



The Results Reporting Data Dock (R2D2) Instruction Manual

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Introduction

The purpose of this instruction manual is to provide you with step-by-step instructions on how to prepare your submissions using the Results Reporting Data Dock (R2D2) website.

Logging in

Accessing R2D2

1. Use Google Chrome, Mozilla Firefox or Microsoft Edge. Do not use Internet Explorer.
2. Access the R2D2 website at: <https://r2d2.dhs.sa.gov.au/>
3. Enter your email address and password¹
4. If you forget your password, use the “reset it” link on the Log In page.

Log In

Please enter your account details in the following fields to log in:

Email Address *

Email Address cannot be blank.

Password *

If you forgot your password you can [reset it](#)

Tips

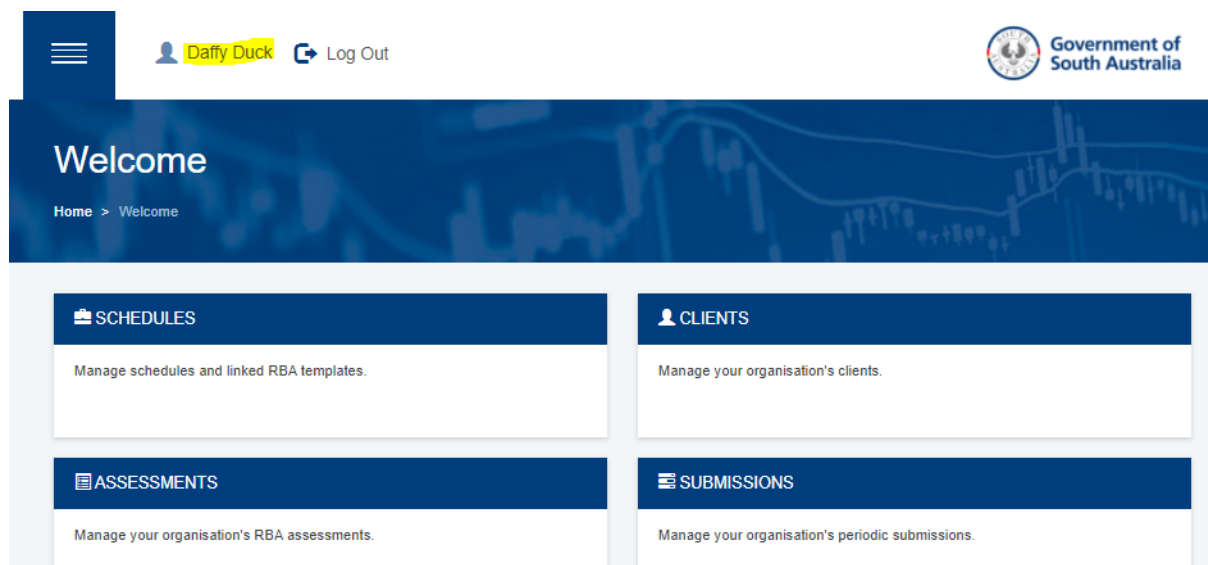
- Change your password the first time you log in (and regularly thereafter) to maintain security
- Your password must contain a mix of numbers, lower case and upper case letters – there is not a specific character requirement, but it will only let you set a password that is complex

¹ Note: DHS will email you your log in details when you first transition to R2D2, as part of the initial set-up. After this time, **it is the organisation's responsibility to set up new users (instructions on how to do this are contained in this manual)** – and to send out the log-in details to these new users.

- Password reset emails do not always get through spam filters. These emails will come from: noreply@communityci.com.au
- If you encounter any issues, please speak with your IT teams about spam filtering. For example, they may want to liaise with the mailbox providers to organise a spam filtering bypass for any emails coming from:
 - @communityci.com.au
 - @relay.communityci.com.au

Changing Your Password

1. Log in to R2D2
2. Click on your name at the top of the Home screen. (In the screenshot below, the name is “Daffy Duck”)



3. The User Account screen will display

Daffy Duck

Home > User Accounts > Daffy Duck

USER ACCOUNT DETAILS

First Name	Daffy
Last Name	Duck
Email	daffy.duck@sa.gov.au

CHANGE PASSWORD

Current Password *	<input type="password"/>
New Password *	<input type="password"/>
	<input type="password"/>
Confirm New Password *	<input type="password"/>

TWO-STEP VERIFICATION

Two-Step Verification	Disabled - Enable Two-Step Verification
-----------------------	---

☒ Update

Cancel

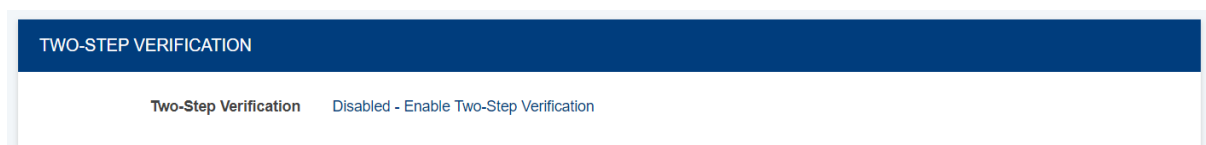
4. Enter your current password and new password
5. Confirm the new password
6. Click the blue “Update” button at the bottom left of the screen.

Set up Multi-Factor Authentication (MFA)

1. Log in to R2D2
2. Click on your name at the top of the screen (for example, "Daffy Duck")



3. Scroll down to the bottom of the page, and look for the heading "Two-Step Verification"



4. Click "Disabled – Enable Two Step Verification"
5. This takes you to a page with three key steps
 - a. For Step 1, download an app on your mobile device to support two factor authentication.
 - b. For Step 2, open the app and scan the QR code or manually enter the code provided by R2D2 into the app
 - c. For Step 3, take the verification code provided by the app and enter this into R2D2 where it says "Verification Code" (with no spaces between the numbers)

Step 3: Verify two-step verification token

Enter the verification code that appears in the application into the field below and click the verify button.

Verification Code

Different Types of User Accounts

There are four types of user accounts or roles, which determine what level of access you have. They are described below:

Worker

Can add clients and complete assessments for them²

² Only set up a user account as a 'Worker' if you have a Schedule RBA template set to an Individual data collection method. **See page 12-13** if you are unsure what this means or how to verify this.

Manager

Full access to organisation clients, assessments, schedules and submissions.

Administrator

Manager access plus can add user accounts

Referral and Placement Co-ordinator

Same access Administrators plus access to “Referrals” and “Placements.” Not widely used in R2D2. If in doubt about its relevance to you, check with your contract manager or R2D2 support staff.

Note

When DHS sets up initial user accounts, they are by default set up as an “Administrator.” After this, it is the organisation’s Administrator(s) who are responsible for managing the level of access their staff have.

If you are an **Administrator**, the home menu displays:

- Schedules
- Clients
- Assessments
- Submissions
- User Accounts.

