

# PSP Information Quality Reports

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## User Guide for Permanency Support Program (PSP) Providers

How to access and use the Placements and Plans reports in the Federated Analytics Platform

Version 1.8

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# Introducing the Federated Analytics Platform



## Easy to view

Uses cloud-based technologies to extract information from ChildStory and presents it in a list form for PSP agencies to easily view large amounts of data on children they case manage



## Up-to-date data

Presents data in an automated, secure way via regular updates for agencies.  
The data represents information in ChildStory - all edits are still to be made in the Partner Community



## Information security

It is a secure application available to authorised partner agency employees, and accessed via the existing single sign-on OKTA portal

**Reminder not to take screen shots of photos of children's information – this is a breach of information security**

# Benefits to PSP Providers and DCJ

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1. Increases information sharing between DCJ and PSP agencies whilst still maintaining security of sensitive child data
2. Improves data quality on a continual basis by providing faster access to monthly up-to-date data for providers
3. Presents data in a user-friendly way for agencies to be able to identify and correct discrepancies between ChildStory data and their client information database (including a download option to view large amounts of data)
4. Improving data accuracy will result in more accurate PSP payments
5. Uses the existing secure access pathway (OKTA) that is familiar to agencies
6. Provides a basis for new reports and dashboards to be added in the future
7. Reduces administrative burden by replacing the need for manual extracts

# Access authorisation

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Authorised access is limited to provider staff who are positioned to oversee data at a service level.

Casework Practitioners do not require access – downloaded data can be shared internally from authorised users (noting downloads will not include identifiable information such as children or carer names).

## New users applying for access:

- Step 1: Complete the [DCJ Federated Analytics Platform User Access form](#) including reading the [Privacy and You for Service Providers](#) PDF training module
- Step 2: Principal Officer sends completed form with their approval to the District's Contracting or Commissioning and Planning mailbox
- Step 3: DCJ processes authorisation approval, noting insufficient business justification or incomplete forms may impact approval
- Step 4: User will be notified of approval and steps via email, noting next steps will depend on whether the user has an active Okta account – see next page

# Okta login and access

Access to the new reports is via the secure pathway DCJ Okta. This pathway aligns to DCJ security policy and ensures the protection of DCJ systems and sensitive data. New users with an active Okta account will be able to login and access the reports. New users who do not have an active Okta account will need to activate an Okta account before they can access the reports.

## If you have an active Okta account

1. Log in to your Okta account via: <https://portal.dcj.nsw.gov.au>
2. Complete Okta verify
  - Enter the six number security code sent to your work email address
3. After logging in to the Okta portal, click on the *PSP Information Quality Reports* tile (this will take you the to Cover Page to access the reports)


## If you do not have an active Okta account

Follow the steps in the [Okta Self-Registration Guide](#)

- *The guide will direct you through the steps to register for Okta, create a new account and verify your account – the starting point requires you to click the link in the email that is sent to you from [noreply-okta@external-dcj.nsw.gov.au](mailto:noreply-okta@external-dcj.nsw.gov.au)*
- *After you have created your new Okta account, you will receive an email confirming your account is approved and you will be able to access the new PSP Information Quality Reports*

# Cover Page

The Cover Page provides a single access point for all available reports and dashboards related to the PSP Information Quality reports.



Communities  
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GOVERNMENT

## DCJ PSP Information Quality Reports

### Overview

The reports on this page are for PSP Providers to easily view lists of data on the children and young people they case manage. The data source is ChildStory.

These reports should be used by PSP Providers to identify data discrepancies between this data and their own client information databases and make corrections in the Partner Portal where needed.


You can contact the local CFDU e.g. for record approvals, or the ChildStory Partner Support Team via [ChildStoryPartnerSupport@facns.nsw.gov.au](mailto:ChildStoryPartnerSupport@facns.nsw.gov.au) for help with technical data issues or understanding the data.

This data is refreshed monthly. Changes or updates made to records in the Partner Portal will be reflected in the next month's refresh.

