are sent out to agencies by DHS to update information contained in your agency's QDC Tool database to keep it consistent with records contained in the Central Repository:

reference data file	Contains the latest version of all of the QDC questions and their respective answer codes. DHS will normally provide you with this file on a diskette or a CD. The accompanying letter will give the name of the import file as this will change with each re-issue.
Agency_Export data file	Contains all agency, service location and service type outlet details including contact details, as contained in the QDC Central Repository. DHS will provide you with this file either on disk or via email. The name of the file will always be Agency_Export .

Importing the reference data file

System administrator access only

1. Insert the CD containing the reference data file into the CD drive, or if you received the file on disk, copy the file to a designated directory within your computer.
2. Open the QDC Tool Main menu screen.
3. Click on the *Administration* menu and select *Import Reference Data...* to open this screen.

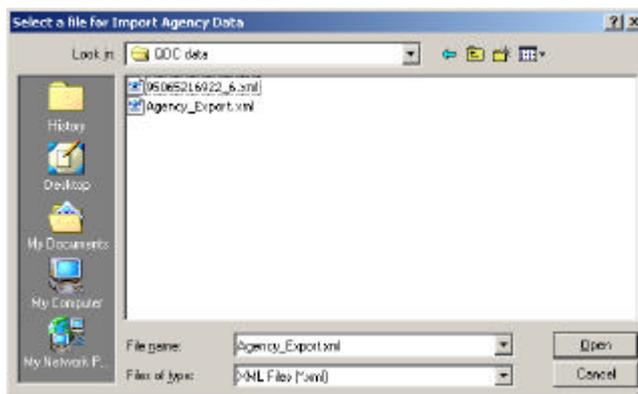


4. Locate the file, either on the CD ROM itself or the directory to which you have copied it and click once on the file name.
5. Click **Open**.
QDC Tool imports all of the data contained in the file and updates the reference information stored in your database.
A message advises you when the process is complete.
6. Click **OK** to return to the Main menu screen.

Importing the Agency_Export data file

System administrator access only

1. Insert the CD or diskette containing the file into the appropriate drive on your computer or, if you received the file via email, copy it to a designated directory within your computer.
2. Open the QDC Tool Main menu screen.
3. Click on the *Administration* menu and select *Import Agency Data...* to open this screen.



4. Locate the file *Agency_Export.xml*, either on the CD ROM itself or the directory to which you have copied it and click once on the file name.
5. Click **Open**.
QDC Tool imports all of the data contained in the file and updates the reference information stored in your database.
A message advises you when the process is complete.
6. Click **OK** to return to the Main menu screen.

Viewing agency details

You can check your address and contact details at any time.

Viewing your agency details

System administrator access only

1. Open the QDC Tool Main menu screen.
2. Click on the *Administration* menu and select *View Agency Details...* to open the *Agency Details* screen.

The screenshot shows a window titled "Agency Details" with the following content:

Address

Name: Bill and Ben Inc
 Address: 210 Holden Av
 48 McLachlan Street
 HAWTHORN Victoria 3122

Sector: Non-Government Income tax exempt (charity)

Please advise DHS immediately if any of the details are incorrect. For details refer to Section 4 of the QDC Data Guide.

Contacts

Name	Position	Phone	Primary Contact
Bill Bennett	CEO	9898 1223	Yes

Buttons: View Contact Details, Close

2. Check the details displayed and contact the QDC Helpdesk if you notice that anything is incorrect.
3. Click **Close** to exit.

Viewing the agency contact details

You can also view the contact details recorded for this location.

System administrator access only

1. Open the *Agency Details* screen:
2. Click **View Contact Details** to open the *Agency Contact Details* screen.

The screenshot shows a window titled "Agency Contact Details" with the following content:

Title: Mr

Family name: Bennett

Given name: Bill

Position: CEO

Phone: 9898 1223

Fax: 9898 3221

Email: simplyhelping@wimmera.com.au

Mobile:

Comments:

PrimaryContact? Active?

Buttons: Close

3. Check the details displayed and contact the QDC Helpdesk if you notice that anything is incorrect.
4. Click **Close** to exit.

Maintaining agency location details

System administrator access only



Maintaining agency location details involves modifying the service locations and service type outlets you selected when you initialised the QDC Tool.

