EDDI AGENCY REPORTS USER GUIDE

Why should I use EDDI reports?

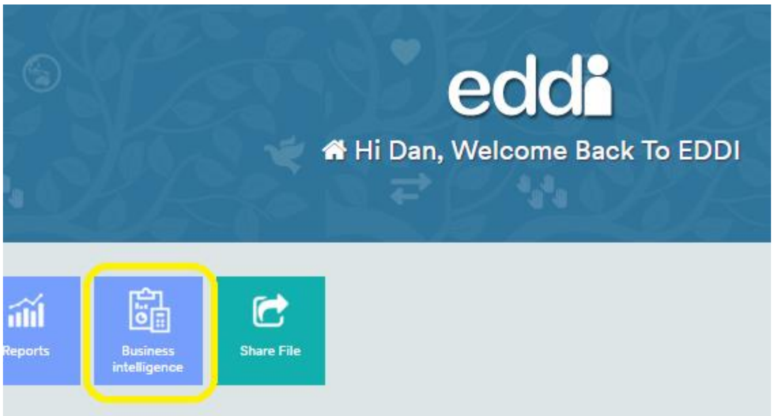
EDDI reports provide quick and user friendly access to data about prospective and accredited carers at your agency. Through EDDI reports you have a wealth of information at your fingertips, including but not limited to:

- stats on prospective and accredited carers for team and board reports
- real time information on compliancy checks
- customised mailing lists
- a heat map where you can identify accredited households available for placement

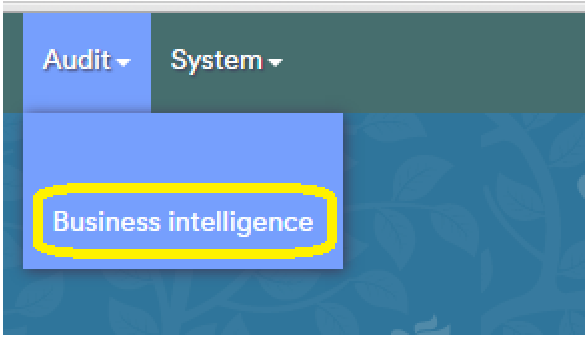
If you have any questions about how to use EDDI reports, please ask the EDDI helpdesk or Fostering Connections Project Team for assistance.

Where do I access reports?

You can access reports in the **Business Intelligence** module via the icon on your EDDI homepage

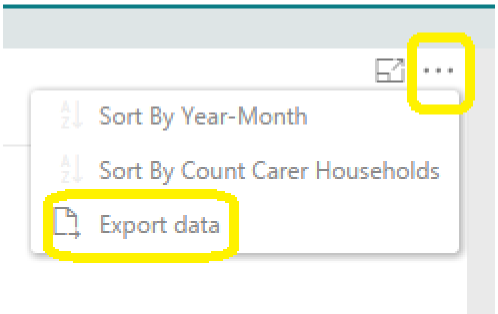


You can also access reports via the **audit** menu at the top of your screen. This is useful if you are not on the EDDI home page and need to access a report.

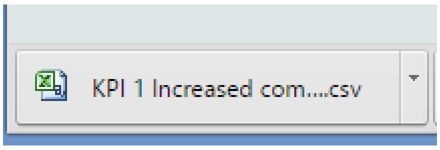


How do I download report data?

All report data is downloadable as a **.csv** document which opens in **Microsoft Excel**. To download a report select the **… icon** at the top right hand corner of the page and select **Export Data**



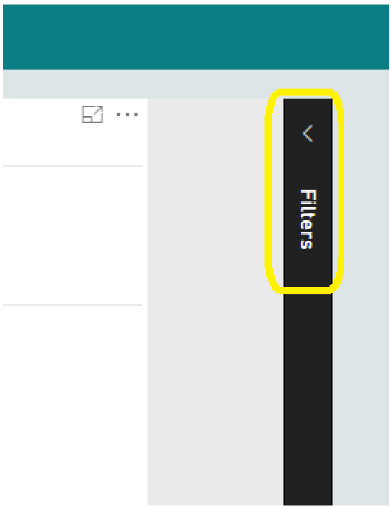
The downloaded report will automatically appear in the bottom left hand corner of your screen



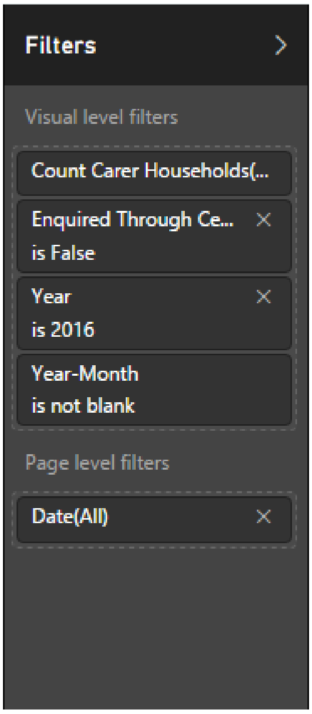
Can I choose what information I download in a report?

Yes you can. Each report has default settings, but you can specify the type of information you want to see or download by using the report **filter**, which is available on the right hand side of the page in each report

To expand (open) the filter, **click on the Filters panel.**

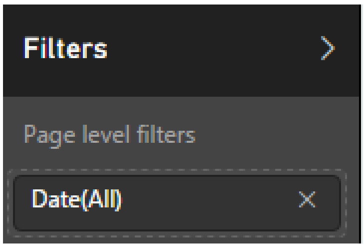


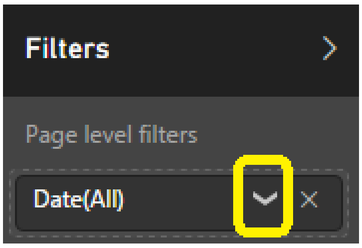
The panel will then expand and appear as per the image below:



How do I use the filter?

To set a filter, place your cursor over the field name to reveal the down arrow. Click on the down arrow to expand the list to select the information you want to filter.

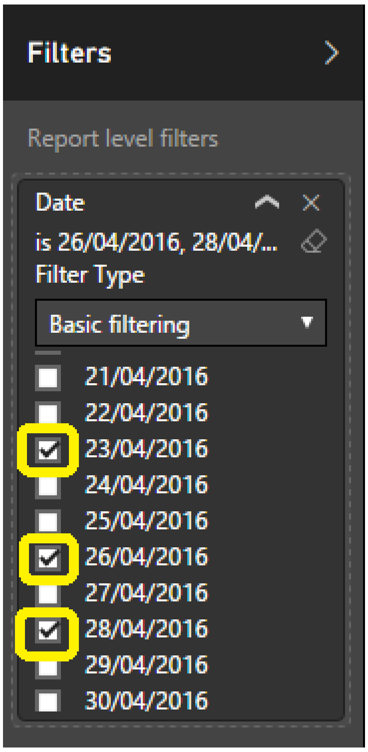




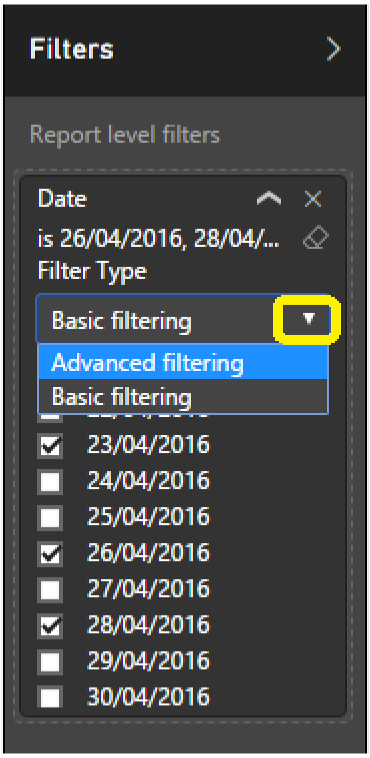
Step 1 **Step 2**

Filters are set by default to **basic filtering**. To use basic filtering, click on the tick box next to each date you wish to include in your report.

In the example below, your report would only include data for dates 23, 26 and 28 April 2016.