If you are experiencing issues with accessing the reports, please contact [permanency.support@facns.nsw.gov.au](mailto:permanency.support@facns.nsw.gov.au) and we will work with you to resolve any issues.

### PSP Placements and Plans reports - NON DOWNLOADABLE

These reports contain sensitive information such as children names and carer names. Information security prevents these reports from being downloaded.



[Click to view NON DOWNLOADABLE reports \(includes names\)](#)


There are two reports:

1. Placements report - provides data on characteristics and placement details
2. Plans report - provides data on plan compliance (case plan, leaving care plan, cultural support plan).

Updated: Monthly  
Classification: Sensitive - Personal

### PSP Placements and Plans reports - DOWNLOADABLE

These reports do not contain children names and carer names. They can be downloaded and exported to Excel.



[Click to view DOWNLOADABLE reports \(excludes names\)](#)


There are two reports:

1. Placements report - provides data on characteristics and placement details
2. Plans report - provides data on plan compliance (case plan, leaving care plan, cultural support plan).

Updated: Monthly  
Classification: Sensitive - Personal

### PSP Summary Dashboard

This dashboard contains a high-level view of data in the PSP Placements and Plans reports for your agency.



[Click to view Summary Dashboard](#)

The dashboard includes the following summaries:

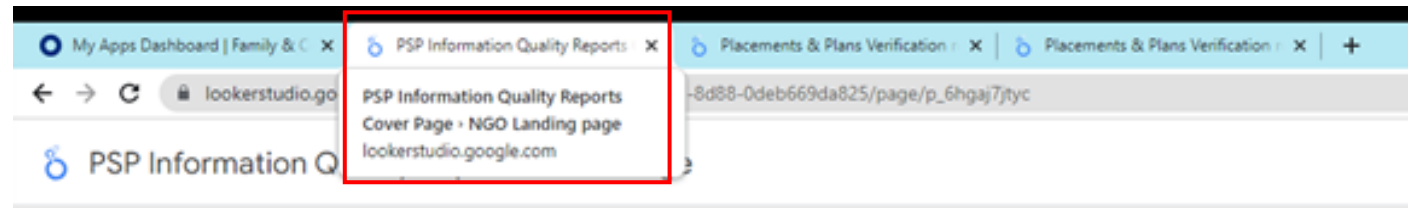
- Case management and placements
- Plans
- Missing information
- Leaving care plans
- Case plans due to end next 3 months

Updated: Monthly  
Classification: Sensitive

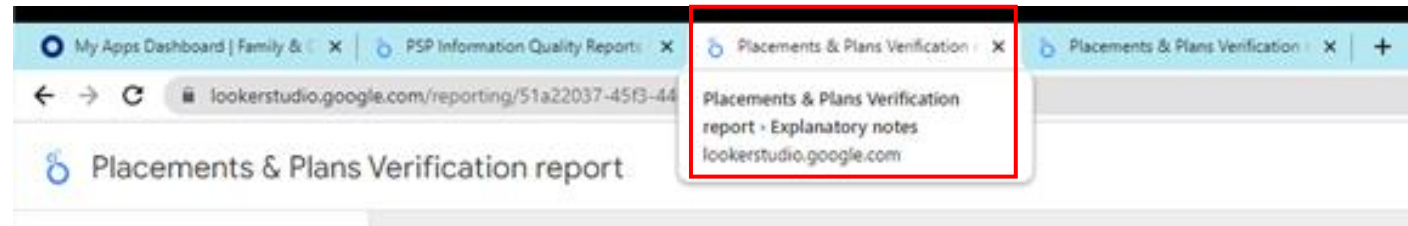
# Navigating between report versions

Clicking on the link to view the reports (either Non-Downloadable or Downloadable version) will open a new window (tab) so you can easily navigate between the reports and Cover Page.