You would normally use this screen if you are adding or removing a service type outlet to or from a service location. You should only do this after you talk to someone at QDC helpdesk.

1. Open the QDC Tool Main menu screen.
2. Click on the *Administration* menu and select *Agency Location Maintenance...* to open the *Select Outlets* screen.

All service locations available to your agency are listed in the *Service Location* list on the screen.

3. Click on the location that you wish to make changes to.
All service type outlets for that location are displayed in either or both the *Available Outlets* column and the *Selected Agency Outlets* column in the bottom half of the screen. If you select another location the list in both columns will change to reflect the services provided at that location.
4. If you are adding a new service type outlet, it will be listed in the *Available Outlets* column:
 - Click on the name of the outlet listed under *Available Outlets* and click **Add >**

If you are removing a service type outlet, it will be listed in the *Selected Agency Outlets* column:

- Click on the name of the outlet listed under *Selected Agency Outlets* and click **< Remove**.

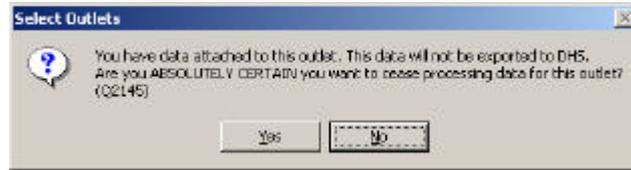
If you remove a service type outlet that has users and hours associated with it, all of the associated information will also be lost.

The selected service type outlets are transferred to the opposite column. Remember that when data is exported to DHS, only those outlets marked as selected are processed by the QDC Tool. So if you de-select an outlet, the data you have entered will not be sent to DHS.

5. Complete step 4 for each service location for which you are making changes.

6. Click **OK**.

If you have added data for a service type outlet, and you elect to remove it from a location, the following message will appear.



7. Click **Yes** if you are certain that you wish to proceed. You are then returned to the QDC Tool Main menu screen.

If your selections are **incorrect**:

- click **N** to return to the *Select Outlets* screen.

Maintaining QDC Tool user data

The *System User Maintenance...* function allows administrators to maintain information about users of QDC Tool.

Those with system administrator access to QDC Tool can:

- view details of all current users of QDC Tool at your agency;
- provide access to new users of QDC Tool;
- change the access role assigned to a user;
- make specific users inactive;
- assign new passwords.

Searching for existing users

System administrator access only

1. Open the QDC Tool Main menu screen.
2. Click on the *Administration* menu and select *System User Maintenance...* to open the *Working with System Users* screen.

From here you can view a list of users of QDC Tool. You can list all users of the system or set limits to who is listed by searching for those with a specific name, role, or whether they are active or inactive.

List all users

To list all users in the system:

1. Click **New Search**.
2. Click **Find**.

A list of all users of QDC Tool (active and inactive) appears in the *Working with System Users* screen.

User Name	Family Name	Given Name	Role	Active
ADMIN	Admin	Admin	Admin	Y
AJONES	Jones	Arthur	Admin	Y
BLOGGSF	Bloggs	Fred	User	Y
BLOWAJ	Joe	Blaw	Admin	Y
FNERK	Nark	Fred	User	Y
SMITHJ	Smith	Jane	User	Y
USER	User	User	User	Y

Search by name

You can search by family name, given name or user name of any user. For a name search you can use an asterisk (*) as a wild card character: * therefore substitutes for any value in a sequence of characters.

For example if you wish to list all records for people whose names start with S, enter S* into the Family Name field.

1. Click **New Search** to clear all existing values on the screen.
2. Type a name (or part of a name followed by *) in either the Family Name, Given Name or User Name fields.

Note that you can search on all name fields at once if you wish and in combination with a role and active/inactive search.

3. Click **Find**.

A list of all users that matched the search criteria.

Search by role or by active/inactive

1. Click **New Search** to clear all existing values on the screen.
2. If you wish to search by role:
 - Click on the *Role* drop down list and select either **User** or **Admin**.

If you wish to search by whether they are active or inactive:

- Click on the *Active* drop down list and select either **Yes** or **No**.

Note that you can also search on both role and active/inactive and in combination with a name search.

3. Click **Find**.

A list of all users of the type you selected appears.