If you have **Manager** level access, the home menu displays:

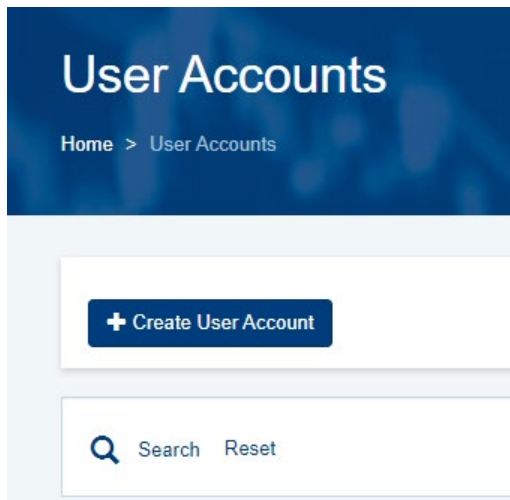
- Schedules
- Clients
- Assessments
- Submissions.

If you have **Worker** level access, the home menu only displays Clients and Assessments.

Adding New Users — Administrators/Referral and Placement Coordinators only

1. Login to R2D2 and click “User Accounts”

2. Before adding a user, search for them first to make sure this hasn't already been completed (the search button features in the screenshot below).



3. If you do need to add them, click the blue "Create User Account" button and enter the relevant details: First and Last name; Email address; Password; and Role
4. Click the green "Activate" button, which will enable access

Managing Users

You can update the Role of a user account in two ways.

First method to update the role

1. Login to R2D2 and click "User Accounts"
2. Use the search box to search for the user
3. Click on the 3 stacked dots at the end of the row of the user account you want to edit - and click "Edit" on the menu that pops up.

Second method to update the role

1. Click the name of the user (for example, Ozzie Bordercollie) which brings up a page with a blue "Edit" button on the top left of the screen.

Home > User Accounts > Ozzie Bordercollie

[Edit](#) [Deactivate](#)

USER ACCOUNT DETAILS

First Name	Ozzie
Last Name	Bordercollie
Email	ozzie.bordercollie@sa.gov.au
Status	Active

ROLE

Organisation	DCSI-Test
Role	Administrator

2. Click edit and change the “role”
3. Click “Update” to save your work

Deactivating Accounts

Deactivating the account means the user will no longer be able to log in to R2D2.

This is important in instances where a staff member or volunteer leaves. It helps protect the confidentiality of the data you upload and enter.

1. Login to R2D2 and from the Home menu click “User Accounts”
2. Use the search box to search for the user
3. Click on the user’s name to display the User Account screen.
4. Click the red “Deactivate” button at the top of the screen.

Understanding the Workflow of R2D2

To understand the work flow of R2D2, you need to understand whether you are an **individual** or **aggregate** reporter (or a combination of the two).

Are you an individual or aggregate reporter?

In order to check what type of reporter you are – you need to:

1. Navigate to the Schedules section of R2D2 on the top left of the Welcome screen.
2. Click the Schedule reference for example, “DCSI-Test-007”
3. This takes you to a screen that shows you Schedule (i.e. contract) details and lists Schedule RBA templates
4. Look in the Collection Method column (highlighted below) of your Schedule RBA template(s) – it will either say Aggregate Submissions or Individual Submissions. For example, in the screenshot below you can see that the Schedule RBA template requires Aggregate submissions.

The screenshot shows the R2D2 interface. At the top, there's a navigation bar with a menu icon, user 'John Doe', and a 'Log Out' button. The Government of South Australia logo is on the right. Below the navigation bar, the page title is 'DCSI-Test-007' with a breadcrumb trail 'Home > Schedules > DCSI-Test-007'. The main content area is divided into two sections: 'SCHEDULE DETAILS' and 'SCHEDULE RBA TEMPLATES'. The 'SCHEDULE DETAILS' section shows the following information:

Stream	CSSP > Youth Support & Development
Region	Barossa Light and Lower North
Start Date	01 Jan 2017
End Date	30 Jun 2021
Funding Amount	\$1,000,000.00
Reference	DCSI-Test-007

The 'SCHEDULE RBA TEMPLATES' section shows a table with the following columns: Name, Start Date, End Date, Due Date, Collection Method, and Status. The 'Collection Method' column is highlighted in yellow. The table contains one row:

Name	Start Date	End Date	Due Date	Collection Method	Status
Copy of Test template	01 Jan 2019	30 Jun 2019	31 Jul 2019	Aggregate Submissions	Active

Individual Reporters

As an individual reporter, you need to:

1. Add clients

2. Complete assessment(s) for each client³

- a. An assessment refers to a set of questions on the R2D2 website, which are to be answered for an individual client.
- b. They may be a Pre Service or Post Service assessment – see the next page for a more detailed explanation if you don't know what this means.
- c. The source of this RBA data may be a participant or worker-completed survey, practice tool, and/or another selected data collection tool.

3. Create a submission

When you create your submission after adding clients and completing assessments, data from the assessments will automatically appear. You will have the opportunity to answer additional questions and provide written information (for example, Story Behind the Data and/or Any Additional Information).

Pre- and Post-Service

Many funded programs using R2D2 undertake Pre- and Post-Service measurement.

Pre-Service

Pre-Service assessment acts as a baseline to track outcomes against and it is assumed that if a client is still engaging, it is because they are still working towards achieving outcomes.

Ideally the Pre-Service assessment will be completed for a client as close to the start of service as possible.

Post-Service

The Post-Service assessment is basically a new label for the assessments you have always completed. It can be used for clients who are still engaged with the service, and for clients who have completed and exited the service.

Multiple assessments

It's not recommended to do multiple Pre-Service assessments in a submission period.

However, if you were to complete multiple Pre-Service and multiple Post-Service assessments for a client, note that only the first Pre-Service assessment and most recent

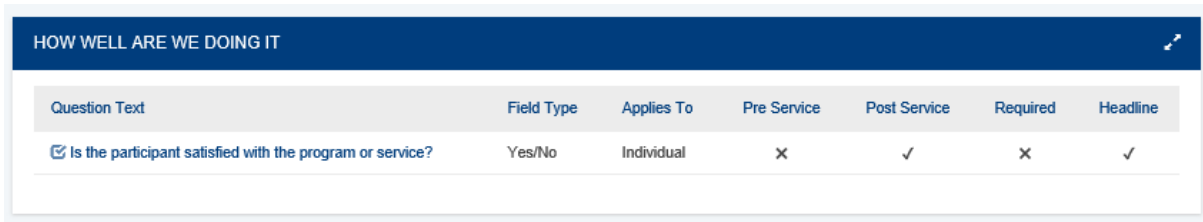
³ We ask that you assess 80% or more of the clients that are engaging with your service during the reporting period. Only data from the most recent assessment will be counted in the submission to DHS. You may wish to do more than one assessment to track change for individual clients within a reporting period, this data will be available within your organisation

Post-Service assessment in the reporting period are counted towards the submission (that is, one Pre-Service and one Post-Service assessment).

How do I tell if I should be doing Pre- and Post-Service measurement?