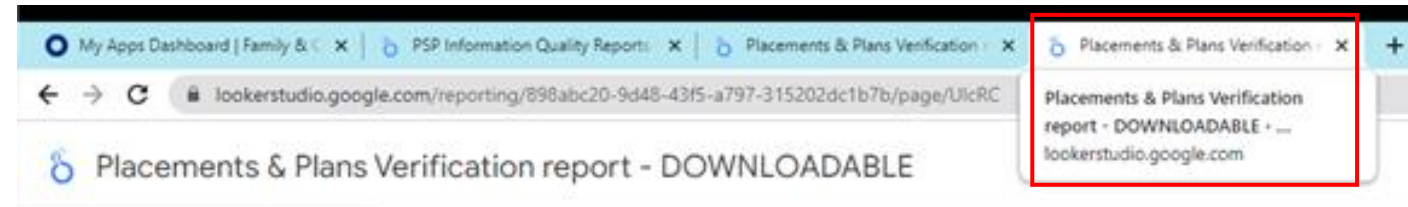
Window 1 – Cover Page



Window 2 – Non-Downloadable version



Window 3 – Downloadable version



# Placements report

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- Displays all records of children in the agency's case management who have approved placements that were active in the previous 3 months (to date specified)
  - Shows one row per placement AND another row for that placement if there have been changes (e.g. placement changes, CAT outcome change)
  - Data remediation and corrections to placement related data will assist payment accuracy and improvements to reliability and quality of data in the system

## Authorised users can:

- View records for children recorded in ChildStory under their case management (including active placements with other agencies)
- Identify any discrepancies between data recorded in ChildStory to their NGO client information database, for example:
  - Check recent entries, transfers and exits are up to date
  - Review child details e.g. Name, Aboriginal status, CAT outcome, placement details such as household name, placement type, dates
  - Make updates to data in ChildStory Partner Community (if possible) or speak with local CFDU, CSC or the ChildStory Partner Support Team depending on the correction that needs to be made

# Plans report

- Displays case plan, leaving care plan and cultural support plan data recorded in ChildStory up until a point in time (date shown)
- Names in the list are children and young people who are in the Parental responsibility of the Minister and case managed by the provider agency

## Authorised users can:

- View outstanding Case Plans, Leaving Care Plans, Cultural Support Plans for children and young people
- Monitor the Case Plan Review Date to plan ahead

## Reading the columns - Ask yourself:

<b>Is a plan 'required'?</b> i.e. shows if the child meets the criteria and they require this type of plan	<b>Is the plan 'current'?</b> i.e. shows if the child or young person has a current plan or needs an updated plan
<ul style="list-style-type: none"><li>• Y = yes, a plan is required for this child or young person</li></ul>	<ul style="list-style-type: none"><li>• Y = yes, they have a current plan</li></ul>
<ul style="list-style-type: none"><li>• N = no, a plan is not required for this child or young person</li></ul>	<ul style="list-style-type: none"><li>• N = no, the plan is not current and needs updating (these are the rows that require follow up)</li></ul>

# Counting rules for plans

Case Plans	Leaving Care Plans	Cultural Support Plans
<ul style="list-style-type: none"> <li>A case plan is current if the Case Plan record is Active and Approved in ChildStory and the start date is within 365 days of when the data was extracted from ChildStory OR the child is the subject of a Final Order that has been granted this Financial Year.</li> <li>Children in care &lt;30 days will have N (no) in the Case Plan Required column.</li> <li>See the Explanatory notes page in the Placements and Plans reports for more information.</li> </ul>	<ul style="list-style-type: none"> <li>Young people aged 15 or more require a leaving care plan.</li> <li>A leaving care plan is valid in ChildStory if               <ul style="list-style-type: none"> <li>a current approved Case Plan exists <u>AND</u></li> <li>Planning for Independence = Yes – Planning for Independence</li> </ul> </li> </ul> <p>HINT: Use the AGE for a child to support the planning for upcoming Leaving Care Plans.</p>	<ul style="list-style-type: none"> <li>Children and young people who are recorded as Aboriginal/Aboriginal and Torres Strait Islander/Torres Strait Islander are required to have a Cultural Support Plan.</li> <li>A Cultural Support Plan is valid in ChildStory if:               <ul style="list-style-type: none"> <li>a Final Legal Order has been made in the last 12 months</li> <li>the child entered PRM/Care to Secretary within the past 30 days</li> <li>if a Cultural Support Plan is saved in Notes and Attachments (with a start date in the last 12 months) <u>AND</u> <ul style="list-style-type: none"> <li>has a category of Cultural</li> <li>has a sub category of Cultural Plan <u>OR</u> Cultural Plan Review</li> <li>status of 'complete'</li> <li>Is not cancelled</li> </ul> </li> <li>If Current Approved Compliant Case Plan exists <u>AND</u> Cultural Support Plan question is answered as one of these values:                   <ul style="list-style-type: none"> <li>Cultural plan attached</li> <li>New Plan developed</li> <li>Existing Plan reviewed</li> <li>New plan developed and approved</li> <li>Existing plan reviewed and approved</li> </ul> </li> </ul> </li> </ul>