Sort the list

Any list of names in the *Working with System Users* screen can be sorted in any sequence.

- Do this by clicking on the headings at the top of the list: *Family Name*, *Given Name*, *User Name*, *Role*, and *Active*.

Adding a new user to QDC Tool

System
administrator
access only



1. Open the QDC Tool Main menu screen.
2. Click on the *Administration* menu and select *System User Maintenance...* to open the *Working with System Users* screen.
3. Click **Add** to open the *User Details* screen.

4. Enter the *User Name*, *Family Name*, *Given Name*.

User name is what you enter first when logging on. You can enter any sequence of characters you like, however, a good convention is to base the user name on the first initial and surname of the person (for example: Fred Bloggs would have the user name FBLOGGS).

If an existing user has exactly the same user name and you try to enter it, the system will **warn** you that the name already exists. You will not be able to enter the same user name.

5. Click on the dropdown arrow next to *Role* and select:
 - **User** if the person is to have normal user access.
 - **Admin** if the person is to have system administrator access.
6. Leave the *Active?* checkbox ticked if you are giving the person immediate access.
7. Click **Save**.
QDC Tool generates a new password for the user and advises you what it is.



8. Take down the new password so you can advise the user.

In case you forget, first passwords are always generated using the first 4 characters of the *user name* and a four-digit number based on the current day and month. For example, if the User name is AJONES and the date is 9 December the password will be AJON0912.

9. Click **OK**.

The new user is now listed in the window on the *Working with System Users* screen.

WARNING!

- If you **lose** your **password**, DHS **cannot** restore your system access.

Changing user details



You can change details of an existing user at any time.

1. Open QDC Tool, click on the *Administration* menu and select *System User Maintenance...* to open the *Working with System Users* screen.
2. Search for the user whose details you wish to change.
3. Click on the name of the user.
Note that the **Inactivate** and **Edit** buttons now become active.
4. Click **Edit**.
The *User Details* screen appears displaying current details of the user.
5. Change the details as required.

You will be able to change all of the user details except user name. If you try to change the user name you are advised that the name for this user already exists.

6. Click **Save**.
The new details will now appear in the *Working with System Users* screen.

Making a user inactive

Once a user is entered into QDC Tool you cannot delete them (i.e. completely remove the name) from the database. This is because every record in the QDC database is associated with the user who created it and who last changed it.

Never try to create a new user by changing details of an existing user.

If a user leaves the agency or has no more responsibility for entering QDC data then you can set their user status to **inactive**. Once you set a user to inactive, you can always activate them again in the future.

To make a user inactive:

1. Open QDC Tool, click on the *Administration* menu and select *System User Maintenance...* to open the *Working with System Users* screen.
2. Search for the user whose details you wish to change.
3. Click on the name of the user.
4. Click **Inactivate**.
A message appears asking if you wish to confirm the action.
5. Click **Yes**.
The user is now listed as inactive.

Making a user active

To make an inactive user active:

1. Open QDC Tool, click on the *Administration* menu and select *System User Maintenance...* to open the *Working with System Users* screen.
2. Search for the user you wish to make active.
3. Click on the name of the user.
4. Click **Edit**.
The *User Details* screen appears displaying current details of the user.
5. Click the *Active?* Checkbox so that it is ticked.
6. Click **Save**.
The user is now listed as active in the *Working with System Users* screen.

Changing a user role

To a change a user's role:

1. Open QDC Tool, click on the *Administration* menu and select *System User Maintenance...* to open the *Working with System Users* screen.
2. Search for the user.
3. Click on the name of the user.
4. Click **Edit**.
The *User Details* screen appears displaying their current details.
5. Click on the dropdown arrow next to *Role* and select:
 - **User** if the person is to have normal user access.
 - **Admin** if the person is to have system administrator access.
6. Click **Save**.
The user is now listed with the new role in the *Working with System Users* screen.

There must be at least one person with the role of system administrator within your organisation in order for all of the functions of QDC Tool to be accessed.

Assigning a new password

If a user forgets or compromises their password, you can issue a new password as follows:

1. Open QDC Tool, click on the *Administration* menu and select *System User Maintenance...* to open the *Working with System Users* screen.
2. Search for the user you wish to make active.
3. Click on the name of the user.
4. Click **Edit**.
The *User Details* screen appears displaying current details of the user.
5. Click **New Password**.
QDC Tool generates a new password for the user and advises you what it is.
6. Take down the details of new password so you can advise the user.
7. Click **Save**.