You have multiple options for finding out:

1. You can check the Schedule RBA template in R2D2
 - a. From the home menu, click on “Schedules”, then click on the appropriate Schedule and then the Schedule RBA template – it will show you the list of questions that need to be answered, as well as their question properties:



HOW WELL ARE WE DOING IT						
Question Text	Field Type	Applies To	Pre Service	Post Service	Required	Headline
<input checked="" type="checkbox"/> Is the participant satisfied with the program or service?	Yes/No	Individual	✗	✓	✗	✓

A “tick” symbolises it is asked at this time point, an “X” symbolises it is not – for example, the above screenshot tells us that the satisfaction question is only asked at Post Service

2. Alternatively, you can try completing an assessment in R2D2 (step-by-step instructions on how to do this can be found on page 24) via:
 - a. Direct Entry
 - i. If you try and do a Pre Service assessment via direct entry and there are no Pre-Service questions to answer, you will get an error message that reads “the assessment type is not available for this Schedule RBA template” – as per the below screenshot

Create Assessment

Home > Assessments > Create Assessment

This Assessment Type is not available for this Schedule RBA Template

ADMINISTRATION

Client * Search for a record +

Client cannot be blank.

Template * DCSI-Test-007 - Test of the start date - Jul 2019

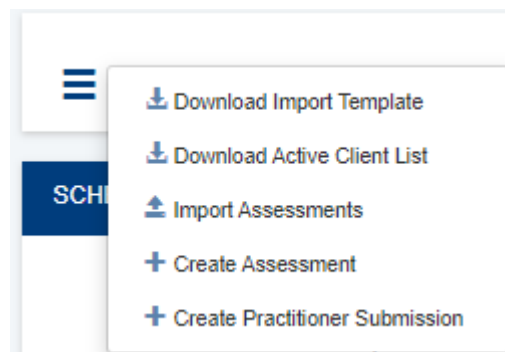
Assessment Type * Pre Service

Assessed By * Practitioner

Create Cancel

b. Bulk upload

- i. If you go to download the bulk import assessment template by clicking “Download Import Template” from the pop-up menu



- ii. On the next page you need to nominate an “Export Type”

Previous Next

Step 1: Select any required fields and click Next to continue. To go back, click Previous button..

Export Type * Pre Service

- iii. The options for the “Export Type” are determined by what types of questions appear on the template. For example, you can only download a bulk import template with a pre service phase if pre service questions exist, and vice versa

3. Finally, you can always get in touch with R2D2 support staff if you get stuck.

Aggregate Reporters

As an aggregate reporter, you need to:

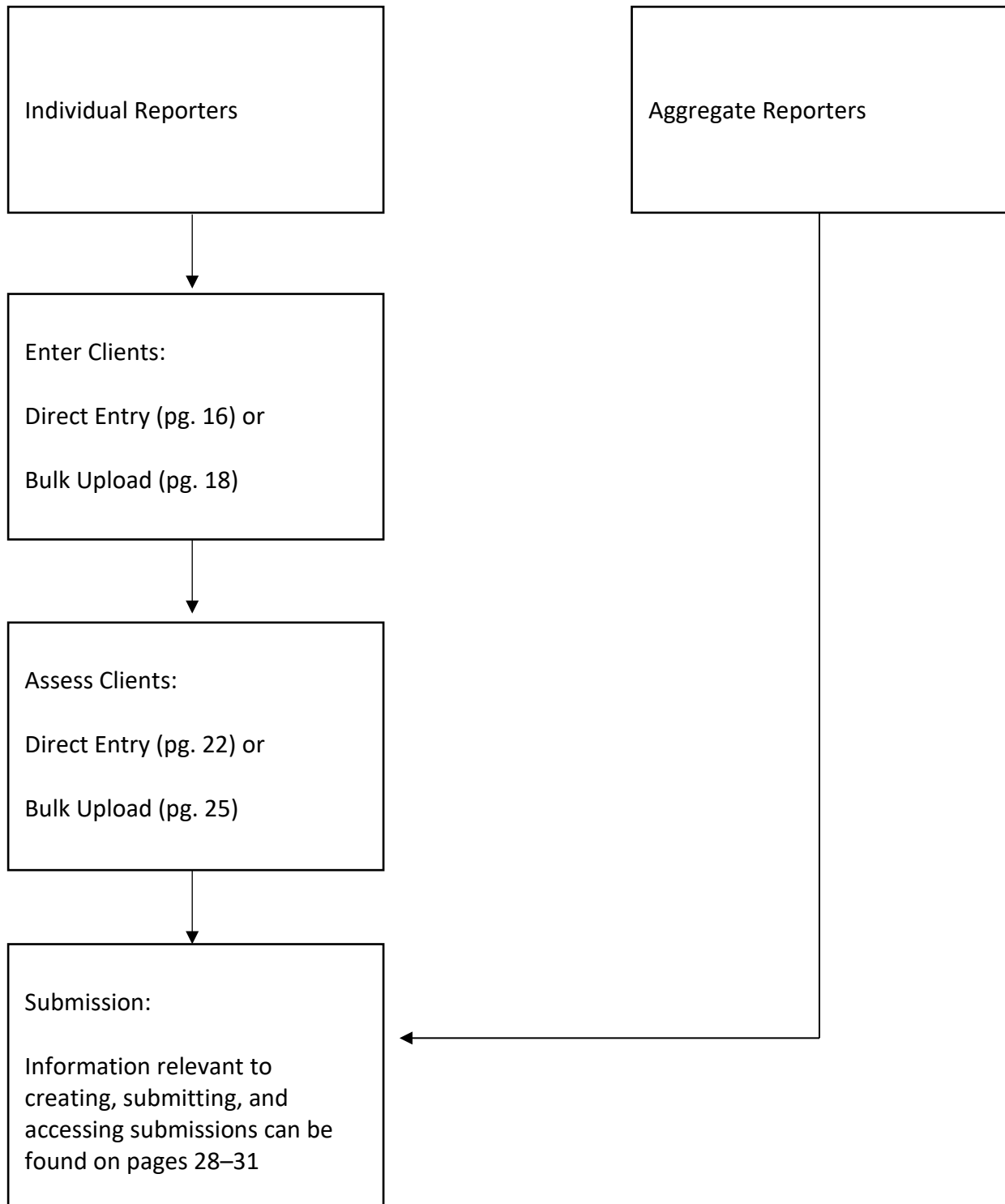
1. Create a submission
2. Enter data directly into the submission - you will have the opportunity to answer additional questions and provide written information (for example, Story Behind the Data and/or Any Additional Information).
3. Save
4. Submit – including ticking the box to confirm you wish to submit the submission

You do **NOT** need to add clients or complete assessments for an Aggregate Submission.

If you have multiple templates, you may have a **combination** of the above. There is a Glossary on **page 43** if you need further clarification.

Workflow diagram of individual versus aggregate reporters

Below represents the work flow of individual versus aggregate reporters, noting that in R2D2 there are two ways to add clients and two ways to assess clients.