# Tips to identify discrepancies and outstanding information

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## Placements report:

- Check all information is consistent between your client information system and the Placements report, e.g. demographic info, CAT outcome, placement agency, household/carer name, placement start and end dates, placement type etc. If the Placement report is incorrect - update ChildStory / liaise with DCJ to approve records. Filter on headings to view order as needed, e.g. start date to view recent placements

## Plans report:

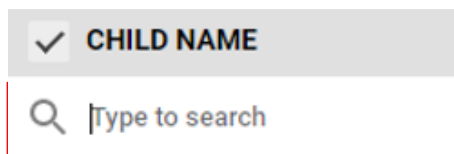
- For all Outstanding Plans – click filter ‘Y’ ONLY (i.e. Yes, there is an outstanding plan)
- For outstanding Case Plans - click heading ‘Case Plan Current’ and view all with ‘N’ (i.e. No, plan is not current)
- For Leaving Care Plans - filter ‘Leaving Care Plan Required’ Y only (i.e. Yes, 15yrs+), then click column heading ‘Leaving Care Plan Current’ to order column and view all with an ‘N’
- For Cultural Support Plans - filter ‘Cultural Support Required’ Y only (i.e. Yes, Aboriginal or Torres Strait Islander), then click column heading ‘Cultural Support Plan Current’ to order column and view all with an ‘N’
- Check Case Plan Goal

# Using filters

Limited filters are available above the column lists in the Placements and Plans report for users to search records, for example: Child Name, Household Name, Outstanding Plans etc. Multiple filters can be used at the same time.


## Setting a filter

- Click the drop down list and type to search



- Hover arrow over name and click ONLY, then click off the drop down list to refresh the screen
- For multiple items, also tick the other items (e.g. if searching for siblings, type the names and click all the boxes next to their names, then click off the drop down list to refresh the screen)

## Removing a filter

- Click the drop down list that has a filter on it and then click the  icon to remove the filter


Hint: Filtered drop down lists will have a number to show how many results are filtered



# Sorting columns

Limited filters are available above the column lists in the Placements and Plans report for users to search records, for example: Child Name, Household Name, Outstanding Plans etc. Multiple filters can be used at the same time.

All column headings can be sorted, but only one at a time.

Sorting a column	Removing the sort
<ul style="list-style-type: none"><li>Navigate to the column heading and click on it</li></ul> <p>Hint: click on column heading again to sort A-Z or Z-A</p>	<ul style="list-style-type: none"><li>Navigate to top left of the heading row and click the arrow reset button</li></ul> 

# Combining filters and sorting columns

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Filters and sorting columns can occur at the same time.

A good example of where this is useful when users want to see how many young people require a leaving care plan and it needs updating.