Backing up and restoring the database

Backup your data regularly. How often you do this depends on how often the data changes and how much work you would be prepared to do to re-enter the data that was not captured during your last backup. As a minimum, if you add data every day then you should back up every day.

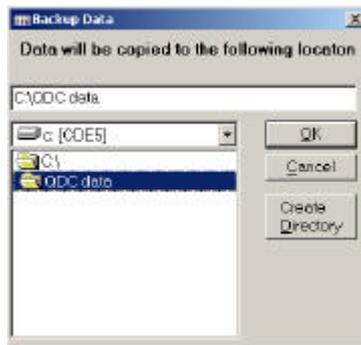
Remember: you can always get a replacement of QDC Tool from DHS, but only **you** will have a copy of all of your own data.

QDC Tool will back-up your data each time you close the system, but you can also run the function from the menu. The data is saved as comma separated value files (.csv), and only the data that you entered is copied (not the reference data and agency details provided to you by DHS). This means that the backup is fast and takes up little space.

Backing up the QDC Tool database

System
administrator
access only

1. Open the QDC Tool Main menu screen.
2. Click on the *Administration* menu and select *Backup Database...* to open the *Backup Data* screen.



3. In the browse area of the screen, select the drive and directory location where you wish to save your data.

It is good practice for backup files to be stored in a separate directory to any other files.

If you wish you can create a new directory to hold backup files:

- Click **Create Directory** to open this dialogue box.



- Type the correct drive (C:\, D:\ etc) followed by the name of the new directory. e.g. **C:\QDC\QDC data\backup files**
- Click **OK** to return to the *Backup Data* screen.

4. Click **OK**.

The back up process begins. If backup files already exist in the location you selected, you are asked if you wish to overwrite them.

- Click **Yes** to proceed. Otherwise, you are returned to the *Backup Data* screen to select a new location or drive.

When the process is complete the message *The Backup process has finished* appears.

5. Click **OK** to return to the QDC Tool Main menu screen.

Restoring the QDC Tool database

System administrator access only



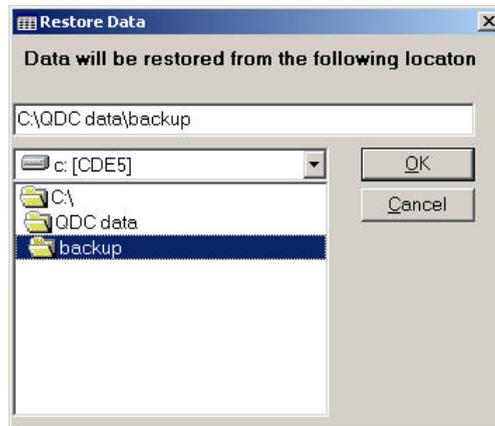
Restoring your QDC Tool database may be necessary if the existing database is corrupted or deleted, or if you need to install QDC Tool on a new computer.

If you are re-installing QDC Tool and want to re-use the existing database:

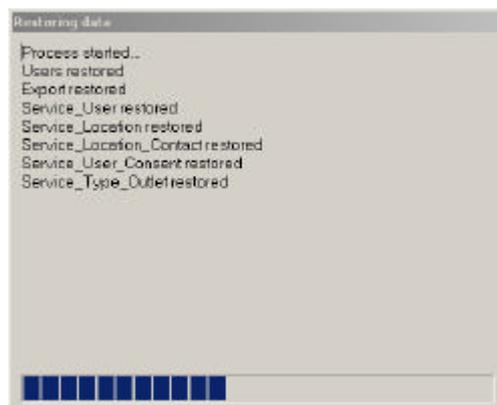
- re-install QDC Tool from CD and initialise the set-up.
- then use the *Restore Data* facility in QDC Tool to import the database.

If you are installing QDC Tool 2.0 **do not** try to restore from a database backup made using QDC Tool 1.1, as it will fail. Make sure you create a backup immediately after you install QDC Tool 2.0.