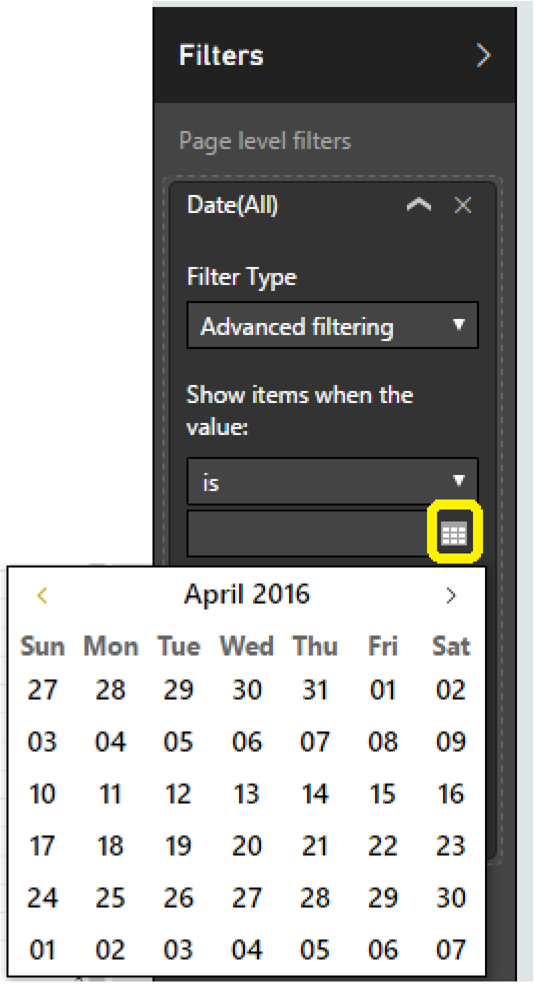


To change the setting to **advanced filtering** – select the down arrow on the dropdown list and select ‘advanced filtering’ as per the example below.

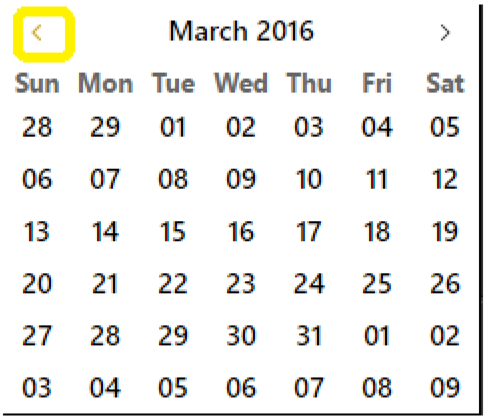


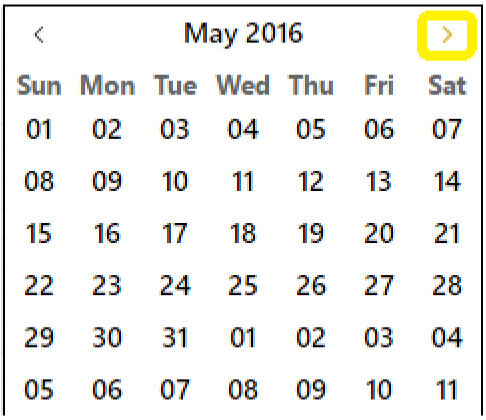
Advanced filtering allows you to filter information by specific parameters. In many cases, you will need to filter information by **date range**.

To choose your date range, select the **calendar** icon

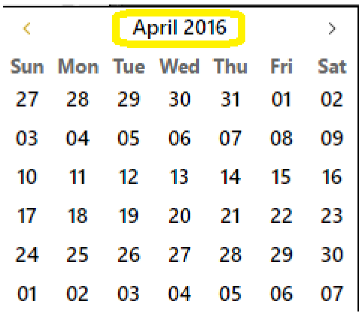


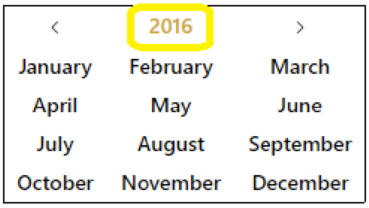
To move back a month, select the **back arrow**, to move forward a month, select the **forward arrow**.

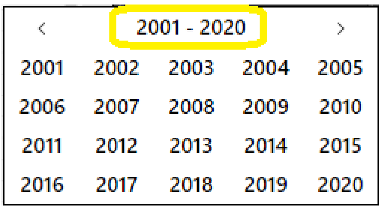




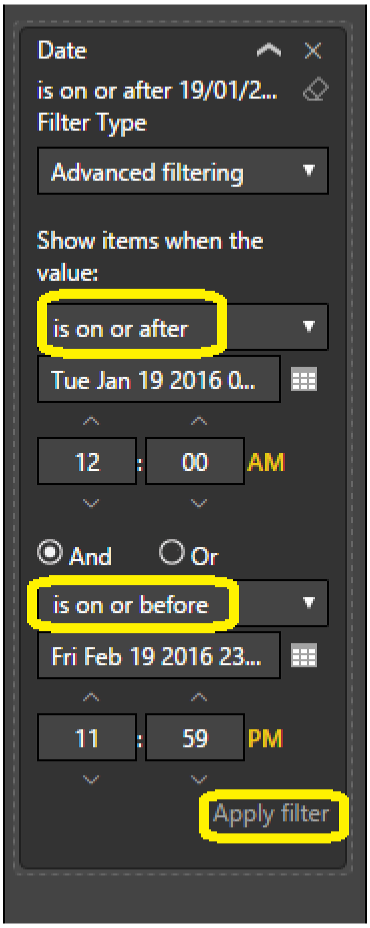
To select a different **year** or **decade** click on month/year at the top of the calendar







In the example below, the filters have been have been set to ‘**is on or after’** Tuesday 19 January 2016 and ‘**is on or before’** 19 February 2016, meaning the data date range will be 19 January – 19 February 2016 inclusive.