E.g. for Leaving Care Plans:

- Filter Outstanding Plans = Y
- Filter Leaving Care Plan Required = Y
- Sort Leaving Care Plan Current heading to view records with N (this combination of filter and sorting will show records for young people who require a leaving care plan but it is not current and needs updating in the system)


# Downloadable reports

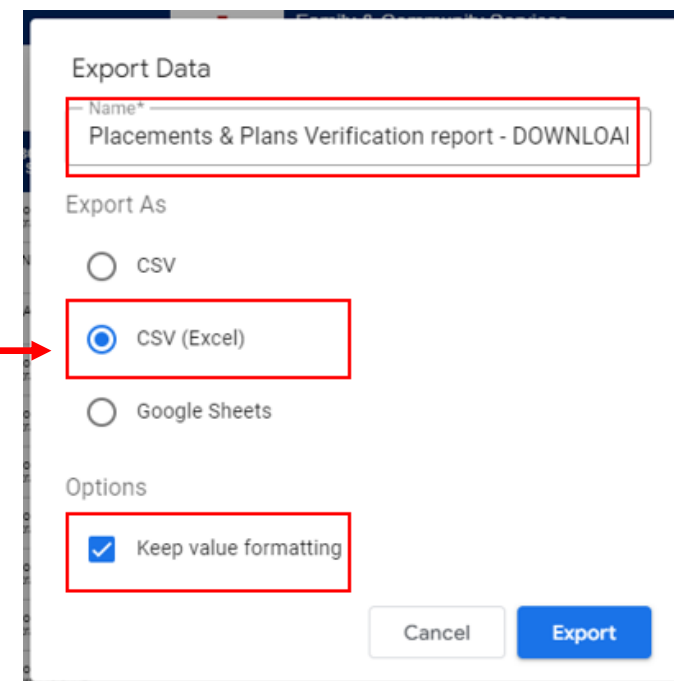
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Downloadable reports are available to export and use offline to compare information in ChildStory with data in the Provider's client information database:

- ChildStory ID and Household ID are available for comparison purposes.
- Sensitive information such as child names and household names are excluded due to information security and privacy requirements.
- Downloadable reports can be shared with non-users internally, noting PSP providers must comply with DCJ's Information Security Policy Suite.

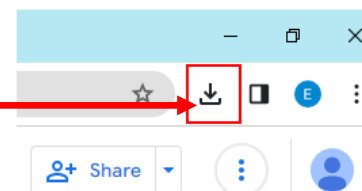
# Exporting reports

- Click into the DOWNLOADABLE reports link on the NGO Cover Page
- Navigate to the Placements or Plans report you wish to export
- Right click in table and select Export OR click  icon at top right of table) and select Export
- Enter a name to save the file
- Select an Export As option:
  - CSV creates a comma separated text file
  - CSV (Excel) creates a comma separated text file where non-ASCII characters are encoded properly for use in Excel™ **(Preferred)**
  - DO NOT SELECT Google Sheets
- Click the 'Keep value formatting'
- Click Export



The image shows a screenshot of the 'Export Data' dialog box. It has three main sections: 'Export Data', 'Export As', and 'Options'. In the 'Export Data' section, the 'Name\*' field contains 'Placements & Plans Verification report - DOWNLOAD'. In the 'Export As' section, the 'CSV (Excel)' option is selected with a radio button. In the 'Options' section, the 'Keep value formatting' checkbox is checked. At the bottom right, there are 'Cancel' and 'Export' buttons.

- View the in-tray icon to find your exported file
- Note: any filters will also be applied to exported data and date fields will automatically convert to DD/MM/YYYY in Excel



# Resolving issues and updating records

- **Access and onboarding issues** - Authorised users who experience problems with accessing either the OKTA portal or Placement and Plans reports on the Federated Analytics Platform can contact [permanency.support@dcj.nsw.gov.au](mailto:permanency.support@dcj.nsw.gov.au). We will work with you to ensure your access issues are resolved as quickly as possible.

The processes that are currently in place to resolve data issues and make updates to records in ChildStory will not change.

- **Updating records** - providers will be able to make corrections and updates in ChildStory Partner Community as per current practices.
- **If a record needs approval from DCJ** – contact local CFDU or CSC to discuss out-of-date information or records that require approval from DCJ.
- **For technical support and child data issues** – for example unable to access the record in ChildStory or do not know what to do to address the issue in ChildStory - contact the ChildStory Partner Support Team via [ChildStoryPartnerSupport@dcj.nsw.gov.au](mailto:ChildStoryPartnerSupport@dcj.nsw.gov.au)

# Summary Dashboard

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The PSP Summary Dashboard represents information on the monthly Placements and Plans reports for an agency.

