Australian Government

Department of Health and Aged Care

THE IAHP PHC PERFORMANCE REPORT IN THE HEALTH DATA PORTAL

2 APRIL 2024

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About This Guide

The *IAHP PHC Performance Report in the Health Data Portal* user guide has been developed to assist health service users with performing their required tasks when submitting their IAHP PHC Performance Report within the Health Data Portal (the Data Portal) each September as part of the reporting process.

This user guide contains step-by-step instructions and other important information for health service users involved in the submission of the IAHP PHC Performance Report through the Data Portal.

Health service end users will perform the following functions when submitting their IAHP PHC Performance Report in the Data Portal:

- Create the IAHP PHC Performance Report, attach supporting documents, and send it on to the next stage of the submission process
- Review the IAHP PHC Performance Report
- Amend the IAHP PHC Performance Report
- Approve the IAHP PHC Performance Report
- Amend the IAHP PHC Performance Report based on FDSS feedback
- Participate in Interim Processing for the IAHP PHC Performance Report if needed
- Print and/or PDF the IAHP PHC Performance Report form.

Version History

This section details the different versions of this user guide and what they contain, allowing you to decide if/when you need to download an updated version of the guide for your use.

Version Number	Date	Change
1.0	2 April 2024	Original version

Introduction to the IAHP PHC Performance Report

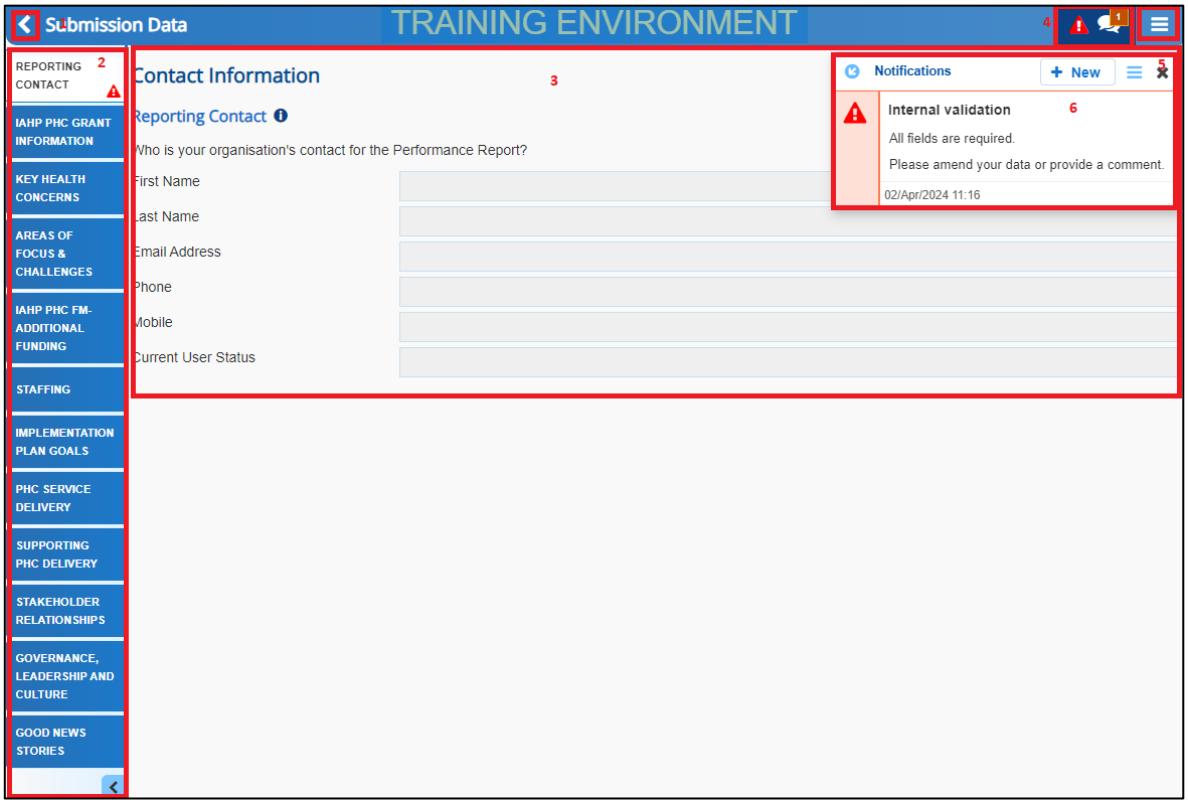
The IAHP PHC Performance Report is submitted by health services each September through the Data Portal.

The IAHP PHC Performance Report contains the following sections that need to be completed by health services when submitting the form:

- **Reporting Contact** – the person within your service who will be the primary contact for you IAHP PHC Performance Report, should anyone outside of your service need to contact you about it.
- **IAHP PHC Grant Information** – Your service's grant information will display here and can be reviewed as needed.
- **Key Health Concerns** – Enter information regarding how you addressed each key health need your service has, as identified in your IAHP PHC Performance Report.
- **Areas of Focus & Challenges** – Detail your progress against each area of focus and challenge your service has, as identified in your IAHP PHC Performance Report.
- **IAHP PHC FM Additional Funding** – If your service received additional PHC funding for the financial year, specify here whether you were able to spend the money and, if not, why not.
- **Staffing** – Detail any staffing challenges you had during the year and how you are addressing these challenges.
- **Implementation Plan Goals** – This tab will display your targets and results for selected nKPIs for the two most recent collection periods. If you did not achieve any of your targets for the most recent collection period, enter an explanation as to why.
- **PHC Service Delivery** – Give your service a rating here for the year for each of the different PHC Service Delivery objectives listed. Then, for each grouping, detail your achievements.
- **Supporting PHC Delivery** - Give your service a rating here for the year for each of the different Supporting PHC Service Delivery objectives listed. Then, for each grouping, detail your achievements.
- **Stakeholder Relationships** – Give your service a rating here for how effective your different stakeholder relationships have been over the year. You can also add detail regarding your achievements and challenges regarding these relationships.
- **Governance, Leadership & Culture** - Give your service a rating here for how effectively you have met your governance, leadership, and culture objectives over the year. You can also add detail regarding your achievements and challenges regarding these objectives.
- **Good News Stories –** This section of the IAHP PHC Performance Report gives you the opportunity to share any good news stories your service has for the year.

Introduction to the IAHP PHC Performance Report form

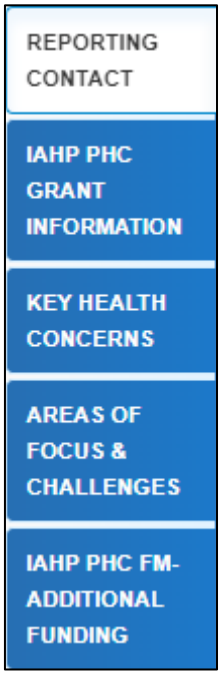
There are several different tasks available within the IAHP PHC Performance Report form in the Data Portal that can be used to help you submit your data as quickly and as accurately as possible.



1. Cancel and go back to overview

- Allows you to quickly navigate away from the form and back to the Data Portal home screen.

2. The Tabs List

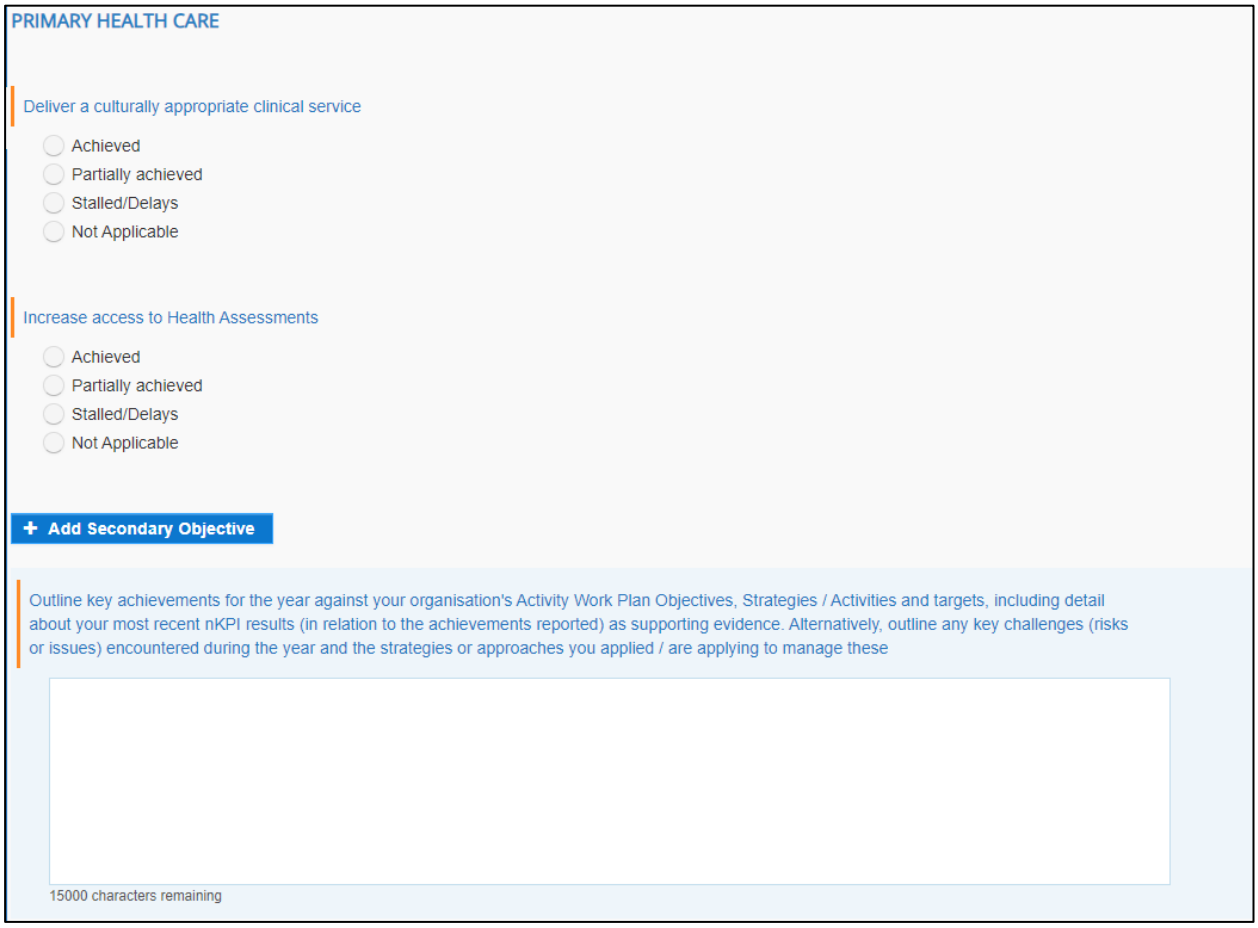


Allows you to move through the different sections of the form by selecting the tab/section you wish to view/work on from the left-hand side of the form.

A will display on any tabs containing data validation flags that need to be addressed due to cells on the tab not being completed.

This section can be hidden if needed by selecting at the bottom of the tabs. The section can then be reopened when needed by selecting , now at the top of the form.

3. Main Form Window



This section of the form contains the data entry cells for the tab that has been selected on the left-hand side of the form. This is where all data is entered in the form.

4. Open notifications - Some comments require action buttons

If there are any data validation flags that need to be addressed in a particular section of the Performance Report form, will display in the blue *Submission Data* bar in the top right-hand corner of the form.

If there are any comments that have been added to the section by a user, will display in the blue *Submission Data* bar in the top right-hand corner of the form.

To view a validation flag or user entered comment in the *Notifications Tray*, simply select the applicable button.

5. The Options Menu

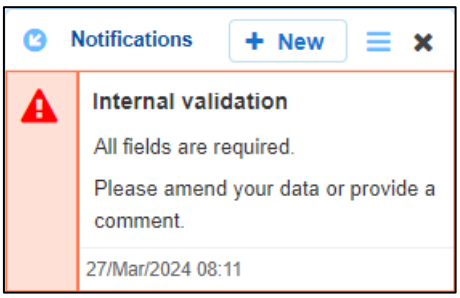
The *Options Menu* groups together additional functions that can be completed from within the form. The functions available through the *Options Menu* in the Performance Report form are:

- Summary View - Displays all sections of the form in the one view so the whole form can be printed if needed.
- Populate empty cells with zeros - Adds zeros to any empty cells in the selected section of the form. Numbers aren't really used in the IAHP PHC Performance Report so this function wouldn't be used very often.