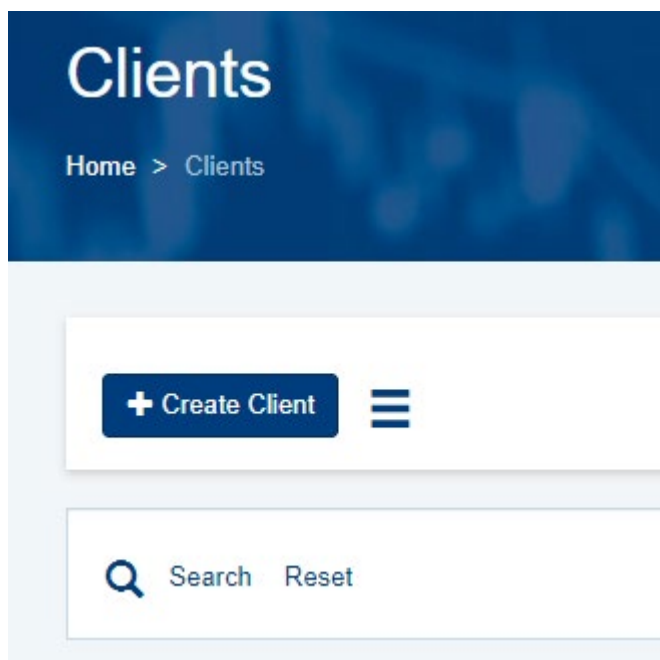
[Workflow diagram plain text description](#)

Managing Clients – *individual reporters only*

There are three ways to enter clients:

Direct Entry

1. From the Home menu, click “Clients”
2. Search to see if clients have already been added⁴ by using the search button



3. If they have not been entered before, click the blue “Create Client” button
4. This brings up a screen that looks like this:

⁴ As much as possible, we want to reduce the likelihood of having duplicate clients in the R2D2 system. You should also check that the unique ID you are assigning to an individual, is not already in use.

CLIENT DETAILS	
Unique Identifier *	<input type="text"/>
	<i>Unique Identifier cannot be blank.</i>
First Name *	<input type="text"/>
Last Name *	<input type="text"/>
Date Of Birth	<input type="text"/>
Year Of Birth *	<input type="text"/>
Email	<input type="text"/>
Mobile	<input type="text"/>

RESIDENTIAL ADDRESS DETAILS	
Residential Address	<input type="text" value="Type your address"/>
Notes	<input type="text"/>
Street Number	<input type="text"/>
Street Name	<input type="text"/>
Street Type	<input type="text"/>
Suburb	<input type="text"/>
Postcode *	<input type="text"/>

DEMOGRAPHICS	
Gender	<input type="text" value="- select -"/>
Aboriginal Status	<input type="text" value="- select -"/>
CALD Status	<input type="text" value="- select -"/>
Disability	<input type="text" value="- select -"/>

Which asks for the following information:

1. **Unique identifier** – this can be numbers, letters, or a mixture of both. The Unique Identifier is **very important for reducing the likelihood of duplicate clients being entered into the system**. If you use a Client Management System, your clients most likely have a unique identifier already, and this should be used in R2D2. Otherwise, you will need to develop a way to assign and record unique identifiers for each individual client.
 - i. If you need to develop your own unique identifier, an example could be using the first three letters of a client's first and last name and their DOB.

- ii. For example, John Doe born 01/02/1970 would have the unique identifier JohDoe01021970
 - iii. Make sure the unique identifier you assign to a client is not already in use – you can do this by searching in the “Clients” section of R2D2. Otherwise, R2D2 will think that you are trying to update client information, and may overwrite the details of a client that is already in the system with that unique identifier.
- 2. **Client details – it is compulsory to provide a Client’s first and last name,** However, the email and mobile phone number⁵ sections are optional.
 - 3. **Residential Address Details** – you can search for the full address or enter it manually. Postcode is the only compulsory field.
 - 4. **Client demographics** – a client’s DOB (or at a minimum, year of birth) is compulsory.
 - 5. Other demographics such as Gender, Aboriginal status, CALD status and Disability status are typically mandated at point of assessment but still answered here using drop down answer boxes
 - 6. Once you finish adding Client details, you need to click the “Activate button” – as only active clients can be assessed.

Bulk upload of clients

Note: users with Worker level access are unable to upload clients in bulk

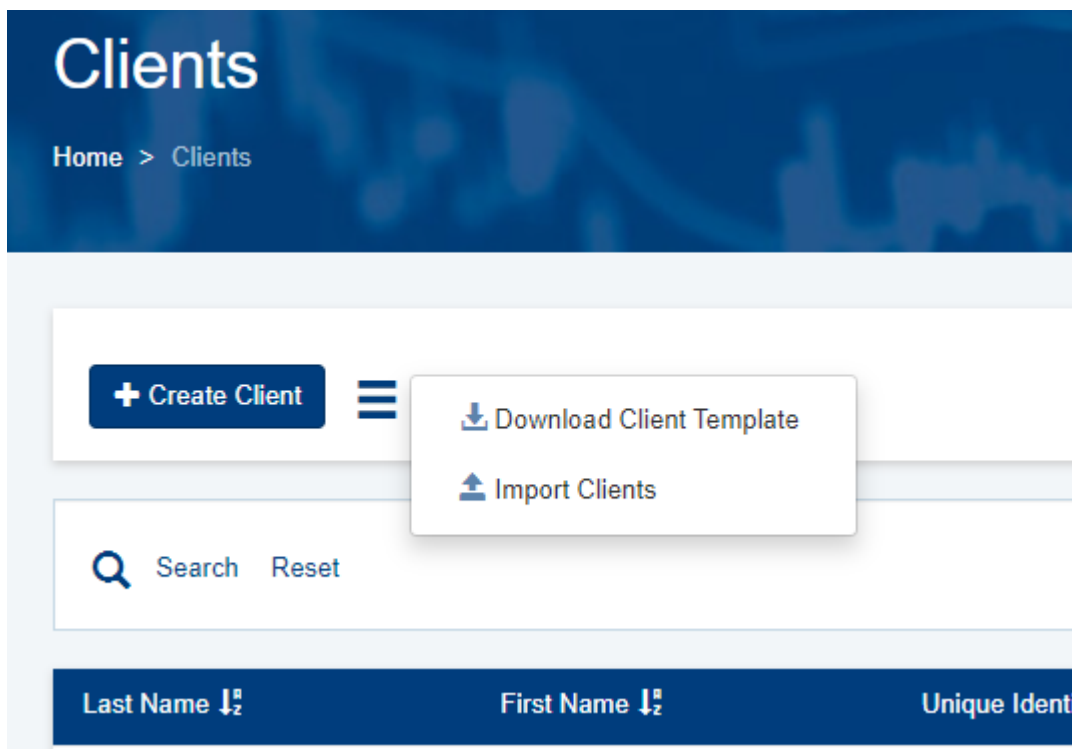
- 1. From the Home menu, click “Clients”
- 2. Click on the three stacked lines (to the right of the “Create Client” button) and select “Download Client Template”
- 3. Choose an Export option, “Blank Template” or “All Data” and then click next
 - a. “Blank Template” will download with no data apart from column headings
 - b. “All Data” will download with the details of previously added clients
- 4. This downloads an excel spreadsheet – with column headings that match the fields required when adding Clients via “Direct Entry” (see screenshot below)

⁵ Note: landline number formats are not accepted as valid by R2D2. The rationale underpinning this is because these contact details may be used in the future for directly emailing or texting survey links to clients.