**Counting rules:** See the Explanatory notes tab to view the counting rules used for data on the Summary Dashboard.

## Using the dashboard and reports to identify records

- **Children placed with another agency** – Placements report > Placement Provider Agency filter and untick your agency.
- **New to your case management this month** – Compare the current month's Plans report to the previous month's Plans report (Tip: users should save a copy of the Plans report offline each month to be able to compare the information).
- **Plans** – Plans report > filter for Outstanding Plans (Yes) > use the individual filters for Case Plans, Leaving Care Plans and Cultural Support Plans as indicated on Page 12 of this guide.
  - Number of outstanding plans – total number of plans that need updating (some children may have more than one outstanding plan)
  - Number of unique children and young people with at least one outstanding plan – unique count of children.

# Summary Dashboard

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- **No placement or whereabouts record** – these are children who have no current open placement or whereabouts record but are case managed by the agency. Two ways of identifying them depending on the circumstance:
    - 1) If no recorded placement in the last three month – they will not appear on the placements report because no placement/whereabouts record, but they will appear on the Plans report because the agency has case management – cross check the names on these reports to identify who is on the Plans report and missing from the Placements report
    - 2) If at least one closed placement in last three months – they will appear on the Placements report with an end date – filter the Placements report to all open placements (i.e. no end date) > remove duplicates > compare/lookup children records in the Plans report. Any children who appear in the Plans report and not the Placements list have no open placement or whereabouts record.
  - **Children turning 15 years old soon** – Placements report > filter Age to see who is 14 years old. Check in ChildStory or your agency's client information system for the date of birth to see who is turning 15 next month. If the child turns 15 during the month, the change won't appear until next month's refresh. Note: the data is static as of the end of the month – depending on timing of looking at the information, the child may have already turned 15.
  - **Case Plans due to end next three months** – Plans report > filter Case Plan Start Date to identify records with a Case Plan Start Date from last year that is approaching 12, 13, 14 months (e.g. Case Plan Start Date in August last year is due to end in August this year).
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# Access security

There are extreme controls in place to ensure the data for these reports resides in NSW and is accessed by approved persons only. DCJ can confirm the data does not go offshore, despite the appearance of the google.com website. The build for these reports on the Federated Analytics Platform was endorsed by the NSW Privacy Commissioner.

Additional security measures include:

- A rigorous application process requiring new applicants to provide their contact details, business justification, WWCC, privacy acknowledgement and Principal Officer approval (including a requirement for the form to be sent to DCJ directly from the Principal Officer's work email address)
- A secure application available to new users only via Okta login security (two factor authentication)
- Restricted user access to their own NGO data so users can only see children's information for their agency
- Full details with children's names are available on the online version with protection rules, however there is also a workable downloadable version which does not contain sensitive identifying information
- Access via work email verification which ties the user to their place of employment. Users will only have available access if they are working at the agency as per their Access Form. They can only get the code to verify their identity via their own work email address
- If the reports have not been accessed by a user within a **90 day period or the user's Working With Children check expires**, their access will automatically be removed and the user will need to reapply for access.

Service Providers are encouraged to notify their DCJ Contract Manager and cc [permanency.support@dcj.nsw.gov.au](mailto:permanency.support@dcj.nsw.gov.au) if an approved user no longer requires access to the Placements and Plans reports on the Federated Analytics Platform – DCJ will then remove their access as a matter of urgency.

# Okta Self-Registration guide

If you do not have an active Okta account and have been approved to access the PSP Information Quality Reports, you can use the *Okta Self-Registration Guide* (see page 6) to create a new account and view the reports.

If you experience any difficulties, contact your DCJ Contract Manager or email [permanency.support@dcj.nsw.gov.au](mailto:permanency.support@dcj.nsw.gov.au)

The Okta Self-Registration guide cover page looks like this:

