*Authoritative information and statistics
to promote better health and wellbeing*

A Review of the Financial Management Program Data Sets

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Victorian AIDS Council/ Gay Men's Health Centre, NSW

Wesley, NT

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Abbreviations

ACOSS	Australian Council of Social Service
AFCCRA	Australian Financial Counselling Credit Reform Association
AIHW	Australian Institute of Health and Welfare
CDEP	Community Development Employment Projects
CFC	Commonwealth Financial Counselling
ER	Emergency Relief
FaHCSIA	Department of Families, Housing, Community Services and Indigenous Affairs
FIM	Family Income Management
FMP	Financial Management Program
FMPDD	Financial Management Program Data Dictionary
FMPWG	Financial Management Program Working Group
MM	Money Management
MMU	METeOR and Metadata Unit
NMDS	National Minimum Data Set
SCCHDS	Standing Council on Community Housing and Disability Services

Summary

This document describes the work undertaken by the Australian Institute of Health and Welfare's (AIHW) METeOR and Metadata Unit (MMU) to review and develop specifications for an improved data collection for the FaHCSIA Financial Management Program (FMP).

The report is intended to assist FaHCSIA to develop a new FMP data collection. It forms part of a broad review of the suite of FMP services and provides the specifications for a new FMP data set. The new data set has been developed by undertaking a review of data requirements and consulting a sample of FMP providers, peak bodies and FaHCSIA staff.

The 'in-scope' activities of the new data set are the currently collected Emergency Relief (ER), Commonwealth Financial Counselling (CFC) and Money Management services (MM). These services are provided free to people who are experiencing financial stress or are at risk of financial stress. The majority of these services are delivered through community service and/or welfare organisations.

A significant objective of this project has been to reduce the data collection burden currently imposed on service providers. This project has also sought to improve the relevance and usefulness of data collected by FAHCSIA.

This report outlines the data development processes and principles adopted by the data development team during the construction of the new data set. It also documents the research process, research findings and provides recommendations on:

- which providers should be in scope for the data set
- which clients/services should be in scope for the data set if funding is obtained through multiple sources
- how the data should be reported by providers to FaHCSIA
- how the data should be reported back by FaHCSIA to providers
- the frequency of reporting periods
- the data items to be collected as part of the data set.

The report includes full metadata for the data items, and follows the approach used in FaHCSIA's Minimum Standard Client Data Set.

The report contains a number of recommendations regarding changes to the current reporting requirements.

It also contains some suggested collection tools (in Section 6.2). These have been developed to promote discussions between FaHCSIA and various stakeholders. Further development and consultation with stakeholders is likely to be necessary before they can be implemented.

Governance and process recommendations

Recommendation 1: Governance arrangements for data collection methodologies and change processes should be put in place in line with those described in Section 5 of this report. This includes appropriate lead times for development and exposure of new data standards and including service providers in the process of adding new data items. It is recommended that about 6 months lead time be given to providers to allow them to make necessary systems changes.

Recommendation 2: FaHCSIA should adopt the data development principles described in Section 2 as standard practice for any future development of data relating to the FMP.

Recommendation 3: FAHCSIA should establish a working group with representative membership from all of the stakeholders, including Australian Government, state and territory government representatives, non-government organisations (including service providers) and peak bodies to advance work on the National Minimum Data Sets and to determine any future changes to the data collection program and data definitions.

Recommendation 4: Develop a feedback loop for providers at the national level that provides information about the FMP and its attendant data collections via a series of newsletters, forums, or personal visits.

Recommendation 5: Develop and make available to the public data reports on the number and types of service delivered by the FMP. This should include a clear link between policy directives and the data collected to support the provision, planning and performance of the FMP sector.

Data collection and data dictionary recommendations

Recommendation 6: Adopt the data standards and their definitions as defined in Section 6 of this report (The Financial Management Program Data Dictionary) for use in both the data collection forms and data collection manuals. This includes adopting existing national data standards that have already been endorsed by the community services sector where appropriate.

Recommendation 7: Adopt the National Minimum Data Set Specifications for ER as specified in Section 6 of this report, and introduce a reduced cut-off of $20,000 for small ER organisations.

Recommendation 8 and 9: Adopt the National Minimum Data Set Specifications for CFC (Recommendation 8) and MM (Recommendation 9) as specified in Section 6 of this report, and remove the regular collection of the qualitative data items. A number of the qualitative items can be easily altered to become quantitative items and, where appropriate, these have been have been included in the data dictionary.

Recommendation 10: Prepare an annual qualitative questionnaire to obtain the 'good news stories' and other narrative components of the current FMP data collections.

Future developments

Recommendation 11: Agree to support the use of electronic client management systems to capture information at the client level which would give service providers the capability to record data once, and from which reports could be generated to support aggregate collection.

1   Introduction

FAHCSIA commissioned AIHW to produce a Financial Management Program (FMP) data set for its endorsement. The new data set specifications reflect findings from a review of reporting requirements and consultations with a sample of FMP providers and selected peak bodies.

The FMP aims to build financial resilience and wellbeing for vulnerable people and those most at risk of financial and social exclusion and disadvantage. It helps people across a range of income and financial literacy levels to overcome financial adversity, manage their money, participate in their communities and plan for the medium to long term.

The program includes Emergency Relief (ER), Commonwealth Financial Counselling (CFC) and Money Management information and education (Money Management – MM). In addition, other strategies (not in the scope of this project) are used to build financial capability and inclusion through specific projects, information about savings and retirement, and research into problem gambling and its impacts.

Emergency Relief services provide support to address immediate needs in time of crisis. Assistance often includes food parcels and clothing, transport, chemist vouchers, help with accommodation, payment of bills, budgeting assistance and sometimes cash. Importantly, Emergency Relief agencies provide appropriate referrals to other services that help to address underlying causes of financial crisis.

Commonwealth Financial Counselling services help people in financial difficulty to address their financial problems and make informed choices. Services may include direct casework (for example, provision of advice and information); advocacy and/or negotiation; referral; community education; and networking/liaison.

Money Management services currently operate in remote communities, predominantly supporting Indigenous people, including Income Management participants. They provide clients with education and information to help them manage their money. They do not provide financial advice or deal with complex financial/legal matters but will facilitate access to financial counsellors for help with complex issues.

All FMP services are voluntary, free, confidential, and available to people who are experiencing personal financial difficulties due to circumstances such as unemployment, sickness, credit over-commitment and family breakdown or who want to build their financial skills.

Money Management services are particularly targeted at families and individuals with low levels of financial literacy in disadvantaged communities in remote locations in Australia.

To facilitate flexible service delivery, service providers are expected to prioritise services and distribute assistance to clients according to the providers' own needs-assessment processes, and determine the level and type of assistance that is most appropriate in each circumstance.

Services can be accessed through a range of gateways including other Financial Management services, Centrelink, utility companies, housing services, community organisations and self-referrals.

Services under the program complement each other: helping in times of crisis, building stability through advocacy and advice, and building longer-term capability and wellbeing.

Some funded organisations provide several types of service to support people at different times, ranging from crisis, to stability, to long-term capability.

All services are expected to offer referrals that connect people with appropriate financial and social support. They are expected to work with other community and business services and agencies in their local region, such as Centrelink, housing, employment, and mental health or family support services to provide support tailored to meet clients' needs. In areas where Income Management is in place, services will support Income Management participants to build their financial capability through money management education and financial counselling.

FaHCSIA monitors and evaluates the FMP mainly from 6-monthly performance reports completed by service providers in accordance with their funding agreements. These agreements can require financial statements and/or acquittal reports to be submitted as part of this process.

Data is collected for each program and collated into a quarterly, half-yearly or an annual report to evaluate whether the funds provided are sufficient and to determine if program outcomes are met through the delivery of quality, efficient and effective services. Data is collected on the type of services provided and the clientele supported.

1.1 The financial management program project phases

The Australian Institute of Health and Welfare was contracted by FaHCSIA to review the reporting requirements for the Financial Management Program. The purpose of the project is to create specifications for a FMP data set to ensure standardised reporting requirements across Emergency Relief, Commonwealth Financial Counselling and Money Management Services and enable data to be compared more effectively across states and territories. One of the project's main goals is to reduce provider reporting burden, primarily by reducing complexity, while improving data utility. This is achieved by consolidating data items and using existing national data standards and other data items present across the FMP.

The project was undertaken in three phases.

1.1.1 Phase 1

The first phase involved a desk-top review of relevant literature and included the preparation and submission of a preliminary report to FaHCSIA. During this initial stage, there were frequent meetings with FaHCSIA staff to ensure program-specific knowledge was gained about Emergency Relief, Money Management and Commonwealth Financial Counselling. The preliminary report included the initial development of a data dictionary specifically for the FMP, and a redesigned framework to assist in measuring performance.

1.1.2 Phase 2

The second phase primarily focused on stakeholder consultation and information consolidation.

Provider consultations were undertaken with various state and territory organisations to determine the current data collection process and relevance of the information gathered to providers. Meetings were held with each of FaHCSIA's network offices to understand the data processing requirements at the FaHCSIA interface. Meetings were also held with some peak bodies and other funding bodies to gauge provider reporting burden and canvass general issues across the sector. A list of providers consulted is at Attachment 4.

Numerous organisations have been either visited or participated in teleconferences as part of this consultation. Many organisations also returned questionnaires on the data they collect and supplied copies of their data collection forms (some of these organisations submitted the forms at the request of their respective head offices).

The following table shows the visited organisations by state/territory and type of service provided.

Table 1: Organisations visited by state

	Commonwealth Financial Counselling	Emergency Relief	Money Management Services
Australian Capital Territory	1	1	0
New South Wales	2	10	0
Victoria	1	6	1
Tasmania	2	15	0
South Australia	2	7	0
Western Australia	2	7	1
Northern Territory	3	4	2
Queensland	1	3	1
Total	14	53	5

In addition to the feedback from the 72 organisations noted in the table above, 28 questionnaire forms were received from Emergency Relief, Money Management and Financial Counselling providers.

1.1.3 Phase 3

The third phase involved analysing new material provided by FAHCSIA on other relevant research projects under way, considerable further development of data items, and creation of the data dictionary provided at Section 6.2.

2   Data development

Recommendations of this chapter

> **Recommendation 2.** FaHCSIA should adopt the data development principles described in Section 2 as standard practice for any future development of the FMP.

2.1   What is information?

2.1.1   Data development for primary and secondary purposes

Data are the prerequisites for information that is required to support all levels and types of business. The need for data development arises at all levels, from senior decision makers at the national and international levels, to the state and territory, local government and individual levels. For example, data recorded on a client's records, such as address, income and personal circumstances, assists the provider to deliver effective services to assist the client. That same data, when part of an aggregate collection, provides policy and research groups with information to undertake needs analysis work and measure outcomes, and provides a researcher with the information required for outcomes analysis.

Good data development practices should be mindful of opportunities to re-use available data, where appropriate, and ensure that data collected for one purpose can be made available for others, so that additional data should be collected only where this is not yet available. It is important that data required for secondary purposes (for example, the generation of statistics, policy-making and planning) is obtained as a by-product of service delivery (or the care process). Similarly, data developed for mainly primary purposes should also be used to compare and inform about the effectiveness of service delivery, and measure performance.

2.1.2   Uses of information

1. Service delivery—information about each event or transaction is needed to deliver effective services to clients.

2. Customer profiling—information about clients (such as their habits and preferences) makes it possible to design and deliver better and more effective services. If agencies do not know the extent to which they are currently assisting customers, they cannot determine what policy or procedural changes would be most effective in improving services. Also, comparisons between the characteristics of the target group and actual clients can facilitate targeting of services.

3. Planning—up-to-date and comprehensive information about resources (such as vouchers, food, people, computers, vehicles and property) is required for planning the effective management of resources. Information about the climate in which organisations

operate can also assist in service planning. At the planning stage, information is a key factor in decision-making.

4. Decision-making—information is needed to make sound decisions. For example, how an organisation should allocate government funding, or confidently predict its annual expenditure.

5. Policy-making—information about demand, client needs for assistance and other service delivery issues helps governments to assess how best to support the sector.

6. Measuring and controlling performance—information is required to measure and evaluate the impact or effectiveness of a service. Information is needed to determine whether service provision is better or worse than expected, and to identify ways in which corrective action may be taken. Information that compares local performance with agreed benchmarks is used as the main way of measuring performance.

2.2   Data development principles

Integral to any data development project is an understanding of both the principles of data development, and of the reporting requirements the project is attempting to address. The FMP data dictionary in Section 6 has been developed with both of these factors in mind and also considers reporting burdens associated with data collection at the provider level. It has not been possible to consider implementation issues that may be associated with changing current collection practices, other than in the broadest sense, as FaHCSIA is understood to be developing new systems to store and collect data and this work is out of scope of this project.

Data development is a structured process, based on an understanding of the information to be derived using the data. It includes modelling data needs and clarifying the relationships between data. Key data concepts are identified and standardised by creating data elements. Data development results in the production of a set of data standards to ensure consistent collection and use of the data set.

The principles and methodology in this report are universally applicable. They can be adopted by those interested in developing data for use at the national, state/territory or local levels. The principles and methodology are also applicable across all subject areas, including community services, health, early childhood and housing and homelessness.

The principles and methodology provide a starting point for anyone who undertakes data development with the intention of collecting or using the data, and for those who want to know what is involved in the process of data development. They may be of particular interest to:

1. System developers, including people involved in developing database specifications, data exchange mechanisms and validating programs. System development is expensive and time consuming. This makes it even more important that data from these systems are based on sound data development principles that meet agreed standards and are endorsed by authoritative bodies.

2. Users of data sets who may be interested in understanding data (and metadata), including how it is developed and structured. Users of data sets would include service providers (who are often also responsible for data collection) as well as people using the data for secondary purposes, such as administration, research or statistical analysis.

3. Data developers who are seeking knowledge of the process, principles and methodology of data development to help avoid problems and pitfalls. Data developers may be anyone designing a data collection, including developing questions and data items to use, irrespective of how the data are to be collected (survey, administrative collection, interview and so forth).

The advent of electronic data and web-based capture and communication systems provides a unique opportunity to improve the quality and coverage of information in Australia and the potential to re-use and share data. In line with the 'create once, use often' objective of information management, it is important to look for opportunities to improve the information available for national reporting and analysis when undertaking electronic data collection initiatives. Otherwise, significant additional costs may be incurred by creating parallel systems whose products may not necessarily be compatible, resulting in inefficiencies and risks to data quality. It is important that data development use principles that ensure data collected at the point of service delivery can be aggregated and used for secondary purposes.

This report outlines and applies data development practices that incorporate the steps needed to produce high-quality, consistent data that meet the needs of all users, and attract the necessary agreement on content and authority behind the data specifications. The document promotes the role of metadata in describing data and the use of data standards to improve consistency in data recording where consistency and comparability is required.

2.3 Characteristics of good data development

2.3.1 Be clear about the purpose of the data collection

Before deciding what data to collect and develop, it is important to be clear about the purpose of the data collection. This includes the important policy or planning questions, or service provision needs for which data collection is required, and how having the data will help deliver more efficient and effective services. FaHCSIA wishes to use the data collected regarding the FMP to:

- ensure funding agreement requirements are met and funding risks managed
- describe the FMP outputs, outcomes, quality, efficiency and effectiveness to a range of audiences
- demonstrate the need for, and to inform, continuous improvement
- identify and raise awareness of best-practice approaches.

2.3.2 Data included must be required to meet the objectives of the data collection

Once the purpose of the data collection has been defined, the data required to meet the collection's objectives can be identified and developed. Data developed and included must meet the collection's objectives, as the costs of developing, collecting, compiling, validating and reporting data can be significant.

2.3.3 Stakeholders

While they may not themselves undertake data development, stakeholders have an interest in not only ensuring that data are made available, but also that the data are relevant, consistent, comparable and accurate. Stakeholders depend on the outcomes of good data development and may use the data for a variety of purposes, ranging from service provision, planning, advocacy and statistical reporting, to service planning and policy-making.

The key stakeholders that need to be considered for the FMP include:

- Politicians and government officials—including Commonwealth, state and territory government ministers and their advisors—who use information to make decisions about sector support.

- Service providers and their peak bodies—who require information to provide better services and advocate for their sector.

- Educators and researchers—who develop evidence-based products.

2.3.4 Create once, use often

The availability of existing data sources should be explored and existing data used where possible. Data needed to support secondary (or downstream) information purposes (such as reporting, policy, governance or decision support) should be obtainable from primary data (point-of-service delivery data). Otherwise, data needed for secondary requirements would have to be developed and collected separately, resulting in significant additional costs because of the need to establish parallel data collection systems to support existing and new data flows, whose products may not necessarily be fully compatible. Similarly, data developed and collected for mainly statistical purposes should be used to provide feedback to improve and enhance primary service delivery. In the case of this project, many data providers are able to extract data from their systems that could be used for data collection via an administrative system, rather than by submission of forms and spreadsheets. This would require a great deal of work from a systems perspective but would facilitate both regular and consistent reporting by the more technologically sophisticated organisations. It may also reduce the current double handling of data, where state and territory offices enter the data into the FaHCSIA system on behalf of the provider. Alternatively, a client management system could be developed that allows providers to capture the information they require to provide assistance, and simultaneously allows extraction of FaHCSIA relevant information.

Data must be able to be collected as a by-product of service delivery or administrative practice. The data must be relevant and meaningful to those collecting the data and be of benefit to service providers. Data development must take into account the business needs, feasibility of data collection, appropriateness of the data, as well as scientific evidence and recommendations (guidelines) of subject matter experts. Where possible, data development should be based on data that service providers already want or need to collect about clients and service provision. Most importantly, data development should ensure that data collectors are not constrained or forced to operate in ways outside usual practice.

2.3.5 Data development should minimise collector/recording burden

Good data development should ensure compatibility of data collection and reporting requirements to avoid situations where the same data has to be collected, counted or reported differently for different programs. This will reduce the reporting burden on service providers and help to reduce cost.

2.3.6 Data development should be mindful of privacy concerns

Data development processes must take into account security policies and privacy issues, including ensuring compliance with the information privacy principles. Data sets should avoid the inclusion of data standards that may be regarded as private or confidential, otherwise data provided may not be reliable or accurate because respondents may be reluctant to provide the data. Confidentiality is of paramount importance in the case of FMP as many clients may be concerned if private information is collected.

2.3.7 Creating data standards is part of data development

The quality of data, including its consistency and comparability, is enhanced when data standards are available to support the collection and use of a data set. The development of data standards is not something that should be done at the end of the data development process. It is very much a part of the data development process itself. In developing the FMP data dictionary proposed in this paper, the AIHW has used its significant expertise to develop data elements that can be used as standards once appropriate governance mechanisms have been adopted. Governance mechanisms are discussed in more detail in Section 5.

2.3.8 National and international standards should be used wherever available and applicable

When data are being developed, it is important to ensure that the specifications of the data are consistent with national and international data standards. This avoids duplication of effort and the development of conflicting data standards. Data sets should be based on a single set of agreed definitions and data standards, such as the National Community Services, Housing Assistance or Health Data Dictionaries, so data developers can 'pick and mix' from existing agreed definitions, ensuring a high degree of consistency and reducing data development time and cost. Where possible, pre-existing standards have been used in the development of the data dictionary for FMP.

2.3.9 Data development may be incremental

Data development should support incremental development, such that the scope of the data set is expanded over time. It may not be possible to develop all data required for a data set at the same time. Depending on the time and resources available, it may be better to stage the data development so that the scope of collection is expanded over time. This is particularly relevant in this case, as systems enhancements may mean that data collections can only be altered when systems development work occurs.

2.3.10 Data development is system independent

Data development must ensure that data in the data set are well defined and standardised so that they can be compared independent of the organisation, system or tool that captures the data. Data development must not be limited by the capability of any particular system.

2.3.11 Acknowledge the limitations of data

While it is important to be mindful of the opportunity to re-use existing data, it is also important to be aware of any limitations and to ensure that these are acknowledged. It is also important to note that data that are suitable for some purposes may have limited use for other. For example, while data about client counts may be a useful measure of numbers of people seeking assistance, the data may not be adequate unless combined with other information to assess the need for assistance within a community.

3   Current data reporting

3.1 Overview

FMP funding agreements require aggregated data to be reported for Emergency Relief, Commonwealth Financial Counselling and Money Management services to funding agreement managers every 6 months, except for Emergency Relief providers with a funding agreement of $80,000 or less (which are only required to report annually). Funding agreements are predominantly in FaHCSIA's state/territory network offices.

The reporting requirements for Emergency Relief, Commonwealth Financial Counselling and Money Management services are unaligned. As shown in Attachment 1, these requirements contain a mix of quantitative and qualitative data.

Each of the network offices are responsible for collating, aggregating and analysing the data received and forwarding it to national office for national level analysis and reporting.

The services involved in this research project reported spending a significant amount of time reporting case studies and other qualitative data. There is little knowledge within the sector of how or why these questions are asked. The sector acknowledges the usefulness and appeal of good news stories to attract the attention of politicians including ministers (face credibility), but query the usefulness as evidence to support program delivery or research. It is difficult to determine causal relations between an individual outcome and a particular successful intervention. Many of the narrative descriptions used in the CFC report are amalgamated and therefore details of individual circumstances are lost, even at the agency level. Amalgamated narratives at the national level are of no use as an evidence base.

For case studies to be useful as an evidence base, they need to be targeted to answer specific questions. This would provide a basis that enables subsequent interpretation of the results more generally beyond the immediate case study and can be used in conjunction with other qualitative information. Case studies can be useful as a research tool in describing complex issues where it is difficult to isolate variables or where there are multiple, influencing variables. However, to make use of this information in an aggregated way, the variables need to be broken down into components for analysis. That is, more useable information can be attained if individual circumstances are enumerated, such as identifying characteristics of people assisted, circumstances of individuals and families, presenting problems, services delivered/model of services delivery and outcomes achieved.

3.2 Examination and comparability of data elements in current collections

The AIHW project team compared the current reporting templates of the three programs. While most of the data requirements were similar, there were a number of data items used only once each collection. The burden of collection for these three programs is significant, as the providers must keep different information for different services as well as use different definitions for similar services in different programs. Attachment 1 shows the comparison of data items across the three collection areas.

The table shows that different terminology is used in each of the collections. While the current forms provide some definitions regarding the meaning of each term, they are not consistent and do not align with standard definitions used across other sectors. In addition, different collections measure different things, but use the same terminology to define these items.

For ER in particular, the data collected are not providing sufficient information to FaHCSIA to enable an assessment of the program to be undertaken. No information is collected about a client's income, housing affordability, type or value of assistance received. Very little information is collected about the organisation delivering the services, or the types of services being delivered.

4 Consultation with service providers

4.1 Site visits

Between July and October the project team undertook a number of visits to the service providers in all states and territories. Service providers ranged from large non-government organisations to smaller service providers in urban, regional and remote areas.

The visits were conducted either in a forum of service providers or interview-style meetings with individual service providers. These two formats provided an opportunity for the AIHW to gain knowledge of the financial management program activities. They also enabled the AIHW to better understand areas of common ground in the case of the forum-style meetings and the conditions under which the services provided in the case of the individual interviews.

Each of the service providers were sent a list of data items and asked to report if they were currently collecting the data. The template (Attachment 2) was broken into three sections and used to record findings from the discussion. The sections were:

Clients and service delivery

The type of information listed may assist the agency in describing its client group, that is, social, economic and demographic characteristics, referral processes/pathways, and what services are delivered and to whom; and for service planning, for example, interpreter/cultural needs of clients.

Administration and agency data

The type of information listed may assist an organisation in determining the agency's workload, staff requirements and provide feedback to agency staff.

Supporting research/one-off surveys

Any additional information that may not be collected as part of the normal business of service provision, that may be useful to include in a data dictionary for use by researchers. This enables data to be more useful across a range of one-off surveys/research.

4.1.1 Data provider concerns with current collections

Information collected from providers was used to develop the data dictionary.

The following is a summary of providers' main concerns. This list is not meant to be exhaustive, but represents a view of those visited. Much of the discussion with providers was informal so it is not possible to quantify the exact number of providers making each comment, however, the following comments were made by most of the providers visited.

- The definition of a client as against an instance of assistance is not clear. When counting clients assisted for the reporting period, it is not clear whether the count is of unique individuals assisted or the number of times each individual was assisted. For example, a client is assisted twice within the reporting period and is counted as one or in other instances the count would be 2. This also has implications for calculating average cost per client.

- The definition of a client as an individual identity versus a group or family assisted is not consistent. The counting rules applied to individuals seeking services are being applied differently by different providers. A family is counted either as one individual, or each individual in the family who is benefiting from the service is counted as a separate client. (This is particularly relevant in ER where often food parcels are made up on the basis of the size of the family. An individual receives a smaller food parcel than a family of 6.)

- The definition of a new client is not clear and is being interpreted differently by service providers. Some are identifying new clients as those who have received services in a 6-month or a 12-month period and have not been seen before in that time. When this period has ended, the client is then counted as a new client if they return for more services. Other service providers do not have any time limitations and only take clients off their records when they move to a different jurisdiction or have died. Still others count only clients they have never seen before as new clients.

- The definition of client versus case is not clear. Some organisations providing services record any individual seeking services as a case, some record them as clients. Some limit case counts to those who have face-to-face meetings, whereas others include ongoing cases that are dealt with by phone as cases, or clients. The definition regarding the time period between cases, that is, is it the same case or a new case, is not defined anywhere. This also has implications for calculating average cost per case.

- Financial counselling requests data on the time spent with a client. Organisations providing financial counselling services are recording time spent with clients inconsistently. For example, time spent on advocacy services and speaking with financial institutions, which can take up a majority of the time or follow-up telephone contact, may be counted as client time in some organisations, or not counted at all in organisations that only count face-to-face contact with the client as time spent on casework. This also has implications for time spent on other activities, which may or may not include client-related time, such as group education activities.

- NGOs are using different systems to collate data. In some organisations, a paper form is used to collect data from the client at the time the service is first provided and is a task usually done by volunteers. These forms are then entered into the database system used by the service provider or an Excel spreadsheet before the information is extracted for reporting purposes. The databases vary among NGOs and some are more efficient than others in extracting data. They have to be changed when FaHCSIA reporting questions change, to ensure requirements can still be met. If FaHCSIA implements a case-management system, either a software interface will need to be developed to interact with existing systems or a parallel system adopted.

- Requests for new data items to be collected can often be ad-hoc requests based on ministerial requirements. Currently no lead time is given to NGOs to collect data on new or ad-hoc questions. Processes need to be implemented to introduce new data items on FaHCSIA reports that provide sufficient lead time for FaHCSIA state offices and service providers.

- Service providers requested feedback on the data collected to better understand the trends occurring in other states and territories. Receiving feedback could also help volunteers to be more enthusiastic about collecting the data from clients and understand the relevance and importance of quality data.

- Referrals to other services are made by all NGOs and are often made on the basis of a client who has requested multiple services. These clients are usually assessed to identify other underlying issues and referred on for such things as housing assistance services, family support, and mental health services. Referrals are also made from other agencies such as Centrelink to ER, CFC or MM service providers. This information is not captured.

- Clients who repeatedly access ER services are usually known to the agencies. In cases where informal networks exist between agencies at the local level, they are likely to be known across agencies as well. There is no current mechanism to capture this information and therefore it is unknown what percentage of clients accessing services are the same clients over and over. Adoption of a statistical linkage key within the collection would enable the evidence base to be captured.

- Data on unmet demand is not currently captured due to the difficulty in identifying turnaways where the agency's services are by appointment only and are limited to particular times a day. Few NGOs are able to collect counts of those who could not make an appointment, or receive assistance elsewhere. There is significant confusion around the meaning of turnaways and unmet demand. Assessing the viability of the program requires an understanding of the size of the problem. Without an understanding of the number of clients unable to access services when they need them, it is difficult to understand if current funding is sufficient. Unmet demand was sometimes understood to be those clients who sought services and were not able to receive them outside business hours, which NGOs did not count. A satisfactory way to determine the size of any unmet demand problem is by implementing a client-management system that allows tracking (via a statistical linkage key) of clients across providers. Significant privacy issues will need to be addressed if this option is considered.

- The majority of the NGOs consulted were funded by state and federal governments to administer FMP services and, in turn, were required to adhere to different reporting requirements. FaHCSIA reporting is undertaken on either a 6- or 12-month basis. Other funders can have the same time periods or ask for data on a quarterly basis.

- Case study information reporting can take a significant amount of time for providers to complete. There is a sense among providers that this information is not used in any systematic way.

- Many different models of service delivery have been adopted by providers around the country. Some are undertaking ground-breaking activity in this sphere, yet these innovative approaches are not captured via current reporting mechanisms, which mean there is little evidence base to support them.

- The data items collected as part of the process of providing ER services extend far beyond the current FaHCSIA requirements. The same data that is collected for Money Management and Commonwealth Financial Management services could also be collected for many of the Emergency Relief-funded services, as most providers would already have it available.

The most common types of additional information collected were:

- – type of assistance provided
- – reasons for seeking assistance
- – sources of income
- – demographic background.

Among ER providers that collected additional data, most indicated they had used it to prepare reports, which were typically used for internal management. More than half of those who had prepared reports based on additional data did so on a monthly basis.

Attachment 3 lists in order of collection the items most commonly collected by providers that are not reported to FaHCSIA.

Attachment 4 lists all providers visited.

4.1.2 Consultation with other groups

In addition to provider consultation, the AIHW also spoke with funders and some peak body representatives regarding ER. The nature of these discussions was primarily around the effectiveness of the ER program rather than the data collection, although the significant burden imposed on providers by the current collection methodology was discussed.

Discussions with the Australian Council of Social Service (ACOSS) focused on its current work producing the ER Handbook and the perceived difficulties associated with the ER service program.

The AIHW also consulted Lotteries West, in WA, which provides significant ER funding to various providers in WA. Reporting requirements for Lotteries West vary considerably from those of FaHCSIA, and include an acquittal only for funds spent. The application process for funding is required to fully describe the services to be delivered, and funding decisions are based on this process.

The Social Policy Research Centre is undertaking a research program to examine best practice in service delivery for the FMP. Discussions with this group focused primarily on difficulties analysing ER, CFC and MM data.

5   Options and recommendations for future data collection

Recommendations

Recommendation 1: Governance arrangements for data collection methodologies and change processes be put in place in line with those described in Section 5. This includes appropriate lead times for development and exposure of new data standards and inclusion of service providers in the process of adding new data items to ensure the feasibility and efficiency of collecting the data item is discussed. It is recommended that about 6 months lead time is given to providers to allow them sufficient time to make necessary changes to forms and systems.

Recommendation 3: Establish a working group with representative membership from all of the stakeholders, including Australian Government, state and territory representatives, non-government organisations (including service providers and peak bodies) to progress work on the National Minimum Data Sets and to determine any future changes to the data collection program and data definitions.

Recommendation 4: Develop a feedback loop for providers at the national level that provides both data and information via a series of newsletters, forums, or personal visits.

Recommendation 5: Develop, and make available to the public, data reports on the number and types of service delivered via the FMP. This should include a clear link between policy directives and the data collected to support the provision, planning and performance of the FMP sector.

Recommendation 7: Adopt the National Minimum Data Set Specifications for ER as specified below and introduce a new cut-off of $20,000 for small ER organisations.

Recommendation 8: Adopt the Data Set Specification for MM as specified in Section 6 and remove the regular collection of the qualitative data items. A number of the qualitative items can be easily altered to become quantitative items and, where appropriate, these have been have been included in the data dictionary.

Recommendation 9: Adopt the Data Set Specification for CFC as specified in Section 6, and remove the regular collection of the qualitative data items. A number of the qualitative items can be easily altered to become quantitative items and, where appropriate, these have been have been included in the data dictionary.

Recommendation 10: Prepare a qualitative questionnaire to obtain the 'good news stories' and other narrative components of the current data collection.

Recommendation 11: Agree to support the use of electronic client-management systems to support the capture of information at the client level, which would give service providers the capability to record data once, and from which reports could be generated to support aggregate collection.

5.1 Proposed characteristics of FMP national data collections

The FMP services in scope of this review require that data be collected to assess both the effectiveness of the program and the amounts of assistance being offered to the community through the programs. The current data collections do not allow FaHCSIA to effectively assess the program, provide no indication of services offered (particularly in relation to ER) and offer no objective way of providing information to providers about the effectiveness of their service delivery models if feedback is given.

Key findings:

1. Time spent collecting data is disproportionate to funding received. That is, decrease reporting burden for lesser funded organisations (who may have some difficulty providing information) but increase reporting requirements of the larger organisations. This should include the removal of the qualitative data from the surveys and replacing it with an annual reporting collection process.

2. Lack of alignment between ER, MM and CFC data collections and other related data collections are increasing the reporting burden and reducing the usefulness of the information within the current collections. Over time, this can cause issues in comparing data with other related information across the health and welfare collections.