6. The Notifications Tray

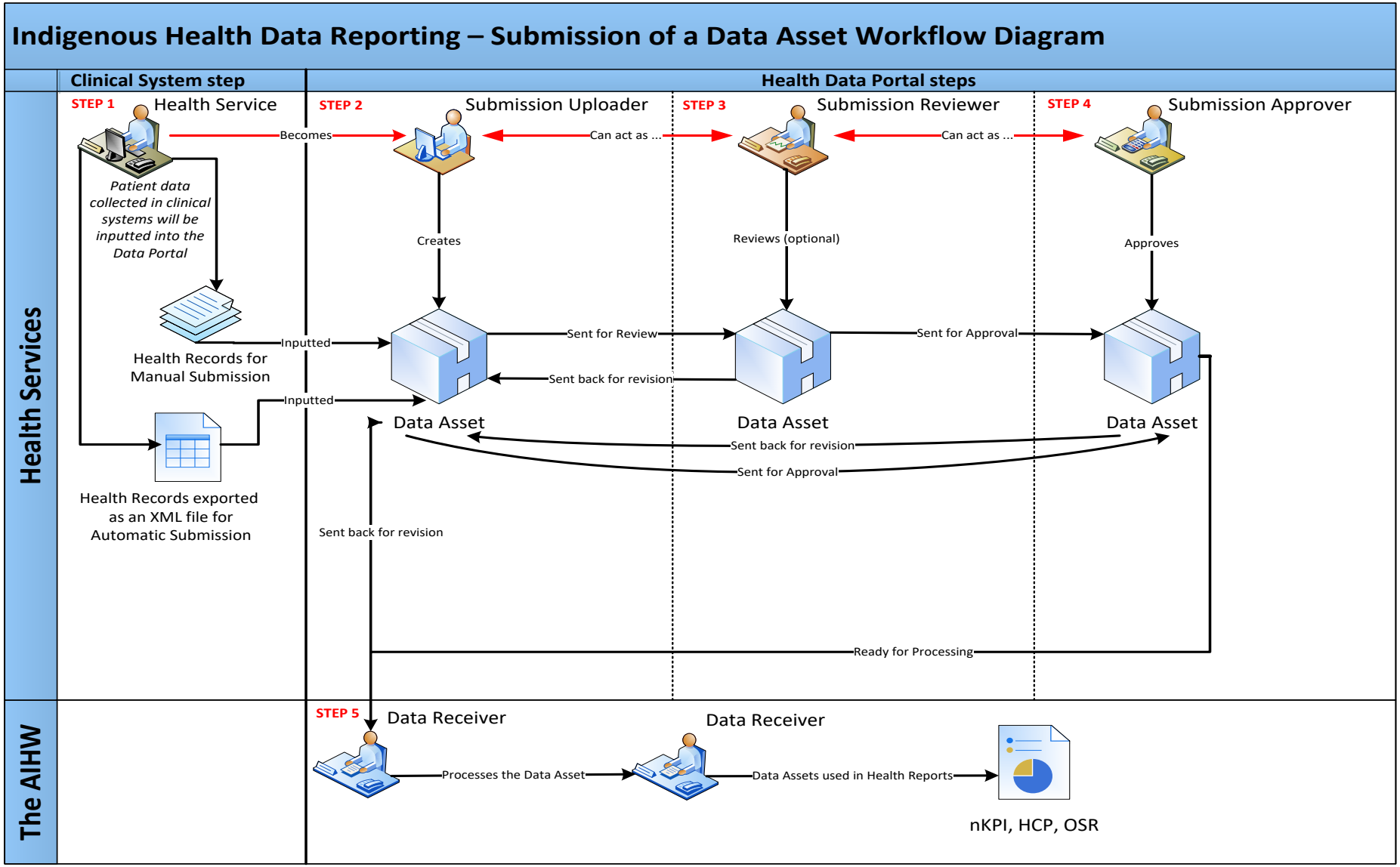
All data validation flags and user generated comments in the Performance Report form are displayed in a *Notifications Tray*.

To open the *Notifications Tray* if it doesn't display by default in the form, select either or .



- To dock the tray at the bottom of the section or undock it so you can move it around the form, select
- To add a new comment, select + New.
- To search for a particular validation flag/user comment, or to show completed comments in the tray, select .
- To close the tray, select .
- To respond to a validation flag/user comment, hover your mouse pointer to the right of the title so the available buttons display, and then select .
- To view any highlighted cells accompanying the flag/comment, select .

IAHP PHC Performance Report Health Data Portal Submission Workflow



Submit your IAHP PHC Performance Report

Each September, all IAHP PHC-funded health services will need to submit their IAHP PHC Performance Reports through the Health Data Portal.

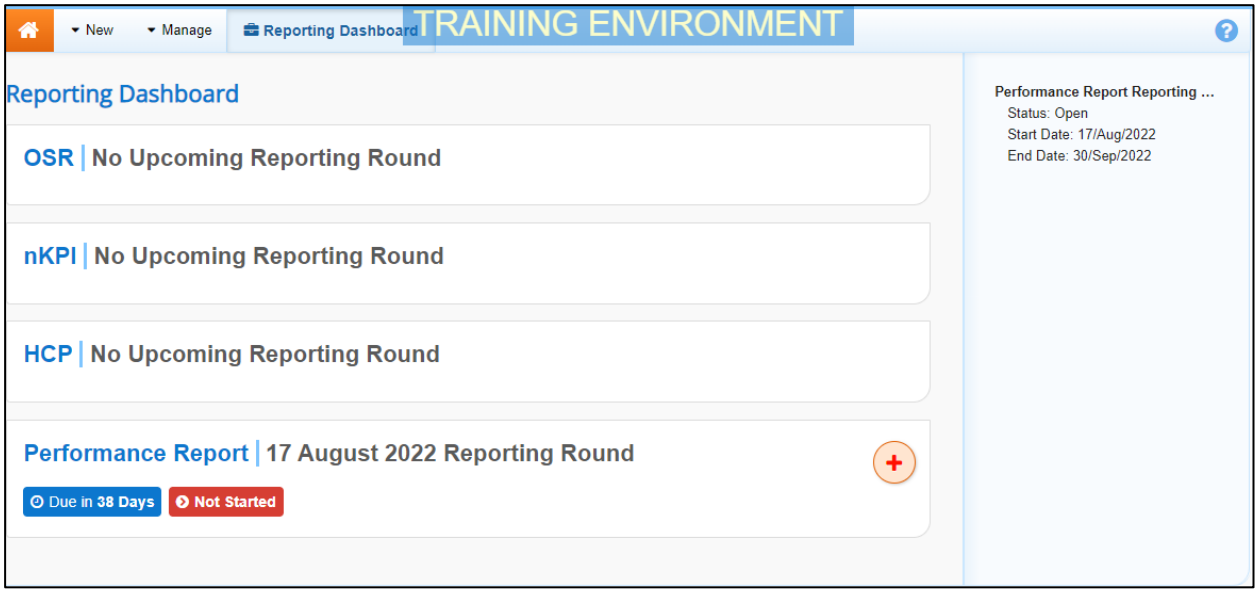
The IAHP PHC Performance Report reports progress against the health service's IAHP PHC Activity Work Plan, submitted through the Data Portal each June. The Performance Report in the Health Data Portal will behave like a manual submission, needing to be created and populated by the health service's *Submission Uploader*.

The IAHP PHC Performance Report Health Data Portal reporting round runs from *1 September* to *31 October* each year.

The following procedure is used to submit your IAHP PHC Performance Report through the Data Portal.

1. Ensure you have logged in to the Data Portal and the Data Portal home screen is displayed with the Reporting Dashboard open.

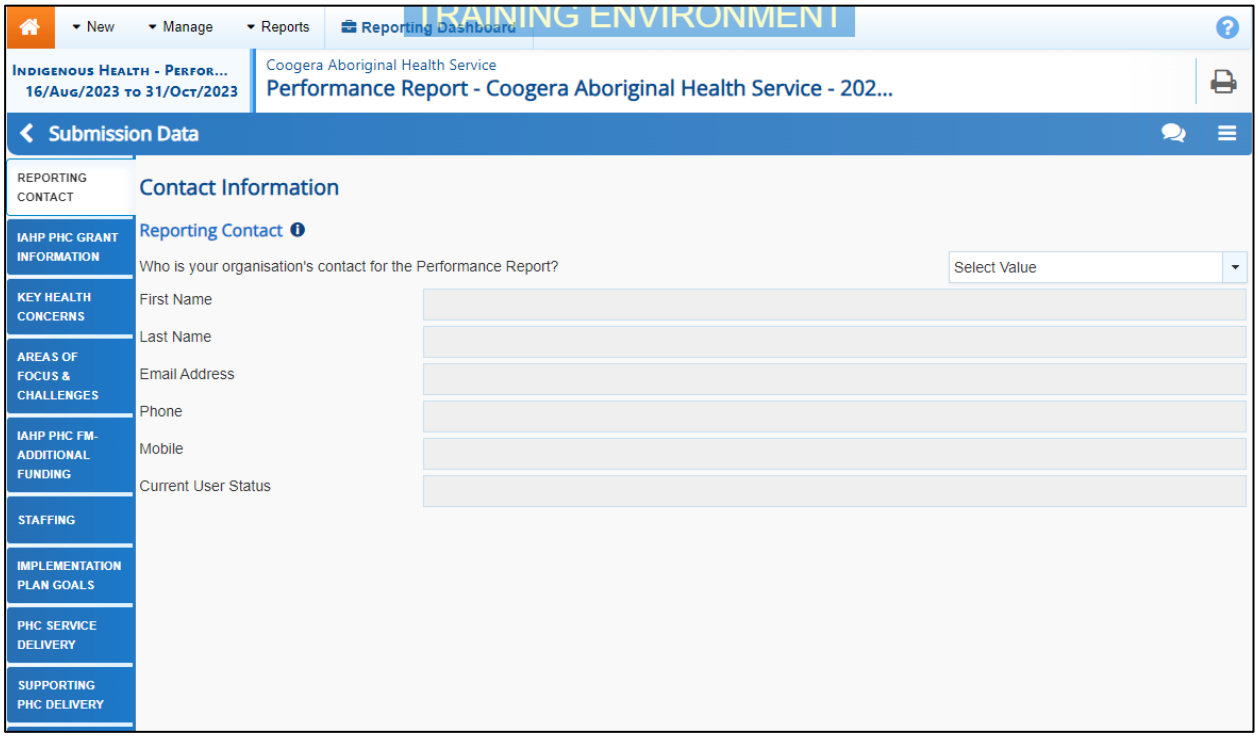
The Performance Report tile will display on your Reporting Dashboard.



1. To commence the submission of your Performance Report, select to the right of Performance Report reporting round text in the Reporting Dashboard.

The IAHP PHC Performance Report can also be created by selecting *New* > *Asset for Submission* on the menu bar.

The IAHP PHC Performance Report form will display, broken down by tabs on the left-hand side of the screen, and the *Reporting Contact- Contact Information* section will display by default.



The reporting contact for your organisation is the person who will be contacted by your DSS Funding Agreement Manager (FAM) if any part of your report needs further discussion.

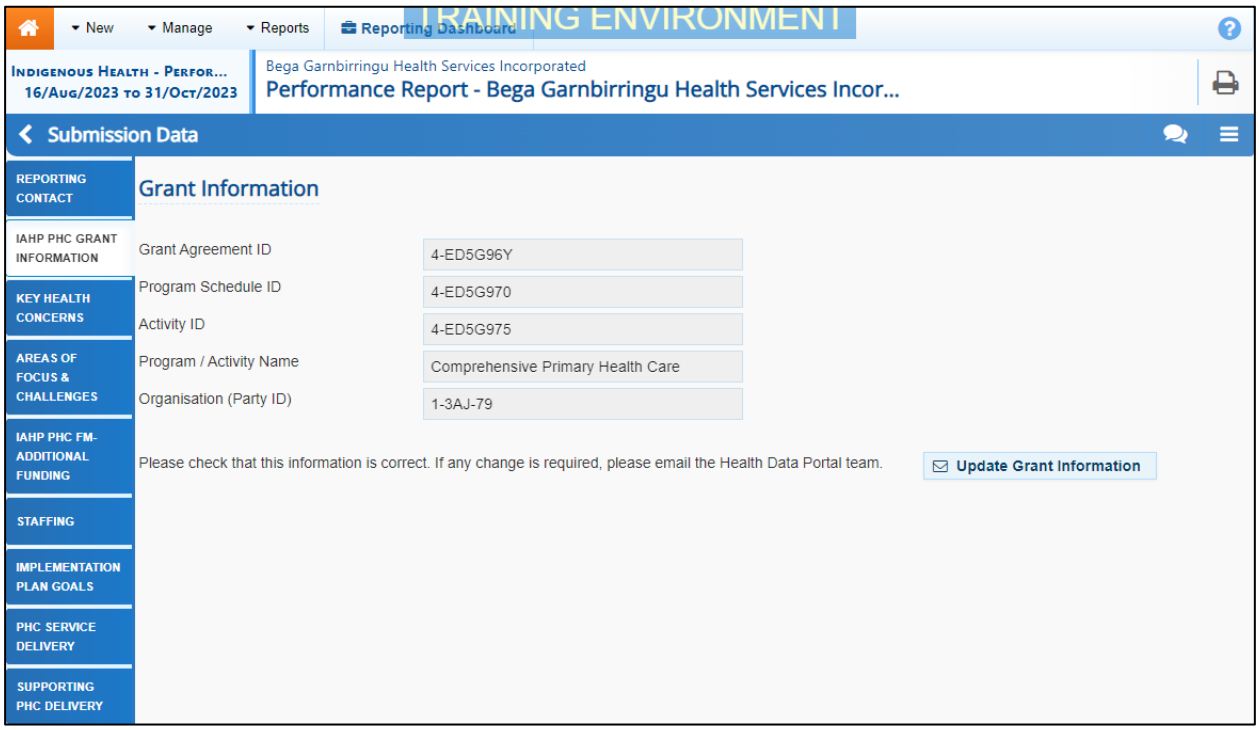
To view help text for the *Reporting Contact - Contact Information* section, select .

2. To record your reporting contact, select and then select the person within your service who will be your reporting contact.

The details of the selected person will now display in the cells on the form.

3. To save the selection, select Save at the bottom of the form.
4. To continue completing your IAHP PHC Performance Report, select the **IAHP PHC Grant Information** tab on the left-hand side of the form.

The *IAHP PHC Grant Information* tab will display.