1. Open the QDC Tool Main menu screen.
2. Click on the *Administration* menu and select *Restore Database...* to open the *Restore Data* screen.



3. In the browse area of the screen, select the drive and directory location where the backup files are located.
4. Click **OK**.
The screen displays a progress bar when the restore process begins.



When the process is complete the message *The restore data process has finished* appears.

5. Click **OK** to return to the QDC Tool Main menu screen.

Changing your password

Passwords can be changed at any time by system administrators or ordinary users of QDC Tool.

You should always change your password the first time you use QDC Tool.

Preventing unauthorised access to QDC Tool is important, to protect the privacy of your service users and to ensure that incorrect or inappropriate data is not entered into the database.

Every record in the database has the user name attached to it. Changing your password periodically helps to ensure that no one else can make unauthorised entries of data in your name.

Changing the password

To change the password:

1. Click on the *Administration* menu and select *Change Password...*. The *Change Password* dialogue box appears.

2. Type your current password in the **Current Password** field.
3. Type your new password in the **New Password** field.
4. Type your new password in the **Confirm Password** field.

Remember that:

- what you type in the **New Password** and **Confirm Password** fields must be identical;
- passwords are case sensitive.

If you forget your password...

If you have user access only, contact your system administrator to have it reset.

If you are a system administrator, see Viewing agency details on page 123 for information on how to do this.

WARNING!

If the system administrator forgets or loses the password, DHS cannot open the database.

Glossary

Agency Codeno	A unique number provided by DHS that is used to match files to a funded agency.
AIHW	Australian Institute of Health and Welfare. The central data agency for the CSTDA.
AP&DC	Agency Performance and Data Collection. This is a DSD data collection to support performance monitoring.
CSDA	Commonwealth State Disability Agreement. Now known as CSTDA (see below).
CSTDA	Commonwealth State and Territory Disability Agreement (previously known as CSDA - the Commonwealth State Disability Agreement). This is a formal agreement signed by the Commonwealth Government and all State and Territory governments under which funding is provided to support specialist services for people with disabilities. In Victoria, these services are provided through DSD, PDRSS and the Early Intervention programs. Although data requirements for services provided by DSD and PDRSS are included in this guide those for services provided by Early Intervention are not, and are collected using another information system.
CURL	A command line tool for transferring files with URL syntax
Data item	A specific detail of information that equates to a question that has to be responded to during data collection for every service type outlet that provides DSD, PDRSS or HACC services and every service user that receives them. For example, the question: <i>To what extent does the service user participate in getting around outside without transport?</i> equates to the data item: <i>Participation: getting around.</i> There are many data items and they are classed according to whether they relate to: <ul style="list-style-type: none"> • service type outlets • service users. Data items are identified by an S or U , followed by a unique number and definition, e.g. <i>S 03, Weeks per quarter of operation, or U 003 Date of birth.</i>
DHS	Department of Human Services.
DHS activity type	The funding category through which services are provided to service users at the service type outlet. Where agencies are funded via a service agreement with the Department of Human Services, the funded activities should be consistent with those contained in the agency's service agreement.
DSD	Disability Service Division. The division of the Department of Human Services that funds services for individuals with a range of disabilities, excluding psychiatric disability.
Funded agencies	All agencies funded by DSD and PDRSS must submit data, as specified with this data guide, for each service type outlet. HACC agencies that wish to use the QDC Tool, instead of the existing HACC E -form or HACC forms must also submit data in accordance with this guide.
HACC	Home and Community Care. A program administered by the Aged Care Branch in Rural and Regional Health and Aged Care Services Division of the Department of Human Services.
HACC E-Form	Computer application distributed within Victoria by the HACC program to enable HACC funded agencies to record and submit data electronically each quarter for the purpose of reporting the HACC MDS.
HACC MDS	Minimum data set requirement for HACC funded agencies in accordance with the agreement between the state and civil governments.
In house systems	Computer systems developed or purchased by agencies to record information about their service users and associated service provision.