3. There are a lack of governance arrangements for FMP information collection and use. That is, there is no formal mechanism to develop and endorse sector-wide data standards and data collections relevant to current policy and research initiatives.

5.1.1 Emergency Relief

Current reporting requirements for ER are very minimalistic, regardless of the size of the agency delivering services, or the funding provided to the organisation. Current ER reporting is every 6 months, unless ER providers are funded less than $80,000 in which case they are only required to report annually.

This service represents the major proportion of the overall FMP funding and receives the least data from service providers.

ORIMA Research indicated it would be feasible to do two things to improve the data collection: one is to introduce the same collection that is used for the Money Management and Commonwealth Financial Counselling services, the other is to reduce the minimum amount to report for ER funding to $20,000. Our consultation process with providers indicates that this would be an achievable goal, although the recommended ER data set specification is different from the Money Management and CFC collections as it contains no casework. All other items are the same.

Summary of proposed changes

- Agencies receiving less than $20,000 provide an acquittal report once a year. This acquittal form should indicate how much of the funding has been spent on the services agreed between FaHCSIA and the service provider. No other information is required.

- Agencies receiving $20,000 or more provide the ER data set once a year.

- Items as specified in the ER National Minimum Data Set Specification be collected.
- Qualitative section of current data collection be removed and replaced with a new collection vehicle.

Table 2 shows the recommended data items for collection against the current items collected and reported to FaHCSIA, with a brief description of the recommended change. Most of the data elements that have been recommended to add are already collected by services in order to deliver the Emergency Relief service and are highly relevant to policy discussions on performance indicators. The intent is for the data definitions to be used at the collection point and then be aggregated at the agency, jurisdiction and national levels without significant manipulation in the process. Where a data element that is not currently reported has been added to the collection, it is because the information is essential for delivering services and is currently collected by services although not reported to FaHCSIA. Adding to the current collection will enable FaHCSIA to identify trends and gaps in services at a national level.

Table 2: Recommended changes for Emergency Relief data elements

Recommended Emergency Relief data elements	Emergency Relief data elements (January to June 2010)	Description of change
OUTLET OR AGENCY DATA ELEMENTS		
Australian state/territory identifier (service provider organisation)		Added this item to clearly identify each state from each reporting form.
Name of organisation		Added to indicate if the outlet is part of a larger concern.
Name of outlet or agency	Name of outlet	No change
Reporting period start and end	Reporting period	No change
Postcode — Australian (service provider organisation)		Added to better locate the agency based on data from the reporting form.
Number of clients	Number of clients in the reporting period.	Clarified the description of a client.
New client indicator	Number of new (first-time) clients in the reporting period.	Added an indicator to clearly separate the new and current clients. Total of these two should add up to the number of clients.
Interpreter services required		Added to identify when an interpreter is needed. This is sometimes an added cost to delivering services that may not be covered in the MM funding.
Full-time equivalent paid staff		Quantified this data element to better count the number of employees. The remaining questions on staff turnover should be placed in a qualitative report.
Full-time equivalent volunteer/unpaid staff		Added as it is important to count any volunteers providing services.
AGGREGATE CLIENT DATA ELEMENTS		
Age range		Added as this information is essential for delivering services and is currently collected by services although not reported to FaHCSIA.
Indigenous status	Number of Indigenous clients	Provided the National Standard for

Recommended Emergency Relief data elements	Emergency Relief data elements (January to June 2010)	Description of change
	accessing ER in the reporting period (not mandatory 2009-10).	Indigenous status that permits the differentiation between Aboriginal and Torres Strait Islander people.
Income management indicator	NT WA and Cape York only: Number of clients accessing ER in the reporting period who are participating in income management.	Created a data element for use in all three FMP services. For ER added the condition that only NT, WA and Cape York agencies should report on this item.
Household composition		Added the item to better describe the types of households accessing services. Commonly collected by ER agencies.
Number of dependants		Added the item to better identify the actual number of people being assisted by the services. Commonly collected by ER agencies.
Postcode — Australian (person)		Added the item to better identify the location of where clients live. Can be used as comparative information of location of outlets. Commonly collected by ER agencies.
Country of birth		Added to assess the cultural diversity of clients. Recommend entering the 10 most common countries of birth collected in the FMP sector for the value domain. Commonly collected by ER agencies.
Source of income	Number of clients accessing ER in the reporting period whose main source of income is Centrelink.	Provided the National Standard for Source of Income that permits comparison with other collections also collecting source of income.
Main language other than English spoken at home	Number of clients accessing ER in the reporting period who speak a main language other than English at home (non-mandatory 2009-10).	Added to assess the cultural diversity of clients. Recommend entering the 10 most common languages collected in the FMP sector for the value domain. Commonly collected by ER agencies.
Marital status		Added to obtain a better picture of the types of relationships of clients. Commonly collected by ER agencies.
Sex		No change
Labour force status		Added as this information is essential for delivering services and is currently collected by services although not reported to FaHCSIA.

Recommended Emergency Relief data elements	Emergency Relief data elements (January to June 2010)	Description of change
AGGREGATE SERVICE ACTIVITY DATA ELEMENTS		
Reason for seeking assistance (financial management)		Added to complement the source of referral data element that is currently collected.
Service activity type (emergency relief)	Any other information about the assistance you provide and/or the outcome achieved, eg, case studies.	Combined the questions currently collected into a code set that quantifies the number of clients and the types of services in one question.
Number of clients referred		Added the National Standard for source of referral.
Assistance — reason not provided		Added to quantify the unmet demand or turnaways.
Referral destination (emergency relief services)	Number of clients referred to other services in the reporting period.	No change
Assistance needs resolved indicator	Was the client's problem/s resolved?	Added to account for the performance indicator requirement however the quality of the data from this item should be treated with caution as it is subjective.
Financial assistance amount		Added for better accountability. Many ER agencies collect this type of information however it is not currently collected by FaHCSIA.
Other items		
	For the end of June report only: Number of clients accessing ER five times or more in the 2009-10 financial year.	Recommend deleting from the collection unless the reporting rules around the frequency of providing ER support are standardised.
	Number of clients accessing ER in the reporting period who are serving a Centrelink non-payment or waiting period.	Recommend deleting from the collection unless the reporting rules around the reasons for why these data are needed can be described. The recommended data set for ER will provide a better picture of the client than asking this question.

The data dictionary attached to this report provides FaHCSIA with an opportunity to 'cherry pick' items that will better answer its information questions and then, following the governance processes outlined in Section 5.2 for addition of items to the data set of this report, increase the usefulness of the data from ER.

5.1.2 Money Management

Current Money Management reporting is providing a good deal of data, but the definitions used in the collection are not well understood by providers. (For example, 'case' and 'client' are used intermittently and in different ways.) In addition, a great deal of qualitative information is reported, often at great provider expense, that is not comparable or able to be assessed in any systematic way. The collection should also be better aligned with the recommended new ER and CFC data items.

Summary of proposed changes

- Items as defined in the MM National Minimum Data Set Specification be added or removed as appropriate to this collection.

- Qualitative section of current data collection be removed and replaced with a new collection vehicle.

Table 3 shows the recommended data items for collection against the current items collected and reported to FaHCSIA, with a brief description of the recommended change. Most of the data elements that have been recommended to add are already collected by services in order to deliver the Money Management service and are highly relevant to policy discussions on performance indicators. The intent is for the data definitions to be used at the collection point and then be aggregated for at the agency, jurisdiction and national levels without significant manipulation in the process.

Table 3: Recommended changes for Money Management data elements

Recommended Money Management data elements	Money Management services data elements(January to June 2010)	Description of change
OUTLET OR AGENCY DATA ELEMENTS		
Australian state/territory identifier (service provider organisation)		Added this item to clearly identify each state from each reporting form.
Name of organisation		Added to indicate if the outlet is part of a larger concern.
Name of outlet or agency	Name of outlet	No change
Reporting period start and end	Reporting period	No change
Postcode — Australian (service provider organisation)		Added to better locate the agency based on data from the reporting form.
Number of clients	Number of clients in the reporting period.	Clarified the description of a client.
New client indicator		Added an indicator to clearly separate the new and current clients. Total of these two should add up to the number of clients.
Interpreter services required		Added to identify when an interpreter is needed. This is sometimes an added cost to delivering services that may not be covered in the MM funding.
Full-time equivalent paid staff	How many staff do you currently have working on Money Management Service activity and what are their roles? Has there been any staff turnover this reporting period? What difficulties has this caused and how has this been addressed?	Quantified this data element to better count the number of employees. The remaining questions on staff turnover should be placed in a qualitative report.
Full-time equivalent volunteer/unpaid staff	Age of clients	Added as it is important to count any volunteers providing services.

Recommended Money Management data elements	Money Management services data elements(January to June 2010)	Description of change
AGGREGATE CLIENT DATA ELEMENTS		
Age range		Added the National Standard for age range that includes age ranges below 18.
Indigenous status	Number of Indigenous clients	Provided the National Standard for Indigenous Status that permits the differentiation between Aboriginal and Torres Strait Islander people.
Income management indicator	Number of clients participating in welfare payment reform Compulsory income management Voluntary income management/ Family Income Management (FIM) agreed budget Transition from income management to Community Development Employment Projects (CDEP) Transition from income management to employment	Created a data element for use in all three FMP services.
Household composition		Added the item to better describe the types of households accessing services. Commonly collected by MM agencies.
Number of dependents		Added the item to better identify the actual number of people being assisted by the services. Commonly collected by MM agencies.
Postcode — Australian (person)		Added the item to better identify the location of where clients live. Can be used as comparative information of location of outlets.
Country of birth		Added to assess the cultural diversity of clients. Recommend entering the 10 most common countries of birth collected in the FMP sector for the value domain. Commonly collected by MM agencies.
Source of income		Added as this information is essential for delivering services and is currently collected by services although not reported to FaHCSIA.
Disability group		Added the item to assess the types of disability of clients.
Main language other than English spoken at home	Number of who speak a main language other than English at home.	Added to assess the cultural diversity of clients. Recommend entering the 10 most common languages collected in the FMP sector for the value domain. Commonly collected by MM agencies.
Marital status		Added to better obtain a better

Recommended Money Management data elements	Money Management services data elements(January to June 2010)	Description of change
		picture of the types of relationships of clients. Commonly collected by MM agencies.
Sex	Sex of clients	No change
Labour force status		Added as this information is essential for delivering services and is currently collected by services although not reported to FaHCSIA.
Income — gross (person)		Added as this information is essential for delivering services and is currently collected by services although not reported to FaHCSIA.
Household annual gross income range ($10,000 range)		Added as this information is essential for delivering services and is currently collected by services although not reported to FaHCSIA.
Tenure type		Added as this information is essential for delivering services and is currently collected by services although not reported to FaHCSIA.
AGGREGATE SERVICE ACTIVITY DATA ELEMENTS		
Reason for seeking assistance (financial management)		Added to compliment the source of referral data element that is currently collected and is helpful in identifying a pattern of behaviour of clients seeking assistance.
Service activity type (Money Management services)	Number of clients receiving assistance with or education from your service who have developed a Money Management budget or plan.	Combined the questions currently collected into a code set that quantifies the number of clients and the types of services in one question. This is a suggested code set that will need to be reviewed by FaHSCIA before implementation.
	Number of clients receiving assistance with or education from your service in relation to family payments.	
	Number of workshops conducted by your service.	
	Number of people attending these workshops.	
Source of referral	Number of clients: From a financial counsellor From emergency relief From Centrelink From other services	No change
Referral destination (Money Management services)	Number of clients referred by your service: To a financial counsellor To emergency relief To Centrelink To other services	Added some other services to the code set.

Recommended Money Management data elements	Money Management services data elements(January to June 2010)	Description of change
Assistance — reason not provided		Added to better quantify the unmet demand or turnaways.
Education delivery mode		Added to quantify the method of education activity undertaken in Money Management services.
Assistance needs resolved indicator	How well has it been done?	Added to account for the performance indicator requirement however the quality of the data from this item should be treated with caution.
Case-management goal status		Added to quantify whether the case management goals have been reached.
Consent obtained indicator		Added as this information is essential for delivering services and is currently collected by services although not reported to FaHCSIA.
Hours of service	Length of time taken to assist a client. Low support = under 1 hour Medium support = 1 to 3 hours High support = Over 3 hours	Added to quantify the total number of hours required to deliver the services. Survey questions not quantitative questions will assist in determining the complexity of service delivery.
OTHER ITEMS		
	Please describe links between your service and other organisations, eg, the relationships and/or partnerships that have been established with other programs, services, organisations or groups in the areas you service. This includes any local reference group of which you are a member.	Consider these questions for a separate survey.
	How do these relationships/partnerships contribute to the outcomes of your service?	Consider these questions for a separate survey.

5.1.3 Commonwealth Financial Counselling

Current Commonwealth Financial Counselling Services reporting is providing a good deal of data but, as with Money Management above, the definitions used in the collection are not well understood by providers. (Both 'case' and 'client' are used intermittently and in different ways.) In addition, a great deal of qualitative information is reported often at great provider expense that is not comparable or able to be assessed in any systematic way. The collection should also be better aligned with the recommended new ER and MM data items.

Summary of proposed changes

- Items as defined in the CFC National Minimum Data Set Specification be added or removed as appropriate to this collection.

- Qualitative section of current data collection be removed and replaced with a new collection vehicle.

Table 4 shows the recommended data items for collection against the current items collected and reported to FaHCSIA, with a brief description of the recommended change. Most of the data elements that have been recommended to add are already collected by services in order to deliver the Commonwealth financial counselling service and are highly relevant to policy discussions on performance indicators. The intent is for the data definitions to be used at the collection point and then be aggregated at the agency, jurisdiction and national levels without significant manipulation in the process.

Table 4: Recommended changes for Commonwealth Financial Counselling data elements

Recommended Commonwealth Financial Counselling data elements	Commonwealth Financial Counselling data elements (January to June 2010)	Description of change
OUTLET OR AGENCY DATA ELEMENTS		
Australian state/territory identifier (service provider organisation)		Added this item to clearly identify each state from each reporting form.
Name of organisation		Added to indicate if the outlet is part of a larger concern.
Name of outlet or agency	Name of outlet	No change
Reporting period start and end	Reporting period	No change
Postcode — Australian (service provider organisation)		Added to better locate the agency based on data from the reporting form.
Number of clients	Number of clients in the reporting period.	Clarified the description of a client.
New client indicator	Number of new clients/ number of existing clients.	Added an indicator to clearly separate the new and current clients. Total of these two should add up to the number of clients. This type of separation will allow for counting of all clients and then separate into new and existing clients.
Interpreter services required		Added to identify when an interpreter is needed. This is sometimes an added cost to delivering services that may not be covered in the MM funding.
Full-time equivalent paid staff	What is the staffing level of your CFC service (FTE)?	Quantified this data element to better count the number of employees. The remaining questions on staff turnover should be placed in a qualitative report.
Full-time equivalent volunteer/unpaid staff		Added as it is important to count any volunteers providing services.
AGGREGATE CLIENT DATA ELEMENTS		
Age range	Age of new clients	Added the National Standard for age range that includes age ranges below 18. New client indicator will allow for new clients to be separated from all clients.
Indigenous status	Number of new Indigenous clients.	Added the National Standard for Indigenous status. New client

Recommended Commonwealth Financial Counselling data elements	Commonwealth Financial Counselling data elements (January to June 2010)	Description of change
		indicator will allow for new clients to be separated from all clients.
Income management indicator		Simplified this data element to an indicator of what type of income management the client is participating in. Codes in the currently collected data element were not mutually exclusive.
Household composition	Household type of new clients.	Added the item to better describe the types of households accessing services.
Number of dependants		Added the item to better identify the actual number of people being assisted by the services.
Postcode – Australian (person)		Added the item to better identify the location of where clients live. Can be used as comparative information of location of outlets.
Country of birth		Added to assess the cultural diversity of clients.
Source of income	Main sources of income of new clients.	New client indicator will allow for new clients to be separated from all clients.
Disability group		Added the item to assess the types of disability of clients.
Main language other than English spoken at home	Number of new clients where a main language other than English is spoken at home.	New client indicator will allow for new clients to be separated from all clients.
Labour force status		Added as this information is essential for delivering services and is currently collected by services although not reported to FaHCSIA.
Income – gross (person)	Level of gross income — individual income of new clients.	New client indicator will allow for new clients to be separated from all clients.
Marital status		Added to obtain a better picture of the types of relationships of clients.
Sex	Sex of new clients	No change. New client indicator will allow for new clients to be separated from all clients.
Household annual gross income range ($10,000 range)	Level of gross income – household income of new clients.	New client indicator will allow for new clients to be separated from all clients.
Tenure type	Housing tenure of new clients.	New client indicator will allow for new clients to be separated from all clients.
AGGREGATE SERVICE ACTIVITY DATA ELEMENTS		
Reason for seeking assistance (financial management)	Key problems/causes of financial difficulty (cam be more than one) new clients. People affected by mental illness New arrivals/new and emerging	Combined the questions currently collected into a code set that qualifies number of clients and the reason for seeking assistance. New client indicator will allow for new clients to be separated from all

Recommended Commonwealth Financial Counselling data elements	Commonwealth Financial Counselling data elements (January to June 2010)	Description of change
	communities (including humanitarian entrants)	clients.
	Prisoners/former prisoners (and their families)	
	Problem gamblers	
	Indigenous communities	
	Seniors	
	People with disabilities	
	Homeless people	
	People participating in income management measures	
	Global financial crisis	
	People on income support	
	Relationship stress or breakdown	
Number of clients referred	New clients referred to your CFC service.	Simplified the code set. The current code set is extensive and was not mutually exclusive.
Service activity type (Commonwealth financial counselling)	Activity split – estimated split between activities.	Combined the questions currently collected into a code set that quantifies the number of clients and the types of services in one question.
	Provide an overview of demand for our CFC service (eg, trends, emerging issues, demand management where possible, quantify changes in demand and provide details of level/nature of unmet demand).	
	Overview of demand for your CFC service.	
	Overview of case complexity/diversity for your CFC service.	
	Provide an overview of case complexity/diversity for your CFC service (eg, trends, emerging issues)	
	Activity split – estimated split between activities.	
	Financial literacy/Money Management training new clients.	
Assistance — reason not provided	Issues and trends from your CFC service's contact with select groups.	Added to quantify the unmet demand or turnaways.
Referral destination (Commonwealth financial counselling services)	Number of clients referred to other services in the reporting period.	No change
Education delivery mode	Education delivery mode.	Same code set as currently used however removed training of volunteers as that is not a provision of service to clients.
Assistance needs resolved indicator	Was the client's problem/s resolved?	Added to account for the performance indicator requirement however the quality of the data from this item should be treated with caution.

Recommended Commonwealth Financial Counselling data elements	Commonwealth Financial Counselling data elements (January to June 2010)	Description of change
Episode end date	Number of cases closed in the reporting period.	Episode end date that falls within a reporting period will signify a closed case in the reporting period.
Case-management goal status	Did the client gain increase knowledge/skills related to money management?	Added to quantify whether the case management goals have been reached.
Consent obtained indicator		Added as this information is essential for delivering services and is currently collected by services although not reported to FaHCSIA.
Hours of service	Total number of casework sessions (eg, face to face, telephone), including opening session.	Hours of service can be broken up into the types of services provided.
	Average amount of time (in hours) per client (including casework sessions, activities on behalf of/associated with client).	
	Average amount of time (in hours) per case (including casework with sessions, activities on behalf of/associated with case).	
	Total hours – estimated number of hours (including holidays).	
Other items		
	Overview of case complexity/diversity for your CFC service.	Consider using these questions for a separate survey.
	Provide an overview of case complexity/diversity for your CFC service (eg, trends, emerging issues).	
	Issues and trends from your CFC service's contact with select groups.	
	Discuss issues and trends from your CFC service's contact with select groups.	
	Describe links between your CFC service and other organisations (eg, discussions with other organisations in your area about referrals, clients' needs or services; staff/service membership with professional associations or peak bodies.	
	Does your CFC funding cover the full cost of delivering your CFC service?	Recommend deleting from the collection unless the reporting is broader than CFC services.

5.1.4 Improved collection vehicle

FaHCSIA is altering the way it collects data from its providers. AIHW provider interaction suggests that a client-management portal, using the web, which allows providers to update

organisational information and report online, would be the optimal solution to reporting from a provider's perspective. A significant body of work would be required to determine both scope and costing for a fundamental
rethink of collection tools. It is likely that a client-management system would need to be designed that allowed web-based uploading of data for those who could use it, coupled with a forms-based or email approach for other providers. This is outside the scope of this review. However, it is recommended that FaHCSIA adopt the National Minimum Data Set specifications for collection into whichever collection, regardless of the collection tool adopted.

5.2 Governance arrangements

In Australia's federally dispersed welfare system, strong governance arrangements are needed to ensure that information collected from different service providers are consistent and therefore accurate and useful for policy, planning and program management.

An information infrastructure is needed to support the collection of nationally consistent and comparable data on population needs and the assistance provided. This infrastructure should include:

- An agreement to collect data consistent with national data standards where appropriate.
- An agreed approval process for data standards based on review by a committee.
- Regular publication of endorsed data standards.

These elements are elaborated in the following sections.

The current FMP process for collecting information does not include a strong governance mechanism and does not allow (necessarily) for input from the service providers. Current arrangements require that providers supply data as requested, but there is no process in place to accommodate information change requests. Many providers find it difficult to alter existing paper forms, let alone complex IT systems, without adequate notice. In addition, providers have no vehicle through which to advise FaHCSIA about additional information they collect or information that may be useful for policy development. The establishment of strong governance processes will assist in meeting both provider needs and ensuring that national data standards are met where appropriate.

It is recommended that governance mechanisms for information be established under the Standing Council on Community Housing and Disability Services (SCCHDS), with particular special purpose committees vested with delegated authority to endorse national standards and definitions. This is likely to be a staged process, commencing with jurisdictional and other stakeholder consultation and resulting ultimately in SCCHDS involvement.

It is recognised that the processes to establish governance arrangements as described in this section will take some time to establish.

5.2.1 Information agreement

An information agreement in this context is a multilateral agreement between government community services and statistical agencies to provide the framework for a cooperative approach to information development. It is recommended that an information agreement be

put in place to formalise the governance and work required to develop and implement data collections for the FMP.

An agreed scope that captures all services provided under the Financial Management Program including services provided through funding sources other than FaHCSIA will provide a good foundation for collecting consistent data in the sector.

5.2.2 Specific objectives

Information agreements expect to:

- Provide a framework to facilitate, coordinate, plan, manage and prioritise information developments, in order to:
  - link data and data development to policy and program development
  - identify data gaps
  - prioritise data development activities
  - develop agreed national uniform data definitions
  - agree national minimum data sets
  - coordinate data developments in both government and non-government agencies
  - reduce duplication of data development and collection by coordination with other human services sectors.
- Provide a structure for developing data standards, uniform definitions and classifications, that will:
  - improve existing data
  - ensure data collections across the community services sector are consistent and comparable while retaining individual collections
  - develop a Financial Management Program Data Dictionary.
- Improve access to consistent and timely information between all levels of government, service providers, consumers and funders, while ensuring privacy and confidentiality requirements are met.
- Improve consistency in data definitions, classification and collections between community services, health, housing assistance and income support.
- Improve coordination of activities under the agreement with those of the Review on Government Services and the Council of Australian Governments.

5.2.3 Core activities

- Development and maintenance of a Financial Management Program Data Dictionary (FMPDD) (produced from METeOR) used by all data developers and collections.
- Development of community services data classifications and standards.
- Endorsement of national minimum data sets consistent with agreed dictionary definitions and classifications.
- Integrating and harmonising community services, health, housing and homelessness, and income support data definitions, classifications and standards where possible.

- Data linkage across community service and other sectors.
- Dissemination of national information.

5.2.4 Financial Management Program Working Group terms of reference

The Working Group's major role is to assess data definitions and methods of collection proposed for the Financial Management Program Data Dictionary and to endorse revisions and additions to the data collection. Members and member organisations of the Financial Management Program Working Group (FMPWG) can develop the data definitions and work with the FMPWG when developing proposals for inclusion in the FMPDD.

5.2.5 Draft terms of reference

The Working Group is responsible for:
- maintaining the development and revision of the FMPDD
- developing, maintaining and promoting the use of appropriate metadata standards
- promoting the consistency, quality and relevance of financial management program data both at state/territory and national levels in Australia and across national data collections, where relevant
- reviewing and endorsing by the National Minimum Data Sets (NMDSs) in the Financial Management Program field. All data element definitions to be included in the FMPDD require endorsement by the FMPWG. Members of the Working Group can make recommendations to the FMPWG to endorse new data standards or modifications to an existing data standard.

5.2.6 Responsibilities of Working Group members

In support of their collective responsibilities as described in the terms of reference, individual Working Group members are required to consult all relevant stakeholders within their organisation to ensure that the data standards are acceptable for national implementation.

Members are responsible for attending meetings, commenting on submissions, participating in discussions and making decisions. Decision-making is by consensus among all members. Where a member is on leave, membership responsibilities should be delegated to another person within the member's jurisdiction.

Members are responsible for considering submissions and making recommendations on metadata items as data standards. These include performance indicators, definitions of data elements and data set specifications. Committee members will need to be confident that appropriate consultation has occurred with relevant sources of expertise and where required.

5.2.7 Working Group assessment operations

The Working Group will make recommendations for inclusions on the Work Program and provide an assessment of the overall use of the project by:

- making an assessment of evidence that shows the potential data standards were or will be developed
  - using consultation process involving all relevant jurisdictions and a suitable range of recognised experts in the field, where appropriate
  - with consensus from the parties to that process
  - with all jurisdictions and experts, where possible, having agreed to or endorsing the submitted data specifications
  - taking into account the implications for data collection systems and reporting requirements.
- making an assessment of whether the auspicing body has the appropriate standing
- identifying the committees and groups under the FMP umbrella that should be informed of the project
- making an assessment of the recommended process for implementation, review and future development and maintenance of the specifications.

5.2.8 Draft Working Group membership

Subject to FaHCSIA's agreement, Working Group membership may be adjusted as appropriate to reflect changes in the Working Group's role and workload. In addition, the Working Group may invite the participation of individuals to provide independent expert advice as required.

The Working Group is to consist of representatives from:

Funders

The Department of Families, Housing, Community Services and Indigenous Affairs (Financial Management Program) from Central office and each state and territory

Large service providers

Salvation Army

St Vincent de Paul

Anglicare

Smaller service providers

One representative from each state/territory representing smaller service providers (this could be on a rotational basis)

Peak bodies

Australian Council of Social Service (ACOSS)

Australian Financial Counselling Credit Reform Association (AFCCRA)

To obtain national agreement of metadata, the Working Group may invite the participation of independent experts in the field to provide advice about the content of the submissions.

5.3 Publishing data

An important component of any data collection is the publication of the information received and analysis undertaken, including the provision of feedback to the data providers and other interested parties.

Currently, an ad-hoc method of feedback is provided in some jurisdictions to data providers and other NGOs regarding information available for FMP service provision. Several jurisdictions prepare newsletters that cover the sector and send them to selected groups, however, the FMP would benefit from a coordinated approach to the provision of feedback.

During the course of AIHW visits, without exception, providers indicated a strong wish to receive data on the FMP and good news stories and best-practice advice from FaHCSIA. Providers were keen to obtain both qualitative and quantitative information about the demographics of clients, trends in client activity, the types of services being offered, and nearby services they may be able to refer clients to. Most providers wanted the data to be publically available, and linked to research and policy directions, and many were interested in understanding the range of services being offered by other providers to clients.

It is probable that a combination of public-style program reporting via the internet or paper publications, alongside less formal newsletters and area-specific information, would be the best method to satisfy the requirements of providers.

6   Data dictionary

Recommendations

> **Recommendation 6:** Adopt the data standards and their definitions as defined in Attachment 6 (The Financial Management Program Data Dictionary) for use in both the data collection forms and in data collection manuals. This includes adoption of existing national data standards that have already been endorsed by the community services sector where appropriate.

The current FMP process for collecting information should include a comprehensive data dictionary that is accessible by all FMP service providers. Current arrangements provide a few definitions associated with the collection forms and these are frequently misinterpreted. Understanding of definitions would be improved if they were stored in a metadata registry easily accessible by all service provides required to report data. It is recommended that to improve all aspects associated with data collection and reporting of FMP services, a metadata registry housing the FMP data dictionary and collection instrument be made available.

A metadata registry is a system or application where metadata is stored, managed and disseminated. METeOR was developed to store, manage and disseminate metadata in the Australian health, community services and housing assistance sectors.

Throughout this project, METeOR was a key tool used in the development of the FMP data dictionary and associated data sets for Emergency Relief, Commonwealth Financial Counselling and Money Management.

6.1   METeOR

6.1.1   Overview of METeOR

METeOR is Australia's repository for national metadata standards for the health, community services and housing assistance sectors. The system was developed by the Australian Institute of Health and Welfare.

As a metadata registry, METeOR also provides tools for the online development of metadata. Metadata developers are able to submit new metadata to METeOR, which is stored in structures based on the ISO/IEC 11179 standards.

METeOR allows registry staff (known as registrars) to advance these metadata through a defined endorsement process on the authority of the relevant governance body (known as Registration authorities). Once metadata are endorsed, METeOR allows these metadata to be located and viewed on the web and to be downloaded as documents.

METeOR provides users with a suite of features and tools. These include online access to a wide range of nationally endorsed data definitions and tools for creating new definitions based on existing already endorsed components. It has a strong focus on providing comprehensive user support and assistance.

Through METeOR users can find, view and download more than 2,600 data standards. Using these standards will help to:

- avoid wasting resources by creating and maintaining similar standards
- base information systems on nationally endorsed standards
- obtain data that is comparable across many different data collections.

6.1.2 Metadata standards

The development of metadata standards improves quality, relevance, consistency and the availability of national information about the health and welfare of Australians. The drivers for standard development arise from the need for better information — whether it is statistical, administrative, clinical or other information.

Metadata standards describe the expected meaning and acceptable representation of data for use within a defined context. The need for consistency of meaning is vital to facilitate information sharing among primary and secondary users of the data. Much of the work involved in establishing a data collection is in the development of metadata standards to ensure comparability and consistency of the data collected and produced from the collection.

Other benefits include:

Consistency of content and definition

If we never have to share data then there is no need to standardise. If we share data then we need to ensure that all those who need to use the data can clearly understand the meaning, regardless of how the data is collected or stored.

The AIHW has drafted a mapping document to show the proposed new collection data items, see Attachment 5.

Avoid duplication and diversity of solutions

Metadata standards are generally required when excessive diversity creates inefficiencies or impedes effectiveness. Metadata standards offer a means of narrowing the variety of ways information is exchanged among different groups, allowing synergy between multiple development efforts.

Reduction in cost of data development

Metadata standards provide a way to solve a problem that other people can use. They provide a common and consistent platform for organisations to work from, thereby simplifying adoption and implementation at both the local and national levels.

6.2 Recommended Financial Management Program Data Dictionary

This draft recommended Financial Management Data Dictionary contains definitions suitable for use in the three activities covered by the Financial Management Program (FMP).

Recommended Financial Management Program Data Dictionary

Exported from METeOR
(AIHW's Metadata Online Registry)

Any enquiries about or comments on this publication should be directed to:

National Data Development and Standards Unit
Australian Institute of Health and Welfare
GPO Box 570
Canberra ACT 2601

Email: datadevelopment@aihw.gov.au

Phone: (02) 6244 1222 Fax: (02) 6244 1166

List of metadata items

Data Element Technical Names

Data sets

Recommended Financial Management Program Data Dictionary

Identifying and definitional attributes

Metadata item type:	Data Set Specification
METeOR identifier:	407137
Registration status:	*No registration status*
DSS type:	Data Set Specification (DSS)
Scope:	This draft Financial Management Program Data Dictionary contains definitions suitable for use in the three activities covered by the Financial Management Program (FMP).

The Financial Management Program aims to build financial resilience and wellbeing for vulnerable people and those most at risk of financial and social exclusion and disadvantage. It helps people across a range of income and financial literacy levels to overcome financial adversity, manage their money, participate in their communities and plan for the medium to long term.

The Program supports financial management initiatives that work together to promote financial inclusion by helping people avoid or resolve financial difficulties and achieve financial self-reliance. The services provide crisis support, budgeting and financial counselling, financial education, and incentive and asset building elements to build longer-term financial capability.

Service strategies include:

emergency relief;

financial counselling;

money management information and education;

projects to build financial capability and inclusion;

information about saving for retirement; and

research into problem gambling and its impacts.

The reporting requirements are aligned across these service strategies.

Reuse of data elements permits direct comparisons to be made across the service strategies and contributes to a greater understanding of the data reported to FaHCSIA. Broad dissemination of these definitions to service providers will also assist in improving the quality of the data.

Metadata items in this Data Set Specification

Seq No.   Metadata item

- Commonwealth Financial Counselling Data Set

- Emergency Relief Data Set

- Financial exclusion data element cluster

- Money Management Services Data Set

- Statistical linkage key 581 cluster

- Age range

- Assistance needs resolved indicator

- Assistance—reason not provided

- Australian state/territory identifier (service provider organisation)

- Case management goal status

- Consent obtained indicator

- Country of birth

- Disability group

- Education delivery mode

- Episode end date

- Financial assistance amount

- Full-time equivalent paid staff

- Full-time equivalent volunteer/unpaid staff

- Geographic remoteness (person)

- Geographic remoteness (service provider organisation)

- Hours of service

- Household annual gross income range ($ 10,000 range)

- Household composition

- Income management indicator

- Indigenous status

- Interpreter services required

- Labour force status

- Level of highest educational attainment

- Main language other than English spoken at home

- Marital status

- New client indicator

- Number of clients

- Number of clients referred

- Number of dependents

- Organisation name
- Person annual gross income range ($ 10,000 range)
- Postcode—Australian (person)
- Postcode—Australian (service provider organisation)
- Reason for seeking assistance (Financial management)
- Referral destination (Commonwealth financial counselling services)
- Referral destination (emergency relief services)
- Referral destination (money management services)
- Referral source (Commonwealth financial counselling)
- Referral source (Emergency relief)
- Referral source (Money management)
- Reporting period start and end
- Service activity type (Commonwealth financial counselling)
- Service activity type (emergency relief)
- Service activity type (money management services)
- Sex
- Source of income
- Tenure type

Commonwealth Financial Counselling Data Set

Identifying and definitional attributes

Metadata item type:	Data Set Specification
METeOR identifier:	423366
Registration status:	*No registration status*
DSS type:	Data Set Specification (DSS)
Scope:	The objective of this program is to assist people with personal financial difficulties to make better informed choices when dealing with their financial problems and increase their capability to manage this in future.

To achieve this a free financial counselling service is provided to people who are experiencing financial difficulties due to circumstances such as unemployment, sickness, credit over-commitment and family breakdown.

The Program is underpinned by a set of principles for design and delivery:

resources are targeted towards those experiencing financial stress or at risk of financial stress;

services recognise the causes of financial stress are complex and multi-dimensional;

assistance is voluntary, free and confidential;

services are delivered through appropriately qualified community partners;

services can be accessed through a range of local referral channels; and

resources are deployed across a mix of crisis assistance and capability building initiatives.

The counting unit is a clients where each service delivered is counted as being delivered to 1 client regardless of how many dependents the client may have. There is scope to report the number of dependents a client has which enables policy makers to determine the actual number of people assisted for the purposes of delivering Commonwealth financial counselling.

An existing client of the Commonwealth financial counselling service is someone who has previously received assistance from the FaHCSIA funded Commonwealth financial counselling service at the agency in the past 3 years.

A new client is someone who has not received any Commonwealth financial counselling services from the FaHCSIA funded Commonwealth financial counselling service at the agency in the past 3 years.

There are 2 reporting periods each calendar year for which services are required to submit data on the preceding 6 months;

Reporting period 1: 1st January to 30th June

Reporting period 2: 1st July to 31st December.

If funding is received after the commencement of the reporting period providers report data from the date of the commencement of services to the last date of the reporting period.

Relational attributes

Implementation in Data Set Specification:	Recommended Financial Management Program Data Dictionary *No registration status*

Metadata items in this Data Set Specification

Seq No.	Metadata item	Obligation	Max occurs
1	Australian state/territory identifier (service provider organisation)	Mandatory	1
2	Organisation name	Mandatory	2
4	Reporting period start and end	Mandatory	2
5	Postcode—Australian (service provider organisation)	Mandatory	1
6	Number of clients	Mandatory	1
7	New client indicator	Mandatory	1
8	Interpreter services required	Optional	1
9	Full-time equivalent paid staff	Mandatory	1
10	Full-time equivalent volunteer/unpaid staff	Mandatory	1
11	Age range	Mandatory	1
12	Indigenous status	Mandatory	1
13	Income management indicator	Mandatory	1
14	Household composition	Mandatory	1
15	Number of dependents	Optional	1
16	Postcode—Australian (person)	Mandatory	1
17	Country of birth	Mandatory	1
18	Source of income	Mandatory	1
19	Disability group	Optional	1
20	Main language other than English spoken at home	Mandatory	1

21	Labour force status	Mandatory	1
22	Person annual gross income range ($ 10,000 range)	Mandatory	1
23	Marital status	Mandatory	1
24	Sex	Mandatory	1
25	Household annual gross income range ($ 10,000 range)	Optional	1
26	Tenure type	Mandatory	1
27	Reason for seeking assistance (Financial management)	Mandatory	1
28	Referral source (Commonwealth financial counselling)	Conditional	1
29	Service activity type (Commonwealth financial counselling)	Mandatory	1
30	Referral destination (Commonwealth financial counselling services)	Mandatory	1
31	Assistance—reason not provided	Mandatory	1
32	Education delivery mode	Optional	1
33	Assistance needs resolved indicator	Mandatory	1
34	Episode end date	Mandatory	1
35	Case management goal status	Optional	1
36	Consent obtained indicator	Mandatory	1
37	Hours of service	Mandatory	1

Emergency Relief Data Set

Identifying and definitional attributes

Metadata item type:	Data Set Specification
METeOR identifier:	423380
Registration status:	*No registration status*
DSS type:	National Minimum Data Set (NMDS)
Scope:	Emergency Relief aims to assist people to deal with their immediate crisis situation in a way that maintains dignity and encourages self-reliance. Services are targeted to people in financial crisis.

Funding is provided to community and charitable organisations for distribution to people in their area that require emergency relief. This is not the sole funding for some organisations as they also receive funding from other government departments and through public donations. Data collected for this data set is specifically about FaHCSIA funded Emergency Relief services.

Services that are provided through this program are:

purchase vouchers of a fixed value (e.g. for food, transport or chemist vouchers);

assistance with rent/accommodation;

part-payment of utility account/s;

material assistance such as food parcels or clothing;

budgeting assistance and/or

appropriate referrals to other services that help to address underlying causes of financial crisis.

The counting unit is clients where each service delivered is counted as being delivered to 1 client regardless of how many dependents the client may have. There is scope to report the number of dependents a client has to enable policy makers to determine the actual number of people assisted for the purposes of delivering emergency relief.

An **existing client** of the emergency relief service is someone who has previously received assistance from the FaHCSIA funded emergency relief service at the agency in the past 3 years.

A **new client** is someone who has not received any emergency relief services from the FaHCSIA funded emergency relief service at the agency in the past 3 years.

There are 2 **reporting periods** each calendar year for which emergency relief services are required to submit data on the preceding 6 months;

Reporting period 1: 1st January to 30th June

Reporting period 2: 1st July to 31st December.

If funding is received after the commencement of the reporting period providers report data from the date of the commencement of services to the last date of the reporting period.

Relational attributes

Implementation in Data Set Specification:	Recommended Financial Management Program Data Dictionary No registration status

Metadata items in this Data Set Specification

Seq No.	Metadata item	Obligation	Max occurs
1	Australian state/territory identifier (service provider organisation)	Mandatory	1
2	Organisation name	Mandatory	2
4	Reporting period start and end	Mandatory	2
5	Postcode—Australian (service provider organisation)	Mandatory	1
6	Number of clients	Mandatory	1
7	New client indicator	Mandatory	1
8	Interpreter services required	Optional	1
9	Full-time equivalent paid staff	Optional	1
10	Full-time equivalent volunteer/unpaid staff	Optional	1
11	Age range	Mandatory	1
12	Indigenous status	Mandatory	1
13	Income management indicator	Mandatory	1
14	Household composition	Optional	1
15	Number of dependents	Mandatory	1
16	Postcode—Australian (person)	Optional	1
17	Country of birth	Mandatory	1
18	Source of income	Mandatory	1
19	Main language other than English spoken at home	Mandatory	1
20	Labour force status	Mandatory	1
21	Marital status	Mandatory	1
22	Sex	Mandatory	1

23	Reason for seeking assistance (Financial management)	Mandatory	1
24	Referral source (Emergency relief)	Mandatory	1
25	Service activity type (emergency relief)	Mandatory	1
26	Number of clients referred	Mandatory	1
27	Assistance—reason not provided	Mandatory	1
28	Referral destination (emergency relief services)	Mandatory	1
29	Assistance needs resolved indicator	Mandatory	1
30	Financial assistance amount	Mandatory	1

Money Management Services Data Set

Identifying and definitional attributes

Metadata item type:	Data Set Specification
METeOR identifier:	423378
Registration status:	*No registration status*
DSS type:	Data Set Specification (DSS)
Scope:	The Money Management Strategy was implemented in partnership with Indigenous communities and predominantly operates in remote communities. It provides services in personal or small group education and information which includes arranging access to financial counsellors for assistance in more complex issues.

The key objectives of this strategy are to increase:

capacity to overcome barriers to financial inclusion

financial literacy, knowledge and skills

assets and reduce debts.

The counting unit is a clients where each service delivered is counted as being delivered to 1 client regardless of how many dependents the client may have. There is scope to report the number of dependents a client has which enables policy makers to determine the actual number of people assisted for the purposes of delivering money management services.

An existing client of the money management service is someone who has previously received assistance from the FaHCSIA funded money management service at the agency in the past 3 years.

A new client is someone who has not received any money management services from the FaHCSIA funded money management service at the agency in the past 3 years.

There are 2 reporting periods each calendar year for which services are required to submit data on the preceding 6 months;

Reporting period 1: 1st January to 30th June

Reporting period 2: 1st July to 31st December.

If funding is received after the commencement of the reporting period providers report data from the date of the commencement of services to the last date of the reporting period.

Relational attributes

Implementation in Data Set Specification: Recommended Financial Management Program
Data Dictionary *No registration status*

Metadata items in this Data Set Specification

Seq No.	Metadata item	Obligation	Max occurs
1	Australian state/territory identifier (service provider organisation)	Mandatory	1
2	Organisation name	Mandatory	2
4	Reporting period start and end	Mandatory	2
5	Postcode—Australian (service provider organisation)	Mandatory	1
6	Number of clients	Mandatory	1
7	New client indicator	Mandatory	1
8	Interpreter services required	Optional	1
9	Full-time equivalent paid staff	Optional	1
10	Full-time equivalent volunteer/unpaid staff	Mandatory	1
11	Age range	Mandatory	1
12	Indigenous status	Mandatory	1
13	Income management indicator	Conditional	1
14	Household composition	Mandatory	1
15	Number of dependents	Mandatory	1
16	Postcode—Australian (person)	Conditional	1
17	Country of birth	Mandatory	1
18	Source of income	Mandatory	1
19	Disability group	Conditional	1
20	Main language other than English spoken at home	Mandatory	1
21	Labour force status	Mandatory	1
22	Person annual gross income range ($ 10,000 range)	Mandatory	1
23	Marital status	Mandatory	1
24	Sex	Mandatory	1
25	Household annual gross income range ($ 10,000 range)	Optional	1
26	Tenure type	Mandatory	1
27	Reason for seeking assistance (Financial management)	Mandatory	1
28	Referral source (Money management)	Mandatory	1
29	Service activity type (money management services)	Mandatory	1

30	Referral destination (money management services)	Mandatory	1
31	Assistance—reason not provided	Mandatory	1
32	Education delivery mode	Optional	1
33	Assistance needs resolved indicator	Mandatory	1
34	Case management goal status	Conditional	1
35	Consent obtained indicator	Mandatory	1
36	Hours of service	Optional	1

Data element clusters

Financial exclusion data element cluster

Identifying and definitional attributes

Metadata item type: Data Set Specification

METeOR identifier: 407180

Registration status: *No registration status*

DSS type: Data Element Cluster

Scope: To assist in determining whether the conditions exist for an individual to be at risk of financial exclusion.

Financial exclusion is the lack of access by certain consumers to appropriate low cost, fair and safe financial products and services from mainstream providers. Financial exclusion becomes of more concern in the community when it applies to lower income consumers and/or those in financial hardship. Financial exclusion is observable at individual, family, or household level, but can also be heavily concentrated in suburbs or regions, and sometimes among ethnic minorities in a suburb or region. Financial exclusion can also apply to individual small businesses, NFPs and other community enterprise organisations. (Chant Link and Associates)

Where an individual has the following responses to this data element cluster they should be considered to be at risk of financial exclusion and referral to financial counselling is advisable.

Education level of Year 10 or less

Unemployed or unskilled workers

Below average income

Below average savings

In the age groups 18-24 or 70+

Source and reference attributes

Reference documents: Chant Link and Associates 2004. ANZ A report on financial exclusion in Australia. Viewed 12 February 2011,

<https://www.anz.com/resources/5/1/51dccf804d2fa3169f3dbf766a918285 /Financial-Exclusion-Summary-Presentation.pdf?CACHEID= 26048e804d2bd4f682369b69785e67b9>

Relational attributes

Implementation in Data Set Specification: Recommended Financial Management Program Data Dictionary *No registration status*

Metadata items in this Data Set Specification

Seq No.	Metadata item	Obligation	Max occurs
-	Age range	Mandatory	1
-	Area of usual residence	Mandatory	1
-	Disability group	Mandatory	1
-	Employment type	Mandatory	1
-	Full-time/part-time status	Mandatory	1
-	Indigenous status	Mandatory	1
-	Level of highest educational attainment	Mandatory	1
-	Main language other than English spoken at home	Mandatory	1
-	Mental health disorder indicator	Mandatory	1
-	Paid employment indicator	Mandatory	1
-	Person annual gross income range ($ 10,000 range)	Mandatory	1
-	Personal saving	Mandatory	1
-	Proficiency in spoken English	Mandatory	1
-	Sex	Mandatory	1

Statistical linkage key 581 cluster

Identifying and definitional attributes

Metadata item type: Data Set Specification

METeOR identifier: 349510

Registration status: Community Services, Standard 21/05/2010
          Housing assistance, Standard 23/08/2010

DSS type: Data Element Cluster

Scope: Statistical data linkage refers to the bringing together of data from different sources to gain a greater understanding of a situation or individual from the combined (or linked) dataset. This facilitates a better understanding of the patterns of service use by groups of clients for research, statistical or policy analysis, planning and evaluation purposes.

Its form is: **XXXXXDDMMYYYYN**

The sequence in which the linkage key is completed is as follows:

Family name (the first 3 Xs)

Given name (the 4th and 5th X)

Date of birth by day, month and four-digit year

Sex

XXX 2nd, 3rd and 5th letters of the family name.

In the first three spaces the agency should record the 2nd, 3rd and 5th letters of the client's family name.

For example: If the client's family name is Smith the reported value should be MIH. If the client's family name is Jones the reported value should be ONS.

Regardless of the length of a person's name, the reported value should always be three characters long. If the legal family name is not long enough to supply the requested letters (i.e. a legal family name of less than five letters) then agencies should substitute the number '2' to reflect the missing letters. The placement of a number '2' should always correspond to the same space that the missing letter would have within the 3-digit field. A number (rather than a letter) is used for such a substitution in order to clearly indicate that an appropriate corresponding letter from the person's name is not available.

Cases where the family name has less than 5 letters:

If a person's family name is Farr, then value reported would be AR2 because the 2 is substituting for a missing 5th letter of the family name. Similarly, if the person's family name was Hua, then the value reported would be UA2 because the 2 is substituting for the missing 5th letter of the family name.

If a client's family name is missing altogether the agency should record the number 999 for all three spaces associated with the family name, (not the number 2). In some cultures it is traditional to state the family name first. To overcome discrepancies in recording/reporting that may arise as a result of this practice, agencies should always ask the person to specify their legal first given name and their legal family name separately. These should then be recorded as first given name and family name as appropriate, regardless of the order in which they may be traditionally given.

If the client's family name includes non-alphabetic characters—for example hyphens (as in Lee-Archer), apostrophes (as in O'Mara) or blank spaces (as in De Vries)—these non-alphabetic characters should be ignored when counting the position of each character.

XX 2nd and 3rd letters of given name

In the fourth and fifth spaces the agency should record the 2nd and 3rd letters of the client's given name.

For example: If the client's given name is Elizabeth the reported value should be LI. If the client's given name is Robert the reported value should be OB.

If the client's given name includes non-alphabetic characters—for example hyphens (as in Jo-Anne) or apostrophes (as in D'Arcy), these non-alphabetic characters should be ignored when counting the position of each character.

Regardless of the length of a person's given name, the reported value should always be two characters long. If the given name of the person is not long enough to supply the requested letters (i.e. a name of less than three letters) then agencies should substitute the number '2' to reflect the missing letters. The placement of a number '2' should always correspond to the same space that the missing letter would have within the 2-digit field. A number (rather than a letter) is used for such substitutions in order to clearly indicate that an appropriate corresponding letter from the person's name is not available.

For example: If the person's legal name was Jo then the value reported would be O2 because the 2 is substituting for the missing 3rd letter of the given name.

If the person's given name is missing altogether the agency should record 99 for the two spaces associated with the given name. In some cultures it is traditional to state the family name first. To overcome discrepancies in recording/reporting that may arise as a result of this practice, agencies should always ask the person to specify their given name and their family name separately. These should then be recorded as first given name and family name as appropriate, regardless of the order in which

they may be traditionally given.

Date of Birth

DD represents the day in the month a person was born

MM represents the month in the year a person was born

YYYY represents the year a person was born

If date of birth is not known or cannot be obtained, provision should be made to collect or estimate age. Collected or estimated age would usually be in years for adults and to the nearest three months (or less) for children aged less than two years. Additionally, an estimated date flag or a date accuracy indicator should be reported in conjunction with all estimated dates of birth.

For data collections concerned with children's services, it is suggested that the estimated date of birth of children aged under 2 years should be reported to the nearest 3 month period, i.e. 0101, 0104, 0107, 0110 of the estimated year of birth. For example, a child who is thought to be aged 18 months in October of one year would have his/her estimated date of birth reported as 0104 of the previous year. Again, an estimated date flag or date accuracy indicator http://meteor.aihw.gov.au/content/index.phtml/itemId/294429 should be reported in conjunction with all estimated dates of birth.

Sex

N represents whether or not the person is a 1. Male or 2. Female.

Operationally, sex is the distinction between male and female, as reported by a person or as determined by an interviewer.

When collecting data on sex by personal interview, asking the sex of the respondent is usually unnecessary and may be inappropriate, or even offensive. It is usually a simple matter to infer the sex of the respondent through observation, or from other cues such as the relationship of the person(s) accompanying the respondent, or first name. The interviewer may ask whether persons not present at the interview are male or female.

A person's sex may change during their lifetime as a result of procedures known alternatively as sex change, gender reassignment, transsexual surgery, transgender reassignment or sexual reassignment. Throughout this process, which may be over a considerable period of time, the person's sex could be recorded as either Male or Female.

In data collections that use the ICD-10-AM classification, where sex change is the reason for admission, diagnoses should include the appropriate ICD-10-AM code(s) that clearly identify that the person is undergoing such a process. This code(s) would also be applicable after the person has completed such a process, if they

have a procedure involving an organ(s) specific to their previous sex (e.g. where the patient has prostate or ovarian cancer).

Code 3   Intersex or indeterminate

Is normally used for babies for whom sex has not been determined for whatever reason.

Should not generally be used on data collection forms completed by the respondent.

Should only be used if the person or respondent volunteers that the person is intersex or where it otherwise becomes clear during the collection process that the individual is neither male nor female.

Code 9   Not stated/inadequately described

Is not to be used on primary collection forms. It is primarily for use in administrative collections when transferring data from data sets where the item has not been collected.

Data that has been produced by linkage for statistical and research purposes should not be used subsequently for client management purposes.

This data cluster contains a set of specific data elements to be reported on in a predetermined combination.

Collection and usage attributes

Guide for use: Where a date of birth is estimated the date accuracy indicator should be used. Please see Relational attributes.

Source and reference attributes

Submitting organisation: Australian Institute of Health and Welfare.

Steward: Australian Institute of Health and Welfare

Origin: AIHW 1998. Home and Community Care (HACC) Data Dictionary Version 1.0. Report prepared for the Commonwealth and State/Territory government HACC Officials.

Reference documents: NCSIMG 2001. Statistical Data Linkage in Community Services Data Collections. Canberra: Australian Institute of Health and Welfare.

Relational attributes

Related metadata references: See also Date—accuracy indicator, code AAA Community Services, Standard 30/09/2005, Housing assistance, Standard 23/08/2010, Health, Standard 04/05/2005

Implementation in Data Set Specification: Recommended Financial Management Program Data Dictionary No registration status

Metadata items in this Data Set Specification

Seq No.	Metadata item	Obligation	Max occurs
1	Letters of family name	Mandatory	1
2	Letters of given name	Mandatory	1
3	Date of birth	Mandatory	1
4	Sex	Mandatory	1
5	Statistical linkage key 581	Mandatory	1
6	Date accuracy indicator	Conditional	1

Data elements

Age range

Identifying and definitional attributes

Technical name: Person—age range, code NN

METeOR identifier: 290540

Registration status: Health, Standard 04/05/2005

Definition: The age range that best accommodates a person's
                             completed age in years, at the time of data collection, as
                             represented by a code.

Data Element Concept: Person—age range

Value domain attributes

Representational attributes

Representation class: Code

Data type: Number

Format: NN

Maximum character length: 2

Permissible values:

Value	Meaning
01	0-4
02	5-14
03	15-24
04	25-34
05	35-44
06	45-54
07	55-64
08	65-74
09	75 years or older

Supplementary values: 99   Not stated

Data element attributes

Collection and usage attributes

Guide for use: Used in computer assisted telephone interview (CATI)
                             surveys in cases where the specific age is not available.

                             Depending on the collection a different starting age may
                             be used, but should map back to the standard output.

                             Information at a finer level can be collected as long as it
                             maps back to the proposed data domain, e.g. 75+ age

group can be split into 75-84 and 85 years or older.

Collection methods:	Although collection of date of birth allows more precise calculation of age, as does the collection of a single age, this may not always be feasible. Age range should be derived from a question on date of birth or age at last birthday.
Comments:	In cases where an exact age is not known or not stated, age may be reported as an age range. The age ranges are consistent with the standard 10 year ranges recommended by the ABS.

Source and reference attributes

Submitting organisation:	National Public Health Information Working Group
Origin:	ABS, Statistical Concepts Library, Standards for Social, Labour and Demographic Variables. Age.
Reference documents:	Reference through: http://www.abs.gov.au/Ausstats/abs@.nsf/StatsLibrary and choose, Other ABS Statistical Standards, Standards for Social, Labour and Demographic Variables, Demographic Variables, Age.

Relational attributes

Implementation in Data Set Specifications:

Commonwealth Financial Counselling Data Set

Question 11. Age of clients at the time of data collection:

The age range that best accommodates a person's completed age in years, at the time of data collection. It is not expected that Financial counsellors would have casework clients under 18 years of age. See 'Age range' in the FMP data dictionary for further explanation.

Emergency Relief Data Set

Question 11. Age of clients at the time of data collection:

The age range that best accommodates a person's completed age in years, at the time of data collection. See 'Age range' in the FMP data dictionary for further explanation.

Money Management Services Data Set

Question 11. Age of clients at the time of data collection:

The age range that best accommodates a person's completed age in years, at the time of data collection. See 'Age range' in the FMP data dictionary for further explanation.

Area of usual residence

Identifying and definitional attributes

Technical name: Person—area of usual residence, geographical location
                                   code (ASGC 2009) NNNNN

METeOR identifier: 386783

Registration status: Health, Superseded 17/12/2010

Definition: Geographical location of usual residence of the person, as
                                   represented by a code.

Data Element Concept: Person—area of usual residence

Value domain attributes

Representational attributes

Classification scheme: Australian Standard Geographical Classification 2009

Representation class: Code

Data type: Number

Format: NNNNN

Maximum character length: 5

Data element attributes

Collection and usage attributes

Guide for use: The geographical location is reported using a five digit
                                   numerical code. The first digit is the single-digit code to
                                   indicate State or Territory. The remaining four digits are
                                   the numerical code for the Statistical Local Area (SLA)
                                   within the State or Territory.

                                   The single digit codes for the states and territories and the
                                   four digit codes for the SLAs are as defined in the
                                   Australian Standard Geographical Classification (ASGC).

                                   The ASGC is updated on an annual basis with a date of
                                   effect of 1 July each year. The codes for SLA are unique
                                   within each State and Territory, but not within the whole
                                   country. Thus, to define a unique location, the code of the
                                   State or Territory is required in addition to the code for
                                   the SLA.

                                   The Australian Bureau of Statistics '(ABS) National
                                   Localities Index (NLI) (ABS Catalogue number 1252.0) can
                                   be used to assign each locality or address in Australia to a
                                   SLA. The NLI is a comprehensive list of localities in
                                   Australia with their full code (including State or Territory
                                   and SLA) from the main structure of the ASGC.

For the majority of localities, the locality name (suburb or town, for example) is sufficient to assign a SLA. However, some localities have the same name. For most of these, limited additional information such as the postcode or State can be used with the locality name to assign the SLA. In addition, other localities cross one or more SLA boundaries and are referred to as split localities. For these, the more detailed information of the number and street of the person's residence is used with the Streets Sub-index of the NLI to assign the SLA.

If the information available on the person's address indicates that it is in a split locality but is insufficient to assign an SLA, the code for the SLA which includes most of the split locality should be reported. This is in accordance with the NLI assignment of SLA when a split locality is identified and further detail about the address is not available.

The NLI does not assign a SLA code if the information about the address is insufficient to identify a locality, or is not an Australian locality. In these cases, the appropriate codes for undefined SLA within Australia (State or Territory unstated), undefined SLA within a stated State or Territory, no fixed place of abode (within Australia or within a stated State or Territory) or overseas should be used.

Collection methods: When collecting the geographical location of a person's usual place of residence, the Australian Bureau of Statistics (ABS) recommends that 'usual' be defined as: 'the place where the person has or intends to live for 6 months or more, or the place that the person regards as their main residence, or where the person has no other residence, the place they currently reside.' Apart from collecting a person's usual place of residence there is also a need in some collections to collect area of residence immediately prior to or after assistance is provided, or at some other point in time.

Comments: Geographical location is reported using Statistical Local Area (SLA) to enable accurate aggregation of information to larger areas within the Australian Standard Geographical Classification (ASGC) (such as Statistical Subdivisions and Statistical Divisions) as well as detailed analysis at the SLA level. The use of SLA also allows analysis relating the data to information complied by the Australian Bureau of Statistics on the demographic and other characteristics of the population of each SLA. Analyses facilitates by the inclusion of SLA information include:

comparison of the use of services by persons residing in different geographical areas,

characterisation of catchment areas and populations for establishments for planning purposes, and

documentation of the provision of services to residents of States or Territories other than the State or Territory of the provider.

Relational attributes

Related metadata references: Supersedes Person—area of usual residence, geographical location code (ASGC 2008) NNNNN Health, Superseded 02/10/2009

Has been superseded by Person—area of usual residence, geographical location code (ASGC 2010) NNNNN Community Services, Standard 17/12/2010, Health, Standard 17/12/2010

Implementation in Data Set Specifications: Financial exclusion data element cluster No registration status

Assistance needs resolved indicator

Identifying and definitional attributes

Technical name:	Client—assistance needs resolved indicator, yes/no code N
METeOR identifier:	422322
Registration status:	No registration status
Definition:	An indicator of whether the client's assistance needs were resolved, as represented by a code.
Data Element Concept:	Client—assistance needs resolved indicator

Value domain attributes

Representational attributes

Representation class:	Code
Data type:	Number
Format:	N
Maximum character length:	1

Permissible values:	Value	Meaning
	1	Yes
	2	No
	3	Unknown
Supplementary values:	9	Not stated/inadequately described

Source and reference attributes

Submitting organisation:	Australian Institute of Health and Welfare

Data element attributes

Collection and usage attributes

Guide for use:	Code 1 Yes
	The client's need for assistance was resolved.
	Code 2 No
	The client's need for assistance was not resolved.

Relational attributes

Commonwealth Financial Counselling Data Set
QUESTION 33. A count of whether or not the Client's problem/s resolved:
See 'Assistance needs resolved indicator' in the FMP data dictionary.

Emergency Relief Data Set
QUESTION 29. A count of whether or not the Client's problem/s resolved:
See 'Assistance needs resolved indicator' in the FMP data dictionary.

Money Management Services Data Set
QUESTION 34. A count of whether or not the Client's problem/s resolved:
See 'Assistance needs resolved indicator' in the FMP data dictionary.

Assistance—reason not provided

Identifying and definitional attributes

Technical name:	Service event—reason assistance not provided, code N
METeOR identifier:	270040
Registration status:	Community Services, Standard 01/03/2005
Definition:	The reason assistance was not provided to a person by a community services agency, as represented by a code.
Data Element Concept:	Service event—reason assistance not provided

Value domain attributes

Representational attributes

Representation class:	Code
Data type:	Number
Format:	N
Maximum character length:	1

Permissible values:	Value	Meaning
	1	Service not offered by agency
	2	Person not eligible/wrong target group
	3	Outlet refused service to person/offer refused
	4	Person or service provider unable to attend
	5	Assistance currently not available
	6	Facilities for special needs not available/service inaccessible
	7	Referred to other more appropriate agency
	8	Other
Supplementary values:	9	Not stated/inadequately described

Collection and usage attributes

Guide for use:	Record main reason assistance not provided.
	More specific categories in the data domain (that can map to this data domain) can also provide useful information at an agency or locality level about service gaps and resource limitations. For example code 6 can be broken up into a number of more specific categories to ascertain whether people are having trouble accessing services due to lack of interpreter services, disabled access to a building, etc. This information can help individual

agencies better allocate their resources.

Examples of the above categories are:

CODE 3   Outlet refused service to person/offer refused

Due to inappropriate behaviour or person failed to present and did not contact the agency.

CODE 4   Person or service provider unable to attend

For example, unscheduled staff absence or unscheduled events such as bad weather or electricity failure.

CODE 5   Assistance currently not available

The place, service or resource is not currently available or a waiting period applies.

CODE 6   Facilities for special needs not available/service inaccessible

Facilities for special needs such as disability, cultural, language etc, not available; no disabled access to building; too far away; service not provided in days or hours required.

Data element attributes

Collection and usage attributes

Collection methods: This item should at the least be collected for the primary reason that assistance is not provided. Other reasons can also be collected, but the primary reason should also be specified.

This item should be linked to a type of services or a particular event (such as a referral/contact event or a particular request for service).

Source and reference attributes

Submitting organisation: Australian Institute of Health and Welfare

Relational attributes

Related metadata references: Supersedes Assistance - reason not provided, version 1, DE, NCSDD, NCSIMG, Superseded 01/03/2005.pdf (17.1 KB)

*Implementation in Data Set
Specifications:*

Commonwealth Financial Counselling Data Set

QUESTION 31. A count of the reasons assistance was not provided to clients by a CFC service provider during the reporting period:

There may be more than one reason why a client is not provided with assistance. This data element is used to collect all of these reasons. The reason(s) assistance not provided is intended to quantify turn-aways or unmet demand. See 'Assistance – reason not provided' in the FMP data dictionary for further explanation.

Emergency Relief Data Set

QUESTION 27. A count of the reasons assistance was not provided to a person by an ER service provider during the reporting period:

There may be more than one reason why a client is not provided with assistance. This data element is used to collect all of these reasons. The reason(s) assistance not provided is intended to quantify turn-aways or unmet demand. See 'Assistance – reason not provided' in the FMP data dictionary for further explanation.

Money Management Services Data Set

QUESTION 31. A count of the reasons assistance was not provided to a person by a MM service provider during the reporting period:

There may be more than one reason why a client is not provided with assistance. This data element is used to collect all of these reasons. The reason(s) assistance not provided is intended to quantify turn-aways or unmet demand. See 'Assistance – reason not provided' in the FMP data dictionary for further explanation.

Australian state/territory identifier (service provider organisation)

Identifying and definitional attributes

Technical name:	Service provider organisation—Australian state/territory identifier, code N
METeOR identifier:	289083
Registration status:	Community Services, Standard 07/12/2005 Health, Standard 04/05/2005
Definition:	An identifier of the Australian state or territory where an organisation or agency can be located, as represented by a code.
Data Element Concept:	Service provider organisation—Australian state/territory identifier

Value domain attributes

Representational attributes

Representation class:	Code
Data type:	Number
Format:	N
Maximum character length:	1

Permissible values:

Value	Meaning
1	New South Wales
2	Victoria
3	Queensland
4	South Australia
5	Western Australia
6	Tasmania
7	Northern Territory
8	Australian Capital Territory
9	Other territories (Cocos (Keeling) Islands, Christmas Island and Jervis Bay Territory)

Collection and usage attributes

Guide for use:	The order presented here is the standard for the Australian Bureau of Statistics (ABS). Other organisations (including the Australian Institute of Health and Welfare) publish data in state order based on population (that is, Western Australia before South Australia and Australian

Capital Territory before Northern Territory).