OFFICIAL

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R
1	Unique Id	First Name	Last Name	Email	Mobile	Date Of Bir	Year Of Bir	Street Num	Street Nam	Street Type	Suburb	Postcode	Verified	Gender	Aboriginal	CALD Status	Disability	Status
2																		
3																		
4																		
5																		
6																		
7																		
8																		

5. Complete the spreadsheet, noting that:
 - a. Dates must be formatted YYYY-MM-DD
 - b. If there is a drop down list of possible answer responses, you must select from this list – **do not** type in your own response.
 - c. In the status section select Active so that you do not have to search for clients in the system and Activate them later.
6. Save the spreadsheet somewhere on your computer
7. In R2D2, once again click on the three stacked lines. Select “Import Clients”



This brings up a screen, where you need to browse for your saved Client Import Template.

Home > Clients

Previous Next

Important: Date Of Birth must be in format YYYY-MM-DD

Step 1: Click Choose File button to browse PC, locate a CSV or XLSX file type and click Next to continue. To go back, click Previous button.

File * Browse...

8. When you have selected the saved file, click “Next”
9. This brings up a screen where you check to see that the column headings in excel are being correctly matched to the data fields in R2D2:

Home > Clients

Previous Next

Step 2: Match column headers to data and click Next to continue. To start again, click Previous button.

Unique Identifier *
Unique Identifier ▼

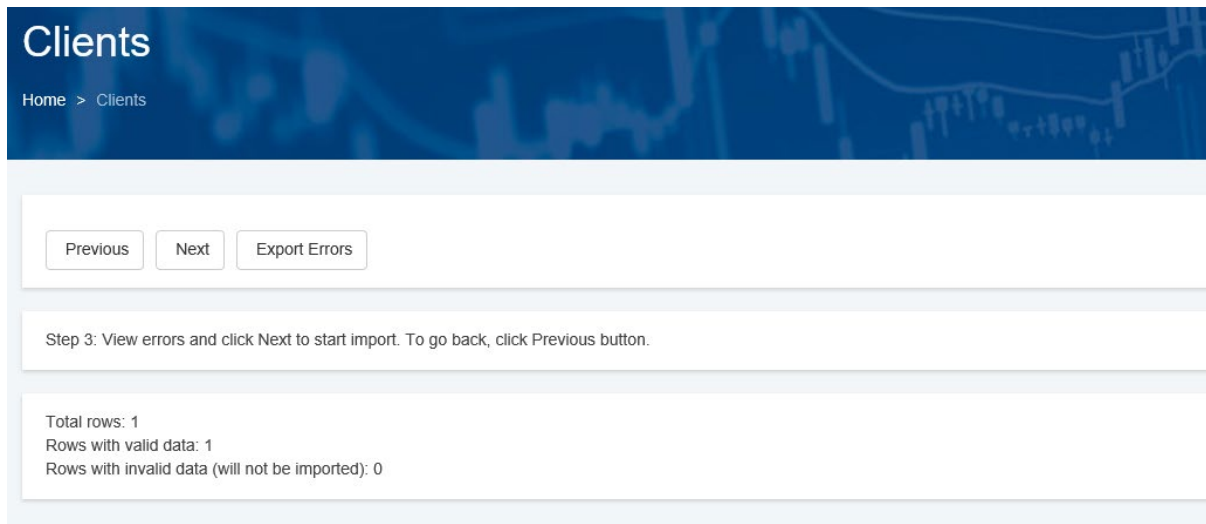
First Name *
First Name ▼

Last Name *
Last Name ▼

Email *
Email ▼

Mobile *
Mobile ▼

10. If you are satisfied it is being matched correctly, click “Next”
11. The next screen looks like this:



12. Only “Rows with valid data” will be successfully imported.

13. If you click “Next” – the import process is complete

14. If you have “Rows with invalid data” – don’t click “Next”, instead:

- a. Click “Export Errors” – which will generate a report in Excel describing why the data has been deemed invalid – which you can fix.
- b. Click “Previous” until you are back at the screen where you browse and select your file
- c. Use the error report to guide you in fixing up any errors on your bulk Client Import Template
- d. Save any changes you make
- e. Browse and select the updated file, and follow the steps above until the import process is complete

Note, if you Bulk import assessments with new clients the new client details will be added to the system and activated. If you add clients to the system this way, you will not be able to add their email address or mobile number. See page 27 for more instructions about bulk importing assessments.

Tips

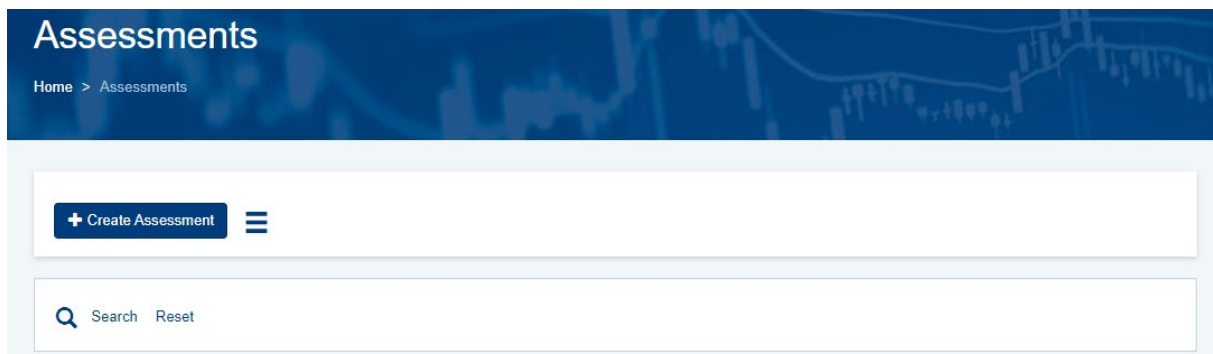
- Reactivate clients (if they have been deactivated) when they return to the service – **don’t** add them again
- If you accidentally add a duplicate, make sure one is deactivated as soon as possible – preferably the client with no assessments against them

Managing Assessments – *Individual Reporters only*

There are two ways to collect assessments against a RBA template:

Direct Entry

1. Navigate from the Home Menu to “Assessments”
2. You can search to see if a client has been assessed – multiple assessments for a particular assessment type per client are possible, but R2D2 only counts the most recent assessment in the reporting period towards the submission to DHS
 - f. By assesment type, we are referring to Pre or Post Service.
 - i. If you do a pre service assessment and a post service assessment for a client, both get counted
 - ii. If you do one pre service and multiple post service assessments for the same client, the pre service assessment and the most recent post service assessment will get counted



3. If you want to create an assessment, click the “Create Assessment”. This brings up a screen that looks like this:

Create Assessment

Home > Assessments > Create Assessment

ADMINISTRATION

Client * Search for a record +

Client cannot be blank.

Template * DCSI-Test-007 - Test of the start date - Jul 2019 ▼

Assessment Type * Post Service ▼

Assessed By * Practitioner ▼

✓ Create Cancel

4. In the “Client” box you can search for client or, you can create a new client by clicking the plus sign
5. In the “Template” box you need to select the appropriate template from the drop down menu.

For some organisations, there may be only one template, but for other organisations there could be multiple.

Importantly, in certain months there will be identically named templates available, that differ only by the month in the title. The month in the title refers to the FIRST month of the reporting period.

For example, for six monthly reporting, a template with “Jan” in the title will count towards the Jan–June period, a template with “Jul” in the title will count towards the July–December period.

For example, for quarterly reporting, a template with “Jan” in the title will count towards the Jan–March period, a template with “April” in the title will count towards the April–June period, a template with “Jul” in the title will count towards the July–September period and a template with “Oct” in the title will count towards the October–December reporting period.