Your options for filtering dates include:

Is: means you want to include the one date you have entered in your report

Is not: means you don't want to include the date you have entered in your report

Is after: means you only want data after the date you have entered

Is on or after: means you only want data for the date you have entered and all dates after that date

Is before: means you only want data before the date you have entered

Is on or before: means you only want data for the date you have entered and all dates before that date

Once you click **apply filter,** the date range you have selected will be applied to the data.

Will my filtered information be downloaded in my report?

When you filter data in a report, it will be filtered to the same setting when you download it as a **.csv** file.

*E.g. 1 if you filter information in a report to only show accredited households at your agency, you will only see accredited household information in your .csv report when you press **Export Data**.*

*E.g. 2 if you filter a report to only show enquiries received by your agency 1- 31 March 2016, you will only see enquiries received by your agency 1- 31 March 2016 in your .csv report when you press **Export Data**.*

What reports are available in EDDI?

1. **Carer Household**

   The carer household report provides detailed information about your agency's prospective and accredited carer households including:

   - if the household is vacant, full or inactive
   - the number of beds available for placements in each household
   - a heat map identifying the number of accredited households by postcode
   - the name of each household member
   - the age of each household member
   - household address
   - the households accreditation and placement preferences
   - The total number of carer households in each agency (and by agency service/branch if applicable), by phase *e.g Enquiry, Accredited – Vacancy, Training – Withdrawn*
   - The referral source of the original enquiry e.g. Facebook, Radio, Word of mouth ***NB this is still being built into the report as of 19/9***

This report has a number of practical uses for your agency. Please contact the EDDI helpdesk or the project team to discuss how you can benefit from its features.

2. **Enquiries by Service per Month**

   This report shows total number of enquiries received by your agency (or agency service/branch if applicable) per month as a bar graph.

   The data from these graphs can be downloaded as a .csv file so you can create your own table or graphs in Excel to represent the data.

   Alternatively, you can use a snipping tool to copy the image of the bar graph as it appears on the screen and paste it into a word document.

3. **Mail Merge List**

   This report creates a mail merge list of household members in each carer household. Including:

   a) the contact number and email address of each household member
   b) households member lists by phase *e.g. only household records that are set to the phase 'Accredited – Full'*
   c) specific household member types in each household *e.g. carer, O18's, under 18*
   d) households that are available for emergency placements

   NB: If a household member has multiple phone numbers, addresses or emails, only one of these will be listed i.e. primary address will display rather than non-primary work address.

4. **Upcoming Annual Reviews:**

This report lists your agency's accredited households and the due date of their next annual review, including households that are:

(a) Vacant and available for placement
(b) Full
(c) Inactive
(d) Deactivated

The report highlights any carer households in red if the annual review date has been missed.

This report is useful for Managers and Coordinators of home based care teams.

5. **Upcoming WWC check, Criminal Check and Carer Register Check**

This report lists all household members of vacant, full, inactive and deactivated accredited households and the date of their next WWC/Criminal/Carer Register checks.

- This report displays a ✓ next to a household members name if the check is valid and up-to-date.
- If a household member's check has expired or does not exist a × displays next to their name.
- Business rules are in place to ensure a × does not display next to the name of a member who doesn't require a check *e.g. a child in the household or someone who is over 18 and frequently visits the household but not actively involved in care of the child such as a grandparent*

What other useful information is available in EDDI?

1. **Household Record Timeline**

The household record timeline gives you a visual timeline for each household record summarising their events completed toward accreditation.

To access a household record's timeline, open a household record in the **Carer** module. You will see a **timeline** heading in menu bar at the top of the page. Click on the timeline heading and a pop up box will open on your screen showing the timeline for that household record.

2. **Carer Audit Module**

The Carer Audit Module identifies updates and changes made to an EDDI household record by date and the worker responsible. Please read the **Carer Audit Module Manual** available on the Information for Agencies page of the Fostering Connections website for further information.

If you have any further questions or need support, contact the EDDI helpdesk on 1300 807 041 or eddi@mackillop.org.au