Source and reference attributes

Reference documents: Australian Bureau of Statistics. Australian Standard
Geographical Classification (ASGC). Cat No. 1216.0.
Canberra: ABS.

Data element attributes

Collection and usage attributes

Collection methods: Irrespective of how the information is coded, conversion
of the codes to the ABS standard must be possible.

Source and reference attributes

Submitting organisation: Australian Institute of Health and Welfare

Origin: Health Data Standard Committee

National Community Services Data Committee

Reference documents: AS4846 Health Care Provider Identification, 2004, Sydney:
Standards Australia

AS5017 Health Care Client Identification, 2002, Sydney:
Standards Australia

In AS4846 and AS5017 alternative codes are presented.
Refer to the current standard for more details.

Relational attributes

Related metadata references: See also Service provider organisation—funding source,
level of government code N *No registration status*

*Implementation in Data Set
Specifications:*

Commonwealth Financial Counselling Data Set
QUESTION 1. Select the state or territory in which the organisation is located from the drop down menu.

Emergency Relief Data Set
QUESTION 1. Select the state or territory in which the organisation is located from the drop down menu.

Money Management Services Data Set
QUESTION 1. Select the state or territory in which the organisation is located from the drop down menu.

Case management goal status

Identifying and definitional attributes

Technical name: Client—case management goal status, code N

Synonymous names: Extent case management goals achieved

METeOR identifier: 401048

Registration status: Housing assistance, Standard 23/08/2010

Definition: The extent to which a client has achieved his/her case management goals, as represented by a code.

Data Element Concept: Client—case management goal status

Value domain attributes

Representational attributes

Representation class: Code

Data type: Number

Format: N

Maximum character length: 1

Permissible values:

Value	Meaning
1	Not at all
2	Up to half
3	Half or more
4	All

Collection and usage attributes

Guide for use: CODE 1   Not at all

This option is selected if no case management goals were achieved.

CODE 2   Up to half

This option is used if less than half the case management goals were achieved.

CODE 3   Half or more

This option is selected if at least half the case management goals were achieved.

CODE 4   All

This option is used if all case management goals were achieved.

Data element attributes

Collection and usage attributes

Collection methods: The permissible values for this data element are used to form the response categories to the question:

'To what extent does the case worker think the client has achieved their goals over the past reporting period?'

Comments: This item is answered from the perspective of the agency worker. It is answered at the end of a reporting period as to whether the case management goals were achieved.

Source and reference attributes

Submitting organisation: Australian Institute of Health and Welfare

Relational attributes

Related metadata references: Supersedes Client—case management plan goal status, code N Community Services, Standard 30/11/2007

Implementation in Data Set Specifications:

| **Commonwealth Financial Counselling Data Set** |
| QUESTION 35. A count of the extent of to which a clients achieved their case management goals. |
| See 'Case management goal status' in the FMP data dictionary. |

| **Money Management Services Data Set** |
| QUESTION 35. A count of the extent of to which a clients achieved their case management goals. |
| See 'Case management goal status' in the FMP data dictionary. |

Consent obtained indicator

Identifying and definitional attributes

Technical name:	Client—consent obtained indicator, yes/no code N
Synonymous names:	Consent obtained
METeOR identifier:	338737
Registration status:	Community Services, Standard 30/11/2007 Housing assistance, Standard 23/08/2010
Definition:	Whether the client has agreed to have personal information recorded, as represented by a code.
Data Element Concept:	Client—consent indicator

Value domain attributes

Representational attributes

Representation class:	Code
Data type:	Boolean
Format:	N
Maximum character length:	1

Permissible values:	Value	Meaning
	1	Yes
	2	No

Data element attributes

Collection and usage attributes

Guide for use: Code 1 Yes

Information has been provided to the client about the recording of personal information and they have given their consent to being involved.

Code 2 No

The client has been asked to give consent but has refused, or if consent was not obtained for other reasons.

Source and reference attributes

Submitting organisation:	Supported Accommodation Assistance Program Information Sub-Committee (SAAP-ISC).
Origin:	SAAP National Data Collection Agency Collectors Manual July 2005.

Relational attributes

Implementation in Data Set Specifications:

Commonwealth Financial Counselling Data Set

QUESTION 36. The number of clients consenting to information being used for statistical purposes.

The number of yes responses should equal the number of clients. See 'Consent obtained indicator' in the FMP data dictionary.

Money Management Services Data Set

QUESTION 36. The number of clients consenting to information being used for statistical purposes.

The number of yes responses should equal the number of clients. See 'Consent obtained indicator' in the FMP data dictionary.

Country of birth

Identifying and definitional attributes

Technical name:	Person—country of birth, code (SACC 2008) NNNN
METeOR identifier:	370943
Registration status:	Community Services, Standard 02/06/2008 Housing assistance, Standard 24/11/2008 Health, Standard 01/10/2008
Definition:	The country in which the person was born, as represented by a code.
Data Element Concept:	Person—country of birth

Value domain attributes

Representational attributes

Classification scheme:	Standard Australian Classification of Countries 2008
Representation class:	Code
Data type:	Number
Format:	NNNN
Maximum character length:	4

Collection and usage attributes

Guide for use:	The Standard Australian Classification of Countries 2008 (SACC) is a four-digit, three-level hierarchical structure specifying major group, minor group and country.
	A country, even if it comprises other discrete political entities such as states, is treated as a single unit for all data domain purposes. Parts of a political entity are not included in different groups. Thus, Hawaii is included in Northern America (as part of the identified country United States of America), despite being geographically close to and having similar social and cultural characteristics as the units classified to Polynesia.

Data element attributes

Collection and usage attributes

Collection methods:	Some data collections ask respondents to specify their country of birth. In others, a pre-determined set of countries is specified as part of the question, usually accompanied by an 'other (please specify)' category.
	Recommended questions are:
	In which country were you/was the person/was (name) born?

Australia

Other (please specify)

Alternatively, a list of countries may be used based on, for example common Census responses.

In which country were you/was the person/was (name) born?

Australia

England

New Zealand

Italy

Viet Nam

India

Scotland

Philippines

Greece

Germany

Other (please specify)

In either case coding of data should conform to the SACC.

Sometimes respondents are simply asked to specify whether they were born in either 'English speaking' or 'non-English speaking' countries but this question is of limited use and this method of collection is not recommended.

Comments: This metadata item is consistent with that used in the ABS collection methods and is recommended for use whenever there is a requirement for comparison with ABS data (last viewed 2/6/2008).

Relational attributes

Related metadata references: Supersedes Person—country of birth, code (SACC 1998) NNNN Community Services, Superseded 02/06/2008, Housing assistance, Superseded 24/11/2008, Health, Superseded 01/10/2008

Implementation in Data Set Specifications:

Commonwealth Financial Counselling Data Set
QUESTION 17. A count of the number of people in receipt of Commonwealth Financial Counselling by the country in which they were born: Country of birth is the most easily collected and consistently reported of a range of possible data items that may indicate cultural or language diversity. See 'Country of birth' in the FMP data dictionary.

Emergency Relief Data Set
QUESTION 17. A count of the number of people in receipt of emergency relief by the country in which they were born: Country of birth is the most easily collected and consistently reported of a range of possible data items that may indicate cultural or language diversity. See 'Country of birth' in the FMP data dictionary.

Money Management Services Data Set
QUESTION 17. A count of the number of people in receipt of money management by the country in which they were born: Country of birth is the most easily collected and consistently reported of a range of possible data items that may indicate cultural or language diversity. See 'Country of birth' in the FMP data dictionary.

Date accuracy indicator

Identifying and definitional attributes

Technical name:	Date—accuracy indicator, code AAA
METeOR identifier:	294429
Registration status:	Community Services, Standard 30/09/2005 Housing assistance, Standard 23/08/2010 Health, Standard 04/05/2005
Definition:	An indicator of the accuracy of the components of a reported date, as represented by a code.
Data Element Concept:	Date—accuracy indicator

Value domain attributes

Representational attributes

Representation class:	Code
Data type:	String
Format:	AAA
Maximum character length:	3

Permissible values:

Value	Meaning
AAA	Day, month and year are accurate
AAE	Day and month are accurate, year is estimated
AAU	Day and month are accurate, year is unknown
AEE	Day is accurate, month and year are estimated
AEU	Day is accurate, month is estimated, year is unknown
AUU	Day is accurate, month and year are unknown
AUA	Day is accurate, month is unknown, year is accurate
AUE	Day is accurate, month is unknown, year is estimated
AEA	Day is accurate, month is estimated, year is accurate
EAA	Day is estimated, month and year are accurate
EAE	Day is estimated, month is accurate, year is estimated

EAU	Day is estimated, month is accurate, year is unknown
EEA	Day and month are estimated, year is accurate
EEE	Day, month and year are estimated
EEU	Day and month are estimated, year is unknown
EUA	Day is estimated, month is unknown, year is accurate
EUE	Day is estimated, month is unknown, year is estimated
EUU	Day is estimated, month and year are unknown
UAA	Day is unknown, month and year are accurate
UAE	Day is unknown, month is accurate, year is estimated
UAU	Day is unknown, month is accurate, year is unknown
UEA	Day is unknown, month is estimated, year is accurate
UEE	Day is unknown, month and year are estimated
UEU	Day is unknown, month is estimated, year is unknown
UUA	Day and month are unknown, year is accurate
UUE	Day and month are unknown, year is estimated
UUU	Day, month and year are unknown

Collection and usage attributes

Guide for use:

Any combination of the values A, E, U representing the corresponding level of accuracy of each date component of the reported date.

This data element consists of a combination of three codes, each of which denotes the accuracy of one date component:

A – the referred date component is accurate

E – the referred date component is not known but is estimated

U – the referred date component is not known and not estimated.

This data element contains positional fields (DMY) that reflects the order of the date components in the format (DDMMYYYY) of the reported date:

Field 1 (D) – refers to the accuracy of the day component;

Field 2 (M) – refers to the accuracy of the month component;

Field 3 (Y) – refers to the accuracy of the year component.

Data domain	Date component (for a format DDMMYYYY)		
	(D)ay	(M)onth	(Y)ear
Accurate	A	A	A
Estimated	E	E	E
Unknown	U	U	U

This data element is valid only for use with dates that are reported/exchanged in the format (DDMMYYYY).

Example 1: A date has been sourced from a reliable source and is known as accurate then the Date accuracy indicator should be informed as (AAA).

Example 2: If only the age of the person is known and there is no certainty of the accuracy of this, then the Date accuracy indicator should be informed as (UUE). That is the day and month are "unknown" and the year is "estimated".

Example 3: If a person was brought in unconscious to an emergency department of a hospital and the only information available was from a relative who was certain of the age and the birthday's 'month' then the Date accuracy indicator should be informed as (UAA). A year derived from an accurate month and accurate age is always an accurate year.

The Date accuracy indicator can be useful for operational purposes to indicate the level of accuracy that a date has been collected at any point in time. It can indicate whether the stored date needs to be followed up until it reaches the intended minimal required accuracy. For example, if a person was brought in unconscious to an emergency department of a hospital the level of accuracy of the date collected at that point may not be satisfactory. It is likely that the correct date of birth can be obtained at a later date. The Date accuracy indicator provides information on the accuracy of the entered dates that may require further action.

For future users of the data it may also be essential they know the accuracy of the date components of a reported date.

Data element attributes

Collection and usage attributes

Collection methods:	Collection constraints:
	If constraints for the collection of the date are imposed, such as 'a valid date must be input in an information system for unknown date components', the Date accuracy indicator should be used along with the date as a way of avoiding the contamination of the valid dates with the same value on the respective date components.
	Example:
	Some jurisdictions use 0107YYYY and some use 0101YYYY when only the year is known. When month and year are known some use the 15th day as the date i.e. 15MMYYYY. Where this occurs in a data collection that is used for reporting or analysis purposes there will be dates in the collection with the attributes 0107YYYY etc that are accurate and some that are not accurate. Without a corresponding flag to determine this accuracy the analysis or report will be contaminated by those estimated dates.
Comments:	Provision of a date is often a mandatory requirement in data collections.
	Most computer systems require a valid date to be recorded in a date field i.e. the month part must be an integer between 1 and 12, the day part must be an integer between 1 and 31 with rules about the months with less than 31 days, and the year part should include the century. Also in many systems, significant dates (e.g. date of birth) are mandatory requirements.
	However, in actual practice, the date or date components are often not known (e.g. date of birth, date of injury) but, as stated above, computer systems require a valid date. This means that a date MUST be included and it MUST follow the rules for a valid date. It therefore follows that, while such a date will contain valid values according to the rules for a date, the date is in fact an 'unknown' or 'estimated' date. For future users of the data it is essential they know that a date is accurate, unknown or estimated and which components of the date are accurate, unknown or estimated.

Source and reference attributes

Submitting organisation:	Standards Australia
Reference documents:	AS5017 Health Care Client Identification, 2002, Sydney: Standards Australia

Relational attributes

Implementation in Data Set   Statistical linkage key 581 cluster Community Services,
Specifications: Standard 21/05/2010

Date of birth

Identifying and definitional attributes

Technical name: Person—date of birth, DDMMYYYY

METeOR identifier: 287007

Registration status: Community Services, Standard 25/08/2005
                               Housing assistance, Standard 20/06/2005
                               Health, Standard 04/05/2005

Definition: The date of birth of the person.

Data Element Concept: Person—date of birth

Value domain attributes

Representational attributes

Representation class: Date

Data type: Date/Time

Format: DDMMYYYY

Maximum character length: 8

Data element attributes

Collection and usage attributes

Guide for use: If date of birth is not known or cannot be obtained,
                               provision should be made to collect or estimate age.
                               Collected or estimated age would usually be in years for
                               adults, and to the nearest three months (or less) for
                               children aged less than two years. Additionally, an
                               estimated date flag or a date accuracy indicator should be
                               reported in conjunction with all estimated dates of birth.

                               For data collections concerned with children's services, it
                               is suggested that the estimated date of birth of children
                               aged under 2 years should be reported to the nearest 3
                               month period, i.e. 0101, 0104, 0107, 0110 of the estimated
                               year of birth. For example, a child who is thought to be
                               aged 18 months in October of one year would have
                               his/her estimated date of birth reported as 0104 of the
                               previous year. Again, an estimated date flag or date
                               accuracy indicator should be reported in conjunction with
                               all estimated dates of birth.

Collection methods: Information on date of birth can be collected using the one
                               question:

                               What is your/(the person's) date of birth?

                               In self-reported data collections, it is recommended that

the following response format is used:

Date of birth: _ _ / _ _ / _ _ _ _

This enables easy conversion to the preferred representational layout (DDMMYYYY).

For record identification and/or the derivation of other metadata items that require accurate date of birth information, estimated dates of birth should be identified by a date accuracy indicator to prevent inappropriate use of date of birth data. The linking of client records from diverse sources, the sharing of patient data, and data analysis for research and planning all rely heavily on the accuracy and integrity of the collected data. In order to maintain data integrity and the greatest possible accuracy an indication of the accuracy of the date collected is critical. The collection of an indicator of the accuracy of the date may be essential in confirming or refuting the positive identification of a person. For this reason it is strongly recommended that the data element Date— accuracy indicator, code AAA also be recorded at the time of record creation to flag the accuracy of the data.

Comments: Privacy issues need to be taken into account in asking persons their date of birth.

Wherever possible and wherever appropriate, date of birth should be used rather than age because the actual date of birth allows a more precise calculation of age.

When date of birth is an estimated or default value, national health and community services collections typically use 0101 or 0107 or 3006 as the estimate or default for DDMM.

It is suggested that different rules for reporting data may apply when estimating the date of birth of children aged under 2 years because of the rapid growth and development of children within this age group which means that a child's development can vary considerably over the course of a year. Thus, more specific reporting of estimated age is suggested.

Source and reference attributes

Origin: National Health Data Committee

National Community Services Data Committee

Reference documents: AS5017 Health Care Client Identification, 2002, Sydney: Standards Australia

AS4846 Health Care Provider Identification, 2004, Sydney: Standards Australia

Relational attributes

Implementation in Data Set Specifications: Statistical linkage key 581 cluster Community Services, Standard 21/05/2010

Disability group

Identifying and definitional attributes

Technical name: Person—disability group, code N

METeOR identifier: 337532

Registration status: Community Services, Standard 01/03/2005

Definition: The disability group that most clearly expresses the experience of disability by a person as represented by a code.

Context: Disability groupings constitute a broad categorisation of disabilities in terms of the underlying health condition, impairment, activity limitations, participation restrictions, environmental factors and support needs.

                           Disability is the umbrella term for any or all of: an impairment of **body structure** or function, a limitation in **activities**, or a restriction in **participation**. Disability is defined in terms of three components: 'Body functions and structures', **'Activity and Participation'** and **'Environmental factors'**.

Data Element Concept: Person—disability group

Value domain attributes

Representational attributes

Representation class: Code

Data type: Number

Format: N

Maximum character length: 1

Permissible values:

Value	Meaning
1	Intellectual/learning
2	Psychiatric
3	Sensory/speech
4	Physical/diverse

Supplementary values: 9   Not stated/inadequately described

Collection and usage attributes

Guide for use: Code 1   Intellectual/learning

                           Intellectual/learning disability is associated with impairment of intellectual functions with limitations in a range of daily activities and restrictions in participation in a range of life areas. Supports may be needed throughout

life; the level of support tends to be consistent over a period of time but may change in association with changes in life circumstances.

This grouping includes:

Developmental delay is applicable to children aged 0-5 only. Conditions appearing in the early developmental period, with no specific diagnosis.

Intellectual disability applies to conditions appearing in the developmental period (age 0–18) associated with impairment of mental functions, difficulties in learning and performing certain daily life skills and limitation of adaptive skills in the context of community environments compared to others of the same age. Includes Down syndrome, tuberous sclerosis, cri-du-chat syndrome etc. Specific learning/Attention Deficit Disorder (other than intellectual). A general term referring to a group of disorders, presumed due to central nervous system dysfunction rather than an intellectual disability, covering significant difficulties in the acquisition and use of listening, speaking, reading, writing, reasoning or mathematical skills.
Autism (including Asperger syndrome and Pervasive Developmental Delay) is used to describe pervasive developmental disorder involving disturbances in cognition, interpersonal communication, social interactions and behaviour (in particular obsessional, ritualistic, stereotyped and rigid behaviours).

Code 2   Psychiatric

Psychiatric disability is associated with clinically recognisable symptoms and behaviour patterns frequently associated with distress that may impair personal functioning in normal social activity. Impairments of global or specific mental functions may be experienced, with associated activity limitations and participation restrictions in a range of areas. Supports needed may vary in range, and may be required with intermittent intensity during the course of the condition. Change in level of supports tends to be related to changes in the extent of the impairment and the environment. Psychiatric disability may be associated with schizophrenias, affective disorders, anxiety disorders, addictive behaviours, personality disorders, stress, psychosis, depression and adjustment disorders.

Code 3   Sensory/speech

This grouping includes:

Deafblind is used to describe dual sensory impairments

causing severe restrictions in communication, and in the ability to participate in community life.

Vision disability encompasses blindness, vision impairment, visual handicap (not corrected by glasses or contact lenses), which can cause severe restrictions in communication, and in the ability to participate in community life.

Hearing disability encompasses deafness, hearing impairment, hearing loss, which can cause severe restrictions in communication, and in the ability to participate in community life.

Speech disability encompasses speech loss, impairment and/or difficulty in communication which can cause severe restrictions in communication, and in the ability to participate in community life.

Code 4   Physical/diverse

Physical/diverse disability is associated with the presence of an impairment, which may have diverse effects within and among individuals, including effects on physical activities such as mobility. The range and extent of activity limitations and participation restrictions will vary with the extent of impairment and the environment. Environmental factors and support needs are related to areas of activity limitation and participation restrictions, and may be required for long periods. Level of supports may vary with both life changes and extent of impairment.

This grouping includes:

Physical disability is used to describe conditions that are attributable to a physical cause or impact on the ability to perform physical activities, such as mobility. Physical disability includes paraplegia, quadriplegia, muscular dystrophy, motor neurone disease, neuromuscular disorders, cerebral palsy, absence or deformities of limbs, spina bifida, arthritis, back disorders, ataxia, bone formation or degeneration, scoliosis etc. Impairments may affect internal organs such as lung or liver.

Acquired brain injury is used to describe multiple disabilities arising from damage to the brain acquired after birth. It results in deterioration in cognitive, physical, emotional or independent functioning. It can be as a result of accidents, stroke, brain tumours, infection, poisoning, lack of oxygen, degenerative neurological disease etc.

Neurological disability applies to impairments of the nervous system occurring after birth, and includes epilepsy and organic dementias (e.g. Alzheimer disease) as well as such conditions as multiple sclerosis and Parkinson disease.

Source and reference attributes

Submitting organisation: Australian Institute of Health and Welfare

Origin: Commonwealth State/Territory Disability Agreement National Minimum Data Set 2002-2003 Data Guide.

Reference documents: Commonwealth State/Territory Disability Agreement National Minimum Data Set 2005-06 Data Guide.

Data element attributes

Collection and usage attributes

Guide for use: This metadata item may be used as a basis for the broad description of similar experiences of disability and patterns of impairments, activity limitations, participation restrictions, support needs and related health conditions. 'Disability group' is not a diagnostic grouping, and there is not a one-to-one correspondence between a health condition and a disability group. Where a precise diagnosis is to be recorded, Episode of care—principal diagnosis, code (ICD-10-AM 6th edn) ANN{.N[N]} and Episode of care—additional diagnosis, code (ICD-10-AM 6th edn) ANN{.N[N]} may be used. The collection of data on disability-related metadata items and diagnosis, together, allows the relationship of the components of disability and related health conditions to be more thoroughly explored.

Consumer groups, service providers and governments may use these groupings to make national and international comparisons.

The experience of disability is complex and multi-dimensional. It can be described using impairments of structure and/or function, patterns of activity limitation, participation restrictions, environmental factors and support needs.

Each of these dimensions can inform the decision on which group to use.

Collection methods: Data collections may report at a lower level of detail. However, it is important that the two levels of classification can be mapped to each other.

Code 1   Intellectual /learning

Intellectual
Specific learning
Autism
Developmental delay

Code 2   Psychiatric

Psychiatric

Code 3   Sensory/speech

Deafblind
Vision
Hearing
Speech

Code 4   Physical/diverse

Physical
Acquired brain impairment
Neurological

Specific collections may require information on all disabilities of person, on only one primary disability or on both.

Relational attributes

Related metadata references: Supersedes Disability grouping, version 2, DE, NCSDD, NCSIMG, Superseded 01/03/2005.pdf (28.2 KB)

Implementation in Data Set Specifications:

Commonwealth Financial Counselling Data Set
QUESTION 19. The number of people in receipt of Commonwealth Financial Counselling who identify as having a disability:
The disability group that most clearly expresses the experience of disability by a person. See 'Disability group' in the FMP data dictionary.
Financial exclusion data element cluster No registration status

Money Management Services Data Set
QUESTION 19. The number of people in receipt of money management assistance who identify as having a disability:
The disability group that most clearly expresses the experience of disability by a person. See 'Disability group' in the FMP data dictionary.

Education delivery mode

Identifying and definitional attributes

Technical name:	Service provider organisation—education delivery mode, code N
METeOR identifier:	420095
Registration status:	No registration status
Definition:	The channel of communication by which the education was provided by the service, as represented by a code.
Data Element Concept:	Service provider organisation—education delivery mode

Value domain attributes

Representational attributes

Representation class:	Code
Data type:	String
Format:	N
Maximum character length:	1

Permissible values:

Value	Meaning
01	Presentations/workshops/seminars
02	Websites
03	Information sheets
04	Budget counselling
05	Group advocacy
08	Other

Data element attributes

Relational attributes

Implementation in Data Set Specifications:

> **Commonwealth Financial Counselling Data Set**
>
> QUESTION 32. A count of methods of education provided by the service during the reporting period:
>
> See 'Education delivery mode' in the FMP data dictionary for further explanation.
>
> **Money Management Services Data Set**
>
> QUESTION 32. A count of methods of education provided by the service during the reporting period:
>
> See 'Education delivery mode' in the FMP data dictionary for further explanation.

Employment type

Identifying and definitional attributes

Technical name:	Person (employed)—employment type, code N
METeOR identifier:	314867
Registration status:	Community Services, Standard 30/11/2007
Definition:	The nature of a person's employment in relation to his or her expected continuity of employment and eligibility for basic leave entitlements, as represented by a code.
Data Element Concept:	Person (employed)—employment type

Value domain attributes

Representational attributes

Representation class:	Code
Data type:	Number
Format:	N
Maximum character length:	1

Permissible values:

Value	Meaning
1	Permanent
2	Fixed term contract
3	Casual

Supplementary values:

9	Not stated/inadequately described

Collection and usage attributes

Guide for use:

CODE 1 Permanent

Permanent employees are those employees who are entitled to either paid sick leave, or paid holiday leave, or both and are not employed on a fixed term contract or casual basis.

CODE 2 Fixed term contract

Fixed-term-contract employees are those employees who have a written agreement to work a minimum number of days over a specified period of time. They do not receive paid sick or annual leave entitlements.

CODE 3 Casual

Casual employees are those employees who do not have a written agreement on the minimum number of days that will be worked. They are usually paid a higher rate of pay, to compensate for lack of permanency and leave entitlements. Casuals may be full-time or part-time, according to the hours they have agreed to work.

The leave entitlements that a worker is eligible for should be used as the basis for choosing which category each worker belongs to.

Source and reference attributes

Origin: Australian Bureau of Statistics 2001. Labour Statistics Concepts, Sources and Methods, Australia 2001. Cat no. 6102.0. Canberra: ABS Reference through:

http://www.abs.gov.au/Ausstats/abs@.nsf. Select: ABS concepts, sources, methods and statistical frameworks.

Data element attributes

Collection and usage attributes

Collection methods: Question: Is the worker employed on a permanent, fixed term contract or casual basis?

Fields are those listed in the data domain.

CODE 9

Not stated/inadequately described, is not to be used on primary collection forms. It is primarily for use in administrative collections when transferring data from data sets where the item has not been collected.

Relational attributes

Implementation in Data Set Specifications: Financial exclusion data element cluster No registration status

Episode end date

Identifying and definitional attributes

Technical name:	Service episode—episode end date, DDMMYYYY
Synonymous names:	Service exit date, Exit date, End date, Support period end date, Date of expiry, Date of exit, Order end date, Detention end date
METeOR identifier:	270160
Registration status:	Community Services, Standard 01/03/2005 Housing assistance, Standard 23/08/2010
Definition:	The date on which a service episode was completed.
Data Element Concept:	Service episode—episode end date

Value domain attributes

Representational attributes

Representation class:	Date
Data type:	Date/Time
Format:	DDMMYYYY
Maximum character length:	8

Data element attributes

Collection and usage attributes

Guide for use:	May occur after or on the same day as date of last delivery of service.
	Due to the considerable variation in the types of services provided in the community services sector, it is not possible at this stage to define in generic terms what will constitute completion of a service episode. Individual collections should however define what constitutes completion for their own purposes.
	This metadata item should always be recorded as an 8 digit valid date comprising day, month and year. Year should always be recorded in its full 4 digit format. For days and months with a numeric value of less than 10, zeros should be used to ensure that the date contains the required 8 digits. For example if a service episode is completed on July 1 2000 the date assistance completed should be recorded as 01072000 as specified by the format.
Collection methods:	The end date must be related to a particular service episode. For each separate service episode a separate end date should be recorded.

Comments:	This metadata item may be used in the calculation of measures of periods of support and duration of assistance.

Source and reference attributes

Submitting organisation:	Australian Institute of Health and Welfare

Relational attributes

Implementation in Data Set Specifications:	**Commonwealth Financial Counselling Data Set**
	QUESTION 34. Number of closed cases during a reporting period:
	Calculate the number of cases/episodes based on the number of cases with an episode end date that fall within the reporting period. See 'Episode end date' in the FMP data dictionary.

Financial assistance amount

Identifying and definitional attributes

Technical name: Person—financial assistance amount, total Australian currency N[NNNN]

METeOR identifier: 401991

Registration status: Housing assistance, Standard 23/08/2010

Definition: The amount of financial assistance provided to a person, in Australian dollars.

Data Element Concept: Person—financial assistance amount

Value domain attributes

Representational attributes

Representation class: Total

Data type: Currency

Format: N[NNNN]

Maximum character length: 5

Unit of measure: Australian currency (AU$)

Data element attributes

Collection and usage attributes

Guide for use: This data element is collected in whole dollar amounts. If vouchers are given instead of cash the value of the voucher is to be recorded.

Relational attributes

Implementation in Data Set Specifications:

> **Emergency Relief Data Set**
>
> QUESTION 30. The total amount of assistance provided in Australian dollars during the reporting period:
>
> For material aid, include the value of the goods provided e.g. estimated value of a food parcel, clothing, fridge. See 'Financial assistance amount' in the FMP data dictionary for further explanation

Full-time equivalent paid staff

Identifying and definitional attributes

Technical name: Service provider organisation—full-time equivalent staff (paid), total N[NNN{.N}]

METeOR identifier: 270213

Registration status: Community Services, Standard 01/03/2005

Definition: The aggregate full time equivalent staff units for all paid staff.

Data Element Concept: Service provider organisation—full-time equivalent staff

Value domain attributes

Representational attributes

Representation class: Total

Data type: Number

Format: N[NNN{.N}]

Maximum character length: 5

Unit of measure: Full-time equivalent (FTE) staff

Unit of measure precision: 1

Data element attributes

Collection and usage attributes

Guide for use: Calculated number of staff (full-time equivalents) for each staffing category.

The ordinary time hours normally worked may differ according to the type of work. The hours under the relevant award or agreement should be used if known. If the relevant award or agreement staff hours for an occupation is not known, or the worker is undertaking a variety of tasks, 38 hours per week should be used as a substitute.

Hours of unpaid leave are to be excluded.

Contract staff employed through an agency are included where the contract is for the supply of labour (e.g. nursing) rather than of products (e.g. provision of photocopies). In the former case, the contract would normally specify the amount of labour supplied and could be reported as full-time equivalent units.

If under the relevant award of agreement a full-time nurse is paid for an 80 (ordinary time) hour fortnight, the full-time equivalent for a part time nurse who works 64 hours

is 0.8 (64 divided by 80). If a full-time nurse under the same award is paid for a 100 hours for that fortnight (20 hours overtime), then the full time equivalent is 100 divided by 80=1.25. This number would then be added to the full time equivalent staff units for all other staff and the number rounded to one decimal place.

Where staff provide services to more than one establishment, full-time equivalent staff members should be apportioned between all establishments to which services are provided on the basis of hours paid for in each. (Salary costs should be apportioned on the same basis).

Collection methods:	This metadata item is not intended to be a completely accurate calculation of staff hours, but a general indication of the number of hours an agency is staffed by paid staff.
	This metadata item may be calculated over weeks, fortnights, months or an annual basis.

Source and reference attributes

Submitting organisation:	Australian Institute of Health and Welfare

Relational attributes

Related metadata references:	Supersedes Full-time equivalent paid staff, version 1, DE, NCSDD, NCSIMG, Superseded 01/03/2005.pdf (16.3 KB)
Implementation in Data Set Specifications:	**Commonwealth Financial Counselling Data Set** QUESTION 9. The number of full-time equivalent staff providing Commonwealth financial counselling services: Full time equivalent staff units are the on-job hours paid for (including overtime) and hours of paid leave of any type for a staff member (or contract employee where applicable) divided by the number of ordinary-time hours normally paid for a full-time staff member when on the job (or contract employee where applicable). See 'Full time equivalent staff' in the FMP data dictionary for further explanation. Include any staff involved in CFC services that are described in the agreement with FaHCSIA such Counsellors and Administration staff (up to the permitted percentage of funding).

Emergency Relief Data Set

QUESTION 9. The number of full-time equivalent staff providing emergency relief services:

Full time equivalent staff units are the on-job hours paid for (including overtime) and hours of paid leave of any type for a staff member (or contract employee where applicable) divided by the number of ordinary-time hours normally paid for a full-time staff member when on the job (or contract employee where applicable).

See 'Full time equivalent staff' in the FMP data dictionary for further explanation. Include any staff involved in ER services that are described in the agreement with FaHCSIA such Counsellors and Administration staff (up to the permitted percentage of funding).

Money Management Services Data Set

QUESTION 9. The number of full-time equivalent staff providing money management services:

Full time equivalent staff units are the on-job hours paid for (including overtime) and hours of paid leave of any type for a staff member (or contract employee where applicable) divided by the number of ordinary-time hours normally paid for a full-time staff member when on the job (or contract employee where applicable).

See 'Full time equivalent staff' in the FMP data dictionary for further explanation. Include any staff involved in MM services that are described in the agreement with FaHCSIA such Counsellors and Administration staff (up to the permitted percentage of funding).