6. In the “Assessment Type” – you need to select whether you are completing a Pre or Post Service assessment. If you are confused by this terminology, see pg. 14.
7. In the “Assessed By” box, you need to leave the answer as “Practitioner.”
8. When you click the “Create” Button, this creates a draft assessment – which you can begin completing. The screen will look something like this:

ADMINISTRATION

Client Toby Baldock

Template Test of the start date

Assessment Date * 28 Oct 2019

Engagement Start *

Engagement End

Assessed By Practitioner

HOW WELL ARE WE DOING IT

Is the participant satisfied with the program or service?

- select -

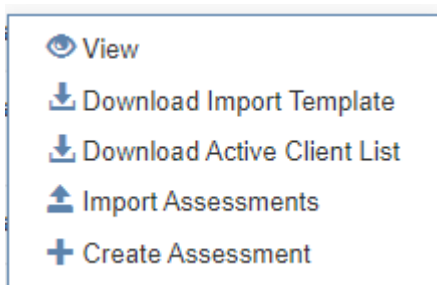
9. Client name and Template name - are pre-populated, based on your previous selection
10. Assessment date – must fall within the start and end date of the template. You will receive an error message if it does not. Other things to note:
 - a. It is pre-populated with the current date – though you can change this.
 - b. It must be after the client’s engagement start date.⁶
 - c. It is mandatory.
11. Engagement Start – this is the date the client commenced with your service or program. can refer to a date in the current reporting period, or a date prior to this. It is mandatory.
12. Engagement End – This is the date the client completed or exited the service. If the client is still active in the service the engagement end date remains blank this is not mandatory, as it is possible the client is still engaging with the program when you are completing the assessment.
13. The rest of the assessment contains the questions that you must complete for the client.
14. Scroll to the bottom of the assessment and click “Update” – this will save the data you have entered as a draft – this means that you can return to the assessment and edit it later (by locating the assessment and clicking “Edit”).

⁶ This is a logic rule, because it does not make sense to assess a client before they start engaging with the program.

15. If you have finished completing the assessment – click “Mark As Completed” – this changes the status of the assessment to “Completed”. Note: Only completed assessments will be counted towards a submission.
16. If you have Manager, Administrator or Referral and Placement Coordinator level access, you can send assessments back to draft by clicking “Revert Completed” – this is useful if you notice a mistake.

Bulk Import

1. From the Home menu, click Schedules
2. Select the appropriate Schedule (there may be multiple options)
3. Hover over the the three stacked dots at the end of the template you want to complete assessments for.
4. Remember, you can only complete assessments for a Schedule RBA template with a Collection Method that is “Individual Submissions.”
5. This will bring up a pop up menu with a “Download Import Template – as depicted below:



6. Select “Download Import Template” and you will see a screen like this:

7. Select whether you want to download a Pre or Post Service bulk import template (you will only have both options if there are questions to answer at both pre and post service) for “Export Type”
8. You also need to select the “Export Period” (i.e. whether to download an “Empty template”, a template with clients who were assessed in the previous reporting period “Previous Period Data”, or a template with all clients who have been assessed historically against the template, “All data.”
9. Click next when you have made your selections
10. Click “Download File”
11. This will download an excel spreadsheet. It is similar to the Client Import Template, but has additional column headings that represent questions answered on the pre or post service assessment

Remember...

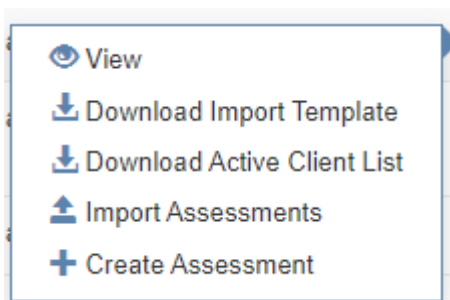
You can add the details of a client who has not been added to R2D2 before to the bulk assessment import template

You can choose to download a blank bulk import template, or a template with clients that have been assessed historically, if you need to assess them again.

You can't have different assessment types (e.g. pre and post service) on the same bulk import template

12. Once you have saved your file and are ready to upload – return to the same Schedule and locate the correct Schedule RBA template (be mindful of the Start and End dates). Once again, hover over the 3 stacked dots at the end of the row to bring up the pop-up menu

This time – select “Import Assessments”



13. Browse for your saved file

The screenshot shows the 'Templates' page with a blue header. Below the header, there are 'Previous' and 'Next' buttons. A yellow box contains the text: 'Important: Assessment Date, Engagement Start, Engagement End must be in format YYYY-MM-DD'. Below this, a white box contains the text: 'Step 1: Click Choose File button to browse PC, locate a CSV or XLSX file type and click Next to continue. To go back, click Previous button.' At the bottom, there is a file selection area with the text 'File *', a text input field, and a 'Browse...' button.

14. Complete the column matching exercise

The screenshot shows the 'Templates' page with a blue header. Below the header, there are 'Previous' and 'Next' buttons. A white box contains the text: 'Step 2: Match column headers to data and click Next to continue. To start again, click Previous button.' Below this, there is a form with five dropdown menus, each with a label and an asterisk: 'Unique Identifier *', 'First Name *', 'Last Name *', 'Date Of Birth *', and 'Year Of Birth *'. Each dropdown menu has a text input field and a downward arrow button.

15. When you are satisfied that the column headings match up, select “Next”

16. The screen will then look similar to this:

Templates

Home > Templates

Previous Next Export Errors

Step 3: View errors and click Next to start import. To go back, click Previous button.

Total rows: 1
 Rows with valid data: 1
 Rows with invalid data (will not be imported): 0

17. Much like when importing clients in bulk, only “Rows with valid data” will be successfully imported. If you have “Rows with invalid data” – don’t click next:

- a. Click “Export Errors” – which will generate a report in Excel describing why the data has been deemed invalid – which you can fix.

18. Click “Previous” until you are back at the screen where you browse and select your file

19. Use the error report to guide you in fixing up any errors on your bulk Client Import Template

20. Save any changes you make

21. Browse and select the updated file, and follow the steps above until the import process is complete

Tips

- columns will have dropdown lists to show you what values can be entered. R2D2 will not accept responses that deviate from the dropdown list.
- assessments uploaded from a template will be automatically marked as complete

Managing Submissions

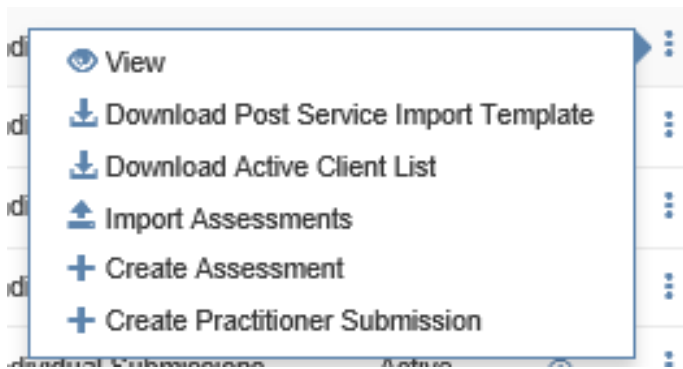
A submission is the periodic report that you submit to DHS. You need to create and submit one submission for each Schedule RBA template.