Jurisdictions	Refers to States and Territories
MDS	Minimum Data Set
MHB	Mental Health Branch
NMDS	National Minimum Data Set. Previously referred to as MDS (Minimum Data Set).
PDRSS	Psychiatric Disability Rehabilitation Support Services (previously referred to as Psychiatric Disability Support Services or PDSS). It refers to the program of the Mental Health Branch in the Metropolitan Health and Aged Care Services Division of the Department of Human Services, which funds rehabilitation and support services to individuals with psychiatric disability.
QDC	Quarterly Data Collection. The combined data collection covering the DSD, PDRSS and HACC.
QDC Tool	Computer application commissioned by the Department of Human Services, i.e. DSD in association with the PDRSS and HACC programs, to enable participating agencies to record and submit their data electronically each quarter.
QDC_ID	A DHS assigned number that identifies the quarter to which the data relates. This is a one up number for each successive quarter dating from the beginning of QDC. For example, the QDC ID for first quarter of the year in which the QDC began is 1 and 4 for the last quarter of that year. The QDC for the first quarter of the following year is 5 and 8 for the last quarter. Quarters are dated according to the financial year, not the calendar year.
Reference week	<p>Each quarterly reporting period contains a 7-day <i>reference week</i> as follows:</p> <ul style="list-style-type: none"> • Quarter 1 from 24 to 30 September; • Quarter 2 from 24 to 30 November; • Quarter 3 from 25 to 31 March; and • Quarter 4 from 24 to 30 June. <p>For Quarter 2 the reference week occurs in November to avoid the collection of data over 25 to 31 December, as this may not be a typical week.</p> <p>The concept of a reference week relates only to information provided by DSD and PDRSS services. It does not relate to HACC services.</p>
Registration ID	A number that uniquely identifies a computer installation within an agency. The ID comprises the Agency Code concatenated with a six-digit unique number assigned by the agency to each of their computer installations that collects QDC.
Reporting period	<p>The quarterly period over which QDC data is collected. Quarters for each financial year are as follows:</p> <ul style="list-style-type: none"> • Quarter 1 - July to September • Quarter 2 - October to December • Quarter 3 - January to March • Quarter 4 - April to June
SDE	Secure Data Exchange. The means by which the QDC securely transfers data across the Internet to the Departments' Central Repository.
Service	A service is support delivered to a service user. Services within the scope of the QDC are those for which funding has been provided by DSD, PDRSS or HACC programs.
service location	A physical location from which services are provided
Service type outlet	The delivery of a particular DHS activity type at or from a discrete service location. For example, where an agency is funded to provide 17035 <i>DSD-Recreation</i> and 17010 <i>DSD-Respite</i> , it is deemed to operate two service type outlets, each with a separate service type outlet code. Each service type outlet will therefore need to collect and report data.
Service user	A person with a disability who receives support from a service type outlet. A service user may receive more than one DHS activity type over a period of time or on a single day.

Snapshot day	The last Wednesday of the financial year. Where service type outlets are required to provide data in relation to service users, they will also need to record which service users received services on the snapshot day. This is to maintain consistency with previous CSTDA National Minimum Data Set collections.
System	The combination of hardware and application software. Each quarter an agency will extract and send to DHS one file for each of the agency's computer systems. In the majority of cases where an agency has an integrated client management system this would result in a single file containing data for the entire agency being generated and sent.
System number	These are six digit numbers that are assigned by the agency to each <i>system</i> that they operate. The agency can choose the method of assigning the number. It can be systematic in the form 000001, 000002, 000003 etc or completely random: 222222, 183876, 957643 etc just as long as each system within the agency has a unique number. This forms part of the Registration ID.
W3C	World Wide Web Consortium. See www.w3c.org .
XML	Extensible Mark-up Language. XML is being widely adopted in the computer industry as a standard for data transmission between disparate systems. XML is easily readable by humans and machines and is part of DHS' long-term strategy for data transmission between electronic systems. See www.w3c.org/XML
XML attribute	The word 'name' in the following XML example is an attribute: <title name="QDC Data Transmission"/> or <title>QDC Data Transmission</title>
XML element	The word 'title' in the following XML example is an element: <title name="QDC Data Transmission"/> or <title>QDC Data Transmission</title> XML elements are case sensitive. All XML elements must be closed as in the above example.
XSD	W3C XML Schema Definition. Used to define and validate an XML document structure. The XML Schema is a contract detailing what XML elements and attributes can be used. It defines an allowable structure and syntax for an XML document. See www.w3c.org/XML/Schema