Full-time equivalent volunteer/unpaid staff

Identifying and definitional attributes

Technical name: Service provider organisation—full-time equivalent staff (volunteer/unpaid), total N[NNN{.N}]

METeOR identifier: 270214

Registration status: Community Services, Standard 01/03/2005

Definition: The aggregate full time equivalent staff units for all **volunteer**/unpaid staff.

Data Element Concept: Service provider organisation—full-time equivalent staff

Value domain attributes

Representational attributes

Representation class: Total

Data type: Number

Format: N[NNN{.N}]

Maximum character length: 5

Unit of measure: Full-time equivalent (FTE) staff

Unit of measure precision: 1

Data element attributes

Collection and usage attributes

Guide for use: The ordinary time hours normally worked may differ according to the type of work a **volunteer** is doing. The hours under the relevant award or agreement should be used if known. If the relevant award or agreement staff hours for an occupation is not known, or the volunteer is undertaking a variety of tasks, 38 hours per week should be used as a substitute.

Example:

A volunteer kitchen hand works 10 hours over a week. The relevant award specifies that a full time kitchen hand usually works 38 hours in a week.

Full time equivalent staff units = 10/38 = 0.263 (for that person for a week) This number would then be added to the full time equivalent staff units for all other staff and the number rounded to one decimal place.

Collection methods: This metadata item is not intended to be a completely accurate calculation of staff hours, but a general indication of the number of volunteer hours an agency is staffed.

This metadata item may be calculated over weeks, fortnights, months or an annual basis.

Source and reference attributes

Submitting organisation: Australian Institute of Health and Welfare

Relational attributes

Related metadata references: Supersedes Full-time equivalent volunteer/unpaid staff, version 1, DE, NCSDD, NCSIMG, Superseded 01/03/2005.pdf (14.9 KB)

Implementation in Data Set Specifications: **Commonwealth Financial Counselling Data Set**

QUESTION 10. The number of full-time equivalent volunteers providing Commonwealth financial counselling services:

A volunteer is a person who willingly gives unpaid help in the form of time, service or skills through an organisation or group. See 'Full time equivalent volunteer staff' in the FMP data dictionary for further explanation.

Emergency Relief Data Set

QUESTION 10. The number of full-time equivalent volunteers providing emergency relief services:

A volunteer is a person who willingly gives unpaid help in the form of time, service or skills through an organisation or group. See 'Full time equivalent volunteer staff' in the FMP data dictionary for further explanation.

Money Management Services Data Set

QUESTION 10. The number of full-time equivalent volunteers providing money management services:

A volunteer is a person who willingly gives unpaid help in the form of time, service or skills through an organisation or group. See 'Full time equivalent volunteer staff' in the FMP data dictionary for further explanation.

Full-time/part-time status

Identifying and definitional attributes

Technical name: Person (employed)—full-time/part-time status, code N

METeOR identifier: 269950

Registration status: Community Services, Standard 01/03/2005
Housing assistance, Standard 23/08/2010

Definition: Whether a person in paid employment is employed full-time or part-time, as represented by a code.

Context: Labour force characteristics.

Data Element Concept: Person (employed)—full-time/part-time status

Value domain attributes

Representational attributes

Representation class: Code

Data type: Number

Format: N

Maximum character length: 1

Permissible values:

Value	Meaning
1	Full-time
2	Part-time

Supplementary values:

9	Not stated/inadequately described

Data element attributes

Collection and usage attributes

Guide for use: Applies only to people whose labour force status is employed. (See metadata item Person—labour force status, code N for a definition of 'employed'). Paid employment includes persons who performed some work for wages or salary, in cash or in kind, and persons temporarily absent from a paid employment job but who retained a formal attachment to that job.

Code 1 Full-time:

Employed persons are working full-time if they:

(a) usually work 35 hours or more in a week (in all paid jobs) or

(b) although usually working less than 35 hours a week, actually worked 35 hours or more during the reference period.

Code 2 Part-time:

Employed persons are working part-time if they usually work less than 35 hours a week (in all paid jobs) and either did so during the reference period, or were not at work in the reference period.

Code 9 Not stated/ inadequately described:

Is not to be used on primary collection forms. It is primarily for use in administrative collections when transferring data from data sets where the item has not been collected.

Collection methods: Can be collected for an actual week (e.g. a particular reference period), or a usual week (e.g. a person usually works part time though they worked full-time in the last week). Note: if collected for a particular reference period, respondents may report 0 hours if on leave for the reference period. For most purposes the hours usually worked will be more appropriate.

This metadata item should be based on the number of hours worked by the person (either actual or usual). It should not be based on the self-enumerated question suggested in the Collection methods of metadata item Person—labour force status, code N. Doing so would result in inaccurate information.

Comments: See the Australian Bureau of Statistics website for details regarding labour force data items and standard questions.

Source and reference attributes

Origin: Australian Bureau of Statistics 1999. Standards for Social, Labour and Demographic Variables, Labour Force Variables. Full-Time/Part-Time Status.

Relational attributes

Related metadata references: Supersedes Employed - working full-time/ part-time, version 2, DE, NCSDD, NCSIMG, Superseded 01/03/2005.pdf (16.5 KB)

Implementation in Data Set Specifications: Financial exclusion data element cluster No registration status

Geographic remoteness (person)

Identifying and definitional attributes

Technical name: Person—geographic remoteness, classification (ASGC-RA 2004) AAN

METeOR identifier: 421770

Registration status: No registration status

Definition: The physical distance of a location in which a person is located from the nearest Urban Centre (access to goods and services) based on population size, as represented by a code.

Context: The Aged Care Act 1997 defines people who live in rural or remote areas as people with special needs.

Data Element Concept: Person—geographic remoteness

Value domain attributes

Representational attributes

Representation class: Code

Data type: String

Format: AAN

Maximum character length: 3

Permissible values:

Value	Meaning
RA1	Major cities of Australia
RA2	Inner regional Australia
RA3	Outer regional Australia
RA4	Remote Australia
RA5	Very remote Australia
RA6	Migratory

Collection and usage attributes

Guide for use: Code RA1   Major Cities

Major cities of Australia: Census Collection Districts (CDs) with an average Accessibility/Remoteness Index of Australia (ARIA) index value of 0 to 0.2;

Code RA2   Inner Regional

Inner regional Australia: CDs with an average ARIA index value

greater than 0.2 and less than or equal to 2.4;

Code RA3   Outer regional

Outer regional Australia: CDs with an average ARIA index value greater than 2.4 and less than or equal to 5.92;

Code RA4   Remote Australia

Remote Australia: CDs with an average ARIA index value greater than 5.92 and less than or equal to 10.53;

Code RA5   Very remote Australia

Very remote Australia: CDs with an average ARIA index value greater than 10.53;

Code RA6   Migratory

Migratory: composed of off-shore, shipping and migratory CDs.

Data element attributes

Collection and usage attributes

Guide for use: Demographic information collected about the location of the person should be coded using the ASGC-RA. This information can include the name of the town or postcode.

The Remoteness Area (RA) Locator is integrated into the Australian Government's Doctor Connect website and is available online via: www.doctorconnect.gov.au/internet/otd/Publishing.nsf/Content/RA-intro

Collection methods: Remoteness area can be established using a postcode, a street address or the name of a suburb or town.

Comments: The ASGC-RA is a statistical geography structure which allows quantitative comparisons between 'city' and 'country' Australia. The purpose of the structure is to classify data from census Collection Districts (CDs) into broad geographical categories, called Remoteness Areas (RAs). The RA categories are defined in terms of 'remoteness' - the physical distance of a location from the nearest Urban Centre (access to goods and services) based on population size. The new classification system for remoteness structure is updated each census, which commenced with the census year 2001.

The classification will reflect levels of remoteness at the time the classification was conceived (or at the time of the previous ABS census).

Relational attributes

Implementation in Data Set Specifications: Recommended Financial Management Program Data Dictionary No registration status

Geographic remoteness (service provider organisation)

Identifying and definitional attributes

Technical name: Service provider organisation—geographic remoteness, classification (ASGC-RA 2004) AAN

METeOR identifier: 423869

Registration status: No registration status

Definition: The physical distance of an organisation's or agency's location from the nearest Urban Centre (access to goods and services) based on population size, as represented by a code.

Data Element Concept: Service provider organisation—geographic remoteness

Value domain attributes

Representational attributes

Representation class: Code

Data type: String

Format: AAN

Maximum character length: 3

Permissible values:

Value	Meaning
RA1	Major cities of Australia
RA2	Inner regional Australia
RA3	Outer regional Australia
RA4	Remote Australia
RA5	Very remote Australia
RA6	Migratory

Collection and usage attributes

Guide for use: Code RA1   Major Cities

Major cities of Australia: Census Collection Districts (CDs) with an average Accessibility/Remoteness Index of Australia (ARIA) index value of 0 to 0.2;

Code RA2   Inner Regional

Inner regional Australia: CDs with an average ARIA index value greater than 0.2 and less than or equal to 2.4;

Code RA3   Outer regional

Outer regional Australia: CDs with an average ARIA index value greater than 2.4 and less than or equal to 5.92;

Code RA4   Remote Australia

Remote Australia: CDs with an average ARIA index value greater than 5.92 and less than or equal to 10.53;

Code RA5   Very remote Australia

Very remote Australia: CDs with an average ARIA index value greater than 10.53;

Code RA6   Migratory

Migratory: composed of off-shore, shipping and migratory CDs.

Data element attributes

Collection and usage attributes

Guide for use: Demographic information collected about the location of the person should be coded using the ASGC-RA. This information can include the name of the town or postcode.

The Remoteness Area (RA) Locator is integrated into the Australian Government's Doctor Connect website and is available online via: www.doctorconnect.gov.au/internet /otd/Publishing.nsf/Content/RA-intro

Collection methods: Remoteness area can be established using a postcode, a street address or the name of a suburb or town.

Comments: The ASGC-RA is a statistical geography structure which allows quantitative comparisons between 'city' and 'country' Australia. The purpose of the structure is to classify data from census Collection Districts (CDs) into broad geographical categories, called Remoteness Areas (RAs). The RA categories are defined in terms of 'remoteness' - the physical distance of a location from the nearest Urban Centre (access to goods and services) based on population size. The new classification system for remoteness structure is updated each census, which commenced with the census year 2001.

The classification will reflect levels of remoteness at the time the classification was conceived (or at the time of the previous ABS census).

Relational attributes

Implementation in Data Set Specifications: Recommended Financial Management Program Data Dictionary No registration status

Hours of service

Identifying and definitional attributes

Technical name: Client—amount of assistance, total hours and minutes
                            NNNN

METeOR identifier: 404961

Registration status: Housing assistance, Standard 23/08/2010

Definition: The number of hours of service received by a client
                           during a reporting period, in hours and minutes.

Data Element Concept: Client—amount of assistance

Value domain attributes

Representational attributes

Representation class: Total

Data type: Number

Format: NNNN

Maximum character length: 4

Unit of measure: Hour and minute

Collection and usage attributes

Guide for use: HHMM

Data element attributes

Collection and usage attributes

Guide for use: This data element refers to the number of hours of service
                           (support) received by an individual client during a
                           reporting period. Time measured includes:

                           (a) time spent directly assisting a client and

                           (b) time spent by an agency worker in arranging a service
                           for the client, which may include arranging
                           accommodation

                           The agency should record the amount of assistance in
                           hours and minutes- rounding up to the nearest 15
                           minutes. Include any contact with a client that is 15
                           minutes or greater. Include time spent on arranging
                           accommodation for a client but exclude time spent in that
                           accommodation by the client.

                           Do not record the time the client receives from partnering
                           agencies who provide the services purchased, arranged or
                           brokered by your agency.

Collection methods:	This measure refers to the direct hours of support that are provided to clients. This may include time spent in face-to-face service delivery, meetings or phone contact with a client or time spent undertaking tasks on behalf of a client (e.g. time spent on preparation of documents, file notes, correspondence, phone calls or liaison with other service providers in relation to the client).

Activities to include:

Time spent with client

face-to-face time spent providing a specific service (individually or in a group setting)

assessment

case management

community education

phone contact with a client

Time spent on behalf of the client (or which can be attributed to a client)

arranging a referral

writing file notes

participating in case conferences directly related to a client, which may include contact with other agencies – e.g. inter-agency meetings, case planning meetings

review of case plans

recording data at time of assessment

mobile service delivery

telephone calls made on behalf of a client

preparation for group activities or training events.

Not counted in hours of service:

team meetings

travel

training

networking meetings

getting supervision

compiling or entering data for reporting

collating data.

This measure excludes time spent on things that cannot be directly attributed to clients, such as: administration, business planning, staff training, travel to and from a client, record keeping not directly related to a client, compiling data for reporting purposes, inter-agency

meetings not directly related to a client, team meetings and professional supervision. It includes time spent on behalf of a client having accommodation arranged but excludes the actual time spent by the client in that accommodation.

Where clients receive support in a group setting, record the hours received for all attending clients (i.e. do not divide group hours by the number of clients. For example, where a staff member runs a 2-hour group activity for 3 clients, count each client as receiving 2 hours of service. If a client spends an hour with two workers, record this as 1 hour received by the client.). This approach ensures a consistent focus on the hours of assistance received by clients.

Example: a client receives 11 hours of assistance from an agency over a 4-week period, which includes time spent on needs assessment, assistance in accessing community services, counselling and advocacy. This is counted as 1100 hours.

Relational attributes

Implementation in Data Set Specifications:

Commonwealth Financial Counselling Data Set

QUESTION 37. The amount of hours and minutes of Commonwealth financial counselling assistance delivered during the reporting period.

Include all services covered under the funding agreement with FaHCSIA for the provision of Commonwealth financial counselling services. See 'Hours of service' in the FMP data dictionary.

Money Management Services Data Set

QUESTION 37. The total amount of assistance provided in hours and minutes during the reporting period:

See 'Amount of assistance' in the FMP data dictionary for further explanation.

Household annual gross income range ($ 10,000 range)

Identifying and definitional attributes

Technical name:	Household—gross income (annual), ten thousand dollar range code N[N]
METeOR identifier:	290742
Registration status:	Health, Standard 04/05/2005
Definition:	The value of gross annual income from all sources (before deductions for income tax, superannuation, etc.) for all household members as represented by a ten thousand dollar range code.
Context:	Gross household income ($ 10,000 ranges) is used as an indicator of the economic status of the household.
Data Element Concept:	Household—gross income

Value domain attributes

Representational attributes

Representation class:	Code
Data type:	Number
Format:	N[N]
Maximum character length:	2

Permissible values:	Value	Meaning
	1	Less than $ 10,000
	2	$ 10,000 - $ 20,000
	3	$ 20,001 - $ 30,000
	4	$ 30,001 - $ 40,000
	5	$ 40,001 - $ 50,000
	6	$ 50,001 - $ 60,000
	7	$ 60,001 - $ 70,000
	8	$ 70,001 - $ 80,000
	9	$ 80,001 - $ 90,000
	10	$ 90,001 - $ 100,000
	11	More than $ 100,000
Supplementary values:	12	Don't know / not sure
	13	Not stated

Data element attributes

Collection and usage attributes

Guide for use: The main components of gross income are:

current usual wages and salary;

income derived from self-employment;

government pensions, benefits and allowances; and

other income comprising investments (including interest, dividends, royalties and rent) and other regular income (including superannuation, private scholarships received in cash, workers' compensation, accident compensation, maintenance or alimony, and any other allowances regularly received).

Gross income is regarded as all receipts which are received regularly and are of a recurring nature. Certain receipts such as lump sum receipts, windfall gains and withdrawals from savings are not considered to conform to these criteria and are not included as income.

Please note that this data element is not consistent with the ABS standards for cash income.

Refer to the ABS website Standards for Social, Labour and Demographic Variables/Cash Income Variables: 1200.0 - Standards for Social, Labour and Demographic Variables, 1999

Source and reference attributes

Submitting organisation: National Public Health Information Working Group

Relational attributes

Implementation in Data Set Specifications:

Commonwealth Financial Counselling Data Set

QUESTION 25. The number of households in receipt of Commonwealth financial counselling by annual gross income in ten thousand dollar groupings:

See 'Household annual gross income range ($ 10,000 range)' in the FMP data dictionary.

Money Management Services Data Set

QUESTION 25. The number of households in receipt of money management services by annual gross income in ten thousand dollar groupings:

See 'Household annual gross income range ($ 10,000 range)' in the FMP data dictionary.

Household composition

Identifying and definitional attributes

Technical name:	Household—household composition, code N{.N}
METeOR identifier:	301755
Registration status:	Housing assistance, Standard 10/02/2006
Definition:	The composition of the household based on the relationship between household members, as represented by a code.
Data Element Concept:	Household—household composition

Value domain attributes

Representational attributes

Representation class:	Code
Data type:	Number
Format:	N{.N}
Maximum character length:	2

Permissible values:

Value	Meaning
1	Family
1.1	Sole parent with dependant(s) only
1.2	Couple only
1.3	Couple with dependant(s) only
1.4	Family (with other family member(s) present)
1.5	Family (with non-related member(s) present)
2	Non family
2.1	Single (person living alone)
2.2	Group (unrelated adults)

Supplementary values:	9	Not stated/inadequately described

Collection and usage attributes

Guide for use: A household should at least contain a member that is 16 years of age or more. If a household does not contain at least one member 16 years of age or over, it should be classified as Unknown.

A dependant is defined as someone who lives in the primary care of parent(s), carer or guardian, is aged 24 years and under and:

• is studying full-time (ages 5 and over); and/or
• is not in receipt of a pension, payment or benefit (e.g. Youth Allowance) or a Prescribed Education Scheme payment (e.g. ABSTUDY); and/or
• has an annual income of no more than the amount specified by Centrelink for basic eligibility for Family Tax Benefit Part A.

A family is defined as two or more persons, one of whom is at least 15 years of age, who are related by blood, marriage (registered or defacto), adoption, step or fostering, and who are usually resident in the same household.

Code 1.5. Family (with non-related member(s) present): Can include people who are not related to the primary family, but are a family themselves.

Code 9. Not stated/inadequately described: Includes not available, not collected, not classifiable, not stated, and inadequately described.

Data element attributes

Collection and usage attributes

Guide for use: It should be noted that only usual residents of a household are considered when describing and categorising households by Household type. Visitors to a household are, by definition, excluded from the household. Usual residence of members of a household is defined as '...that address at which the person has lived or intends to live for a total of 6 months of more' (Census Dictionary 1996).

Other households, including multiple family households may be broken down further to show households with only family members present and those with non-family members present. A family household with only family members present is a household where every individual forms a familial relationship to one of the families belonging to the household. This relates to the ABS Household type definition.

Comments: For the ABS the household is analysed on the basis of the existence or non-existence of family structure and the presence of unrelated household members, rather than on the basis of sex or age, for example

Source and reference attributes

Submitting organisation: National Housing Data Development Committee

Origin: CSHA Public rental housing data manual 2001-02

SCRCSSP (Steering Committee for the Review of Commonwealth/ State Service Provision) 1999. Canberra: AusInfo.

Centrelink 2005. A guide to Australian Government payments—20 March to 30 June 2005.

Reference documents: Australian Bureau of Statistics 1996. Census Dictionary (Cat. no. 2901.0). Viewed 13 October 2005.

Relational attributes

Related metadata references: Supersedes Household—household composition, code N{.N} Housing assistance, Superseded 10/02/2006

Implementation in Data Set Specifications:

Commonwealth Financial Counselling Data Set

Question 14. What are the types of household relationships of clients seeking Commonwealth financial counselling services during the reporting period:

The relationship between people who reside together. See 'Household composition' in the FMP data dictionary for further explanation.

Emergency Relief Data Set

Question 14. What are the types of household relationships of clients seeking emergency relief services during the reporting period:

The relationship between people who reside together. See 'Household composition' in the FMP data dictionary for further explanation.

Money Management Services Data Set

Question 14. What are the types of household relationships of clients seeking money management counselling services during the reporting period:

The relationship between people who reside together. See 'Household composition' in the FMP data dictionary for further explanation.

Income management indicator

Identifying and definitional attributes

Technical name:	Person—income management type, code N
METeOR identifier:	407694
Registration status:	No registration status
Definition:	The type of income management services a person is currently receiving, as represented by a code.
Data Element Concept:	Person—income management type

Value domain attributes

Representational attributes

Representation class:	Code
Data type:	String
Format:	N
Maximum character length:	1

Permissible values:	Value	Meaning
	1	Voluntary scheme
	2	Compulsory scheme
	3	Transitioning from income management to work
Supplementary values:	8	Other
	9	Not stated/Inadequately described

Data element attributes

Relational attributes

Implementation in Data Set Specifications:

> **Commonwealth Financial Counselling Data Set**
>
> QUESTION 13. The number of clients accessing Commonwealth financial counselling who are participating in income management:
>
> Income management is whether a percentage of Centrelink payments are allocated to priority goods and services such as food, housing, clothing, education and health care. See 'Income management indicator' in the FMP data dictionary for further explanation.

Emergency Relief Data Set

QUESTION 13. The number of clients accessing emergency relief who are participating in income management:

Income management is whether a percentage of Centrelink payments are allocated to priority goods and services such as food, housing, clothing, education and health care. See 'Income management indicator' in the FMP data dictionary for further explanation.

Money Management Services Data Set

QUESTION 13. The number of clients accessing money management services who are participating in income management:

Income management is whether a percentage of Centrelink payments are allocated to priority goods and services such as food, housing, clothing, education and health care. See 'Income management indicator' in the FMP data dictionary for further explanation.

Indigenous status

Identifying and definitional attributes

Technical name:	Person—Indigenous status, code N
METeOR identifier:	291036
Registration status:	Community Services, Standard 25/08/2005 Housing assistance, Standard 15/04/2010 Health, Standard 04/05/2005
Definition:	Whether a person identifies as being of Aboriginal or Torres Strait Islander origin, as represented by a code. This is in accord with the first two of three components of the Commonwealth definition.
Data Element Concept:	Person—Indigenous status

Value domain attributes

Representational attributes

Representation class:	Code	
Data type:	Number	
Format:	N	
Maximum character length:	1	
Permissible values:	Value	Meaning
	1	Aboriginal but not Torres Strait Islander origin
	2	Torres Strait Islander but not Aboriginal origin
	3	Both Aboriginal and Torres Strait Islander origin
	4	Neither Aboriginal nor Torres Strait Islander origin
Supplementary values:	9	Not stated/inadequately described

Collection and usage attributes

Guide for use:	This metadata item is based on the Australian Bureau of Statistics (ABS) standard for Indigenous status. For detailed advice on its use and application please refer to the ABS Website as indicated in the Reference documents.
	The classification for Indigenous status has a hierarchical structure comprising two levels. There are four categories at the detailed level of the classification which are grouped into two categories at the broad level. There is one supplementary category for 'not stated' responses.

The classification is as follows:

Indigenous:

Aboriginal but not Torres Strait Islander origin.

Torres Strait Islander but not Aboriginal origin.

Both Aboriginal and Torres Strait Islander origin.

Non-Indigenous:

Neither Aboriginal nor Torres Strait Islander origin.

Not stated/ inadequately described:

This category is not to be available as a valid answer to the questions but is intended for use:

Primarily when importing data from other data collections that do not contain mappable data.

Where an answer was refused.

Where the question was not able to be asked prior to completion of assistance because the client was unable to communicate or a person who knows the client was not available.

Only in the last two situations may the tick boxes on the questionnaire be left blank.

Data element attributes

Collection and usage attributes

Collection methods: The standard question for Indigenous Status is as follows:

[Are you] [Is the person] [Is (name)] of Aboriginal or Torres Strait Islander origin?

(For persons of both Aboriginal and Torres Strait Islander origin, mark both 'Yes' boxes.)

No...

Yes, Aboriginal...............................

Yes, Torres Strait Islander............

This question is recommended for self-enumerated or interview-based collections. It can also be used in circumstances where a close relative, friend, or another member of the household is answering on behalf of the subject. It is strongly recommended that this question be asked directly wherever possible.

When someone is not present, the person answering for them should be in a position to do so, i.e. this person must know well the person about whom the question is being asked and feel confident to provide accurate information about them.

This question must always be asked regardless of data collectors' perceptions based on appearance or other factors.

The Indigenous status question allows for more than one response. The procedure for coding multiple responses is as follows:

If the respondent marks 'No' and either 'Aboriginal' or 'Torres Strait Islander', then the response should be coded to either Aboriginal or Torres Strait Islander as indicated (i.e. disregard the 'No' response).

If the respondent marks both the 'Aboriginal' and 'Torres Strait Islander' boxes, then their response should be coded to 'Both Aboriginal and Torres Strait Islander Origin'.

If the respondent marks all three boxes ('No', 'Aboriginal' and 'Torres Strait Islander'), then the response should be coded to 'Both Aboriginal and Torres Strait Islander Origin' (i.e. disregard the 'No' response).

This approach may be problematical in some data collections, for example when data are collected by interview or using screen based data capture systems. An additional response category

Yes, both Aboriginal and Torres Strait Islander...

may be included if this better suits the data collection practices of the agency or establishment concerned.

Comments: The following definition, commonly known as 'The Commonwealth Definition', was given in a High Court judgement in the case of Commonwealth v Tasmania (1983) 46 ALR 625.

'An Aboriginal or Torres Strait Islander is a person of Aboriginal or Torres Strait Islander descent who identifies as an Aboriginal or Torres Strait Islander and is accepted as such by the community in which he or she lives'.

There are three components to the Commonwealth definition:

descent;

self-identification; and

community acceptance.

In practice, it is not feasible to collect information on the community acceptance part of this definition in general purpose statistical and administrative collections and therefore standard questions on Indigenous status relate to descent and self-identification only.

Source and reference attributes

Origin: National Health Data Committee

         National Community Services Data Committee

Reference documents: Australian Bureau of Statistics 1999. Standards for Social, Labour and Demographic Variables. Cultural Diversity Variables, Canberra. Viewed 3 August 2005.

Relational attributes

Related metadata references: Supersedes Person—Indigenous status, code N Community Services, Superseded 25/08/2005, Health, Superseded 04/05/2005

Implementation in Data Set Specifications:

Commonwealth Financial Counselling Data Set
Question 12. The number of clients accessing Commonwealth financial counselling services who identify as Aboriginal or Torres Strait Islander origin.
The standard question is as follows; [Are you] [Is the person] [Is (name)] of Aboriginal or Torres Strait Islander origin? See 'Indigenous status' in the FMP data dictionary for further explanation.

Emergency Relief Data Set
Question 12. The number of clients accessing emergency relief services who identify as Aboriginal or Torres Strait Islander origin.
The standard question is as follows; [Are you] [Is the person] [Is (name)] of Aboriginal or Torres Strait Islander origin? See 'Indigenous status' in the FMP data dictionary for further explanation.

Money Management Services Data Set
Question 12. The number of clients accessing money management services who identify as Aboriginal or Torres Strait Islander origin.
The standard question is as follows; [Are you] [Is the person] [Is (name)] of Aboriginal or Torres Strait Islander origin? See 'Indigenous status' in the FMP data dictionary for further explanation.

Interpreter services required

Identifying and definitional attributes

Technical name:	Person—interpreter service required, yes/no code N
Synonymous names:	Need for interpreter service
METeOR identifier:	304294
Registration status:	Community Services, Standard 10/04/2006 Health, Standard 08/02/2006
Definition:	Whether an interpreter service is required by or for the person, as represented by a code.
Data Element Concept:	Person—interpreter service required

Value domain attributes

Representational attributes

Representation class:	Code	
Data type:	Boolean	
Format:	N	
Maximum character length:	1	
Permissible values:	Value	Meaning
	1	Yes
	2	No

Data element attributes

Collection and usage attributes

Guide for use:	Includes verbal language, non verbal language and languages other than English.
	CODE 1 Yes
	Use this code where interpreter services are required.
	CODE 2 No
	Use this code where interpreter services are not required.
	Persons requiring interpreter services for any form of sign language should be coded as Interpreter required.
Collection methods:	Recommended question:
	Do you [does the person] require an interpreter?
	Yes
	No

Relational attributes

Related metadata references: See also Person—type of interpreter service required, code N Community Services, Standard 27/04/2007

Supersedes Person—interpreter service required status (health), code N Health, Superseded 08/02/2006

Supersedes Person—interpreter service required (community services), code N Community Services, Superseded 01/05/2006

Implementation in Data Set Specifications:

Commonwealth Financial Counselling Data Set

QUESTION 8. The number of clients seeking Commonwealth financial counselling assistance needing interpreter services during the reporting period:

See 'Interpreter services' in the FMP data dictionary for further explanation.

Emergency Relief Data Set

QUESTION 8. The number of clients seeking emergency relief assistance needing interpreter services during the reporting period:

See 'Interpreter services' in the FMP data dictionary for further explanation.

Money Management Services Data Set

QUESTION 8. The number of clients seeking money management assistance needing interpreter services during the reporting period:

See 'Interpreter services' in the FMP data dictionary for further explanation.

Labour force status

Identifying and definitional attributes

Technical name:	Person—labour force status, code N
METeOR identifier:	270112
Registration status:	Community Services, Standard 01/03/2005 Housing assistance, Standard 01/03/2005 Health, Standard 01/03/2005
Definition:	The self reported status the person currently has in being either in the labour force (employed/unemployed) or not in the labour force, as represented by a code.
Data Element Concept:	Person—labour force status

Value domain attributes

Representational attributes

Representation class:	Code	
Data type:	Number	
Format:	N	
Maximum character length:	1	
Permissible values:	Value	Meaning
	1	Employed
	2	Unemployed
	3	Not in the labour force
Supplementary values:	9	Not stated/inadequately described

Collection and usage attributes

Guide for use: CODE 1   Employed:

Persons aged 15 years and over who, during the reference week:

(a) worked for one hour or more for pay, profit, commission or payment in kind in a job or business, or on a farm (comprising 'Employees', 'Employers' and 'Own Account Workers'); or

(b) worked for one hour or more without pay in a family business or on a farm (i.e. 'Contributing Family Worker'); or

(c) were 'Employees' who had a job but were not at work and were:

on paid leave

on leave without pay, for less than four weeks, up to the end of the reference week

stood down without pay because of bad weather or plant breakdown at their place of employment, for less than four

weeks up to the end of the reference week

on strike or locked out

on workers' compensation and expected to be returning to their job, or

receiving wages or salary while undertaking full-time study; or

(d) were 'Employers', 'Own Account Workers' or 'Contributing Family Workers' who had a job, business or farm, but were not at work.

CODE 2   Unemployed:

Unemployed persons are those aged 15 years and over who were not employed during the reference week, and:

(a) had actively looked for full-time or part-time work at any time in the four weeks up to the end of the reference week. Were available for work in the reference week, or would have been available except for temporary illness (i.e. lasting for less than four weeks to the end of the reference week). Or were waiting to start a new job within four weeks from the end of the reference week and would have started in the reference week if the job had been available then; or

(b) were waiting to be called back to a full-time or part-time job from which they had been stood down without pay for less than four weeks up to the end of the reference week (including the whole of the reference week) for reasons other than bad weather or plant breakdown. Note: Actively looking for work includes writing, telephoning or applying in person to an employer for work. It also includes answering a newspaper advertisement for a job, checking factory or job placement agency notice boards, being registered with a job placement agency, checking or registering with any other employment agency, advertising or tendering for work or contacting friends or relatives.

CODE 3   Not in the Labour Force:

Persons not in the labour force are those persons aged 15 years and over who, during the reference week, were not in the categories employed or unemployed, as defined. They include persons who were keeping house (unpaid), retired, voluntarily inactive, permanently unable to work, persons in institutions (hospitals, gaols, sanatoriums, etc.), trainee teachers, members of contemplative religious orders, and persons whose only activity during the reference week was jury service or unpaid voluntary work for a charitable organisation.

Collection methods: For information about collection, refer to the ABS website:

http://www.abs.gov.au/Ausstats/abs@.nsf/0/AEB5AA310D 68DF8FCA25697E0018FED8?Open

Source and reference attributes

Origin: Australian Bureau of Statistics 1995. Directory of Concepts and Standards for Social, Labour and Demographic Variables. Australia 1995. Cat. no. 1361.0.30.001. Canberra: AGPS.

http://www.abs.gov.au/Ausstats/abs@.nsf/0/AEB5AA310D68 DF8FCA25697E0018FED8?Open (last viewed 21 December 2005)

Data element attributes

Collection and usage attributes

Comments: Labour force status is one indicator of the socio-economic status of a person and is a key element in assessing the circumstances and needs of individuals and families.

Source and reference attributes

Origin: Health Data Standards Committee

Relational attributes

Related metadata references: See also Person—occupation (main), code (ASCO 2nd edn) N[NNN]{-NN}No registration status

Supersedes Labour force status, version 3, DE, Int. NCSDD & NHDD, NCSIMG & NHIMG, Superseded 01/03/2005.pdf (19.5 KB)

Implementation in Data Set Specifications:

> **Commonwealth Financial Counselling Data Set**
>
> QUESTION 21. The number of people in receipt of Commonwealth Financial Counselling who are employed and unemployed:
>
> Employed persons are aged 15 years and over who worked for one hour or more in the week preceding seeking CFC assistance. Unemployed persons are aged 15 years and over who did not work but actively looked for work in the 4 weeks preceding seeking CFC assistance. See 'Labour force status' in the FMP data dictionary.