In some instances, you may have multiple Schedule RBA templates in a schedule – for example, if you report on client outcomes and collaboration outcomes.

Whether you are an individual or aggregate reporter will determine how data gets entered into a submission. This will be explained below.

Creating Submissions

1. Click on the Home button
2. On the Home screen, click Schedules – and then click on the appropriate Schedule (the schedule reference acts like a hyperlink/button)
3. Locate the Schedule RBA template that you want to create the submission for (make sure the Start and End date refer to the relevant reporting period)
4. Hover your mouse over the three stacked dots at the end of the row which will bring up a pop-up menu (see below) and click “Create Practitioner Submission”:



Completing Submissions

See the FAQ (pg.39) and “Notes on Data Collection” (pg.42) for additional information.

1. The first section to complete on a Submission is the “Participation and Assessments”
 - a. Number of **new participants** active in this period: this is the total number of clients new to the service who have been active in the 6 month reporting period
 - b. Number of **returning/continuing participants** active in this period: this is the total number of clients returning to the service or continuing in the service from the previous reporting period.
 - i. Continuing clients are clients who were receiving services in the previous reporting period, did not exit the service and have received services in the current reporting period.
 - ii. Returning clients are clients who have received services in any previous reporting period (under the current service agreement),

exited the service previously, and who have returned to receive services in the current reporting period.

- iii. Note: If you cannot discern whether a client is new or returning, count them as new – and then put in place mechanisms for tracking this for the next reporting period.
- c. **Accumulated total:** total number of unique people in your program to date – this will be calculated automatically.
 - i. For the first reporting period the accumulated total is the sum of the new and returning participant counts.
 - ii. In subsequent periods it is the sum of the current period's new participant count and the previous period's accumulated total.
- d. **Number of unique participants assessed:**
 - i. If you are an individual reporter, this will be calculated automatically based on the number of participants you have completed at least one pre service or one post service (or both) assessment for
 - ii. If you are an aggregate reporter, you need to enter the number of clients that you have collected RBA data for.
 - iii. Note: the number of unique participants assessed should be smaller than the sum of the number of new and returning participants. This is a logic rule because it doesn't make sense to assess more clients than were active in the period.
 - iv. An illustrative example:

You are a service with 12 participants during a reporting period. For:

10 of your participants you complete one pre-service assessment and two post-service assessments

1 participant , you just have the opportunity to complete one pre-service assessment for them (i.e. NO post-service assessment)

1 participant you do not complete any assessments

This means that you have completed 11 pre-service assessments and 20 post-service assessments - and that there are 11 unique participants assessed.

The denominator for the calculation of any percentages for Pre Service assessments will be 11 (as 11 participants had a pre-service assessment completed for them)

However, the denominator for the calculation of any percentages for Post Service assessments will be 10 (as only 10 participants had a post-service assessment completed and only the most recent Post Service assessment will be counted towards your submission).

Note: If you are an aggregate reporter, you will just be entering Post Service data. Therefore, the number of unique participants assessed will become the denominator for any # and % questions on your submission.

2. Measures and the Story Behind the Data

- a. If you are an aggregate reporter, you will need to enter all summary figures and story behind the data here – including the demographics of the participants that you assessed
- b. If you are an individual reporter, the majority of the data will have been extracted from assessments – but you will still need to answer the questions that appear on submission only, and the story behind the data / any additional improvements section.

3. Save your submission regularly – you can also save your submission as a draft and return to it later for additional editing.

- a. When you return to the Submissions section of R2D2 – it will appear in the list in “draft” form – you will not be able to “Create” it again

A Note on R2D2’s “Time Out” Function

R2D2 has a timer function where it will log you out if it registers a period of inactivity (of 60 minutes).

Importantly, if you begin working on your submission – but do not save within the 60 minutes – this will not be registered as “activity” and there is the potential that you will be logged off, losing the data you have entered in the process.

To address this issue, make sure you save regularly.

Another strategy to consider is to type your written responses in a word document and copy into your submission.

Viewing and Editing Submissions

These steps assume you have already created the draft submission. If you have not, please see the instructions about creating submissions first.

1. From the home menu, click Submissions
2. You can search for the submission using the “Search” and the filters
3. In the below screenshot, we can see a Draft Submission

Schedule RBA Template	Schedule	Start Date	End Date	Due Date	Sent On	Type	Status
Multiple Pre Service Question Test	DCSI-Test 008	01 Jan 2020	30 Jun 2020	31 Jul 2020	(not set)	Practitioner	Draft

4. Click on the name to view the data
5. If you wish to edit, you need to select the blue “Edit” button



Submitting Submissions

1. Ensure you submit your submission before the End Date

- a. To submit, click the green “Submit” button



- b. R2D2 will instruct you to “Please scroll down and confirm Submission”
- c. Scroll to the bottom of the page (checking over your Submission for any errors as you do this)
- d. If you find an error – click the blue “Edit” button
- e. If you are happy with your submission, tick the box at the bottom of the page confirming you want to submit, and click the Blue submit button
- f. You will get a notification say that your submission has been submitted

Notes

- ✓ DHS **cannot** see the content of your submission until you submit
- ✓ DHS does **not** received identified client information – just deidentified data

Submitting Submissions with a 0-participant count

If you are an **Individual Submissions reporter** and haven’t completed any assessments, the assessed count will display as 0 when you create the submission. All questions that relate to assessments will be hidden, but certain questions that apply to an Organisation will still appear and require an answer (for example, the New and Returning Participant count).

If you are an **Aggregate Submissions reporter** you need to:

1. Make sure you have clicked “Edit” on the submission
2. change the **Submission scope** from “Standard” (see screenshot below”)

ADMINISTRATION	
Schedule RBA Template	CND Annual Volunteer Outcomes
Schedule	CND-01
Start Date	01 Jul 2021
End Date	30 Jun 2022
Due Date	31 Jul 2022
Submission Scope *	Standard

3. And change this to “No Assessed Participants”

ADMINISTRATION	
Schedule RBA Template	CND Annual Volunteer Outcomes
Schedule	CND-01
Start Date	01 Jul 2021
End Date	30 Jun 2022
Due Date	31 Jul 2022
Submission Scope *	No Assessed Participants

- This will hide irrelevant questions that relate to the assessed participant count and allow you to submit with a 0 assessed count. You will still need to answer some questions that apply to an organisation.

Viewing Historical Submissions

- From the home menu, click Submissions
- You can search for the submission using the “Search” and the filters
- The status will say “submitted” for historical submissions.
- Click on the submission that you want to view, in order to look at the data you submitted. They will be locked from editing to preserve data integrity
- You can print your submissions just like you can print a website (by clicking Tools > Print).
- To save submissions as a PDF you can use Windows 10 or Adobe Acrobat or some internet browsers (for example, Firefox, Safari, Chrome) provide features where you can save web pages as PDFs or print to pdf.
- When saving as a PDF, you may need to tick the box “Background graphics” under “More Settings”

More settings



Paper size

A4



Pages per sheet

1



Margins

Default



Scale

Default



Options



Headers and footers



Background graphics

Frequently Asked Questions (FAQs)

I added a duplicate client by mistake

This only applies to Individual Reporters.

Deactivate the duplicate as soon as you realize to prevent accidentally assessing them. Where possible, deactivate the client who doesn't have an assessment against it.

I started assessing a client against the wrong template

This only applies to Individual Reporters.

Assessments left in "Draft" are **NOT** counted towards the submission – so whilst you cannot delete an assessment, you can leave it in "Draft" and rest assured it will not affect the data you submit to DHS.

I assessed the wrong client by mistake

This only applies to Individual Reporters.

Assessments left in "Draft" are **NOT** counted towards the submission – so whilst you cannot delete an assessment, you can leave it in "Draft" and rest assured it will not affect the data you submit to DHS.

Why are identically named templates appearing?

DHS provides an additional month after the reporting period ends, so that there is sufficient time to prepare submissions. For example, for the Jan 01 – June 30 period, reports are not due until July 31. Therefore, the Jan 01 – June 30 template will remain active for the month of July, but the July 01 – December 31 template(s) will also be active. Thus, it is important to pay attention to the dates of the template when creating assessments and/or submissions. See page XX for more explanation.

I have forgotten my password

Remember there is a "Reset it" link on the log-in page of R2D2 – see pg. 4 for details. A colleague with Administrator level access can also edit your account from the "User Accounts" section. DHS cannot reset your password.

Are clients' details protected?

DHS makes available a secure and well governed data platform for service providers to enter participant information. The R2D2 platform is hosted in the Amazon Web Services (AWS) data centre in Sydney, Australia which provides network level protection. Amazon AWS data centre utilises cloud infrastructure technology which is backed by a set of cloud security tools, with 230 security, compliance and governance services and features. Access

to the R2D2 platform is controlled through unique role-based login. Logins are managed by each organisation, so that they have control over who has access to the information entered. The R2D2 database is partitioned to ensure that DHS never has access to identified participant data. DHS access to the system is controlled through unique role-based login and governed by access protocols and guidelines. Data encryption applies to participant information and some submission information to ensure private confidential information including identifiers and contact information is not compromised.

Why am I getting a validation error?

Regardless of whether you are an individual or aggregate reporter, the sum of your “new” and “returning” participant count must be equal to or greater than the “unique participants assessed” count. This is because logically, you cannot assess more clients than were active in the period.

Further, if you are an aggregate reporter, it is important to understand that the unique participants assessed count becomes the denominator for any question that calculates a % based on the numbers you enter.

For example, if this is the participant count:

PARTICIPATION AND ASSESSMENTS

Number of new participants active in this period

100

Number of returning participants active in this period

50

Accumulated total

150

Number of unique participants assessed in this period

49

Then we would expect the responses to a question such as the one below, to add up to 49 (the unique participants assessed count) – which it does. This means the % sums to 100% - which it should.

HOW WELL ARE WE DOING IT

Is the participant from the priority group?

	Post Service	%
Yes	27	55%
No	22	45%
Not Assessed / Blank	0	0%

Notes on Data Collection

The outcomes data you collect can and should be used to drive continuous quality improvement.

In order to do this, accurate data is required.

We don't expect

- 100% rates for the performance measures

We do expect

- Realistic rates
- At 80% assessment rate – meaning at least one assessment is completed for 80% of your active clients (particularly if you deliver case management / one-on-one services)
- Explanations for trends in the data
- Descriptions of how data is collected
- A commitment to continuous improvement

This can be emphasised in your **performance reviews** and in the “Story Behind the Data” sections, explanation below:

Story Behind the Data

This section provides a real opportunity to contextualise reported figures and trends in the data for your specific outcomes measures . For example, how does this reporting period compare to previous reporting periods – and what are the reasons for any change (or lack thereof?)

It is also a good opportunity to describe how this data is being measured.

This information can be concisely communicated in a paragraph (or two!)

Glossary

Accumulated Total

This is calculated by R2D2. It represents the total number of participants that have accessed the program or service since the beginning of your contract [or the beginning of a new reporting template] with DHS.

Aggregate Submission

A submission requiring the entry of summary figures against your reporting measures. You do NOT need to add clients or complete assessments for an Aggregate Submission.

Assessment

Here, an assessment is referring specifically to the set of questions on R2D2 that relate to an individual. You are expected to answer using the data you have collected via survey, practice tool or via another valid process. Completing an assessment on R2D2 is only required when you are producing an Individual Submission – though you still will likely need to collect data for your clients in your own system for an aggregate submission (depending on the reporting requirements).

Individual Submission

A submission which requires you to add a client and complete an assessment for that client as part of the submission process.

When you create your submission after adding clients and completing assessments, data from the assessments will automatically appear. You will have the opportunity to enter additional summary figures (in some instances) and written information (for example, , Story Behind the Data).

Number of new participants active in this period

This is entered at the point of submission, under the heading “Participation and Assessments.”

Number of returning or continuing participants active in this period

This is the total number of participants returning to the service (or continuing in the service). Continuing participants are:

- Participants who were receiving services in the previous reporting period AND
- Participants who did not exit the service and thus are active in the service currently

Returning Participants are

- Participants who have received services in any previous reporting period (under the current service agreement)
- Exited the service previously
- And have returned to the service in the current reporting period.

Number of unique participants assessed in this period

This is the total number of unique participants for whom you have collected data.

Since this has caused confusion in the past, please read this example for further clarity.

If there are 10 participants, and you assess them twice each – there are 20 assessments. However, the number of unique participants assessed is 10.

“Participant” or “Client”

A participant is 1) an individual who participates in the program, and 2) for whom the program is intended to produce an outcome which will be recorded against an RBA measure.

This differs from casual participants for whom you are recording attendance data but not outcome data against your RBA program measures.

Post-service assessment

Is basically a new label for the assessments you have always completed. It can be used for clients who are still engaged with the service, and for clients who have completed and exited the service.

Pre-service assessment

Will be completed for a client as close to the start of service as possible. This is because the Pre Service assessment acts as a baseline to track outcomes against and it is assumed that if a client is still engaging, it is because they are still working towards achieving outcomes.

Question

A question used to collect data against an RBA measure.

Schedule

Your contract with DHS which describes your organisation, region, and program.

Schedule RBA template

Schedule specific template containing the questions you are required to answer, as negotiated for your contract. Some schedules may have multiple RBA templates (for

example, client template containing RBA measures relating to clients, and collaboration template containing RBA measures relating to work with organisations).

Stream

Subset of funded program used to collect RBA data against (for example, , CSSP: Youth Support and Development)

Submission

A periodic report submitted by organisations to the funding body.

Summary figures

These are the numbers you enter at submission – it could be the number of clients that answer “yes” or “no” (or in some instances, there will be additional response options) against the RBA measures, it could also be responses to questions which require a whole number answer. Very often these are How Much measures – for example, , “Number of referrals”.

Appendix 1

Workflow diagram of individual versus aggregate reporters – in plain text

Step 1

For individual reporters, go to step 2

For aggregate reporters, go to step 4

Step 2

Enter clients by Direct Entry or Bulk Upload.

Step 3

Assess clients by Direct Entry or Bulk Upload.

Step 4

Submission.

[Return to Workflow Diagram](#)