> **Emergency Relief Data Set**
>
> QUESTION 20. The number of people in receipt of emergency relief who are employed and unemployed:
>
> Employed persons are aged 15 years and over who worked for one hour or more in the week preceding seeking ER assistance. Unemployed persons are aged 15 years and over who did not work but actively looked for work in the 4 weeks preceding seeking ER assistance. See 'Labour force status' in the FMP data dictionary.

> **Money Management Services Data Set**
>
> QUESTION 21. The number of people in receipt of money management services who are employed and unemployed:
>
> Employed persons are aged 15 years and over who worked for one hour or more in the week preceding seeking MM assistance. Unemployed persons are aged 15 years and over who did not work but actively looked for work in the 4 weeks preceding seeking MM assistance. See 'Labour force status' in the FMP data dictionary.

Letters of family name

Identifying and definitional attributes

Technical name:	Person—letters of family name, text XXX
METeOR identifier:	349481
Registration status:	Community Services, Standard 27/03/2007 Housing assistance, Standard 23/08/2010
Definition:	The combination of 2nd, 3rd and 5th letters of a person's family name.
Data Element Concept:	Person—letters of family name

Value domain attributes

Representational attributes

Representation class:	Text
Data type:	String
Format:	XXX
Maximum character length:	3

Data element attributes

Collection and usage attributes

Guide for use:

In the three spaces, the agency should record the 2nd, 3rd and 5th letters of the client's family name.

For example: If the client's family name is Brown, the reported value should be RON. If the client's family name is Thompson, the reported value should be HOP.

If the client's family name includes non-alphabetic characters—for example hyphens (as in Lee-Archer), apostrophes (as in O'Mara) or blank spaces (as in De Vries)—these non-alphabetic characters should be ignored when counting the position of each character.

Regardless of the length of a person's name, the reported value should always be three characters long. If the legal family name is not long enough to supply the requested letters (i.e. a legal family name of less than five letters) then agencies should substitute the number '2' to reflect the missing letters. The placement of a number '2' should always correspond to the same space that the missing letter would have within the 3-digit field. A number (rather than a letter) is used for such a substitution in order to clearly indicate that an appropriate corresponding letter from the person's name is not available.

For example: If a person's family name is Farr, then value reported would be AR2 because the 2 is substituting for a missing 5th letter of the family name. Similarly, if the person's family name was Hua, then the value reported would be UA2 because the 2 is substituting for the missing 5th letter of the family name.

If a client's family name is missing altogether the agency should record the number 999 for all three spaces associated with the family name, (not the number 2). In some cultures it is traditional to state the family name first. To overcome discrepancies in recording/reporting that may arise as a result of this practice, agencies should always ask the person to specify their legal first given name and their legal family name separately. These should then be recorded as first given name and family name as appropriate, regardless of the order in which they may be traditionally given.

Comments:

The selected Letters of family name can be used in combination with Letters of given name, Date of birth and Sex to develop a statistical linkage key to facilitate the linkage of records for statistical purposes only. This key will also enable linkage to other related databases that either have the same linkage key or the fundamental information to form the same key. The linkage is to assist research and analysis of the data, not for tracking of individuals through the system for case management.

The provision of letters of a person's name can be a sensitive issue because of privacy and confidentiality concerns. The use of this information will be in accordance with privacy principles.

Relational attributes

Implementation in Data Set Specifications:

Statistical linkage key 581 cluster Community Services, Standard 21/05/2010

Letters of given name

Identifying and definitional attributes

Technical name:	Person—letters of given name, text XX
METeOR identifier:	349483
Registration status:	Community Services, Standard 27/03/2007 Housing assistance, Standard 23/08/2010
Definition:	The combination of the 2nd and 3rd letters of a person's given name.
Data Element Concept:	Person—letters of given name

Value domain attributes

Representational attributes

Representation class:	Text
Data type:	String
Format:	XX
Maximum character length:	2

Data element attributes

Collection and usage attributes

Guide for use:	In the two spaces the agency should record the 2nd and 3rd letters of the client's given name.
	For example: If the client's given name is Elizabeth the reported value should be LI. If the client's given name is Robert the reported value should be OB.
	If the client's given name includes non-alphabetic characters—for example hyphens (as in Jo-Anne) or apostrophes (as in D'Arcy), these non-alphabetic characters should be ignored when counting the position of each character.
	Regardless of the length of a person's given name, the reported value should always be two characters long. If the given name of the person is not long enough to supply the requested letters (i.e. a name of less than three letters) then agencies should substitute the number '2' to reflect the missing letters. The placement of a number '2' should always correspond to the same space that the missing letter would have within the 2-digit field. A number (rather than a letter) is used for such substitutions in order to clearly indicate that an appropriate corresponding letter from the person's name is not available.

For example: If the person's legal name was Jo then the value reported would be O2 because the 2 is substituting for the missing 3rd letter of the given name.

If the person's given name is missing altogether the agency should record 99 for the two spaces associated with the given name. In some cultures it is traditional to state the family name first. To overcome discrepancies in recording/reporting that may arise as a result of this practice, agencies should always ask the person to specify their given name and their family name separately. These should then be recorded as first given name and family name as appropriate, regardless of the order in which they may be traditionally given.

Comments:	The selected Letters of given name can be used in combination with Letters of family name, Date of birth and Sex to develop a statistical linkage key to facilitate the linkage of records for statistical purposes only. This key will also enable linkage to other related databases that either have the same linkage key or the fundamental information to form the same key. The linkage is to assist research and analysis of the data, not for tracking of individuals through the system for case management.
	The provision of letters of a person's name can be a sensitive issue because of privacy and confidentiality concerns. The use of this information will be in accordance with privacy principles.

Relational attributes

Related metadata references:	Is formed using Person (name)—given name, text [X(40)] Community Services, Standard 25/08/2005, Housing assistance, Standard 20/06/2005, Health, Standard 04/05/2005
	Is formed using Person (name)—family name, text X[X(39)] Community Services, Standard 25/08/2005, Housing assistance, Standard 20/06/2005, Health, Standard 04/05/2005
	Is used in the formation of Record—linkage key, code 581 XXXXXDDMMYYYYN Community Services, Standard 21/05/2010, Housing assistance, Standard 23/08/2010
	Is used in the formation of Record—linkage key, code XXXXXDDMMYYYYNNo registration status
	Is used in the formation of Record—linkage key 581, statistical code XXXXXDDMMYYYYNNo registration status
Implementation in Data Set Specifications:	Statistical linkage key 581 cluster Community Services, Standard 21/05/2010

Level of highest educational attainment

Identifying and definitional attributes

Technical name: Person—level of highest educational attainment, code NN

METeOR identifier: 321069

Registration status: Community Services, Standard 29/04/2006

Definition: The highest level of education achieved by a person in relation to completed education, as represented by a code.

Data Element Concept: Person—level of highest educational attainment

Value domain attributes

Representational attributes

Classification scheme: Australian Standard Classification of Education 2001

Representation class: Code

Data type: Number

Format: NN

Maximum character length: 2

Permissible values:

Value	Meaning
01	Postgraduate Degree Level
02	Graduate Diploma and Graduate Certificate Level
03	Bachelor Degree Level
04	Advanced Diploma and Diploma Level
05	Certificate Level
06	Senior Secondary Education (e.g. Year 12, Senior Secondary Certificate of Education)
07	Junior Secondary Education (e.g. Year 10)
08	Primary Education
09	Pre-primary Education
10	Other education
88	No Education

Supplementary values: 99   Not stated/inadequately described

Collection and usage attributes

Guide for use: CODE 01   Postgraduate Degree Level

Includes Higher Doctorate, Doctorate by Research, Doctorate by Coursework, Professional Specialist Qualification at Doctoral Degree Level, Statement of Attainment at Doctoral Degree Level, Bridging and

Enabling Course at Doctoral Degree Level, Master Degree by Research , Master Degree by Coursework , Professional Specialist Qualification at Master Degree Level , Statement of Attainment at Master Degree Level , Bridging and Enabling Course at Master Degree Level.

CODE 02   Graduate Diploma and Graduate Certificate Level

Includes Graduate Diploma, Graduate Qualifying or Preliminary, Professional Specialist Qualification at Graduate Diploma Level, Statement of Attainment at Graduate Diploma Level, Bridging and Enabling Course at Graduate Diploma Level, Graduate Certificate, Professional Specialist Qualification at Graduate Certificate Level, Statement of Attainment at Graduate Certificate Level, and Bridging and Enabling Course at Graduate Certificate Level.

CODE 03   Bachelor Degree Level

Includes Bachelor (Honours) Degree, Bachelor (Pass) Degree, Statement of Attainment at Bachelor Degree Level, and Bridging and Enabling Course at Bachelor Degree Level.

CODE 04   Advanced Diploma and Diploma Level

Includes Advanced Diploma, Statement of Attainment at Advanced Diploma Level, Associate Degree, Statement of Attainment at Associate Degree Level, Bridging and Enabling Course at Advanced Diploma and Associate Degree Level, Diploma, Statement of Attainment at Diploma Level, and Bridging and Enabling Course at Diploma Level.

CODE 05   Certificate Level

Includes Certificate IV, Statement of Attainment at Certificate IV Level, Bridging and Enabling Course at Certificate IV Level, Certificate III, Statement of Attainment at Certificate III Level, Bridging and Enabling Course at Certificate III Level, Certificate II, Statement of Attainment at Certificate II Level, Bridging and Enabling Course at Certificate II Level, Certificate, and Statement of Attainment at Certificate I Level.

CODE 06   Senior Secondary Education

Includes Year 12, Bridging and Enabling Course at Senior Secondary Level, and Year 11.

CODE 07   Junior Secondary Education
Includes Year 7 (NSW, Vic., Tas., ACT), and year 8 to 10.

CODE 08   Primary Education
Includes Pre-Year 1, Years 1 to 6, and year 7 (QLD, SA, WA, NT).

CODE 09   Pre-primary Education
Includes Pre-primary Education.

CODE 10   Other education
Includes Non-award Courses in Higher Education, Non-award Courses in Higher Education, Statements of Attainment not Identifiable by Level, Bridging and Enabling Courses not Identifiable by Level and Education, n.e.c.

CODE 88   No education
Applies only when the person reports that they have not completed any level of education whatsoever.

CODE 99   Not stated/inadequately described
This code is not for use on primary collection forms. It is primarily for use in administrative collections when transferring data from data sets where the item has not been collected.

Comments: This codeset allows for data on Junior secondary education and Senior secondary education to be collected at the first level of detail along with the other first level detail data in the ASCED. The ASCED allows for collection of the junior and senior secondary education data at the second level of the classification.

Source and reference attributes

Reference documents: Australian Bureau of Statistics 2001. Australian Standard Classification of Education (ASCED) 2001. Cat. no. 1272.0. Canberra: ABS.

Online reference through:

Level of Education Structure - Australian Standard Classification of Education (ASCED)

Data element attributes

Collection and usage attributes

Guide for use: The highest level of educational attainment is the highest qualification reported by a person in any field of study, or the highest year of school completed, whichever is the higher.

This value domain allows for mapping of data to data obtained using the Australian Standard Classification of Education (ASCED) 2001 from the Australian Bureau of Statistics.

There are two exceptions to this:

1. Data using this codeset cannot be mapped to the ASCED for codes 06 and 07 unless the data from both is

combined. When combined this data maps to ASCED code 6.

2. The ASCED does not collect information about a person having no educational qualifications whatsoever.

Collection methods:
The recommended question wording for this metadata item is as follows:

'What is the highest level of education you/the person/(name) has completed?' (Mark one box only).

The focus of the item is completed education, so if the person is in Year 11, then the category Junior Secondary Education (Year 10) should be marked as the highest level of education completed.

Source and reference attributes

Submitting organisation:
Australian Institute of Health and Welfare

Relational attributes

Related metadata references:
Supersedes Person—level of highest educational attainment, code N Community Services, Superseded 29/04/2006

Supersedes Level of highest educational attainment, version 2, DE, NCSDD, NCSIMG, Superseded 01/03/2005.pdf (16.4 KB)

Implementation in Data Set Specifications:
Financial exclusion data element cluster No registration status

Main language other than English spoken at home

Identifying and definitional attributes

Technical name:	Person—main language other than English spoken at home, code (ASCL 2005) NN{NN}
METeOR identifier:	304133
Registration status:	Community Services, Standard 29/04/2006 Housing assistance, Standard 10/02/2006 Health, Standard 08/02/2006
Definition:	The language reported by a person as the main language other than English spoken by that person in his/her home (or most recent private residential setting occupied by the person) to communicate with other residents of the home or setting and regular visitors, as represented by a code.
Data Element Concept:	Person—main language other than English spoken at home

Value domain attributes

Representational attributes

Classification scheme:	Australian Standard Classification of Languages 2005
Representation class:	Code
Data type:	Number
Format:	NN{NN}
Maximum character length:	4

Collection and usage attributes

Guide for use:	The Australian Standard Classification of Languages (ASCL) has a three- level hierarchical structure. The most detailed level of the classification consists of base units (languages) which are represented by four-digit codes. The second level of the classification comprises narrow groups of languages (the Narrow Group level), identified by the first two digits. The most general level of the classification consists of broad groups of languages (the Broad Group level) and is identified by the first digit. The classification includes Australian Indigenous languages and sign languages.
	For example, the Lithuanian language has a code of 3102. In this case 3 denote that it is an Eastern European language, while 31 denote that it is a Baltic language. The Pintupi Aboriginal language is coded as 8713. In this case 8 denote that it is an Australian Indigenous language and 87 denote that the language is Western Desert language.

Language data may be output at the Broad Group level, Narrow Group level or base level of the classification. If necessary significant Languages within a Narrow Group can be presented separately while the remaining Languages in the Narrow Group are aggregated. The same principle can be adopted to highlight significant Narrow Groups within a Broad Group.

Data element attributes

Collection and usage attributes

Collection methods:

Recommended question:

Do you/Does the person/Does (name) speak a language other than English at home? (If more than one language, indicate the one that is spoken most often.)

No (English only) _____

Yes, Italian _____

Yes, Greek _____

Yes, Cantonese _____

Yes, Arabic _____

Yes, Mandarin _____

Yes, Vietnamese _____

Yes, Spanish _____

Yes, German _____

Yes, Hindi _____

Yes, Other (please specify)

_____

This list reflects the nine most common languages other than English spoken in Australia.

Languages may be added or deleted from the above short list to reflect characteristics of the population of interest.

Alternatively a tick box for 'English' and an 'Other - please specify' response category could be used.

Comments:

This metadata item is consistent with that used in the Australian Census of Population and Housing and is recommended for use whenever there is a requirement for comparison with Census data.

This data element is important in identifying those people most likely to suffer disadvantage in terms of their ability to access services due to language and/or cultural difficulties. In conjunction with Indigenous status,

Proficiency in spoken English and Country of birth this data element forms the minimum core set of cultural and language indicators recommended by the Australian Bureau of Statistics (ABS).

Data on main language other than English spoken at home are regarded as an indicator of 'active' ethnicity and also as useful for the study of inter-generational language retention. The availability of such data may help providers of health and community services to effectively target the geographic areas or population groups that need those services. It may be used for the investigation and development of language services such as interpreter/ translation services.

Source and reference attributes

Origin: Health Data Standards Committee

National Community Services Data Committee

Australian Bureau of Statistics 2005. Australian Standard Classification of Languages (ASCL) 2005. Cat. no. 1267.0. 2nd Edition, Canberra: ABS. Viewed 29 July 2005.

Relational attributes

Related metadata references: Supersedes Person—main language other than English spoken at home, code (ASCL 1997) NN{NN} Community Services, Superseded 29/04/2006, Housing assistance, Not progressed 13/10/2005, Health, Superseded 08/02/2006

See also Person—first language spoken, code (ASCL 2005) NN{NN} Community Services, Standard 29/04/2006, Housing assistance, Standard 10/02/2006

See also Person—preferred language, code (ASCL 2005) NN{NN} Community Services, Standard 29/04/2006, Health, Standard 08/02/2006

Implementation in Data Set Specifications:

Commonwealth Financial Counselling Data Set

QUESTION 20. A count of the languages other than English spoken by people in receipt of Commonwealth Financial Counselling:

This information is important in identifying those people most likely to suffer disadvantage in terms of their ability to access services due to language and/or cultural difficulties. See 'Main language other than English spoken at home' in the FMP data dictionary.

Emergency Relief Data Set

QUESTION 19. A count of the languages other than English spoken by people in receipt of emergency relief:

This information is important in identifying those people most likely to suffer disadvantage in terms of their ability to access services due to language and/or cultural difficulties. See 'Main language other than English spoken at home' in the FMP data dictionary.

Financial exclusion data element cluster No registration status

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Money Management Services Data Set

QUESTION 20. A count of the languages other than English spoken by people in receipt of money management services:

This information is important in identifying those people most likely to suffer disadvantage in terms of their ability to access services due to language and/or cultural difficulties. See 'Main language other than English spoken at home' in the FMP data dictionary.

Marital status

Identifying and definitional attributes

Technical name: Person—marital status, code N

METeOR identifier: 291045

Registration status: Community Services, Standard 25/08/2005
Housing assistance, Standard 10/02/2006
Health, Standard 04/05/2005

Definition: A person's current relationship status in terms of a couple relationship or, for those not in a couple relationship, the existence of a current or previous registered marriage, as represented by a code.

Data Element Concept: Person—marital status

Value domain attributes

Representational attributes

Representation class: Code

Data type: Number

Format: N

Maximum character length: 1

Permissible values:

Value	Meaning
1	Never married
2	Widowed
3	Divorced
4	Separated
5	Married (registered and de facto)

Supplementary values: 6 Not stated/inadequately described

Collection and usage attributes

Guide for use: Refers to the current marital status of a person.

CODE 2   Widowed

This code usually refers to registered marriages but when self reported may also refer to de facto marriages.

CODE 4   Separated

This code refers to registered marriages but when self reported may also refer to de facto marriages.

CODE 5   Married (registered and de facto)

Includes people who have been divorced or widowed but have since re-married, and should be generally accepted

as applicable to all de facto couples, including of the same sex.

CODE 6   Not stated/inadequately described

This code is not for use on primary collection forms. It is primarily for use in administrative collections when transferring data from data sets where the item has not been collected.

Source and reference attributes

Origin: The ABS standards for the collection of Social and Registered marital status appear on the ABS Website. Australian Bureau of Statistics. Family, household and income unit variables. Cat. no. 1286.0. Canberra: ABS.

Data element attributes

Collection and usage attributes

Collection methods: This metadata item collects information on social marital status. The recommended question module is:

Do you/Does the person usually live with a partner in a registered or de facto marriage?

Yes, in a registered marriage

Yes, in a de facto marriage

No, never married

No, separated

No, divorced

No, widowed

It should be noted that information on marital status is collected differently by the ABS, using a set of questions. However, the question outlined above is suitable and mostly sufficient for use within the health and community services fields. See Source document for information on how to access the ABS standards.

While agencies are encouraged to use the recommended question described above, it is acknowledged that this is not always possible in practice. For example, where the data collection is a by-product of the provision of a health or community service, the information may be ascertained using different means. However, the recommended question should be used wherever practically possible.

Comments: The ABS standards identify two concepts of marital status:

Registered marital status - defined as whether a person has, or has had, a registered marriage;

Social marital status - based on a person's living arrangement (including de facto marriages), as reported by the person.

It is recommended that the social marital status concept be collected when information on social support/home arrangements is sought, whereas the registered marital status concept need only be collected where it is specifically required for the purposes of the collection.

While marital status is an important factor in assessing the type and extent of support needs, such as for the elderly living in the home environment, marital status does not adequately address the need for information about social support and living arrangement and other data elements need to be formulated to capture this information.

Source and reference attributes

Origin: National Health Data Standards Committee

National Community Services Data Committee

Relational attributes

Related metadata references: See also Person—social marital status, code N Housing assistance, Proposed 24/11/2009

Supersedes Person—marital status, code N Community Services, Superseded 25/08/2005, Health, Superseded 04/05/2005

Supersedes Person—marital status, housing assistance code N Housing assistance, Superseded 10/02/2006

Implementation in Data Set Specifications:

Commonwealth Financial Counselling Data Set
QUESTION 23. A count of the marital status of people in receipt of Commonwealth financial counselling services:
This information is used to associate marital status with the need for and use of services, and for epidemiological purposes. See 'Marital status' in the FMP data dictionary.

Emergency Relief Data Set
QUESTION 21. A count of the marital status of people in receipt of emergency relief:
This information is used to associate marital status with the need for and use of services, and for epidemiological purposes. See 'Marital status' in the FMP data dictionary.

Money Management Services Data Set

QUESTION 23. A count of the marital status of people in receipt of money management services:

This information is used to associate marital status with the need for and use of services, and for epidemiological purposes. See 'Marital status' in the FMP data dictionary.

Mental health disorder indicator

Identifying and definitional attributes

Technical name:	Person—mental health disorder indicator, yes/no code N
Synonymous names:	Mental illness indicator
METeOR identifier:	376074
Registration status:	Health, Standardisation pending 04/11/2010
Definition:	A self-reported indicator of whether a person has ever been told by a doctor, psychiatrist, psychologist or mental health nurse that they suffer from a **mental health disorder** (including drug and alcohol abuse), as represented by a code.
Data Element Concept:	Person—mental health disorder indicator

Value domain attributes

Representational attributes

Representation class:	Code	
Data type:	Boolean	
Format:	N	
Maximum character length:	1	
Permissible values:	Value	Meaning
	1	Yes
	2	No

Data element attributes

Collection and usage attributes

Comments:	The term mental illness is sometimes used instead of mental disorder.
	Mental health disorders are classified according to the Diagnostic and statistical manual of mental disorders fourth edition (DSM-IV) (APA 2000).

Source and reference attributes

Submitting organisation:	Australian Institute of Health and Welfare
Reference documents:	APA (American Psychiatric Association) 2000. Diagnostic and statistical manual of mental disorders (Text Revision) (4th edn). Washington, DC: American Psychiatric Association

Relational attributes

Related metadata references: See also Person—medication for mental health disorder indicator, yes/no code N Health, Standardisation pending 04/11/2010

Implementation in Data Set Specifications: Financial exclusion data element cluster No registration status

New client indicator

Identifying and definitional attributes

Technical name:	Person—new client indicator, code N
Synonymous names:	Client; New; Indicator
METeOR identifier:	400548
Registration status:	Housing assistance, Standard 23/08/2010
Definition:	Whether the person has been a client of this Agency before.
Data Element Concept:	Person—new client indicator

Value domain attributes

Representational attributes

Representation class:	Code	
Data type:	Number	
Format:	N	
Permissible values:	Value	Meaning
	1	Yes
	2	No
	3	Not sure
Supplementary values:	9	Not stated/inadequately described

Data element attributes

Relational attributes

Implementation in Data Set Specifications:

> **Commonwealth Financial Counselling Data Set**
>
> QUESTION 7. The number of existing and new clients receiving services or care from an CFC agency or organisation:
>
> An existing client has received Commonwealth financial counselling from your service in the past 3 years. A new client has not received any Commonwealth financial counselling from your service in the past 3 years. See 'New client indicator' in the FMP data dictionary for further explanation.

Emergency Relief Data Set

QUESTION 7. The number of existing and new clients receiving services or care from an ER agency or organisation:

An existing client has received emergency relief from your service in the past 3 years. A new client has not received any emergency relief from your service in the past 3 years. See 'New client indicator' in the FMP data dictionary for further explanation.

Money Management Services Data Set

QUESTION 7. The number of existing and new clients receiving services or care from an MM agency or organisation:

An existing client has received money management assistance from your service in the past 3 years. A new client has not received any money management assistance from your service in the past 3 years. See 'New client indicator' in the FMP data dictionary for further explanation.

Number of clients

Identifying and definitional attributes

Technical name:	Service provider organisation—number of clients, total people N[NNNN]
Synonymous names:	Number of service users
METeOR identifier:	321271
Registration status:	Community Services, Standard 27/04/2007
Definition:	The total number of clients receiving services or care from an agency or organisation.
Data Element Concept:	Service provider organisation—number of clients

Value domain attributes

Representational attributes

Representation class:	Total
Data type:	Number
Format:	N[NNNN]
Maximum character length:	5
Unit of measure:	Person

Data element attributes

Collection and usage attributes

Guide for use:	Each client receiving a service during the reporting period should be counted only once, regardless of the number of times they accessed the service in that time period.
	This data item refers to the number of clients receiving services, not those 'on the books', 'on waiting lists', number of 'beds' or 'places'.
Comments:	The information is needed to provide a basic count of people accessing services, and will relate to population data from the Australian Bureau of Statistics (ABS) to help in assessing met and unmet need.

Source and reference attributes

Submitting organisation:	Australian Institute of Health and Welfare.
	CSTDA NMDS Network.
Origin:	Commonwealth State/Territory Disability Agreement National Minimum Data Set (CSTDA NMDS) collection. Data Guide: data items and definitions 2006-07.

Relational attributes

Implementation in Data Set Specifications:

Commonwealth Financial Counselling Data Set

QUESTION 6. The number of clients receiving services or care from the CFC agency or organisation:

A client is a person who received Commonwealth financial counselling services from the organisation during the reporting period. Count each person receiving Commonwealth financial counselling services, not each family member. Only count each client once no matter how many times you saw him/her during the reporting period. See 'Total number of clients' in the FMP data dictionary for an explanation of clients.

Emergency Relief Data Set

QUESTION 6. The number of clients receiving services or care from the ER agency or organisation:

A client is a person who received emergency relief services from the organisation during the reporting period. Count each person receiving emergency relief services, not each family member. Only count each client once no matter how many times you saw him/her during the reporting period.

See 'Total number of clients' in the FMP data dictionary for an explanation of clients.

Money Management Services Data Set

QUESTION 6. The number of clients receiving services or care from the MM agency or organisation:

A client is a person who received Money management services from the organisation during the reporting period. Count each person receiving Money management services, not each family member. Only count each client once no matter how many times you saw him/her during the reporting period. See 'Total number of clients' in the FMP data dictionary for an explanation of clients.

Number of dependents

Identifying and definitional attributes

Technical name: Person—number of dependents, total N[N]

METeOR identifier: 423238

Registration status: No registration status

Definition: The total number of children under the age of 18 or
                             dependent adults financially supported by the person.

Data Element Concept: Person—number of dependents

Value domain attributes

Representational attributes

Representation class: Total

Data type: Number

Format: N[N]

Maximum character length: 2

Unit of measure: Person

Data element attributes

Collection and usage attributes

Guide for use: Include adult dependents e.g. disability and the aged.
                             Include extended family dependents where they are likely
                             to benefit from FMP assistance.

Relational attributes

Implementation in Data Set
Specifications:

Commonwealth Financial Counselling Data Set
QUESTION 15. Number of dependents assisted in the reporting period:
The number of dependents aged under 18 or dependent adults financially supported by the person. See 'Number of dependents' in the FMP data dictionary for further explanation.

Emergency Relief Data Set
QUESTION 15. Number of dependents assisted in the reporting period:
The number of dependents aged under 18 or dependent adults financially supported by the person. See 'Number of dependents' in the FMP data dictionary for further explanation.

Money Management Services Data Set
QUESTION 15. Number of dependents assisted in the reporting period:
The number of dependent children or adults financially supported by the person. See 'Number of dependents' in the FMP data dictionary for further explanation.

Organisation name

Identifying and definitional attributes

Technical name:	Service provider organisation (name)—organisation name, text [X(200)]
METeOR identifier:	288917
Registration status:	Community Services, Standard 30/09/2005 Health, Standard 04/05/2005
Definition:	The appellation by which an establishment, agency or organisation is known or called, as represented by text.
Data Element Concept:	Service provider organisation (name)—organisation name

Value domain attributes

Representational attributes

Representation class:	Text
Data type:	String
Format:	[X(200)]
Maximum character length:	200

Data element attributes

Collection and usage attributes

Guide for use:	Generally, the complete establishment, agency or organisation name should be used to avoid any ambiguity in identification. This should usually be the same as company registration name. However, in certain circumstances (e.g. internal use), a short name (i.e. an abbreviated name by which the organisation is known) or a locally used name (e.g. where a medical practice is known by a name that is different to the company registration name) can be used. Further, a business unit within an organisation may have its own separate identity; this should be captured (as the unit name – see Organisation name type).
	More than one name can be recorded for an organisation. That is, this field is a multiple occurring field. At least one organisation name must be recorded for each organisation and each name must have an appropriate Organisation name type.

Source and reference attributes

Submitting organisation:	Standards Australia

Relational attributes

Implementation in Data Set Specifications:

> **Commonwealth Financial Counselling Data Set**
>
> QUESTION 2. Name of the Organisation:
>
> Complete the name of the Organisation that is funded to deliver CFC services for this report.
>
> QUESTION 3. Name of outlet or agency:
>
> Complete the name of the outlet or agency that is delivering CFC services for this report.

> **Emergency Relief Data Set**
>
> QUESTION 2. Name of the Organisation:
>
> Complete the name of the Organisation that is funded to deliver ER services for this report.
>
> QUESTION 3. Name of outlet or agency:
>
> Complete the name of the agency that is delivering ER services for this report.

> **Money Management Services Data Set**
>
> QUESTION 2. Name of the Organisation:
>
> Complete the name of the agency that is delivering MM services for this report.
>
> QUESTION 3. Name of outlet or agency:
>
> Complete the name of the agency that is delivering MM services for this report.

Data set specification specific attributes

Conditional obligation: To be collected at least twice for Parent organisation name and Outlet name.

Paid employment indicator

Identifying and definitional attributes

Technical name: Person (employed)—paid employment indicator, code N

METeOR identifier: 314813

Registration status: Community Services, Standard 30/11/2007

Definition: Whether an employed person is paid or unpaid, as represented by a code.

Data Element Concept: Person (employed)—paid employment indicator

Value domain attributes

Representational attributes

Representation class: Code

Data type: Number

Format: N

Maximum character length: 1

Permissible values:

Value	Meaning
1	Yes
2	No

Supplementary values: 9   Not stated/inadequately described

Collection and usage attributes

Guide for use: CODE 9   Not stated/inadequately described

This code is not for use in primary data collections.

Data element attributes

Relational attributes

Implementation in Data Set Specifications: Financial exclusion data element cluster No registration status

Person annual gross income range ($ 10,000 range)

Identifying and definitional attributes

Technical name: Person—gross income (annual), ten thousand dollar range, code N[N]

METeOR identifier: 425159

Registration status: No registration status

Definition: The value of income per week from all sources before any deductions such as income tax and superannuation for a person in ten thousand dollar range.

Data Element Concept: Person—gross income

Value domain attributes

Representational attributes

Representation class: Code

Data type: Number

Format: N[N]

Maximum character length: 2

Permissible values:

Value	Meaning
1	Less than $ 10,000
2	$ 10,000 - $ 20,000
3	$ 20,001 - $ 30,000
4	$ 30,001 - $ 40,000
5	$ 40,001 - $ 50,000
6	$ 50,001 - $ 60,000
7	$ 60,001 - $ 70,000
8	$ 70,001 - $ 80,000
9	$ 80,001 - $ 90,000
10	$ 90,001 - $ 100,000
11	More than $ 100,000

Supplementary values:

12	Don't know / not sure
13	Not stated

Data element attributes

Collection and usage attributes

Guide for use: The main components of gross income are:

wages and salary;

income derived from self-employment;

government pensions, benefits and allowances; and other income comprising investments (including interest, dividends, royalties and rent) and other regular income (including superannuation, private scholarships received in cash, workers' compensation, accident compensation, maintenance or alimony, and any other allowances regularly received).

Gross income is regarded as all receipts which are received regularly and are of a recurring nature. Certain receipts such as lump sum receipts, windfall gains and withdrawals from savings are not considered to conform to these criteria and are not included as income.

Where household or income unit gross income is required, the gross income of each person is summed.

Relational attributes

Implementation in Data Set Specifications:

Commonwealth Financial Counselling Data Set

QUESTION 22. The number of people in receipt of Commonwealth financial counselling by annual gross income in ten thousand dollar groupings:

See 'Person annual gross income range ($ 10,000 range)' in the FMP data dictionary.

Financial exclusion data element cluster No registration status.

Money Management Services Data Set

QUESTION 22. The number of people in receipt of money management services by annual gross income in ten thousand dollar groupings:

See 'Person annual gross income range ($ 10,000 range)' in the FMP data dictionary.

Personal saving

Identifying and definitional attributes

Technical name:	Person—personal saving, total Australian currency N[NNNNN].NN
METeOR identifier:	407178
Registration status:	No registration status
Definition:	The part of a person's income that is not spent in Australian currency.
Data Element Concept:	Person—personal saving

Value domain attributes

Representational attributes

Representation class:	Total
Data type:	Currency
Format:	N[NNNNN].NN
Maximum character length:	8
Unit of measure:	Australian currency (AU$)
Unit of measure precision:	2

Collection and usage attributes

Guide for use:	Always include the cent value, using .00 where there are only dollar values.

Data element attributes

Relational attributes

Implementation in Data Set Specifications:	Financial exclusion data element cluster No registration status

Postcode—Australian (person)

Identifying and definitional attributes

Technical name:	Person (address)—Australian postcode, code (Postcode datafile) {NNNN}
Synonymous names:	Australian postcode
METeOR identifier:	287224
Registration status:	Community Services, Standard 25/08/2005 Housing assistance, Standard 10/02/2006 Health, Standard 04/05/2005
Definition:	The numeric descriptor for a postal delivery area, aligned with locality, suburb or place for the address of a person.
Data Element Concept:	Person (address)—Australian postcode

Value domain attributes

Representational attributes

Classification scheme:	Postcode datafile
Representation class:	Code
Data type:	Number
Format:	{NNNN}
Maximum character length:	4

Collection and usage attributes

Comments:	Postcode - Australian may be used in the analysis of data on a geographical basis, which involves a conversion from postcodes to the Australian Bureau of Statistics (ABS) postal areas. This conversion results in some inaccuracy of information. However, in some data sets postcode is the only geographic identifier, therefore the use of other more accurate indicators (e.g. Statistical Local Area (SLA)) is not always possible.
	When dealing with aggregate data, postal areas, converted from postcodes, can be mapped to Australian Standard Geographical Classification codes using an ABS concordance, for example to determine SLAs. It should be noted that such concordances should not be used to determine the SLA of any individual's postcode. Where individual street addresses are available, these can be mapped to ASGC codes (e.g. SLAs).

Data element attributes

Collection and usage attributes

Guide for use:	The postcode book is updated more than once annually; as postcodes are a dynamic entity and are constantly changing.
Collection methods:	Leave Postcode - Australian blank for:
	Any overseas address
	Unknown address
	No fixed address.
	May be collected as part of Address line or separately. Postal addresses may be different from where a person actually resides.

Source and reference attributes

Submitting organisation:	Standards Australia
Origin:	National Health Data Committee
	National Community Services Data Committee
Reference documents:	AS5017 Health Care Client Identification, 2002, Sydney: Standards Australia
	AS4846 Health Care Provider Identification, 2004, Sydney: Standards Australia
	AS4846 Health Care Provider Identification, 2006, Sydney: Standards Australia
	Australia Post Postcode book. Reference through:
	http://www1.auspost.com.au/postcodes/

Relational attributes

Related metadata references:	See also Person—Australian state/territory identifier, code N Community Services, Standard 25/08/2005, Housing assistance, Standard 10/02/2006, Health, Standard 04/05/2005
	Supersedes Person (address)—Australian postcode (Postcode datafile), code NNN[N] Community Services, Superseded 25/08/2005, Health, Superseded 04/05/2005
	Is used in the formation of Person—geographic location, community services code (ASGC 2004) NNNNN Community Services, Superseded 02/05/2006
	Is used in the formation of Dwelling—geographic location, remoteness structure code (ASGC 2004) N[N] Housing assistance, Retired 10/02/2006

Commonwealth Financial Counselling Data Set

QUESTION 16. What is the postcode of the
Commonwealth Financial Counselling clients?

Complete this information on the worksheet labelled
Postcode of CFC clients (click on the text box below). See
'Postcode-Australian (Person)' in the FMP data dictionary
for further explanation.

Emergency Relief Data Set

QUESTION 16. What is the postcode of the emergency
relief clients?

Complete this information on the worksheet labelled
Postcode of ER clients (click on the text box below). See
'Postcode-Australian (Person)' in the FMP data dictionary
for further explanation.

Money Management Services Data Set

QUESTION 16. What is the postcode of the money
management clients?

Complete this information on the worksheet labelled
Postcode of MM clients (click on the text box below). See
'Postcode-Australian (Person)' in the FMP data dictionary
for further explanation.

Postcode—Australian (service provider organisation)

Identifying and definitional attributes

Technical name:	Service provider organisation (address)—Australian postcode, code (Postcode datafile) {NNNN}
METeOR identifier:	290064
Registration status:	Community Services, Standard 31/08/2005 Health, Standard 04/05/2005
Definition:	The numeric descriptor for a postal delivery area, aligned with locality, suburb or place for the address of an organisation, as represented by a code.
Data Element Concept:	Service provider organisation (address)—Australian postcode

Value domain attributes

Representational attributes

Classification scheme:	Postcode datafile
Representation class:	Code
Data type:	Number
Format:	{NNNN}
Maximum character length:	4

Collection and usage attributes

Comments:	Postcode - Australian may be used in the analysis of data on a geographical basis, which involves a conversion from postcodes to the Australian Bureau of Statistics (ABS) postal areas. This conversion results in some inaccuracy of information. However, in some data sets postcode is the only geographic identifier, therefore the use of other more accurate indicators (e.g. Statistical Local Area (SLA)) is not always possible.
	When dealing with aggregate data, postal areas, converted from postcodes, can be mapped to Australian Standard Geographical Classification codes using an ABS concordance, for example to determine SLAs. It should be noted that such concordances should not be used to determine the SLA of any individual's postcode. Where individual street addresses are available, these can be mapped to ASGC codes (e.g. SLAs).

Data element attributes

Collection and usage attributes

Collection methods: May be collected as part of Address line or separately. Postal addresses may be different from where a service is actually located.

Source and reference attributes

Submitting organisation: Standards Australia

Origin: National Health Data Committee

National Community Services Data Committee

Australia Post Postcode book. Reference through:

http://www1.auspost.com.au/postcodes/

Reference documents: AS5017 Health Care Client Identification, 2002, Sydney: Standards Australia
AS4846 Health Care Provider Identification, 2004, Sydney: Standards Australia

Relational attributes

Implementation in Data Set Specifications:

> **Commonwealth Financial Counselling Data Set**
>
> QUESTION 5. The postcode of the area in which the Commonwealth financial counselling service provider is based during the reporting period:
>
> Complete this information on the worksheet labelled Postcode of CFC outlets (click on the text box below). If outreach and home visits are the model of service delivery use the office base postcode. See 'Postcode-Australian (Service provider organisation)' in the FMP data dictionary for further explanation.

> **Emergency Relief Data Set**
>
> QUESTION 5. The postcode of the area in which the emergency relief service provider is based during the reporting period:
>
> Complete this information on the worksheet labelled Postcode of ER outlets (click on the text box below). If outreach and home visits are the model of service delivery use the office base postcode. See 'Postcode-Australian (Service provider organisation)' in the FMP data dictionary for further explanation.

Money Management Services Data Set

QUESTION 5. The postcode of the area in which the money management service provider is based during the reporting period:

Complete this information on the worksheet labelled Postcode of MM outlets (click on the text box below). If outreach and home visits are the model of service delivery use the office base postcode. See 'Postcode-Australian (Service provider organisation)' in the FMP data dictionary for further explanation.

Proficiency in spoken English

Identifying and definitional attributes

Technical name: Person—proficiency in spoken English, code N

METeOR identifier: 270203

Registration status: Community Services, Standard 01/03/2005
Housing assistance, Standard 10/02/2006
Health, Standard 01/03/2005

Definition: A person's self-assessed level of ability to speak English, as represented by a code.

Data Element Concept: Person—proficiency in spoken English

Value domain attributes

Representational attributes

Representation class: Code

Data type: Number

Format: N

Maximum character length: 1

Permissible values:

Value	Meaning
0	Not applicable (persons under 5 years of age or who speak only English)
1	Very well
2	Well
3	Not well
4	Not at all

Supplementary values: 9   Not stated/inadequately described

Collection and usage attributes

Guide for use: CODE 0   Not applicable (persons under 5 years of age or who speak only English)

Not applicable, is to be used for people under 5 year of age and people who speak only English.

CODE 9   Not stated/inadequately described

Not stated/inadequately described, is not to be used on primary collection forms. It is primarily for use in administrative collections when transferring data from data sets where the item has not been collected.

Comments:	The ABS advises that the most useful information provided by this metadata item is in the distinction between the two category groups of Very well/Well and Not well/Not at all.

Source and reference attributes

Reference documents:	Standards for Statistics on Cultural and Language Diversity 1999. Cat. no. 1289.0. Canberra: ABS.

Data element attributes

Collection and usage attributes

Collection methods:	This metadata item is only intended to be collected if a person has a main language other than English spoken at home; and/or first language spoken is not English.
	Recommended question:
	How well do you speak English? (tick one)
	1. Very well
	2. Well
	3. Not well
	4. Not at all
	Generally this would be a self-reported question, but in some circumstances (particularly where a person does not speak English well) assistance will be required in answering this question. It is important that the person's self-assessed proficiency in spoken English be recorded wherever possible. This metadata item does not purport to be a technical assessment of proficiency but is a self-assessment in the four broad categories outlined above.
	This metadata item is not relevant to and should not be collected for persons under the age of five years.
	While agencies are encouraged to use the recommended question described above, it is acknowledged that this is not always possible in practice. For example, where the data collection is a by-product of the provision of a health or community service, the information may be ascertained using different means. However, this standard should be used wherever practically possible.
Comments:	This metadata item identifies those people who may suffer disadvantage in terms of their ability to access services due to lack of ability in the spoken English language. This information can be used to target the provision of services to people whose lack of ability in spoken English is potentially a barrier to gaining access to government programs and services.

In conjunction with Indigenous status, the main language other than English spoken at home and the country of birth, this metadata item forms the minimum core set of cultural and language indicators recommended by the Australian Bureau of Statistics.

Source and reference attributes

Origin: National Health Data Committee

                                             National Community Services Data Committee

Relational attributes

Related metadata references: See also Person—first language spoken, code (ASCL 2005) NN{NN} Community Services, Standard 29/04/2006, Housing assistance, Standard 10/02/2006

                                             See also Person—main language other than English spoken at home, code (ASCL 2005) NN{NN} Community Services, Standard 29/04/2006, Housing assistance, Standard 10/02/2006, Health, Standard 08/02/2006

                                             See also Person—country of birth, code (SACC 1998) NNNN Community Services, Superseded 02/06/2008, Housing assistance, Superseded 24/11/2008, Health, Superseded 01/10/2008

                                             Supersedes Proficiency in spoken English, version 2, DE, Int. NCSDD & NHDD, NCSIMG & NHIMG, Superseded 01/03/2005.pdf (18.6 KB)

Implementation in Data Set   Financial exclusion data element cluster No registration
Specifications: status

Reason for seeking assistance (Financial management)

Identifying and definitional attributes

Technical name: Person—reason for seeking assistance, financial management code N[N]

METeOR identifier: 407740

Registration status: No registration status

Definition: The reason why a person presented to a financial management agency in order to seek assistance, as represented by a code.

Data Element Concept: Person—reason for seeking assistance

Value domain attributes

Representational attributes

Representation class: Code

Data type: Number

Format: N[N]

Maximum character length: 2

Permissible values:

Value	Meaning
1	Alcohol/Other Drugs
2	Bankruptcy
3	Business failure (own business)
4	Changed Personal Circumstances (e.g. loss of job, illness, death)
5	Child Support Issues
6	Contract dispute
7	Credit/Debt Issues (including harassment by creditors/debt collectors)/Payment Arrears (e.g. credit card, fines, loan)
8	Disabilities (including intellectual disabilities)
9	Family violence
10	Gambling
11	Government Payments waiting period (e.g. pensions, benefits, allowances), including breaching
12	Government Income Management Measure — Compulsory
13	Government Income Management Measure — Voluntary

	14	Housing (including rental/mortgage arrears)
	15	Mental Illness
	16	No Income
	17	Relationship Issues (e.g. separation/divorce)
	18	Taxation Issues
	19	Utilities (e.g. water, gas, electricity, telecommunications)
	20	Other
Supplementary values:	99	Not stated/inadequately described

Collection and usage attributes

Guide for use: *To be developed by data working group.*

Need to describe the value domain more fully in the guide for use.

Data element attributes

Collection and usage attributes

Guide for use: There may be more than one reason why a client seeks assistance. This data element is used to collect all of these reasons.

The presenting reason(s) is intended to focus on the reasons the client presented to the agency as opposed to the underlying reasons or causes that may have built up over a lifetime.

Relational attributes

Implementation in Data Set Specifications:

Commonwealth Financial Counselling Data Set
QUESTION 27. A count of the reasons or problems that caused the clients to seek assistance:
There may be more than one reason why a client seeks assistance. This data element is used to collect all of these reasons. The presenting reason(s) is intended to focus on the reasons the client presented to the agency as opposed to the underlying reasons or causes that may have built up over a lifetime. See 'Reasons for seeking assistance' in the FMP data dictionary for further explanation.

Emergency Relief Data Set

QUESTION 23. A count of the reasons or problems that caused the clients to seek assistance:

There may be more than one reason why a client seeks assistance. This data element is used to collect all of these reasons. The presenting reason(s) is intended to focus on the reasons the client presented to the agency as opposed to the underlying reasons or causes that may have built up over a lifetime. See 'Reasons for seeking assistance' in the FMP data dictionary for further explanation.

Money Management Services Data Set

QUESTION 27. A count of the reasons or problems that caused the clients to seek assistance:

There may be more than one reason why a client seeks assistance. This data element is used to collect all of these reasons. The presenting reason(s) is intended to focus on the reasons the client presented to the agency as opposed to the underlying reasons or causes that may have built up over a lifetime. See 'Reasons for seeking assistance' in the FMP data dictionary for further explanation.

Referral destination (Commonwealth financial counselling services)

Identifying and definitional attributes

Technical name: Referral—referral destination, Commonwealth financial counselling services code N

METeOR identifier: 423824

Registration status: No registration status

Definition: Referral to further assistance by Commonwealth financial counselling services, as represented by a code.

Data Element Concept: Referral—referral destination

Value domain attributes

Representational attributes

Representation class: Code

Data type: String

Format: N[N]

Maximum character length: 2

Permissible values:

Value	Meaning
1	Emergency relief
2	Money management
4	Drug/Alcohol service
5	Clergy
6	Centrelink
7	Counsellor
8	Court (Family Federal, Magistrate
9	Legal practitioner
10	Domestic violence service
11	Disability service
12	Employment service
13	Family relationship service
14	Housing service
15	Community health service
16	Hospital
17	Medical service
18	Mental health care service

19	Respite service
20	Education service
21	Police/correctional service
22	Indigenous service
23	Migrant/ethnic support service
24	Gambling service
25	Creditor
26	Financial institution
27	Insolvency and Trustee Service Australia (ITSA)
28	Utility company
29	Other government agency

Data element attributes

Relational attributes

Implementation in Data Set Specifications:

Commonwealth Financial Counselling Data Set

QUESTION 30. A count of the places to which clients are referred during the reporting period:

See 'Referral destination' in the FMP data dictionary for further explanation.

Referral destination (emergency relief services)

Identifying and definitional attributes

Technical name:	Referral—referral destination, emergency relief services code N
METeOR identifier:	420109
Registration status:	No registration status
Definition:	Referral to further assistance by emergency relief services, as represented by a code.
Data Element Concept:	Referral—referral destination

Value domain attributes

Representational attributes

Representation class:	Code
Data type:	String
Format:	N[N]
Maximum character length:	2

Permissible values:

Value	Meaning
1	Financial counselling
2	Money management
4	Counselling/family support
5	Accommodation/housing/homelessness assistance
6	Social/community support workers
7	Gambling services
8	Drug and alcohol services
9	Legal assistance
10	Domestic violence support
11	Living skills program
12	Doctors/specialist
13	Op shop
14	Parenting support
88	Other

Supplementary values:	99	Unknown

Data element attributes

Relational attributes

Implementation in Data Set Specifications:

Emergency Relief Data Set
QUESTION 26. A count of the places to which clients are referred during the reporting period:
See 'Referral destination' in the FMP data dictionary for further explanation.

Referral destination (money management services)

Identifying and definitional attributes

Technical name:	Referral—referral destination, money management services code N
METeOR identifier:	423830
Registration status:	No registration status
Definition:	Referral to further assistance by money management services, as represented by a code.
Data Element Concept:	Referral—referral destination

Value domain attributes

Representational attributes

Representation class:	Code
Data type:	String
Format:	N[N]
Maximum character length:	2

Permissible values:

Value	Meaning
1	Financial counselling
2	Emergency relief
4	Counselling/family support
5	Drug and alcohol services
6	Gambling services
7	Accommodation/housing/homelessness assistance
8	Social/community support workers
9	Legal assistance
10	Domestic violence support
11	Living skills program
12	Doctors/specialist
13	Op shop
14	Parenting support
88	Other

	Value	Meaning
Supplementary values:	99	Unknown

Data element attributes

Relational attributes

Implementation in Data Set Specifications:

> **Money Management Services Data Set**
>
> QUESTION 30. A count of the places to which clients are referred during the reporting period:
>
> See 'Referral destination (money management)' in the FMP data dictionary for further explanation.

Referral source (Commonwealth financial counselling)

Identifying and definitional attributes

Metadata item type:	Data Element
Technical name:	Referral—referral source, Commonwealth financial counselling code N
METeOR identifier:	432868
Registration status:	No registration status
Definition:	The source of a client referral for Commonwealth financial counselling services, as represented by a code.
Data Element Concept:	Referral—referral source

Value domain attributes

Representational attributes

Representation class:	Code
Data type:	Number
Format:	N
Maximum character length:	1

Permissible values:	Value	Meaning
	1	Self, carer(s), family or friends
	2	Money management
	3	Emergency relief
	4	Centrelink
	8	Other source
Supplementary values:	9	Not stated/inadequately described

Data element attributes

Collection and usage attributes

Guide for use:	Referral includes self referral.
Comments:	Source of referral is important in assisting in the analyses of inter-service client flow.

Relational attributes

Implementation in Data Set Specifications:

> **Commonwealth Financial Counselling Data Set**
>
> QUESTION 28. The number of clients by source of referral during the reporting period:
>
> See 'Source of referral (Commonwealth financial counselling)' in the FMP data dictionary for further explanation.

Referral source (Emergency relief)

Identifying and definitional attributes

Metadata item type:	Data Element
Technical name:	Referral—referral source, emergency relief service code N
METeOR identifier:	432527
Registration status:	No registration status
Definition:	The source of a client referral for emergency relief services, as represented by a code.
Data Element Concept:	Referral—referral source

Value domain attributes

Representational attributes

Representation class:	Code
Data type:	Number
Format:	N
Maximum character length:	1

Permissible values:

Value	Meaning
1	Self, carer(s), family or friends
2	Financial counsellor
3	Money management service
4	Centrelink
8	Other source

	Value	Meaning
Supplementary values:	9	Not stated/inadequately described

Data element attributes

Collection and usage attributes

Guide for use:	Referral includes self referral.
Comments:	Source of referral is important in assisting in the analyses of inter-service client flow.

Relational attributes

Implementation in Data Set Specifications:	**Emergency Relief Data Set** QUESTION 24. The number of clients by source of referral during the reporting period: See 'Source of referral (Emergency relief)' in the FMP data dictionary for further explanation.

Referral source (Money management)

Identifying and definitional attributes

Metadata item type: Data Element

Technical name: Referral—referral source, money management service code N

METeOR identifier: 432861

Registration status: No registration status

Definition: The source of a client referral for money management services, as represented by a code.

Data Element Concept: Referral—referral source

Value domain attributes

Representational attributes

Representation class: Code

Data type: Number

Format: N

Maximum character length: 1

Permissible values:

Value	Meaning
1	Self, carer(s), family or friends
2	Financial counsellor
3	Emergency relief
4	Centrelink
8	Other source

Supplementary values: 9   Not stated/inadequately described

Data element attributes

Collection and usage attributes

Guide for use: Referral includes self referral.

Comments: Source of referral is important in assisting in the analyses of inter-service client flow.

Relational attributes

Implementation in Data Set Specifications:

> **Money Management Services Data Set**
>
> QUESTION 28. The number of clients by source of referral during the reporting period:
>
> See 'Source of referral (money management)' in the FMP data dictionary for further explanation.

Reporting period start and end

Identifying and definitional attributes

Technical name:	Service episode—reporting period, date DDMMYYYY
METeOR identifier:	407632
Registration status:	No registration status
Definition:	The reporting period to which a record relates, as represented by a date.
Data Element Concept:	Service episode—reporting period

Value domain attributes

Representational attributes

Representation class:	Date
Data type:	Date/Time
Format:	DDMMYYYY
Maximum character length:	8

Data element attributes

Relational attributes

Implementation in Data Set Specifications:

Commonwealth Financial Counselling Data Set

QUESTION 4. Reporting period:

This data element is to be recorded twice, once for the start and again for the end of the reporting period.

Emergency Relief Data Set

QUESTION 4. Reporting period:

This data element is to be recorded twice, once for the start and again for the end of the reporting period.

Money Management Services Data Set

QUESTION 4. Reporting period:

This data element is to be recorded twice, once for the start and again for the end of the reporting period.

Service activity type (Commonwealth financial counselling)

Identifying and definitional attributes

Technical name: Service provider organisation—service activity type, Commonwealth financial counselling code N

METeOR identifier: 423290

Registration status: No registration status

Definition: The type of service provided by a Commonwealth financial counselling service, as represented by a code.

Data Element Concept: Service provider organisation—service activity type

Value domain attributes

Representational attributes

Representation class: Code

Data type: String

Format: N

Maximum character length: 2

Permissible values:

Value	Meaning
1	Face to face client financial counselling
2	Group advocacy
3	Training of volunteers
4	Community education activities
5	Regional coordination activities
6	Other community education activities

Supplementary values: 9   Not stated/inadequately described

Collection and usage attributes

Guide for use: Code 1   Face to face client financial counselling

Included in this category are all face to face contact with a client or phone call which involved assistance, calls made on the clients behalf, delivering education and intensive coaching in financial literacy and budgeting individually to clients, provision of tools to implement individual and family budgeting and savings, and debt management plans including on-going budget monitoring, individual advocacy where the service provider assists with accessing financial institutions and financial services information in order to uphold the rights and interests of the client.

Code 2   Group advocacy

Included in this category are activities that seek to influence or secure positive long term changes that remove barriers and address practices that disadvantage people in or at risk of financial stress to ensure their collective rights and interests are upheld.

Code 3   Training of volunteers

Includes activities and training to ensure volunteers acquire skills in areas such as communication, confidentiality, appropriate conduct, positive attitudes, behavioural support and responding to client's individual needs. This also includes specialist skills needed the delivery or assisting in the delivery of financial counselling.

Code 4   Community education activities

Includes activities such as presentations/workshops/seminars, media activities, preparation and distribution of resources such as websites, information sheets, participation in community events such as law week and involvement in related initiatives such as MoneyMinded. Delivery of education and information sessions relating to Money Management services that meet local community needs.

Code 5   Regional coordination activities

Includes administrative activities to coordinate meetings and forums of partner organisations or forums for Commonwealth financial counselling with the purpose of improving delivery services, optimising allocation and use of resources and reducing duplication and overlap of services.

Data element attributes

Relational attributes

Implementation in Data Set Specifications:

> **Commonwealth Financial Counselling Data Set**
>
> QUESTION 29. A count of the types of services provided during the reporting period:
>
> See 'Service activity type (Commonwealth financial counselling)' in the FMP data dictionary for further explanation.

Service activity type (emergency relief)

Identifying and definitional attributes

Technical name:	Service provider organisation—service activity type, emergency relief services code N[N]
METeOR identifier:	423668
Registration status:	No registration status
Definition:	The type of service provided by an emergency relief service, as represented by a code.
Data Element Concept:	Service provider organisation—service activity type

Value domain attributes

Representational attributes

Representation class:	Code
Data type:	Number
Format:	N[N]
Maximum character length:	2

Permissible values:

Value	Meaning
1	Fixed value vouchers
2	Part-payment of rent or mortgage
3	Part-payment of utility bill
4	Material assistance
5	Budgeting assistance
6	Centrelink/Centapay assistance
7	Advocacy with creditors
8	Referral
88	Other

Supplementary values:	99	Not stated/inadequately described

Collection and usage attributes

Guide for use:

Code 1 Fixed value voucher

Includes vouchers of a fixed value (for example, food, transport or chemist vouchers)

Code 2 Part-payment of rent or mortgage

Includes part-payment of an outstanding account for accommodation purposes such as rent/accommodation.

Code 3 Part-payment of utility bill

Includes part-payment of an outstanding account such as

Electricity, Gas, Water or Phone.

Code 4   Material goods

Includes provision of food hampers or parcels and other material goods. Excludes food vouchers.

Code 5   Budgeting assistance

Includes simple assessment with budgeting such as prioritising bill payments.

Code 6   Centrelink/Centapay assistance

Includes help with applying for Centrelink payments or Centapay arrangements.

Data element attributes

Relational attributes

Implementation in Data Set Specifications:

Emergency Relief Data Set
QUESTION 25. A count of the types of services provided during the reporting period: See 'Service activity type (emergency relief)' in the FMP data dictionary for further explanation.

Service activity type (money management services)

Identifying and definitional attributes

Technical name:	Service provider organisation—service activity type, money management service code N
METeOR identifier:	423701
Registration status:	No registration status
Definition:	The type of service provided by a money management service, as represented by a code.
Data Element Concept:	Service provider organisation—service activity type

Value domain attributes

Representational attributes

Representation class:	Code
Data type:	String
Format:	N
Maximum character length:	2

Permissible values:

Value	Meaning
1	Face to face education for budget planning
2	Face to face assistance for family payments
3	Client advocacy
4	Community education workshops
5	Client referral
8	Other

Supplementary values:	9	Not stated/inadequately described

Collection and usage attributes

Guide for use:

Code 1   Face to face education for budget planning

Deliver Money Management approved education and intensive coaching in financial literacy and budgeting. Provide use of tools to implement individual and family budgeting and savings, and debt management plans including on-going budget monitoring.

Code 2   Face to face assistance for family payments

Organise related family support.

Code 3   Client advocacy

Assist with accessing financial institutions and financial services information.

Code 4   Community education workshops

Deliver education and information sessions relating to Money Management services that meet local community need.

Code 5   Client referral

Provide information and arrange appointments to services other than Money Management services.

Data element attributes

Relational attributes

Implementation in Data Set Specifications:

Money Management Services Data Set

QUESTION 29. A count of the types of services provided during the reporting period:

See 'Service activity type (money management)' in the FMP data dictionary for further explanation.

Sex

Identifying and definitional attributes

Technical name:	Person—sex, code N
METeOR identifier:	287316
Registration status:	Community Services, Standard 25/08/2005 Housing assistance, Standard 10/02/2006 Health, Standard 04/05/2005
Definition:	The biological distinction between male and female, as represented by a code.
Data Element Concept:	Person—sex

Value domain attributes

Representational attributes

Representation class:	Code
Data type:	Number
Format:	N
Maximum character length:	1

Permissible values:	Value	Meaning
	1	Male
	2	Female
	3	Intersex or indeterminate
Supplementary values:	9	Not stated/inadequately described

Collection and usage attributes

Guide for use:	Diagnosis and procedure codes should be checked against the national ICD-10-AM sex edits, unless the person is undergoing, or has undergone a sex change or has a genetic condition resulting in a conflict between sex and ICD-10-AM code.
	CODE 3 Intersex or indeterminate
	Intersex or indeterminate, refers to a person, who because of a genetic condition, was born with reproductive organs or sex chromosomes that are not exclusively male or female or whose sex has not yet been determined for whatever reason.
	Intersex or indeterminate, should be confirmed if reported for people aged 90 days or greater.
Comments:	The definition for Intersex in Guide for use is sourced from the ACT Legislation (Gay, Lesbian and Transgender) Amendment Act 2003.

Source and reference attributes

Origin: Australian Capital Territory 2003. Legislation (Gay, Lesbian and Transgender) Amendment Act 2003

Reference documents: Legislation (Gay, Lesbian and Transgender) Amendment Act 2003. See http://www.legislation.act.gov.au/a/2003-14/20030328-4969/pdf/2003-14.pdf.

Data element attributes

Collection and usage attributes

Collection methods: Operationally, sex is the distinction between male and female, as reported by a person or as determined by an interviewer.

When collecting data on sex by personal interview, asking the sex of the respondent is usually unnecessary and may be inappropriate, or even offensive. It is usually a simple matter to infer the sex of the respondent through observation, or from other cues such as the relationship of the person(s) accompanying the respondent, or first name. The interviewer may ask whether persons not present at the interview are male or female.

A person's sex may change during their lifetime as a result of procedures known alternatively as sex change, gender reassignment, transsexual surgery, transgender reassignment or sexual reassignment. Throughout this process, which may be over a considerable period of time, the person's sex could be recorded as either Male or Female.

In data collections that use the ICD-10-AM classification, where sex change is the reason for admission, diagnoses should include the appropriate ICD-10-AM code(s) that clearly identify that the person is undergoing such a process. This code(s) would also be applicable after the person has completed such a process, if they have a procedure involving an organ(s) specific to their previous sex (e.g. where the patient has prostate or ovarian cancer).

CODE 3   Intersex or indeterminate

Is normally used for babies for whom sex has not been determined for whatever reason.

Should not generally be used on data collection forms completed by the respondent.

Should only be used if the person or respondent volunteers that the person is intersex or where it otherwise becomes clear during the collection process that the individual is neither male nor female.

CODE 9   Not stated/inadequately described

Is not to be used on primary collection forms. It is primarily for use in administrative collections when transferring data from data sets where the item has not been collected.

Source and reference attributes

Origin: Australian Institute of Health and Welfare (AIHW) National Mortality Database 1997/98 AIHW 2001 National Diabetes Register, Statistical Profile, December 2000 (Diabetes Series No. 2.)

Reference documents: Australian Bureau of Statistics

AS4846 Health Care Provider Identification, 2004, Sydney: Standards Australia

AS5017 Health Care Client Identification, 2002, Sydney: Standards Australia

In AS4846 and AS5017 alternative codes are presented. Refer to the current standard for more details.

Relational attributes

Implementation in Data Set Specifications:

Commonwealth Financial Counselling Data Set

QUESTION 24. A count of male and female clients in receipt of Commonwealth financial counselling services:

Sex of clients is a key item in a wide range of social, labour and demographic statistics. See 'Sex' in the FMP data dictionary.

Emergency Relief Data Set

QUESTION 22. A count of male and female clients in receipt of emergency relief:

Sex of clients is a key item in a wide range of social, labour and demographic statistics. See 'Sex' in the FMP data dictionary.

Financial exclusion data element cluster No registration status

Money Management Services Data Set

QUESTION 24. A count of male and female clients in receipt of money management services:

Sex of clients is a key item in a wide range of social, labour and demographic statistics. See 'Sex' in the FMP data dictionary.

Source of income

Identifying and definitional attributes

Technical name:	Person—source of cash income (all) code NN
METeOR identifier:	321156
Registration status:	Community Services, Standard 29/04/2006
Definition:	The source from which a person derives any part of his/her income, as represented by a code.
Context:	The metadata item is an indicator of the needs and circumstances of individuals and sometimes, used in assessment of income equity.
Data Element Concept:	Person—source of cash income (all)

Value domain attributes

Representational attributes

Representation class:	Code
Data type:	Number
Format:	NN
Maximum character length:	4

Permissible values:

Value	Meaning
11	Employee cash income
21	Unincorporated business cash income
31	Allowances for students and the unemployed
32	Centrelink pensions for the aged and persons with a disability
39	Other Government cash pensions and allowances
41	Property cash income
42	Superannuation/annuities
43	Transfers from private organisations
44	Transfers from other households
45	Scholarships
49	Other cash income

Supplementary values:

Value	Meaning
88	Nil income
99	Not stated/not known/inadequately described

Collection and usage attributes

Guide for use:　The value domain categories shown above are directly mappable to the narrow sources of cash income specified in the Statistical Concepts Library of the Australian Bureau of Statistics. This is a three level hierarchical classification and is described at the broad (one-digit), narrow (two-digit) and detailed (four-digit) levels.

This value domain uses the two-digit level. Each of the levels may be associated with one or more sub-categories that may be coded at the 4-digit level if desired.

CODE 11 Employee cash income:

Payments from an employer or own limited liability company, including wages or salary, tips, piece rates, penalty rates, loadings, regular bonuses, payment for time not worked (sick leave, recreation leave, public holidays etc.) and director's fees. An employee is classed as receiving cash from an employer or his/her own incorporated enterprise.

CODE 21 **Unincorporated business** cash income:

Unincorporated business cash income is net of operating expenses including: labour costs in the form of wages, salaries and supplements; the value of raw materials and services purchased; the repair and maintenance of equipment (including vehicles); the purchase of fuel; indirect taxes; interest paid in connection with the business; and rent paid for buildings and land used in the business. Unincorporated business cash income is also net of depreciation of capital, such as machinery, vehicles and tools used in the business.

CODE 41 Property cash income:

Includes cash income deriving from the ownership of assets; it comprises returns from financial assets (interest, dividend) from physical assets (rent) and from intellectual assets (royalties).

CODE 43 Transfers from private organisations:

Includes payments from workers compensation, insurance companies etc.

CODE 44 Transfers from other households:

Includes payments from such sources as child support payments, gifts from relatives etc.

Collection methods:　Please note the differences between this Value domain and the ABS classification (that is, Codes 41, 42, 43, 44, 45 and 49 are mappable to the classification codes 91, 92, 93, 94, 95 and 99. In this value domain code 88 and 99 are supplementary values.).

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Source and reference attributes

Submitting organisation: Australian Institute of Health and Welfare for the National Community Services Data Committee.

Reference documents: Statistical concepts library, Standards for Social, Labour and Demographic Variables, Cash Income Variables, Framework for Standard Cash Income Variables, Classification and Coding, Canberra: Australian Bureau of Statistics.

Reference online through:

Ausstats Standards for Social, Labour and Demographic Variables, Cash Income Variables

Data element attributes

Collection and usage attributes

Guide for use: All sources of cash income are included in this concept.

Cash income may be received from employment (Employee cash income), as a profit or loss from an unincorporated enterprise (**Unincorporated business** cash income), from the ownership of assets (Property cash income). Income may also be derived from current transfers from government (pensions and benefits) or from private sources, such as superannuation funds. An individual may receive cash income from more than one source.

Excluded from this concept is income in kind e.g. barter for goods or services.

Collection methods: If the person has multiple sources of income, all sources should be counted.

This question is not asked of person's aged less than 15 years because they are generally dependants.

While this standard requires collection of data at the 2-digit level, some agencies may wish to collect at the 4-digit level for their own purposes. The 4-digit level is detailed below:

Detailed (four-digit) level of sources of cash income

1101 Employee cash income
2101 Unincorporated business cash income
3101 Newstart allowance
3102 Youth allowance
3103 Mature age allowance
3104 Sickness allowance
3105 Austudy payment
3106 ABSTUDY payment

3201 Age pension
3202 Disability support pension
3901 Family Tax Benefit (Parts A and B)
3902 Parenting Payment
3903 Double Orphan Pension
3904 Carer Allowance
3905 Wife Pension
3906 Bereavement Allowance
3907 Widow Allowance (Widow B Pension)
3908 Carer Payment
3911 Service pension (DVA)
3912 Disability pension (DVA)
3913 Partner Allowance
3914 War Widow's Pension (DVA)
3915 Special Benefit
3916 Mobility Allowance
3917 CDEP Participant Supplement
3918 Pensions and allowances from overseas governments
3999 Other Government cash pensions and allowances,
n.e.c
4101 Interest
4102 Dividends
4103 Rent
4104 Royalties
4199 Other property cash income, n.e.c
4201 Superannuation/annuities
4301 Workers compensation/sickness/accident insurance
4399 Other transfers from private organisations, n.e.c
4401 Child support
4402 Gifts from relatives
4499 Other cash transfers from other households, n.e.c
4501 Scholarships
4999 Other cash income, n.e.c
8888 Nil income
9999 Not stated/not known/inadequately described

Relational attributes

Implementation in Data Set Specifications:

Commonwealth Financial Counselling Data QUESTION 18

Emergency Relief Data Set QUESTION 18

Money Management Services Data Set QUESTION 18

A count of the main source of income of clients accessing FMP service in the reporting period:

Employee cash income (eg. Payments from an employer or own limited liability company, including wages or salary, tips, piece rates, penalty rates, loadings, regular bonuses, payment for time not worked)

Unincorporated business cash income (eg. A business that does not possess a separate legal identity from its owner(s). The owner(s) bear full liability for any action or inaction of the business)

Allowances for sutdents and the unemployed (eg. Newstart allowance, Youth allowance, Mature age allowance, Sickness allowance, Austudy payment, ABSTUDY payment)

Centrelink pensions for the aged and persons with a disability (eg. Age pension, Disability support pension)

Other Government cash pensions and allowances (eg. Family Tax Benefit (Parts A and B), Parenting Payment, Double Orphan Pension, Carer Allowance, Wife Pension, Bereavement Allowance, Widow Allowance (Widow B Pension), Carer Payment, Service pension (DVA), Disability pension (DVA), Partner Allowance, War Widow's Pension (DVA), Special Benefit, Mobility Allowance, CDEP Participant Supplement, Pensions and allowances from overseas governments)

Property cash income (eg. Interest, Dividends, Rent, Royalties)

Superannuation/annuities (eg. A series of payments of set size and frequency, often to a retired person)

Transfers from private organisations (eg.Workers compensation/sickness/accident insurance)

Transfers from other households (eg.Child support, Gifts from relatives)

Scholarships (eg. an award of financial aid for a student to further education)

See 'Source of income' in the FMP data dictionary for further explanation.

Statistical linkage key 581

Identifying and definitional attributes

Technical name: Record—linkage key, code 581 XXXXXDDMMYYYYN

METeOR identifier: 349895

Registration status: Community Services, Standard 21/05/2010
Housing assistance, Standard 23/08/2010

Definition: A key that enables two or more records belonging to the same individual to be brought together. It is represented by a code consisting of the second, third and fifth characters of a person's family name, the second and third letters of the person's given name, the day, month and year when the person was born and the sex of the person, concatenated in that order.

Data Element Concept: Record—linkage key

Value domain attributes

Representational attributes

Representation class: Code

Data type: String

Format: XXXXXDDMMYYYYN

Maximum character length: 14

Data element attributes

Collection and usage attributes

Collection methods: Information about whether or not the person's date of birth is accurate should be noted. By knowing that date of birth is accurate it is possible to reduce underestimation of total service user numbers and overestimation of service users' ages.

Comments: The linkage key is designed to make it possible to count number of clients and services they received, without counting the same client more than once. It can also be used for linking to other related data collections. It is for statistical linkage purposes only, not for case management or the tracking of individual persons. This may be done using a range of identifiers and/or keys.

Source and reference attributes

Submitting organisation: Australian Institute of Health and Welfare.

Steward: Australian Institute of Health and Welfare

Relational attributes

Implementation in Data Set Specifications:

Statistical linkage key 581 cluster Community Services, Standard 21/05/2010

Tenure type

Identifying and definitional attributes

Technical name:	Household—tenure type, code N{.N}
METeOR identifier:	303356
Registration status:	Housing assistance, Standard 10/02/2006
Definition:	The nature of a person or social group's legal right to occupy a dwelling, as represented by a code.
Data Element Concept:	Household—tenure type

Value domain attributes

Representational attributes

Representation class:	Code
Data type:	Number
Format:	N{.N}
Maximum character length:	2

Permissible values:

Value	Meaning
1	Owner
1.1	Fully owned
1.2	Being purchased/with mortgage
2	Renter
2.1	Private housing
2.2	Public housing
2.3	Community housing
3	Rent free
4	Life tenure scheme
5	Shared equity or rent/buy scheme
6	None/homeless
7	Other

Supplementary values:	9	Not stated/inadequately described

Collection and usage attributes

Guide for use:	The Tenure type of persons in caravans and manufactured homes is determined according to the tenure of the dwelling structure and not the land. Thus, a person who owns a caravan and rents a site in a caravan park is regarded as an owner.

Code 1.1. Owner - fully owned: Applies to persons who are not making any payments on mortgages or loans secured against the dwelling. (Thus persons who have repaid a loan but technically not discharged the associated mortgage are included in this category).

Code 1.2. Owner - being purchased/with mortgage: Applies to persons who are repaying a mortgage or loans secured against the dwelling, regardless of the purpose of the mortgage or secured loan.

Code 2. Renter: Money is exchanged with another person/organisation in return for accommodation. Included in this category are: Boarder, a person who is provided with meals and lodging; and Lodger, a person who is provided with lodging (a room or rooms) in return for money.

Code 2.1. Private renter: Applies to persons who pay rent in exchange for accommodation from private sources.

Code 2.2. Public renter: Applies to persons who are receiving assistance under the public rental housing programs offered by state and territory housing authorities and are paying rent to the relevant government housing authority.

Code 2.3. Community renter: Applies to persons who are receiving assistance under a community housing program offered by not-for-profit community agencies which may or may not be funded by state and territory housing authorities.

Code 3. Rent free: If no money is exchanged for accommodation and the person is not an owner of the dwelling.

Code 4. Life tenure scheme: The person(s) has/have a contract to live in the dwelling for the term of his/her life but without the full rights of ownership and usually has/have limited or no equity in the dwelling. This is a common arrangement in retirement villages.

Code 5. Shared equity or rent/buy scheme: The household is both purchasing some equity in the dwelling, and paying rent for the remainder.

Code 6. None/homeless: No tenure.

Code 7. Other: The tenure does not fit any of the above categories. For example: house-sitting, payment in kind, for a specific service.

Data element attributes

Source and reference attributes

Submitting organisation: National Housing Data Development Committee

Reference documents: Australian Bureau of Statistics: 2001 Census Data
Dictionary (Cat. no. 2901.0). Reference through:
http://www.abs.gov.au.

Relational attributes

Related metadata references: Supersedes Household—tenure type, code N{.N} Housing
assistance, Superseded 10/02/2006

Implementation in Data Set
Specifications:

Commonwealth Financial Counselling Data Set
QUESTION 26. The number of people in receipt of Commonwealth Financial Counselling by their housing tenure type:
Housing tenure type is used in national data collections as a key housing variable. The tenure type of peoples living situations plays an important role in their health and welfare outcomes. See 'Tenure type' in the FMP data dictionary.

Money Management Services Data Set
QUESTION 26. The number of people in receipt of money management assistance by their housing tenure type:
Housing tenure type is used in national data collections as a key housing variable. The tenure type of peoples living situations plays an important role in their health and welfare outcomes. See 'Tenure type' in the FMP data dictionary.

Attachment 1 Data collection data items (January to June 2010)

Money Management Services (progress report)	Emergency relief	Commonwealth Financial Counselling
Name of organisation		Name of organisation
	Name of outlet	Name of outlet
Reporting period	Reporting period	Reporting period
Client status		
Number of clients in the reporting period	Number of clients in the reporting period	Number of clients in the reporting period
		Number of existing clients
	Number of new (first time) clients in the reporting period	Number of new clients
		Number of cases in the reporting period
		Number of existing clients
		Number of new clients
Number of cases closed in the reporting period		Number of cases closed in the reporting period
Client characteristics		
Age of clients		Age of NEW clients
Under 18 years		Under 18 years
18-24 years		18-24 years
25-34 years		25-34 years
35-44 years		35-44 years
45-54 years		45-54 years
55-64 years		55-64 years
65+		65 years and over
		Unknown
Sex of clients		Sex of NEW clients
Female		Female
Male		Male
		Unknown
Number of who speak a Main language other than English at home	Number of clients accessing ER in the reporting period who speak a main language other than English at home (non mandatory 2009-10)	Number of NEW CLIENTS where a Main language other than English is spoken at home.
Number of Indigenous clients	Number of Indigenous clients accessing ER in the reporting period (not mandatory 2009-10	Number of NEW Indigenous Clients

Money Management Services (progress report)	Emergency relief	Commonwealth Financial Counselling

Number of clients participating in welfare payment reform
 	
    Compulsory income management
 	
    Voluntary income management\
 	
    FIM agreed budget
 	
    Transition from income management to CDEP
 	
    Transition from income management to employment
	Number of clients accessing ER in the reporting period whose main source of income is Centrelink
	
	Number of clients accessing ER in the reporting period who are serving a Centrelink non payment or waiting period.
	
	NT WA and Cape York only: Number of clients accessing ER in the reporting period who are participating in income management
	
	For the end of June report only: Number of clients accessing ER five times or more in the 2009-10 financial year.
		Main sources of income of NEW CLIENTS
		
		Level of Gross Income — Individual Income of NEW CLIENTS
		
		Level of Gross Income – Household Income of NEW CLIENTS
		
		Household Type of NEW CLIENTS
		
		Housing Tenure of NEW Clients
		
		Location of New Clients
		
		Key problems/causes of financial difficulty (cam be more than one) NEW CLIENTS
		
		Financial literacy/Money management training NEW CLIENTS

Service Characteristics		
     Length of time taken to assist a client Low support = under 1 hour	Number of times ER assistance is provided in the reporting period Number of clients referred to other services in the reporting period	 Total number of casework sessions (eg face to face, telephone), including opening session Average amount of time (in hours) per client (including casework sessions, activities on behalf of/associated with client)

Money Management Services (progress report)	Emergency relief	Commonwealth Financial Counselling
Medium support = 1 to 3 hours High support = Over 3 hours Number of clients referred by your service To a financial counsellor To emergency relief To Centrelink To other services Number of clients From a financial counsellor From emergency relief From Centrelink From other services		Average amount of time (in hours) per case (including casework with sessions, activities on behalf of/associated with case) Activity Split – Estimated split between activities
Number of clients receiving assistance with or education from your service who have developed a money management budget or plan.		
Number of clients receiving assistance with or education from your service in relation to family payments.		
Number of workshops conducted by your service.		
Number of people attending these workshops		
		Activity Split - Estimated Split Between Activities
Service data: How well has it been done? Service quality/delivery requirements	Additional information (not mandatory)	
Please describe links between your service and other organisations e.g. the relationships and/or partnerships that have been established with other programs, services, organisations or groups in the areas you service. This includes any local reference group of which you are a member. How do these relationships/partnerships contribute to the outcomes of your service?	Any other information about the assistance you provide and/or the outcome achieved eg. Case studies	Was the Client's problem/s resolved? Did the client gain increase knowledge/skills related to money management
How many staff do you currently have working on Money Management Service activity and		

Money Management Services (progress report)	Emergency relief	Commonwealth Financial Counselling
what are their roles? Has there been any staff turnover this reporting period? What difficulties has this caused and how has this been addressed?		
	Issues (non mandatory)	Overview of demand for your CFC service
		Provide an overview of demand for our CFC service (eg. trends, emerging issues, demand management where possible, quantify changes in demand and provide details of level/nature of unmet demand)
		Overview of case complexity/diversity for your CFC service
		Provide an overview of case complexity/diversity for your CFC service (eg. trends, emerging issues) Issues and trends from your CFC service's contact with select groups Discuss issues and trends from your CFC service's contact with select groups - People affected by mental illness - New arrivals/new and emerging communities (including humanitarian entrants) - Prisoners/Former prisoners (and their families) - Problem gamblers - Indigenous communities - Seniors - People with disabilities - Homeless people - People participating in income management measures - Global financial crisis - People on income support - Relationship stress or breakdown Case study examples (not mandatory) Your CFC service CFC activity for the period Total hours – estimated number of hours (including holidays)

Money Management Services (progress report)	Emergency relief	Commonwealth Financial Counselling
		What is the staffing level of your CFC service (FTE)
		Does your CFC funding cover the full cost of delivering your CFC service
		How do your ensure that CFC financial counsellors have undertaken appropriate training and the expectation that they are a member of , or eligible for membership of, a financial counselling association?
		Describe links between your CFC service and other organisations eg discussions with other organisations in your area about referrals, clients needs or services; staff/service membership with professional associations or peak bodies
		Contact details
	Other issues/comments Name of person completing this report Phone number of person completing this report	Other comments Contact person for this report

Attachment 2 Data collection questionnaire

Financial Management Program Data Set Project

Service provider consultation plan-

Project background

The project work contracted between FaHCSIA and AIHW, is designed to produce specifications for the Financial Management Program data set. The purpose is to produce a data dictionary that can be used to provide nationally consistent and comparable information on FMP programs. The FMP data dictionary will need to be consistent with the Common Assessment Tool for reporting burden on client's and service providers to be minimised.

A significant part of this project is to reduce the reporting burden currently imposed on providers of these services as a result of the collection of the current suite of data sets associated with the program. A data dictionary will be created that will provide standard definitions to apply to data collections across all three financial management programs

The in-scope activities upon which the data set will provide information are the currently collected Emergency relief, Commonwealth Financial Counselling and Money Management services which are provided free to people who are experiencing financial stress or are at risk of financial stress. The vast majority of these services are delivered through community service/welfare organisations.

What data to include in the Financial Management Program Data Dictionary?

The purpose of the field visits is to identify data to be defined and included in a Data Dictionary to be used to support data collection and reporting of the financial management program on a national basis. The consultation between service providers and the AIHW aims to:

- Gain knowledge of the data collected by service providers i.e. what data is useful to know about clients and the provision of services, and what do you need that you can't get now?

- Gain knowledge of the data collected by the State/Territory and other National collections and any other reporting requirements i.e. NGO requirements and government for planning and policy purposes

- Gain knowledge of the data collected by researchers/ad hoc surveys etc for research. i.e. how could these be made more useful and comparable with each other.

Activity 1 Data collection and reporting requirements

The group is asked to identify data items for inclusion in a FMP Data Dictionary to support national data collection and reporting. It may include data that is currently collected or data that is not currently collected but identified as necessary for collection and reporting. The tables provide a list of data elements and definitions taken from the data dictionary, please

add any other data elements that is either collected currently or is required to be collected for future collections.

For each data item identified, the group is asked to consider the following:

1. What data do we want to include in the Data Dictionary?

If you were given a national report or a state/territory report, what would you like to see reported in it?

2. Purpose of the data

For each data item identified, the group is asked to state the purpose of that item. Some questions to consider include:

- Why is the data required? For example, is it required for reporting against the FaHCSIA reporting requirements

- What are we trying to measure? Increased financial literacy, counselling and referral services provided through FMP?

3. What are some of the difficulties experienced or anticipated by staff who collect and /or input that particular data item?

- Is the data of a sensitive nature? Are there other difficulties anticipated in regards to data collection and if so what are they?

- Is it possible to ensure the accuracy of the data?

- If we cannot guarantee the accuracy of the data, is it still worthwhile collecting the data?

4. How frequently do you anticipate the item would be collected?

Is this data something you could routinely collect as part of normal service delivery or more suited to one-off surveys?

Data collection tools and information systems

Could you please provide information on the method used to collect data e.g. paper forms, direct entry in a data base, and the mechanism/s used to collate data for reporting purposes?

The following template has been broken into four sections and will be used to record findings from the discussion

4. Clients and service delivery
5. Administration and Agency (allocating resources, staff,)
6. Supporting research/one off surveys
7. Supporting policy and planning (performance reporting frameworks, outcome measures, measuring unmet demand etc..)

Clients and service delivery

The type of information listed below may assist the agency in describing the agency's client group i.e. social, economic and demographic characteristics, referral processes/pathways and what services are delivered, to whom, and for service planning e.g interpreter/cultural needs of clients.

Data	Definition	Is this data currently collected Yes/No?	Any issues about feasibility and quality of the data collected and other comments.
Age range	The age range that best accommodates a person's completed age in years, at the time of data collection.		
Amount of assistance in dollars/hours	The number of hours/dollars of assistance received by a client of an agency or organisation.		
Case plan outcome	The extent to which a client has achieved his/her case management goals.		
Country of birth	The country in which the person was born.		
Date of birth	The date of birth of the person.		
Disability Group	The disability group that most clearly expresses the experience of disability by a person.		

Data	Definition	Is this data currently collected Yes/No?	Any issues about feasibility and quality of the data collected and other comments.
Employment type	The nature of a person's employment in relation to his or her expected continuity of employment and eligibility for basic leave entitlements.		
First service request			
Full time/ part time status	Whether a person in paid employment is employed full-time or part-time.		
Highest level of education attainment	The highest level of education achieved by a person in relation to completed education.		
Household annual gross income	The value of gross annual income from all sources (before deductions for income tax, superannuation, etc.) for all household members.		
Household composition	The composition of the household based on the relationship between household members.		
Income management indicator	Whether a person is currently receiving income management services.		
Indigenous status	Whether a person identifies as being of Aboriginal or Torres Strait Islander origin. This is in accord with the first two of three components of the Commonwealth definition.		
Labour force status	The self reported status the person currently has in being either in the labour force (employed/unemployed) or not in the labour force.		
Main language other than English spoken at home	The language reported by a person as the main language other than English spoken by that person in his/her home (or most recent private residential setting occupied by the person) to communicate with		

Data	Definition	Is this data currently collected Yes/No?	Any issues about feasibility and quality of the data collected and other comments.
	other residents of the home or setting and regular visitors.		
Money management training indicator (client)	An indicator of whether a person has attended and accredited Money Management course.		
New client indicator	An indicator of whether a client is new to the agency.		
Number of dependent children	The number of young people under 18 who are a dependent child of an adult.		
Paid employment indicator	Whether an employed person is paid or unpaid.		
Person amount spent on rent/mortgage in dollars per week.	The actual amount of rent paid by a person in dollars and cents each week.		
Person's annual gross income	The value of gross annual income from all sources (before deductions for income tax, superannuation, etc.) for the person.		
Person's principle source of income	The source from which a person derives any part of his/her income.		
Personal savings	The part of a person's income that is not spent in Australian currency		
Postcode- Australian (person)	The numeric descriptor for a postal delivery area, aligned with locality, suburb or place for the address of a person.		
Proficiency in spoken English	A person's self-assessed level of ability to speak English.		
Reason for seeking	The reason why a person presented to a financial		

Data	Definition	Is this data currently collected Yes/No?	Any issues about feasibility and quality of the data collected and other comments.
assistance	management agency in order to seek assistance.		
Referral source	The person or agency responsible for the referral of a client to a service provider agency.		
Referral destination	The person or agency to which a client is referred.		
Service activity type provided	The type of service provided by a service provider organisation.		
Service activity type of referral arranged	The type(s) of service or assistance for which a referral is arranged by the outlet		
Service contact date	The date of service contact between a service provider and patient/client.		
Service episode end date	The date on which a service episode was completed.		
Service episode start date	The date on which a service episode commenced		
Service referral date	The date on which a referral was received.		
Sex of person	The biological distinction between male and female.		
Source of income	The source from which a person derives any part of his/her income.		
Tenure type	The nature of a person or social group's legal right to occupy a dwelling.		
Type of income management	What is the type of income management in which the client is participating?		

Administration and Agency Data

The type of information listed below may assist the agency in determining the agency's workload, staff requirements, providing feedback to agency staff.

Data	Definition	Is this data currently collected Yes/No?	Any issues about feasibility and quality of the data collected and other comments.
Australian State/Territory of organisation	An identifier of the Australian state or territory in which an establishment is located.		
Feedback collection method	The method the service provider organisation employs to actively and routinely collect feedback on services and service delivery.		
Financial management Course type (staff)	The type of accredited financial management course attended by staff.		
Funding received in dollars (Agency)	The total amount of funding received to deliver the Financial management program.		
Funding Source type	The source of funding for the delivery of financial management program services.		
Highest level of education attainment	The field of education in which a person has attained their highest qualification.		
Number of clients	The total number of clients receiving services or care from an agency or organisation.		
Number of new clients	The total number of new clients receiving services or care from an agency or organisation-within financial year		
Number of service	The total number of services providers who have		

Data	Definition	Is this data currently collected Yes/No?	Any issues about feasibility and quality of the data collected and other comments.
providers with financial management training	completed or are completing an accredited financial management course.		
Organisational name	The appellation by which an establishment, agency or organisation is known or called.		
Number of volunteer/unpaid workers.	The aggregate full time equivalent staff units for all volunteer/unpaid staff.		
Number of paid workers	The aggregate full time equivalent staff units for all paid staff.		
Partner organisation type	The type of organisation with which an organisation or outlet has formal working partnership(s) in place.		
Post code of organisation	The numeric descriptor for a postal delivery area, aligned with locality, suburb or place for the address of an organisation.		
Reporting period	The reporting period to which a service relates.		
Service activity type provided	The type(s) of service or assistance provided by the outlet.		
Target Group	The population group primarily targeted by a financial management program service.		

Data	Definition	Is this data currently collected Yes/No?	Any issues about feasibility and quality of the data collected and other comments.

Supporting research/one off surveys

Any additional information that may not be collected as part of the normal business of service provision that may be useful to include in a data dictionary for use by researchers. This will enable data to be more useful across a range of one off surveys/research.

Data	Definition	Is this data currently collected Yes/No?	Any issues about feasibility and quality of the data collected and other comments.
Providing a story about how your organisation was able or unable to assist clients or meet community needs	This can include achievements of particular clients, groups of clients who benefited from the services and any anticipated results of that clients benefited from.		
The long term impact services have had on the client and other areas of their work/life.	Increase of financial literacy, lifestyle improvements, employment changes etc		
Describe project activities and how it impacted on clients or on the community	This can include workshops, events, promotional activities, meetings and training		
Are there any issues that are affecting services?	This can include funding, accessibility to services, staffing etc		
Financial stress indicators and Financial	Determine whether the conditions exist for an individual to be at risk of financial exclusion. Where an		

capability/literacy	individual has the following responses they should be considered to be at risk of financial exclusion and referral to financial counselling is advisable. • Education level of Year 10 or less • Unemployed or unskilled workers • Income <$20,000 • Savings <$5,000 • In the age groups 18-24 or 70+		
Outcomes of Income management	Information and outcomes of Income management.		
Outcomes of ER	Information and outcomes of ER.		
Service models	Descriptions of various service models in place to deliver FMP.		
Statistical linkage key	Statistical data linkage refers to the bringing together of data from different sources to gain a greater understanding of a situation or individual from the combined (or linked) dataset. This facilitates a better understanding of the patterns of service use by groups of clients for research, statistical or policy analysis, planning and evaluation purposes.		

Attachment 3 Items collected by providers

The following tables outline the data that are currently collected by FaHCSIA across the different FMP services, and data that are collected by agencies that is not requested for reporting purposes but is readily available. The tables are separated into client level data and agency level data. The purpose of these tables is to outline the availability of data that is collected by agencies for their own reporting requirements and that can also be utilised by FaHCSIA. Note that only a very small number of providers from the total FMP provider population provided input used in this table. The information was gathered from the sample of organisations visited.

Key: All items that are currently collected for each service are outlined. Items that are not collected by FaHCSIA but are collected by some agencies for their own data collection are marked with an x. All items that are highlighted in colour and marked with an x are data items that are not collected by FaHCSIA but are collected by majority of agencies that responded to our data consultation form.

Client Data	ER	CFC	MM
Data items			
Amount of assistance in dollars/hours	x	collected	collected
Service activity type provided	x	x	x
Postcode- Australian (person)	x	x	x
Number of dependent children	x	x	x
Reason for seeking assistance	x	collected	x
Sex of person	x	collected	collected
Date of birth	x	x	x
Household composition	x	collected	x
New client indicator	collected	collected	x
Indigenous status	collected	collected	collected
Referral source	x	collected	x
Source of income	collected	x	x
Referral destination	collected	collected	collected
First service request	collected	collected	x
Service activity type of referral arranged	x	x	x
Person's principle source of income	x	collected	x
Service contact date	x	x	x
Country of birth	x	x	x
Age range	x	collected	collected
Main language other than English spoken at home	collected	collected	collected
Full time/ part time status	x	x	x
Labour force status	x	x	x
Person's annual gross income	x	x	x
Household annual gross income	x	collected	x
Disability Group	x	x	x
Case plan outcome	x	x	x

Agency Data	ER	CFC	MM
Data			
Number of clients	collected	collected	collected
Organisational name	collected	collected	collected
Reporting period	collected	collected	collected
Post code of organisation	x	x	x
Service activity type provided	x	x	x
Australian State/Territory of organisation	collected	collected	collected
Number of new clients	collected	collected	collected
Number of paid workers	x	collected	collected
Funding received in dollars (Agency)	x	x	x
Funding Source type	x	x	x
Number of volunteer/unpaid workers.	x	x	x
Feedback collection method	x	x	x
Partner organisation type	x	collected	collected
Target Group	x	x	x
Number of service providers with financial management training	x	x	x
Financial management Course type (staff)	x	collected	x
Highest level of education attainment (Staff)	x	x	x

Attachment 4 List of providers consulted

Service providers	State/Territory
AC Care Berri	SA
AC Care Waikerie	SA
Allwood Neighbourhood House Inc	VIC
Anglicare	NSW
Anglicare Launceston	TAS
Barwon Health	VIC
Bass Coast Regional Health	VIC
Capeyork Partnerships	QLD
Centrecare Cairns	QLD
Centrecare WA	WA
CARE Inc	ACT
Christian Community Aid Financial Counselling	NSW
Churches Welfare Group Berri Bamera	SA
Combine Church Welfare	SA
Community Information Glen Eira Inc	QLD
Dandenong & District Aboriginal Co-operative limited	VIC
Darebin Family Services	VIC
Frankston Community Support and Information Centre	VIC
Geelong Ethic Community Council Incorporated	VIC
Geraldton Resource Centre	WA
Intercare Waikerie	SA
La Trobe Community Health Services	VIC
Lifeline QLD	QLD
Lutheran Community Care at Blair Athol	SA
Melton Shire Council	VIC
MIDLAS Inc	VIC
Mission Australia Darwin	NT
New Hope Foundation	VIC
North Yarra Community Health	VIC
Nungarin WA Wheatbelt	WA
Otway Health and Community Services	VIC

Port Phillip Community Group	VIC
Red Cross	NT
Rumbalara Aboriginal Co-operative Limited	VIC
St Vincent De Paul ACT	ACT
St Vincent De Paul Bamera	SA
St Vincent de Paul Society, Invermay	TAS
SA Families	SA
Salvation Army Berri	SA
Salvation Army-Social Programme Information Management (SPIM) Project	VIC
Salvation Army Southern States	NT
Salvation Army Darwin	NT
Salvation Army Hobart	TAS
Somerville Cairns	NT
Southern Peninsula Community Support and Information Centre (SPCSIC)	WA
Tammin Economy Shop Cooinda	WA
Uniting Care Wesley Port Adelaide	SA
Valley Community Care	VIC
Victorian AIDS Council/ Gay Men's Health Centre	NSW
Wesley	NT
Yilli House	NT

Attachment 5 Alignment of data items

Money management	Commonwealth financial counselling	Emergency relief
OUTLET OR AGENCY DATA ELEMENTS		
Australian state/territory identifier (service provider organisation)	Australian state/territory identifier (service provider organisation)	Australian state/territory identifier (service provider organisation)
Organisation name	Organisation name	Organisation name
Reporting period start and end	Reporting period start and end	Reporting period start and end
Postcode—Australian (service provider organisation)	Postcode—Australian (service provider organisation)	Postcode—Australian (service provider organisation)
Geographic remoteness (service provider organisation)	Geographic remoteness (service provider organisation)	Geographic remoteness (service provider organisation)
Number of clients	Number of clients	Number of clients
New client indicator	New client indicator	New client indicator
Interpreter services required	Interpreter services required	Interpreter services required
Full-time equivalent paid staff	Full-time equivalent paid staff	Full-time equivalent paid staff
Full-time equivalent volunteer/unpaid staff	Full-time equivalent volunteer/unpaid staff	Full-time equivalent volunteer/unpaid staff
AGGREGATE CLIENT DATA ELEMENTS		
Age range	Age range	Age range
Indigenous status	Indigenous status	Indigenous status
Income management indicator	Income management indicator	Income management indicator
Household composition	Household composition	Household composition
Number of dependents	Number of dependents	Number of dependents
Postcode—Australian (person)	Postcode—Australian (person)	Postcode—Australian (person)
Geographic remoteness (person)	Geographic remoteness (person)	Geographic remoteness (person)
Country of birth	Country of birth	Country of birth
Source of income	Source of income	Source of income
Disability group	Disability group	
Main language other than English spoken at home	Main language other than English spoken at home	Main language other than English spoken at home
Marital status	Marital status	Marital status
Sex	Sex	Sex
Labour force status	Labour force status	Labour force status
Income - gross (person)	Income - gross (person)	
Household annual gross income range ($ 10,000 range)	Household annual gross income range ($ 10,000 range)	
Tenure type	Tenure type	
AGGREGATE SERVICE ACTIVITY DATA ELEMENTS		
Reason for seeking assistance (Financial management)	Reason for seeking assistance (Financial management)	Reason for seeking assistance (Financial management)

Money management	Commonwealth financial counselling	Emergency relief
Service activity type (money management services)	Service activity type (Commonwealth financial counselling)	Service activity type (emergency relief)
Number of clients referred	Number of clients referred	Number of clients referred
Assistance—reason not provided	Assistance—reason not provided	Assistance—reason not provided
Referral destination (money management services)	Referral destination (Commonwealth financial counselling services)	Referral destination (emergency relief services)
Education delivery mode	Education delivery mode	
Assistance needs resolved indicator	Assistance needs resolved indicator	Assistance needs resolved indicator
Episode start date	Episode start date	
Episode end date	Episode end date	
Service contact date	Service contact date	
Case management goal status	Case management goal status	
Consent obtained indicator	Consent obtained indicator	
Hours of service	Hours of service	Financial assistance amount
Statistical linkage key 581	Statistical linkage key 581	