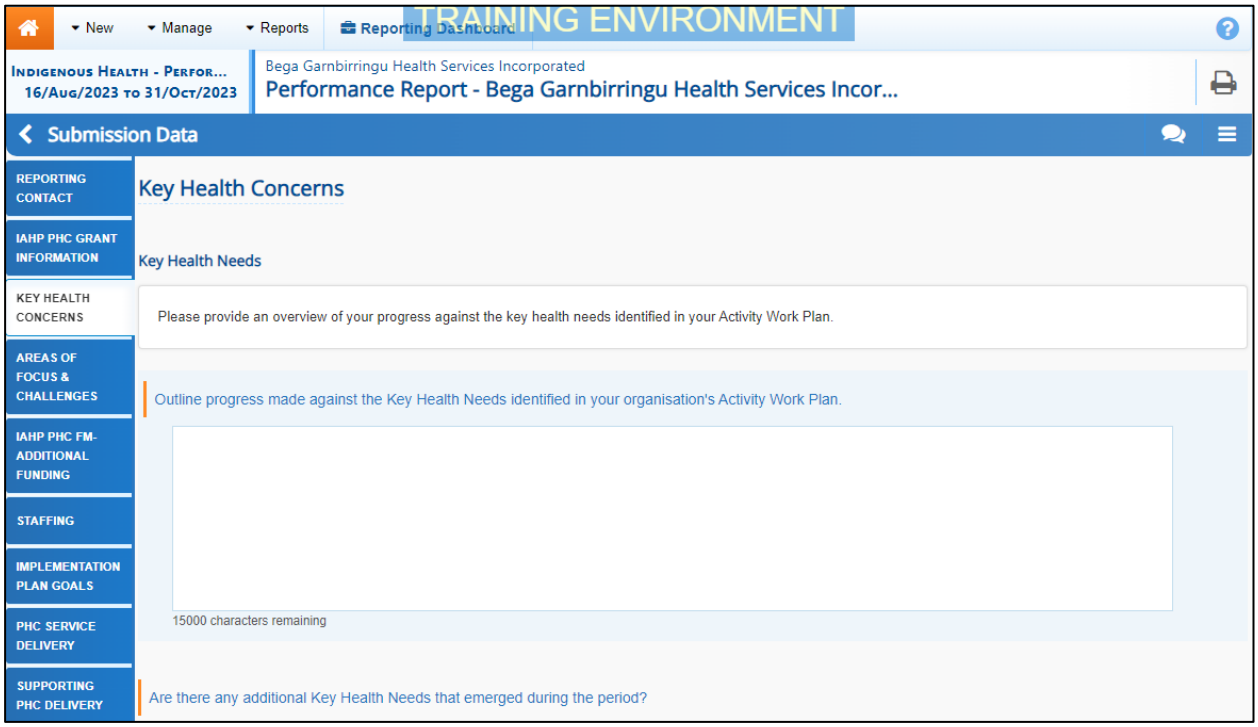


Your health service's grant information will pre-populate here.

If any of your grant information listed here is incorrect, select Update Grant Information, enter the correct information in the email that displays and then send the email. The Health Data Portal team will then use this information to update your grant information in GPS.

5. To continue, select the **Key Health Concerns** tab on the left-hand side of the form.

The *Key Health Concerns* section will now display.



6. Detail your progress against the key health concerns you identified in your IAHP PHC Activity Work Plan.

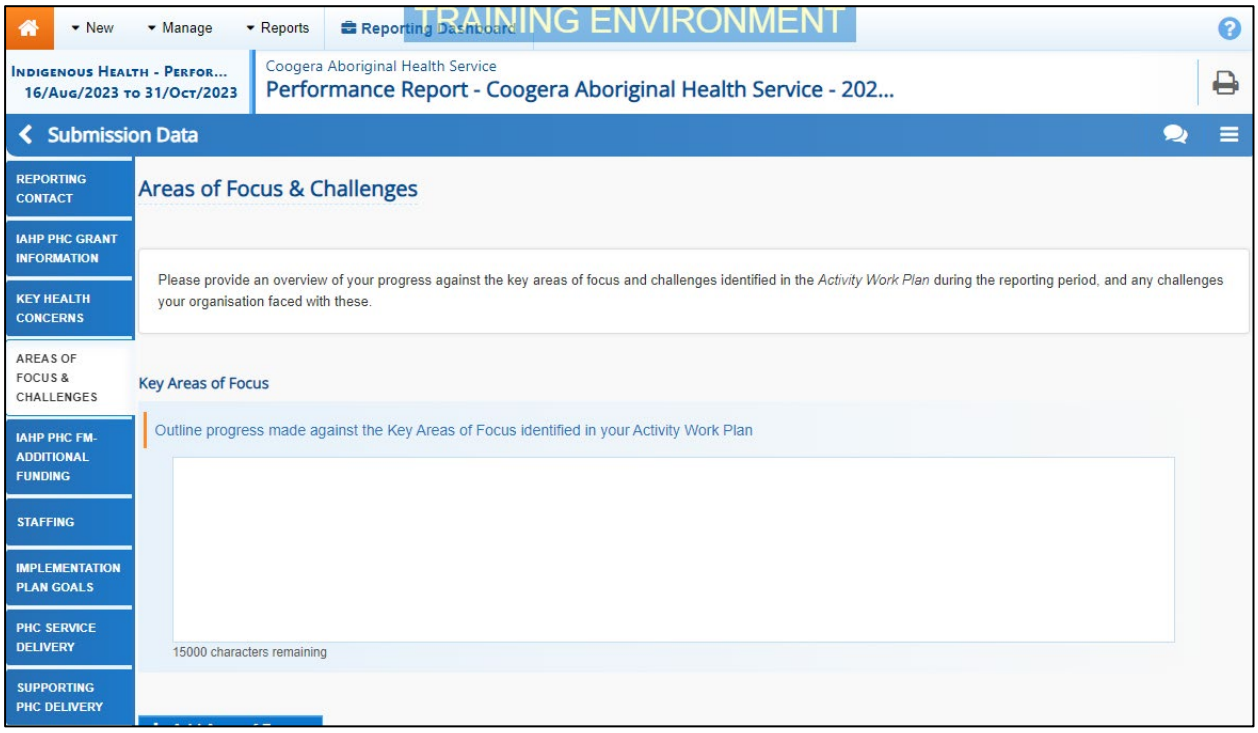
You can enter 15000 characters into each cell in the IAHP PHC Performance Report form.

7. Answer either **Yes** or **No** regarding any additional health needs that arose during the period. If you selected **Yes**, enter the detail in the cell that displays.

8. To save the key health concern information, select Save at the bottom of the form.

9. To continue, select the **Areas of Focus & Challenges** tab on the left-hand side of the form.

The *Areas of Focus & Challenges* section will display.



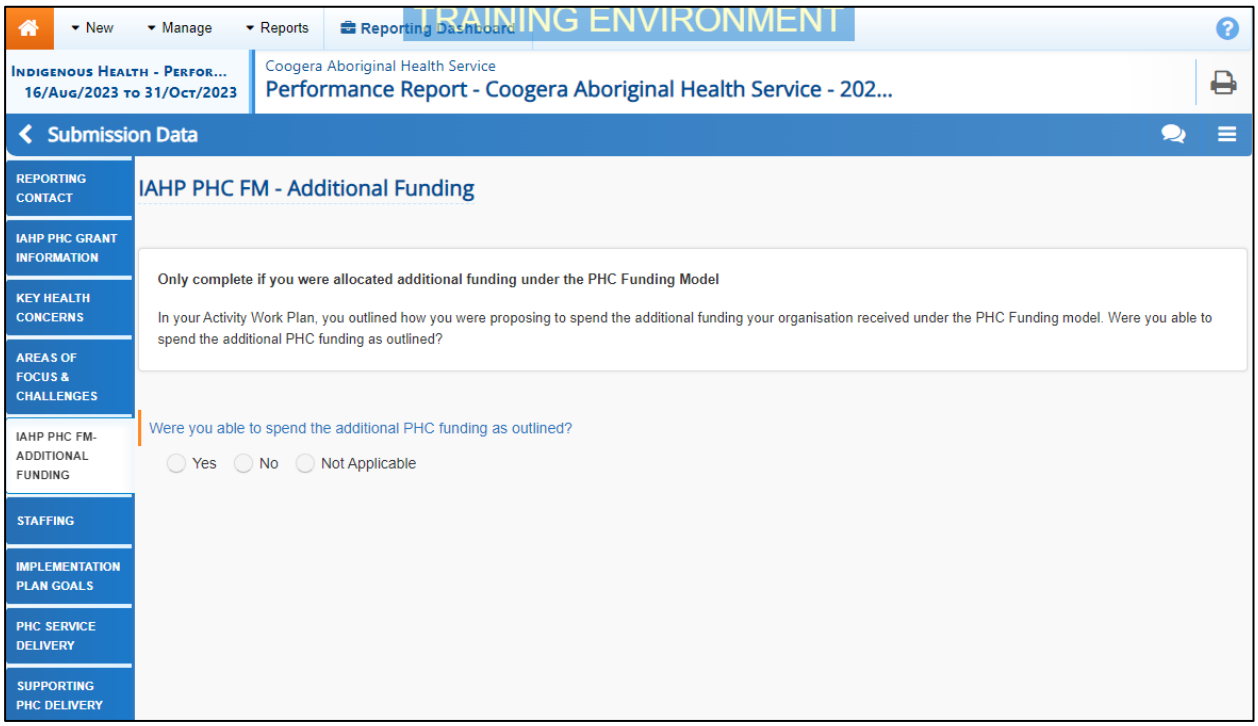
10. Detail your progress against the key areas of focus and challenges you previously identified in your IAHP PHC AWP.

11. Answer either **Yes** or **No** regarding any additional areas of focus/challenges that emerged during the period. If you selected **Yes**, enter the detail in the cell that displays.

12. To save the key focus and challenges information, select Save at the bottom of the form.

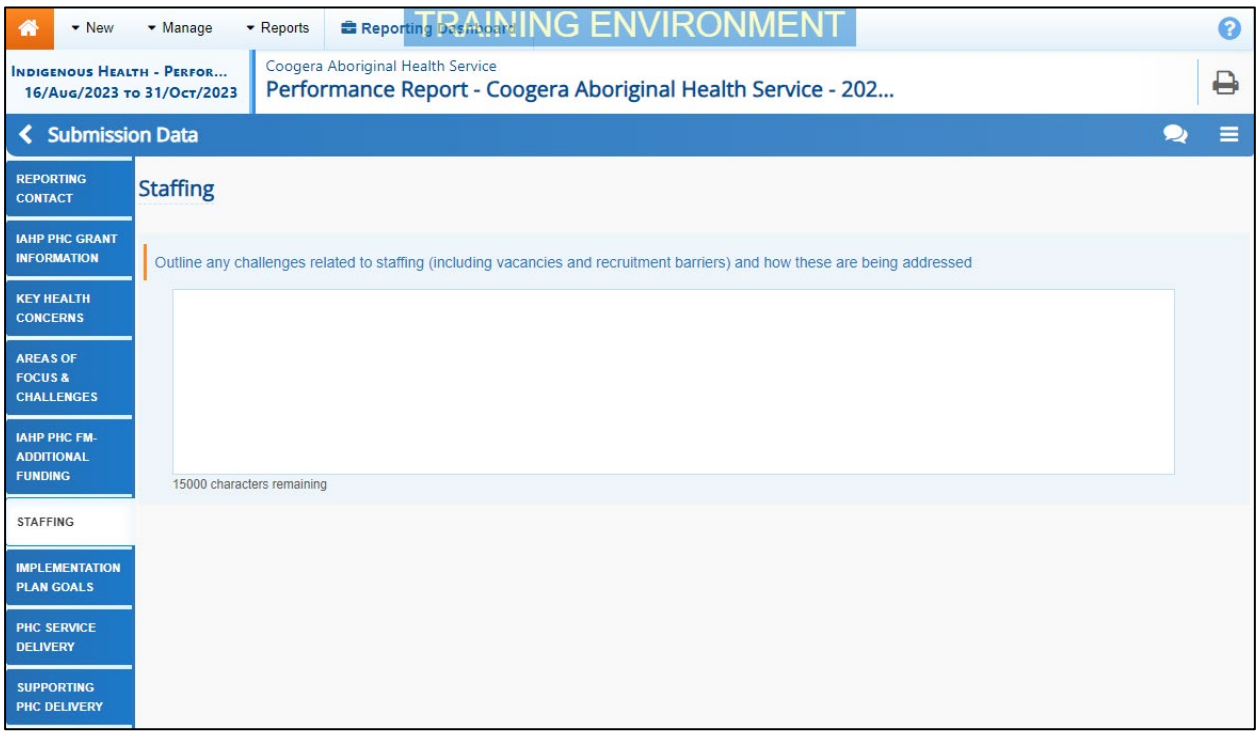
13. To continue, select the **IAHP PHC FM – Additional Funding** tab on the left-hand side of the form.

The *IAHP PHC FM – Additional Funding* section will display.



14. If you received additional funding under the PHC Funding Model and were able to spend it, select **Yes**.
15. If you received additional funding but were unable to spend it, select **No** and then explain why in the cell that displays.
16. If you didn't receive any additional funding, select **Not Applicable**.
17. To continue, select Save at the bottom of the form.
18. Now select the **Staffing** tab on the left-hand side of the form.

The *Staffing* section will display.

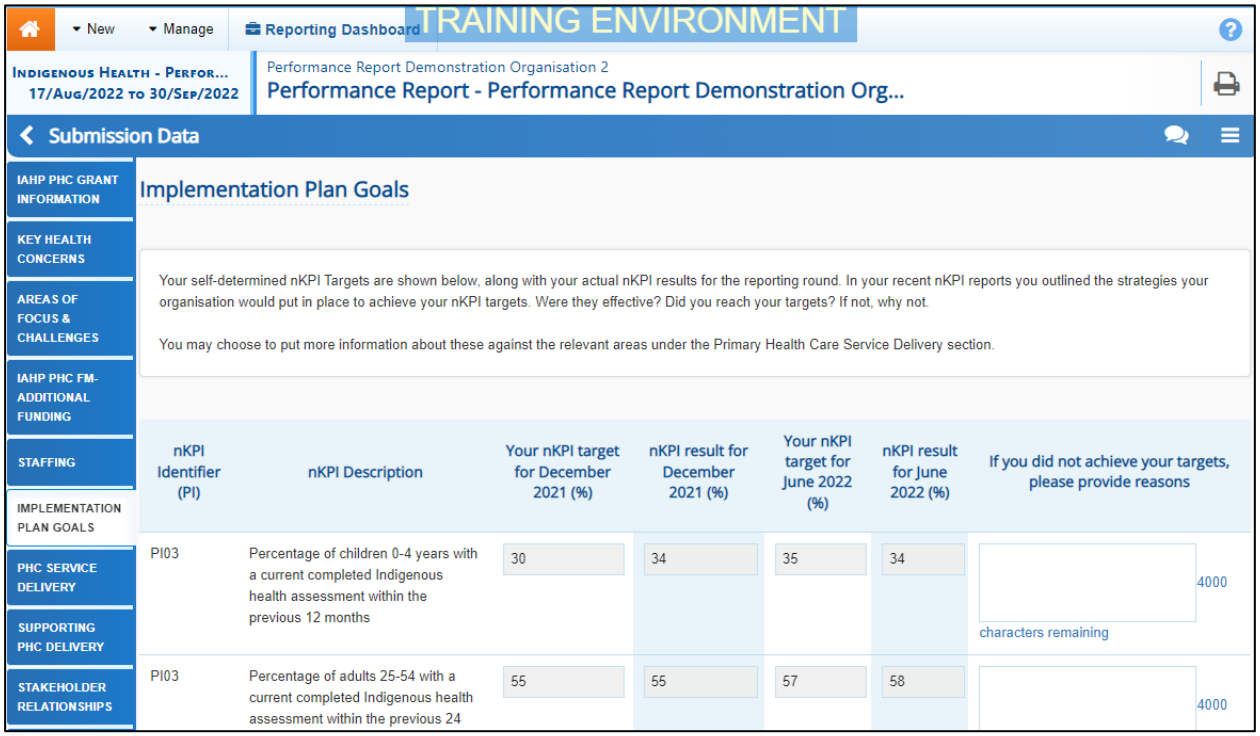


19. Enter details regarding any challenges you have had in the last twelve moths around staffing.

20. To save this information, select Save at the bottom of the form.

21. To continue, select the **Implementation Plan Goals** tab.

The *Implementation Plan Goals* tab will display.



The *Implementation Plan Goals* section will list each of the indicators you are asked to enter your self-determined targets against in your nKPI form, along with your targets and results for each of these indicators for the last two collection periods.

22. If your nKPI results for the applicable indicators for the most recent collection period have not reached the corresponding targets for these indicators, please explain why in the applicable **If you did not achieve your targets, please provide reasons** cell.

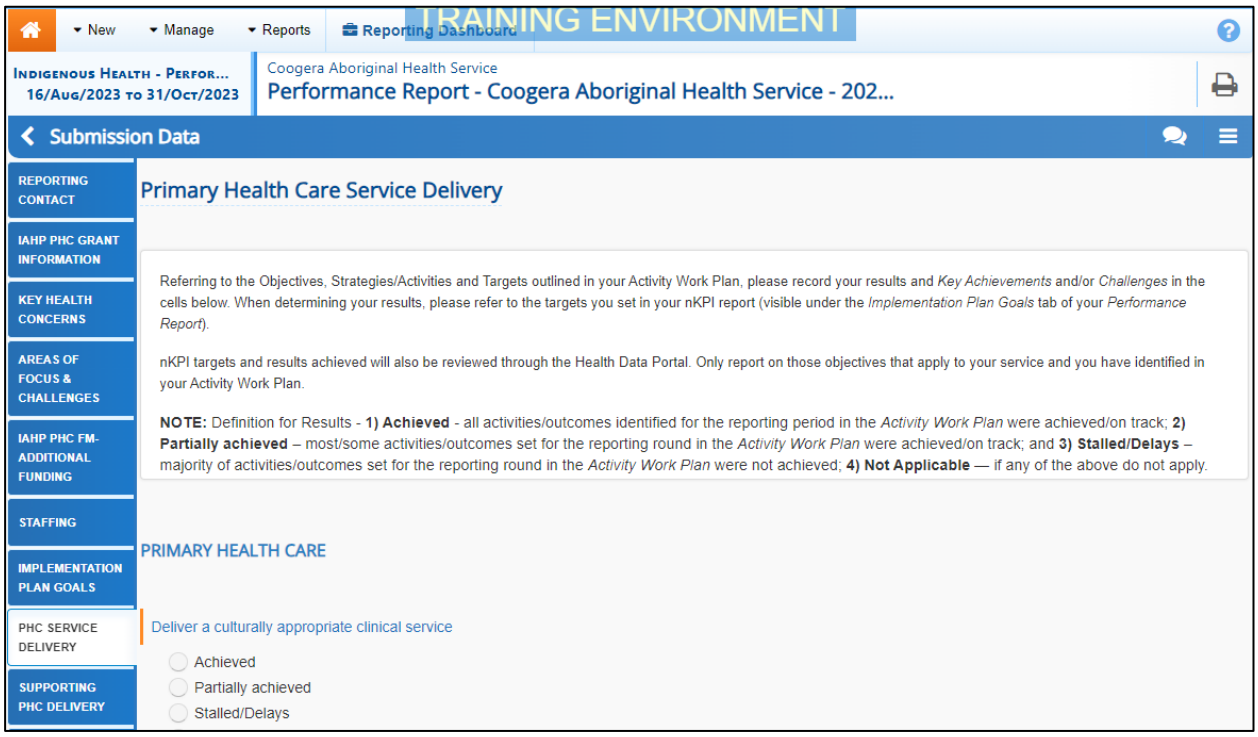
23. If any of your targets or results do not display here, an additional text box will display at the bottom of the tab, asking you to explain why the information has not displayed (For example, you may not have completed the most recent nKPI report due to a change in Clinical Information System).

24. If you do not report on nKPIs, simply explain this in the text box that displays.

25. To save this information, select Save at the bottom of the form.

26. Now select the **PHC Service Delivery** tab on the left-hand side of the form.

The *PHC Service Delivery* section will display.



The *PHC Service Delivery* section of the Performance Report form is divided into the following areas:

- Primary Health Care
- Child and Family Health
- Chronic Disease Management
- In a Primary Health Care Setting

Each area contains several sub-areas, which have *Achieved*, *Partially Achieved*, *Stalled/Delays* or *Not Applicable* as options underneath each.

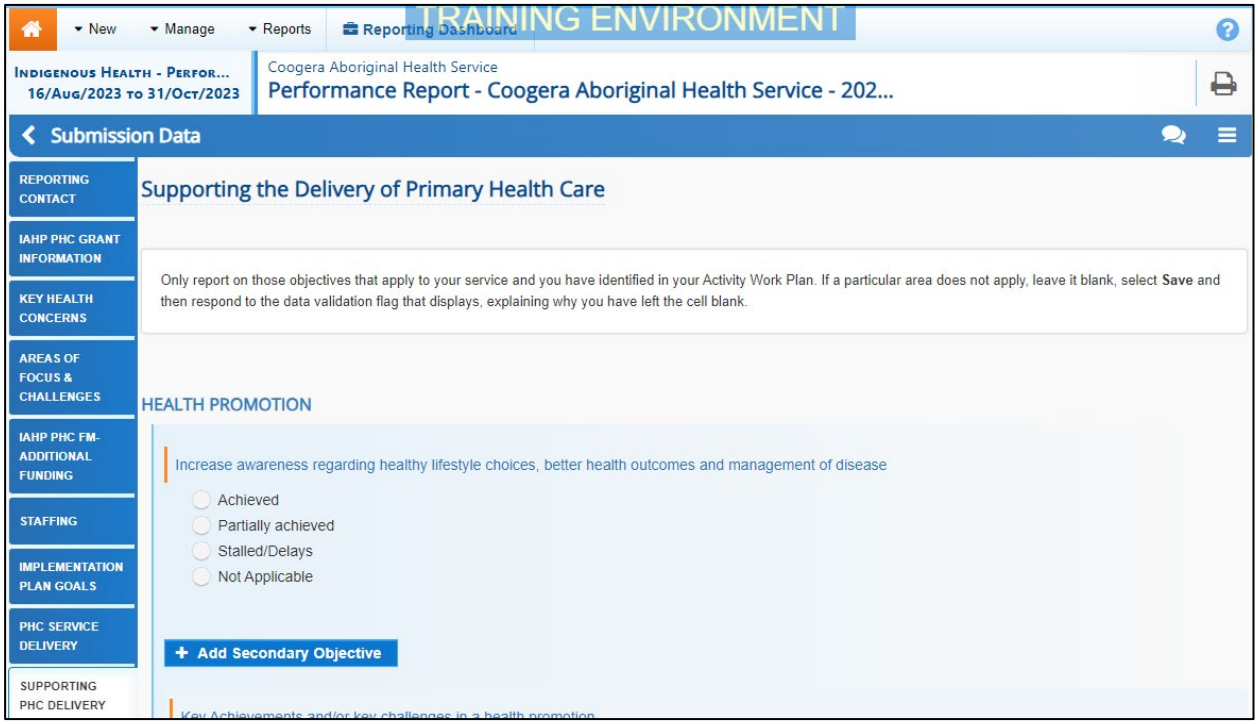
27. Make the appropriate selection for each of these subareas and then detail your key achievements in each area in the free text cell at the bottom of the area.

If you select *Not Applicable*, the text box will disappear, and you won't be required to enter any information.

28. To save this information, select Save at the bottom of the form.

29. To continue, select the **Supporting PHC Delivery** tab on the left-hand side of the form.

The *Supporting the Delivery of Primary Health Care* section will now display.



The *Supporting PHC Delivery* section of the Performance Report form is divided into the following areas:

- Health Promotion
- Continuous Quality Improvement (CQI)
- Specialist and Allied Health

Each area contains sub-areas, which have *Achieved*, *Partially Achieved*, *Stalled/Delays* or *Not Applicable as* options underneath each.

30. Make the appropriate selection for each of these subareas and then detail your key achievements in each area in the free text cell at the bottom of the area.

If you select *Not Applicable*, the text box will disappear, and you won't be required to enter any information.

31. Answer **Yes** or **No** to **Do you provide patient transport services?** If you select **Yes**, you will then need to answer the questions that display underneath.

32. To save this information, select Save at the bottom of the form.

33. To continue, select the **Stakeholder Relationships** tab on the left-hand side of the form.

The *Stakeholder Relationships* section will display.

34. Under **Results**, select **Achieved**, **Partially Achieved**, **Stalled/Delays or Not Applicable** depending on the effectiveness of the partnerships identified in your Performance Report.

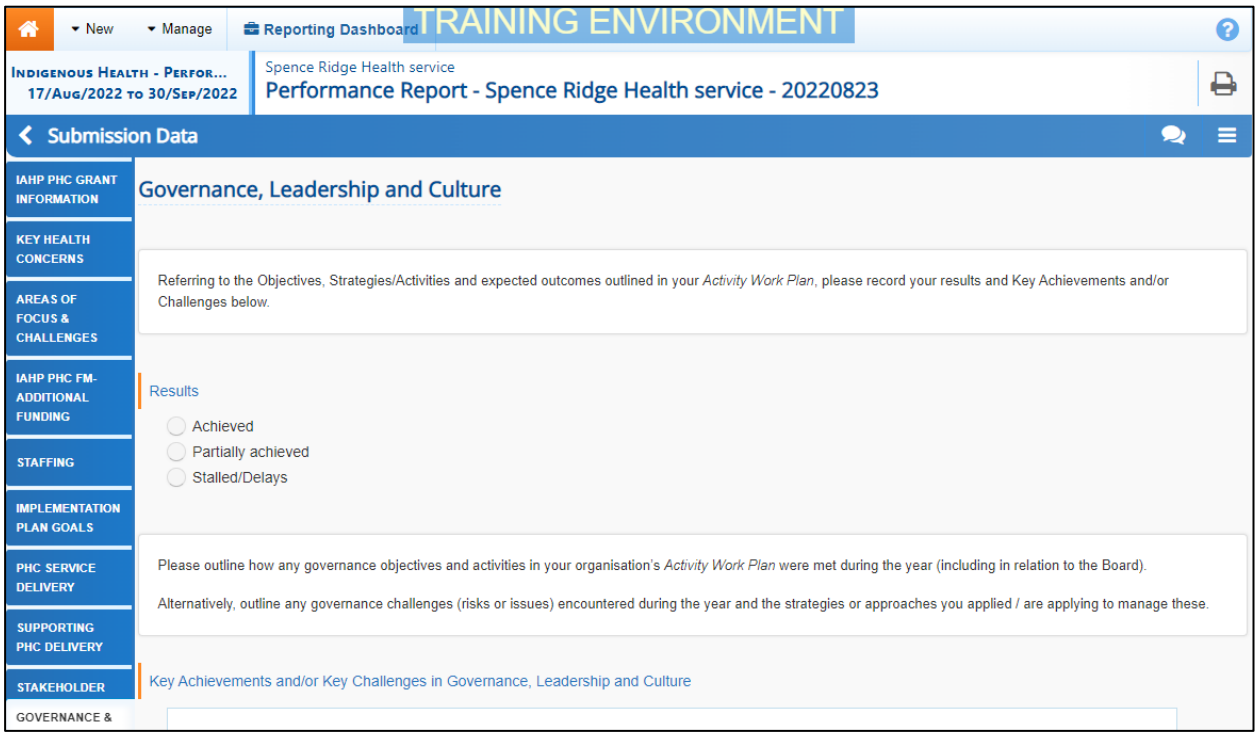
35. Detail your key achievements/challenges in maintaining stakeholder relationships.

If you select *Not Applicable*, the text box will disappear, and you won't be required to enter any information.

36. To save this information, select Save at the bottom of the form.

37. To continue, select the **Governance & Leadership** tab on the left-hand side of the form.

The *Governance, Leadership and Culture* section of the form will now display.



38. Under **Results**, select **Achieved**, **Partially Achieved** or **Stalled/Delays** depending on the effectiveness of your governance and leadership, as identified in your IAHP PHC AWP.

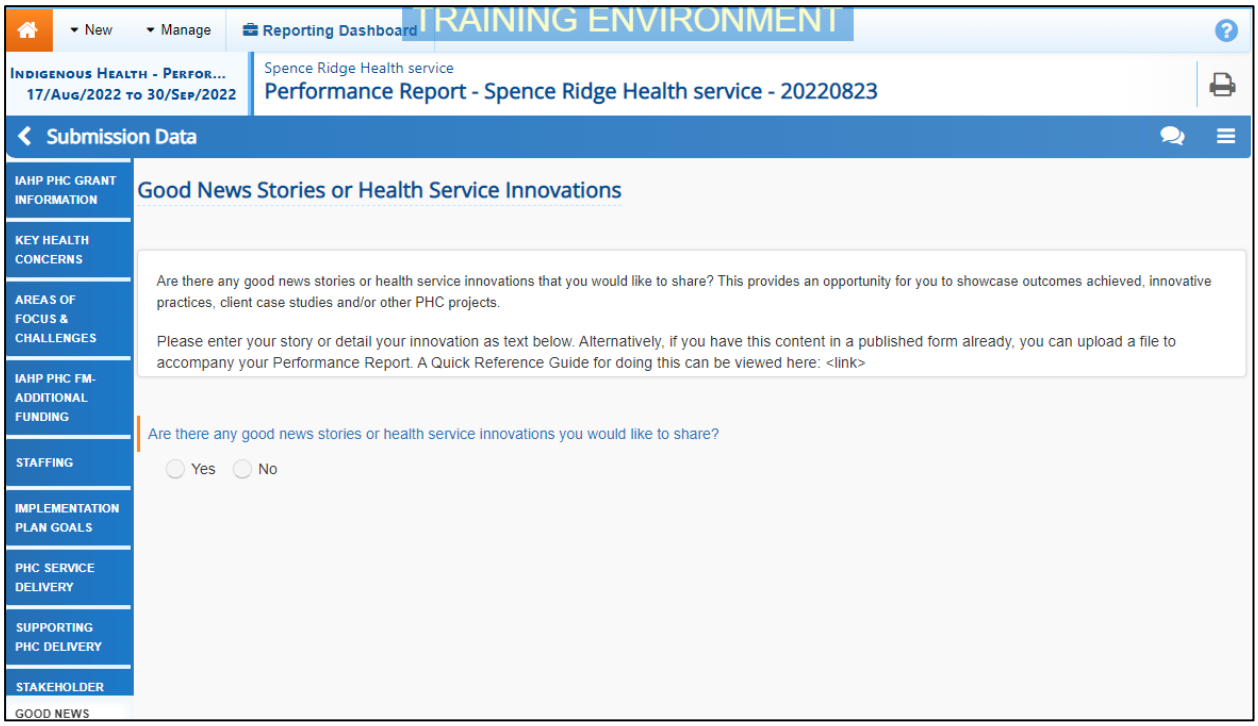
39. Detail your key achievements/challenges in governance, leadership, and culture.

If you don't provide any of the services detailed in this section and, therefore, none of the available options are applicable to you, simply leave the section blank and select Save. In the notifications tray, in the data validation flag that displays, select , select *Other* from the *Reason* field, and then explain why the option has been left blank in the *Additional Information* field (e.g., we do not provide this service).

40. To save this information, select Save at the bottom of the form.

41. To continue, select the **Good News Stories** tab on the left-hand side of the form.

The *Good News Stories or Health Service Innovations* section of the form will now display.



42. If you have any good news stories or innovations, select **Yes,** and enter the detail in the cell that displays.

43. To save this information, select Save at the bottom of the form.

44. To close out of your IAHP PHC Performance Report, select Close at the bottom of the form.

The Data Portal home screen will display with the Reporting Dashboard open.

45. Before progressing your IAHP PHC Performance Report through the submission workflow, answer either **Yes** or **No** to the data sharing consent question(s) that display under **Data Sharing** in the **Reporting Dashboard**, regarding whether you are happy to share your finalised, processed data with NACCHO and/or your state sector support organisation.

If your health service is in the ACT, only the NACCHO question will display here.

To attach additional documentation to your Performance Report:

i. Hover your mouse pointer to the right of the Performance Report reporting round text, select ··· and select **Open Data Asset**.

ii. In the Data Asset Details screen, select and then select Add File at the bottom of the screen.

iii. In the Select Files window that displays, select + Choose File(s).

iv. Navigate to the document you wish to upload and double-click on it.

The selected document has now been uploaded to your Performance Report and will be sent to your DSS FAM as part of the report when you submit it.

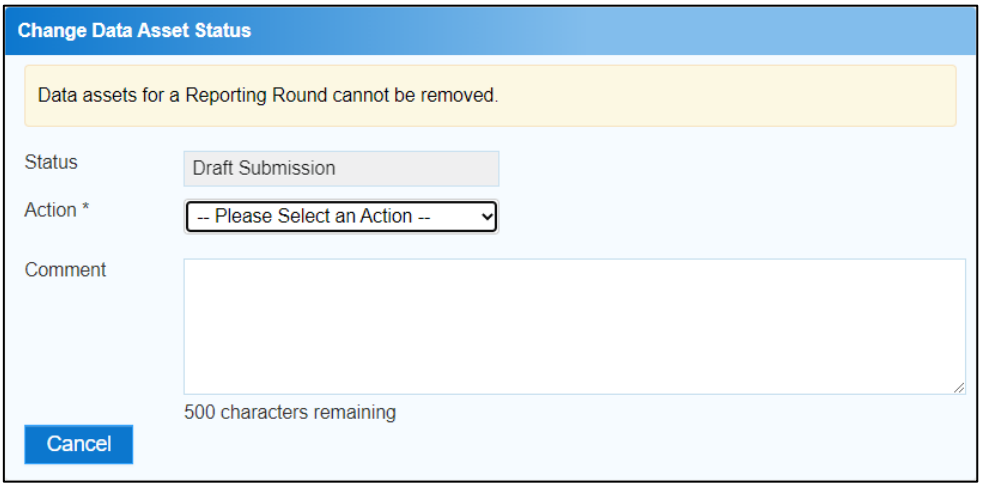
v. If needed, you can enter some information into the **Description** field explaining to your DSS FAM which section(s) of your Performance Report the attached document refers to.

vi. To continue, select Save at the bottom of the screen.

vii. To return to the home screen and your **Reporting Dashboard**, select .

46. To progress the IAHP PHC Performance Report to the next stage of the submission workflow, select Draft Submission in the Reporting Dashboard.

The Change Data Asset Status dialog box will display.



47. In the **Action** field, select and select the required action from the list that displays.

The available actions are:

- **Request Review** – Select this action to send your Performance Report to your *Submission Reviewer* for review prior to it being submitted to your CEO or their representative for approval.
- **Request Approval** – Select this action to send your Performance Report to your CEO or their representative for approval.
- **Request Interim Processing –** Select this action to progress your Performance Report to your DSS FAM for review prior to it going to your CEO or their representative for final approval. This process is known as *Interim Processing*. This option will only appear if you have the *Submission Reviewer* role.

If you have the access to approve IAHP PHC Performance Reports, you will see the *Approve for Submission* option in the *Action* list. This allows you to approve the Performance Report and submit it directly to DSS for processing.

48. In the **Comment** field, enter any comments regarding the action being performed on your Performance Report, if needed.

Any user with access to view your Performance Report will be able to view any comments entered here.

49. One of the following options can now be selected when submitting your IAHP PHC Performance Report, depending on the action that has been selected in the **Action** field:

i. To submit your IAHP PHC Performance Report for internal review, select Request Review. For the next step in the process, see *Review your IAHP PHC Performance Report (Submission Reviewer)*.

ii. To submit your IAHP PHC Performance Report to your CEO or their representative for approval, select Request Approval. For the next step in the process, see *Approve your IAHP PHC Performance Report (Submission Approver)*.

iii. To send your IAHP PHC Performance Report to your DSS FAM for initial review prior to sending it to your CEO or their representative for approval, select Request Interim Processing. For the next step in the process, see *Interim Processing of an IAHP PHC Performance Report*.

To save your IAHP PHC Performance Report as a draft without sending it on to the next stage of the submission process, select Save at the bottom of the screen.

Your IAHP PHC Performance Report has now been created and submitted to either your *Submission Reviewer* for review or your CEO or their representative for approval.

An automated email will be sent to all users within your health service that have been assigned the applicable role in the Data Portal (*Submission Reviewer* or *Submission Approver*) notifying them your IAHP PHC Performance Report has been submitted to them for action. One of your *Submission Reviewers* or *Submission Approvers* can now action your Performance Report as required.

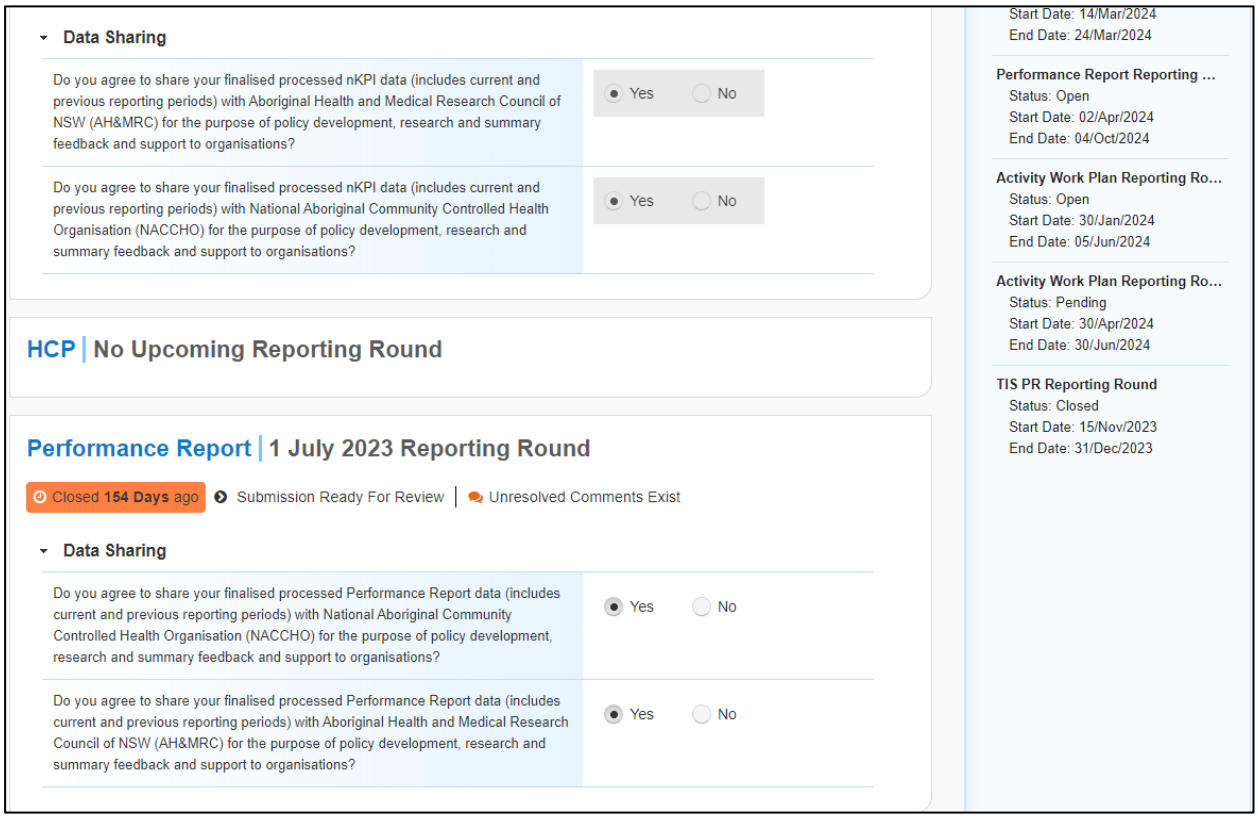
Retrieve your IAHP PHC Performance Report (Submission Uploader)

If a health service's *Submission Uploader* has submitted an IAHP PHC Performance Report for either review or approval in error, they can recall the IAHP PHC Performance Report so the required amendments can be made before resubmitting it for review.

The following procedure is used to retrieve your IAHP PHC Performance Report sent in error through the Data Portal.

1. Ensure you have logged in to the Data Portal and the Data Portal home screen is displayed with the Reporting Dashboard open.

The Reporting Dashboard will display details for your IAHP PHC Performance Report.



2. In the Reporting Dashboard, to retrieve your IAHP PHC Performance Report, select the Performance Report status link (Submission Ready For Review or Submission Ready For Approval).

3. In the Change Data Asset Status dialog box, in the **Action** field, select and select **Revision Required**.

4. To continue, select Revision Required.

Your IAHP PHC Performance Report has now been retrieved from the next step of the submission workflow process and can be amended as required prior to being resubmitted for review or approval.

Review your IAHP PHC Performance Report (Submission Reviewer)

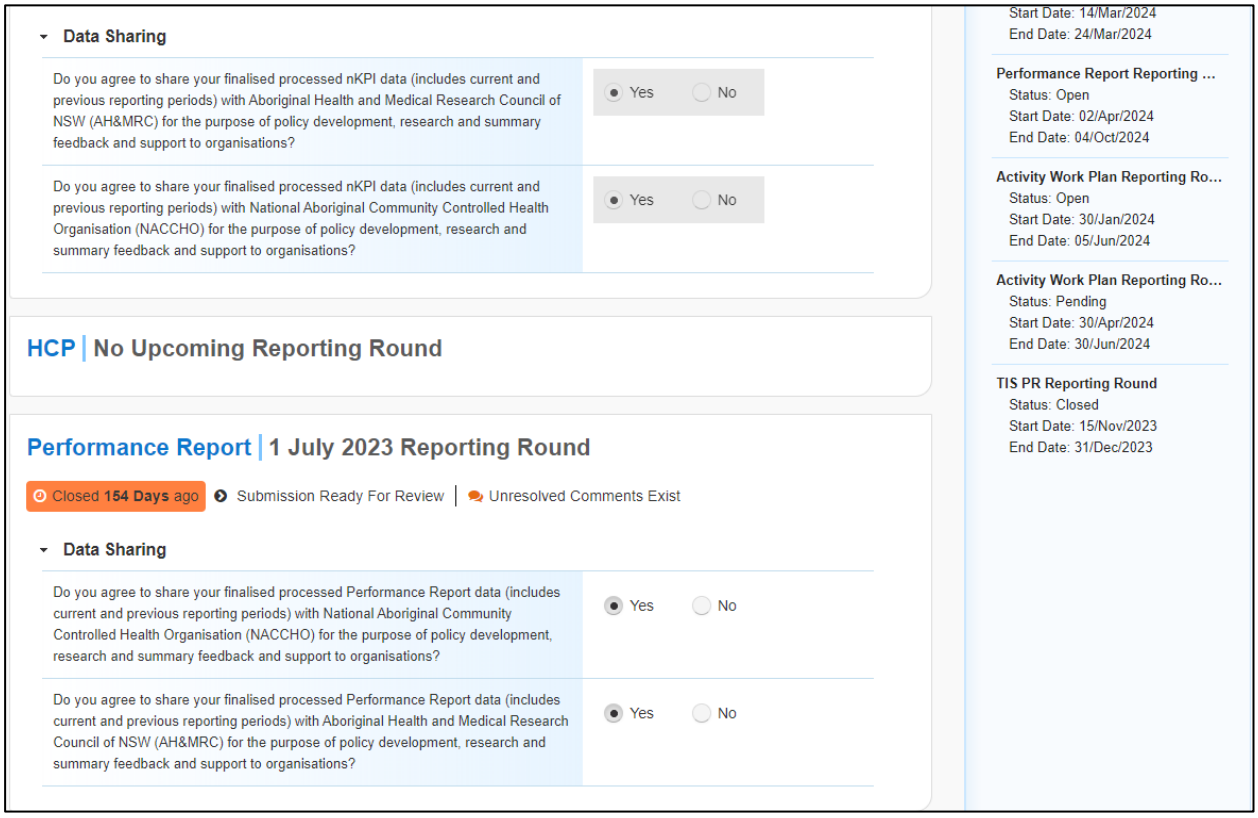
When an IAHP PHC Performance Report has been submitted for review by the health service *Submission Uploader*, it can be reviewed in the Data Portal by anyone within that health service with the *Submission Reviewer* role.

Even though any user in the health service with the *Submission Reviewer* role can review the IAHP PHC Performance Report, only one user can make changes at a time.

The following procedure is used to review your IAHP PHC Performance Report in the Data Portal.

1. Ensure you have logged in to the Data Portal and the Data Portal home screen is displayed with the Reporting Dashboard open.

The Reporting Dashboard will display details for your IAHP PHC Performance Report.



To be eligible for review, your Performance Report's status will need to be *Submission Ready for Review*.

2. To review your IAHP PHC Performance Report, hover your mouse pointer to the right of the Performance Report reporting round text in the Reporting Dashboard and select .

The IAHP PHC Performance Report form will display.

Any sections that still have cells to be completed will contain a ⚠ on the applicable tab for easy identification. Any sections with data validation flags that have been addressed through the addition of a response by the *Submission Uploader*, will contain a 💬1.

3. Review the data in each section as required and enter information into any cells that need to be completed, so the data validation flag ⚠ disappears.

If the *Notifications Tray* doesn't display by default, select ⚠ or 💬1 in the top right-hand corner of the form.

To add a new internal comment for your *Submission Uploader* or *Approver* that you may not wish your DSS FAM to see, select + New in the *Notifications Tray*.

4. To exit the Performance Report form, scroll to the bottom of the form and select ‹ Close.

The Data Portal home screen will display with the *Reporting Dashboard* open.

5. Before progressing the IAHP PHC Performance Report through the submission workflow, select ▸ next to the **Data Sharing** link (if the section doesn't open by default) and answer either **Yes** or **No** to the data sharing consent questions that display, if the questions haven't already been answered.

If your health service is in the ACT only the NACCHO question will display here.

6. Once your Performance Report has been reviewed and updated as required, select ❯ Submission Ready For Review in the Reporting Dashboard and, in the Change Data Asset Status dialog box, in the **Action** field, select ▾ and select the required action.

The available actions are:

- **Request Approval** – Select this action to send your Performance Report to your CEO or their representative for approval.
- **Approve for Submission** – Your CEO or their nominated representative can select this action if they are approving your IAHP PHC Performance Report as well as reviewing it.

- **Request Interim Processing –** Select this action to progress your Performance Report to the *Data Receiver* for review prior to it going to your CEO or their representative for final approval. This process is known as *Interim Processing*.
- **Revision Required** – Select this action to return your Performance Report to the *Submission Uploader(s)* within your health service for amendment.

7. In the **Comment** field, enter any comments regarding the action being performed on your IAHP PHC Performance Report.

Any user with access to view your Performance Report will be able to view any comments entered here.

8. One of the following options can now be selected when submitting your Performance Report, depending on the action that has been selected in the **Action** field:

i. To send your Performance Report to your CEO or their representative for approval, select Request Approval. For the next step in the process, see *Approve your IAHP PHC Performance Report (Submission Approver)*.

ii. To approve your Performance Report and send it directly to your DSS FAM for processing, select Approve for Submission. For the next step in the process, see *Process an IAHP PHC Performance Report*.

iii. To send your Performance Report to your DSS FAM for initial review prior to sending it to your CEO or their representative for approval, select Request Interim Processing. For the next step in the process, see *Interim Processing of an IAHP PHC Performance Report*.

iv. To send your IAHP PHC Performance Report back to your *Submission Uploader* for amendment, select Revision Required. For the next step in the process, see *Amend your IAHP PHC Performance Report (Submission Uploader)*.

Your IAHP PHC Performance Report has now been reviewed and either sent to your CEO or their representative for approval or sent back to your *Submission Uploader* for revision as required.

Amend your IAHP PHC Performance Report (Submission Uploader)

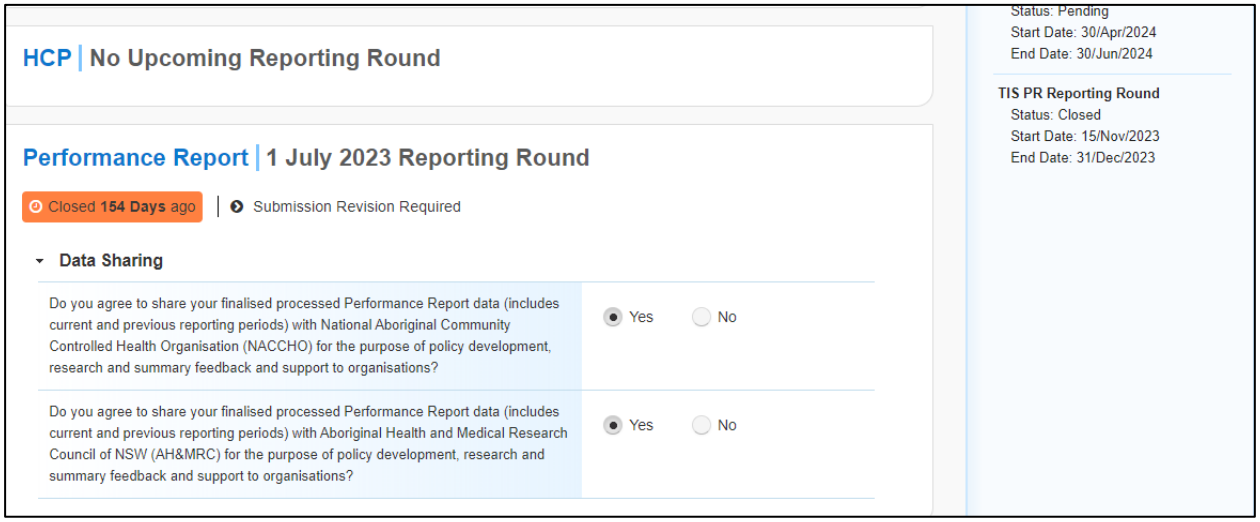
There may be times when your IAHP PHC Performance Report is returned to the *Submission Uploader* for amendment by the representative in your health service the Performance Report has been sent to for review or approval in the Data Portal.

When it is returned for amendment, the Performance Report will have a status of *Submission Revision Required*.

The following procedure is used to amend your IAHP PHC Performance Report in the Data Portal.

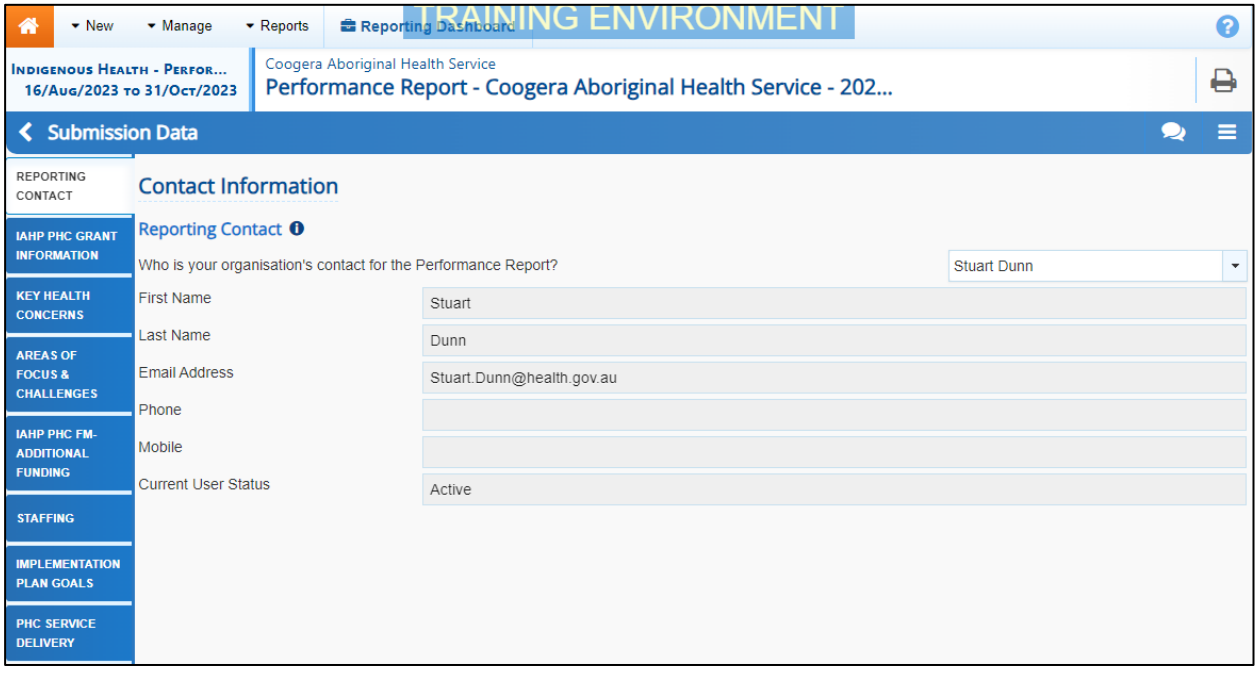
1. Ensure you have logged in to the Data Portal and the Data Portal home screen is displayed with the Reporting Dashboard open.

The Reporting Dashboard will display details for your Performance Report.



2. To amend your Performance Report that has been returned by the *Submission Reviewer* or *Submission Approver*, hover your mouse pointer to the right of the Performance Report reporting round text in the Reporting Dashboard and select .

The IAHP PHC Performance Report form will display.



Any sections of the form that still have cells to be completed will display a ⚠ on the applicable tab on the left-hand side of the form. Any sections with data validation flags that have been addressed through the addition of a response by your *Submission Reviewer or Approver*, will contain a 💬1.

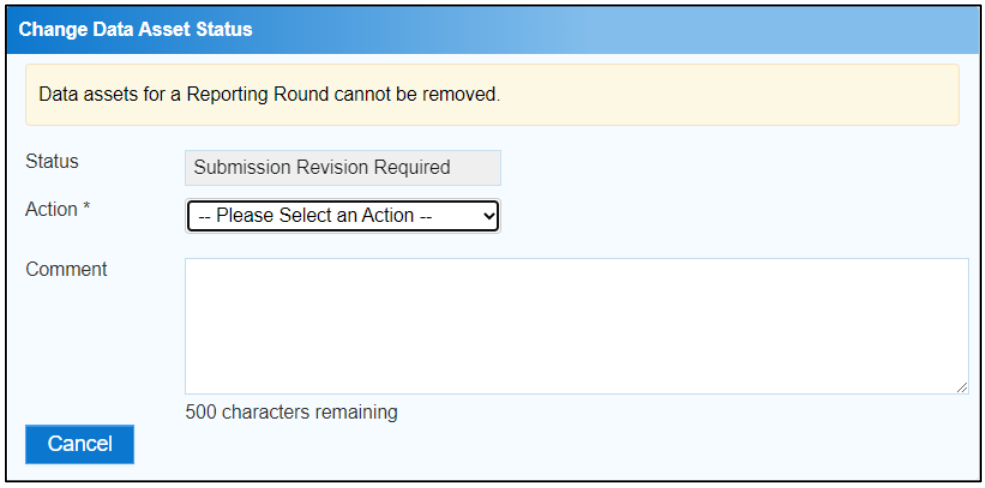
3. Review the data in each tab as required, focussing on any comments made by your *Submission Reviewer* or *Submission Approver* asking you to amend data values.
4. If required, update the value(s) in the required cell(s) based on your *Submission Reviewer*/*Submission Approver's* comments, saving as you go.
5. To exit your IAHP PHC Performance Report form, scroll to the bottom of the form and select ‹ Close.

The Data Portal home screen will display with the Reporting Dashboard open.

6. Before progressing your Performance Report through the submission workflow, select ▸ next to the **Data Sharing** link (if the section doesn't open by default) and answer either **Yes** or **No** to the data sharing consent questions that display, if the questions haven't already been answered.

If your health service is in the ACT only the NACCHO question will display here.

7. Once your Performance Report has been reviewed and updated as required, select Submission Revision Required in the Reporting Dashboard and, in the Change Data Asset Status dialog box, in the **Action** field, select ⌄ and select the required action.



The available actions are:

- **Request Review** – Select this action to send your Performance Report back to your *Submission Reviewer* for review again.
- **Request Approval** – Select this action to send your Performance Report directly to your CEO or their representative for approval.

If you have access to approve your Performance Report, you will also see the *Approve for Submission* option in the action list. This allows you to approve your Performance Report and submit it directly to your DSS FAM for processing.

8. In the **Comment** field, enter any comments regarding the action being performed on your Performance Report, if needed.

Any user with access to view your Performance Report will be able to view any comments entered here.

9. One of the following options can now be selected when submitting your Performance Report, depending on the action that has been selected in the **Action** field:

i. To send your Performance Report to your *Submission Reviewer* for review again, select Request Review. For the next step in the process, see *Review your IAHP PHC Performance Report (Submission Reviewer)*.

ii. To send your Performance Report to your CEO or their representative for approval, select Request Approval. For the next step in the process, see *Approve your IAHP PHC Performance Report (Submission Approved)*.

Your IAHP PHC Performance Report has now been amended and either sent back to your *Submission Reviewer* for review or sent straight on to your CEO or their representative for approval.

An automated email will be sent to all users within your health service that have been assigned the applicable role in the Data Portal (*Reviewer* or *Approver*) notifying them your Performance Report has been submitted to them for action. One of your *Submission Reviewers* or *Submission Approvers* can now action your Performance Report again as required.

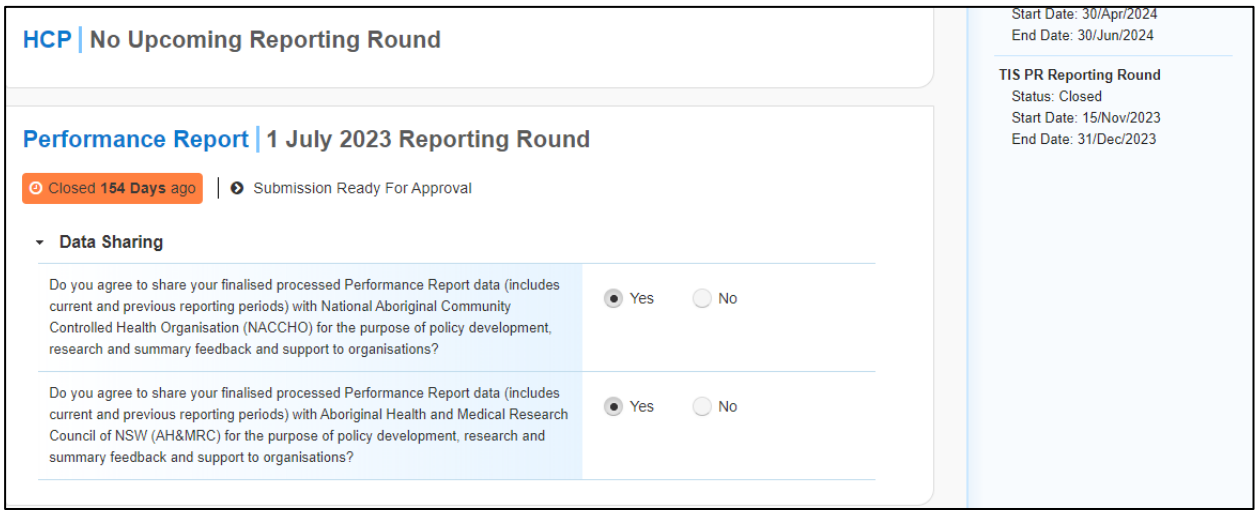
Approve your IAHP PHC Performance Report (Submission Approved)

Your IAHP PHC Performance Report can be approved by anyone within your health service with the *Submission Approver* role in the Data Portal. Traditionally, the task of approval in a health service will be reserved for your CEO or their representative. In smaller health services, the person approving the Performance Report may also be the person who has reviewed and/or submitted the Performance Report.

The following procedure is used to approve your IAHP PHC Performance Report in the Data Portal.

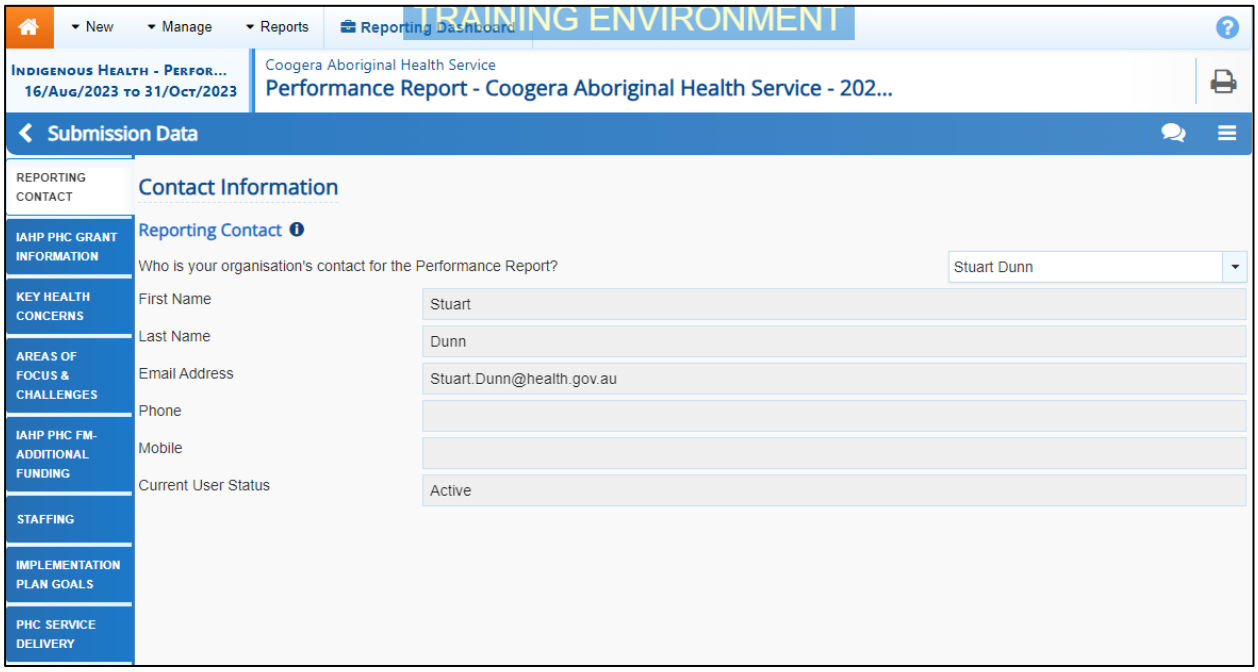
1. Ensure you have logged in to the Data Portal and the Data Portal home screen is displayed with the Reporting Dashboard open.

The Reporting Dashboard will display details for your Performance Report.



2. To approve your IAHP PHC Performance Report, hover your mouse pointer to the right of the Performance Report reporting round text in the Reporting Dashboard and select .

The IAHP PHC Performance Report form will display, with each section on the form displayed as a separate tab on the left-hand side of the form.



Review the information in your Performance Report form, focussing on any sections of the form displaying a on the corresponding tab, if there are any.

If any sections of the form contain a , you should send your Performance Report back to your *Submission Uploader* and ask them to address the issue before returning the submission to you for approval.

3. In the first section of the form displaying a , read the comment that has been left for you in the Notifications Tray.

If the Notifications Tray doesn't display by default, select or in the top right-hand corner of the form to open it.

4. If the comment is just for your information, or you're happy it has been addressed as needed through the data that has been entered into the section, select at the top of the comment in the Notifications Tray.

5. In the Notifications window that displays, select Save.

The comment has now been removed from your Performance Report form.

6. Repeat steps **3** to **5** as needed for each comment that has been left in the form by your *Submission Uploader/Reviewer*.

If you need to respond to one of the comments that has been left by your *Submission Uploader* or *Reviewer*, select in the comment in the Notifications Tray. In the window that displays, select a reason and enter your response in the *Additional Information* field and select Save. Youor response has now been added and can be addressed by your *Submission Uploader* as needed onvce you send your Performance Report back to them for amendment.

7. To exit the Performance Report form, scroll to the bottom of the form and select Close.

The Data Portal home screen will display with the Reporting Dashboard open.

8. Once your Performance Report has been reviewed and updated as required, select Submission Ready For Approval in the Reporting Dashboard and, in the Change Data Asset Status dialog box, in the **Action** field, select and select **Approve for Submission**.

If you responded to one of the comments in the form and need to send it back to your *Submission Uploader* so they can address your response, select *Revision Required* and then select Revision Required.

9. In the **Comment** field, enter any comments about the action being performed on your Performance Report.

10. To approve your Performance Report and send it for processing by your DSS FAM, select Approve for Submission. See the *Process an IAHP PHC Performance Report* QRG for the next step in the process.

Your Performance Report has now been approved and sent to your DSS FAM for processing in the Data Portal.

Process an IAHP PHC Performance Report (DSS FAM)

Once your IAHP PHC Performance Report has been approved by your CEO or their representative, it will be sent to your DSS FAM for processing in the Data Portal in their role as the external *Data Receiver*.

The first step of processing the Performance Report in the Data Portal is for your DSS FAM to review the Performance Report form to ensure the information contained within is complete and correct.

Once your FAM has reviewed the Performance Report form and is comfortable with the content, it can be processed as complete in the Data Portal ready to be used in any reports and publications produced by DSS and Health and Aged Care as required.

Step 1 – Review the IAHP PHC Performance Report (DSS FAM)

Once your DSS FAM has received your approved Performance Report, they will need to review it to ensure it is ready to go to the next stage of the process. For the Performance Report to be processed by DSS, it will need to have the status of *Submission Approved*.

Once your DSS FAM has reviewed the Performance Report in the Data Portal and actioned it as ready to be processed, the Performance Report's status will change to *Ready for Processing*.

All *Submission Uploaders* from your health service will then receive an email informing them the status of the Performance Report has been changed to *Ready for Processing*. This tells you your DSS FAM has taken the Performance Report from their backlog and is now working on it.

Step 2 – Process the IAHP PHC Performance Report (DSS FAM)

Once your Performance Report has the status of *Ready for Processing* in the Data Portal, DSS will process it. Once DSS has processed your Performance Report in the Data Portal, its status will change to *Processed* and the processing of the Performance Report is now complete.

The information within the Performance Report form can now be used by DSS and Health and Aged Care in any reports and publications that need to be produced.

Exception Reporting

Once your IAHP PHC Performance Report has been approved by your CEO or their representative, it will be sent to your DSS FAM for processing. To action the Performance Report in the Data Portal, your DSS FAM needs to have the *Data Receiver* role.

If, upon review of the Performance Report, your DSS FAM feels amendments are needed to the information in your Performance Report, they will initiate the exception reporting process to add comments to your Performance Report describing what amendments are required and will send the Performance Report back to you for amendment.

If the information in the Performance Report is correct and no changes are needed, your DSS FAM can process the Performance Report as complete to finish the submission process. For more information, see *Process an IAHP PHC Performance Report (DSS)* earlier in this guide.

The *first* step in initiating the exception reporting process is for your DSS FAM to update the status of the Performance Report to *Ready for Processing* in the Data Portal, so guiding comments can be added to the relevant sections of the Performance Report form to assist you when you amend the form.

The *second* step of the process is for the FAM to go into the Performance Report form and add the required comments to the applicable sections, so your *Submission Uploader(s)* can easily see the changes they need to make in the form before the Performance Report can be processed as complete by the FAM.

Once your FAM has reviewed the form and made any comments against the applicable sections, they will send it back to your health service. One of the *Submission Uploaders* in your health service should then amend the Performance Report as needed and send it back through the Data Portal submission workflow process as required.

Step 1 – Set the IAHP PHC Performance Report's status to *Ready for Processing (DSS)*

Once it has been confirmed by your DSS FAM that there is information in the IAHP PHC Performance Report that will need to be amended by the health service, the DSS FAM will need to change the status of the Performance Report to *Ready for Processing* so they can add explanatory comments for the health service to the relevant sections of the form.

Step 2 – Add Comments to the Form and Return it to the Health Service for Amendment (DSS)

Once a Performance Report has the status of *Ready for Processing*, your DSS FAM can add comments to any information they feel needs to be amended and can then return it to your health service's *Submission Uploaders* for amendment.

Once this is done, the Performance Report's status will change to *Submission Returned to Uploader* and one of your health service's *Submission Uploaders* now need to address the comments your DSS FAM has made in the form before sending the Performance Report back through the submission approval process.

Even though your DSS FAM has sent the Performance Report back to you, they will still be able to access the Performance Report in "read only" mode so they can provide you with support in amending any information within the Performance Report as required.

Step 3 – Amend your IAHP PHC Performance Report based on DSS FAM feedback (Submission Uploader)

There may be times when an approved Performance Report is returned to you for amendment by your DSS FAM due to issues they have identified with elements of the information in the form.

When your Performance Report is returned, all *Submission Uploaders* in your health service will receive an email detailing the comments the FAM has made regarding the information in your Performance Report form that needs to be amended.

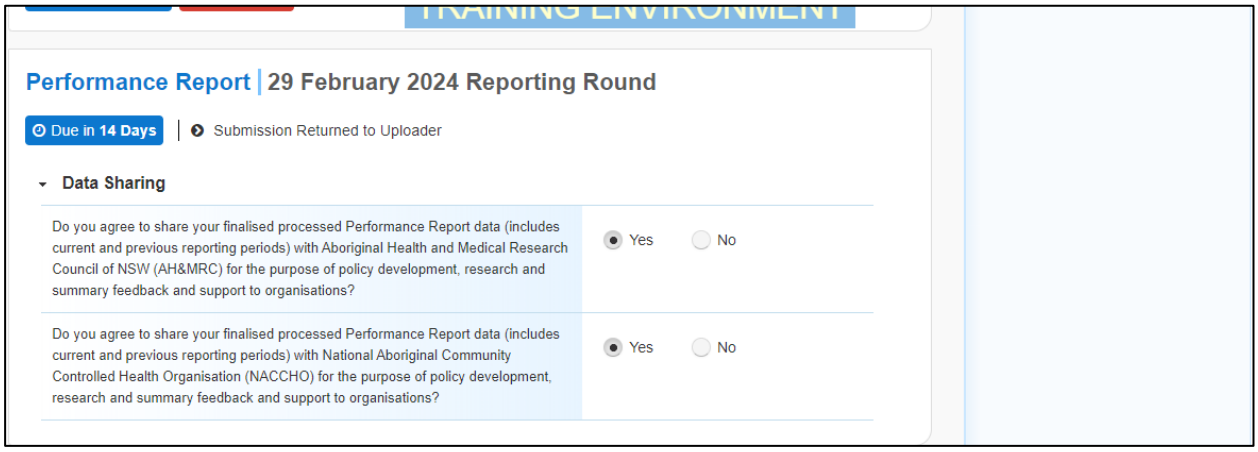
A *Submission Uploader* within your health service will then need to amend the information in the form, directly addressing the comments made by your FAM.

When your Performance Report is returned to you by your DSS FAM, it will have the status of *Submission Returned to Uploader*.

The following procedure is used to amend your IAHP PHC Performance Report based on DSS FAM feedback.

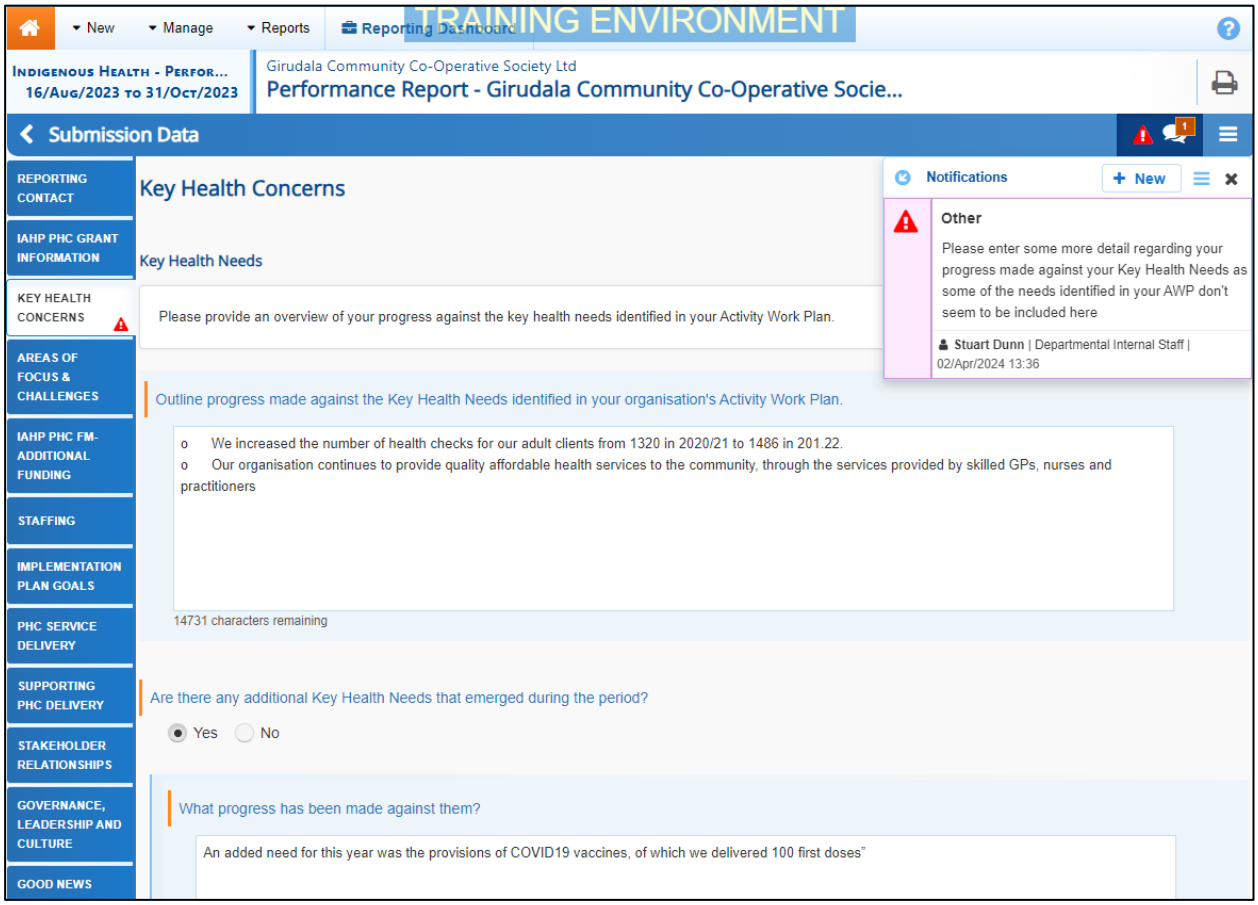
1. Ensure you have logged in to the Data Portal and the Data Portal home screen is displayed with the Reporting Dashboard open.

The Reporting Dashboard will display details for your Performance Report.



2. To amend your IAHP PHC Performance Report, hover your mouse pointer to the right of the Performance Report reporting round text in the Reporting Dashboard and select .

The IAHP PHC Performance Report form will display and the *Notifications Tray* for each tab will display any comments your DSS FAM has made about the information entered into the form.



If the *Notifications Tray* doesn't display by default, select or in the top right-hand corner of the screen.

3. Navigate to the first section of the form with a displaying and review the first comment that has been made by your DSS FAM regarding your IAHP PHC Performance Report information.

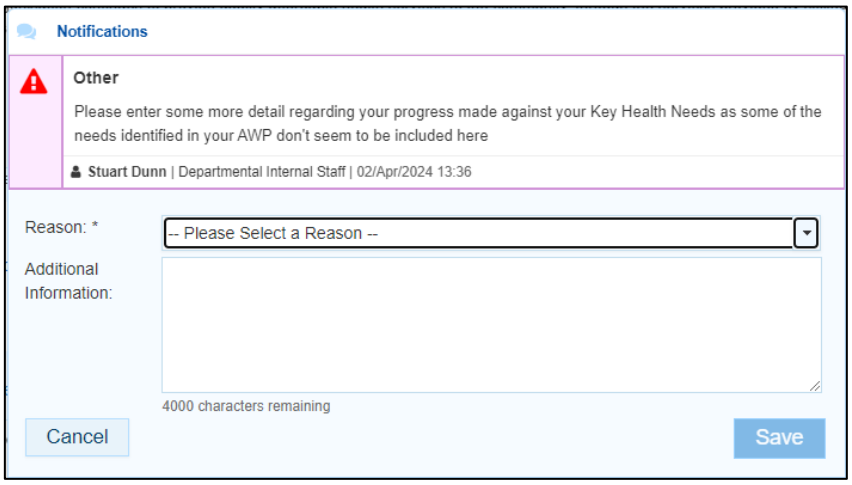
4. If you are unsure which cell in the section the comment refers to, select and the cell will be highlighted for you.

5. If it is clear to you what amendment your DSS FAM needs you to make, update the information in the applicable cells as needed, ensuring the updates are addressing your FAM's comment.

Once you have made the required text amendments, you will alos need to respond to the DSS FAM's comment in the Notifications Tray.

6. To do this, select next to the appolicable comment in the Notifications Tray.

The Notifications window will display.



7. In the Notifications window, select in the **Reason** field and select **Other (specify).**
8. In the **Additional Information** field, enter text explaining the amendments you have made. If needed, you can add instructions here on where the changes have been made if you think the text you have added/changed may be difficult for your FAM to find.
9. To save your response, select Save.
10. Repeat steps **3** to **9** for any other changes that need to be made to the information in this section of the form in response to the comments made by your DSS FAM.

Your responses have now been added to the FAM's comments and the for the section should now have been replaced by .

11. To save the text changes you have made to the section, select Save at the bottom of the IAHP PHC Performance Report form.
12. Repeat this process for all sections of the form displaying a .

If you have made the required amendments to your information and would like to add an explanatory comment for the DSS FAM, select + New at the top of the *Notifications Tray,* select a *Reason* and add your comment in the *Additional Information* field.

The comments have now been added and can be viewed by anyone accessing the Performance Report in the future.

The Data Portal home screen will display with the *Reporting Dashboard* open.

13. Once the Performance Report has been reviewed and updated as required, select Submission Returned to Uploader in the Reporting Dashboard and, in the Change Data Asset Status dialog box, in the **Action** field, select and select the required action.

The available actions are:

- **Request Review** – Select this action to send your Performance Report to your *Submission Reviewer* for review again.
- **Request Approval** – Select this action to send your Performance Report back to your CEO or their representative for approval.

If you can approve your Performance Report, you will see the *Approve for Submission* option in the action list. This allows them to approve your Performance Report and submit it directly to your DSS FAM for processing again.

14. In the **Comment** field, enter any comments regarding the action being performed on your Performance Report, if needed.

Any user with access to view your IAHP PHC Performance Report will be able to view any comments entered here.

15. One of the following options can now be selected when submitting your Performance Report, depending on the action that was selected in the **Action** field:

    i. To send your Performance Report to your *Submission Reviewer* for review again, select Request Review. For the next step in the process, see *Step 4 - Review your IAHP PHC Performance Report based on DSS FAM Feedback (Submission Reviewer)*.

    ii. To send your Performance Report back to your CEO or their representative for approval, select Request Approval. For the next step in the process, see *Step 5 - Approve your IAHP PHC Performance Report based on DSS FAM Feedback (Submission Approver)*.

Your IAHP PHC Performance Report has now been amended and either sent on to your *Submission Reviewer* for further review or sent straight on to your CEO or their representative for approval again.

An automated email will be sent to all users within your health service that have been assigned the applicable role in the Data Portal (*Submission Reviewer* or *Submission Approver*) notifying them your Performance Report has been submitted to them for action.

Step 4 – Review your IAHP PHC Performance Report based on DSS FAM Feedback (Submission Reviewer)

If your DSS FAM has identified issues with any of the information you have entered into the Performance Report form, they will add comments to the form and send it back to your health service for amendment. Once the *Submission Uploader* in your health service has addressed the comments made, they may send the amended Performance Report on to the *Submission Reviewer* to be reviewed again prior to being sent again for internal approval.

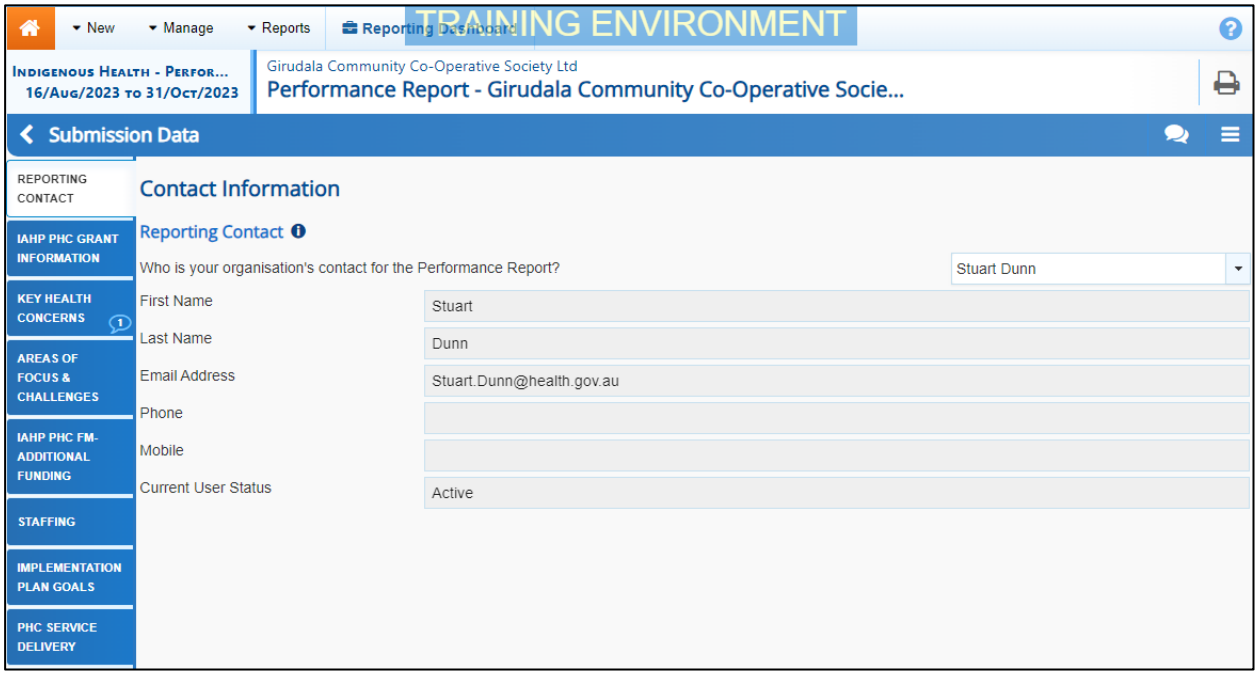
The following procedure is used to review your IAHP PHC Performance Report in the Data Portal based on DSS FAM feedback.

1. Ensure you have logged in to the Data Portal and the Data Portal home screen is displayed with the Reporting Dashboard open.

The Reporting Dashboard will display details for your Performance Report.

2. To review your IAHP PHC Performance Report, hover your mouse pointer to the right of the Performance Report reporting round text in the Reporting Dashboard and select .

The IAHP PHC Performance Report form will display.

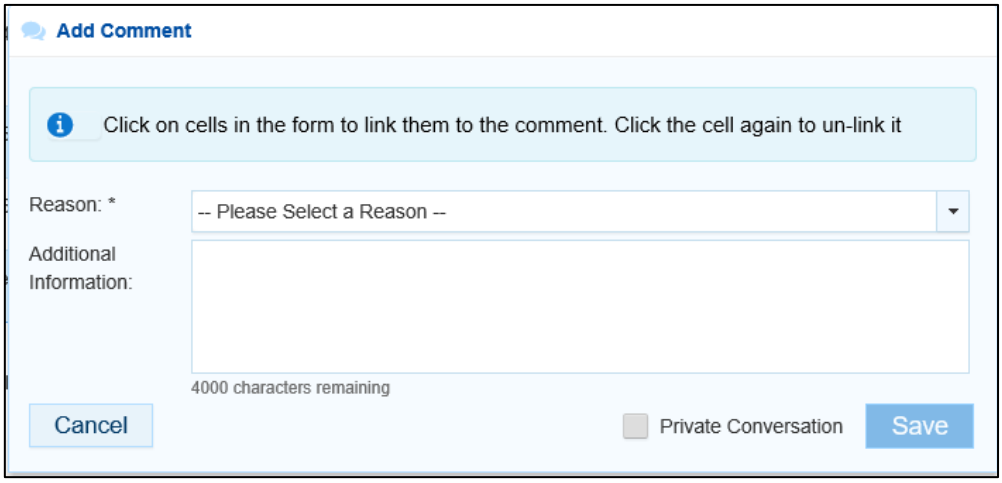


3. Review the information in the form and any accompanying comments as required.

Each of the comments added to a section of the form can be read to see the changes that were requested by your DSS FAM, and the subsequent updates made by your *Submission Uploader* in response.

4. Update any information if needed, including addressing DSS FAM comments if needed.
5. To add a comment for your colleagues explaining any change you have made to the data, select + New at the top of the Notifications Tray.

The Add Comment dialog box will display.



6. If needed, select the cell(s) to be linked to the comment you are adding.
7. Select in the **Reason** field and select the reason the comment is being added from the drop-down list.
8. Enter an explanatory comment in the **Additional Information** field.
9. To make the comment private so the external *Data Receivers* can't see it, select the **Private Conversation** check box.
10. To save the response, select Save.

Your comment can be edited by selecting and selecting *Edit Comment* or deleted by selecting and selecting *Delete Comment*.

The comment(s) has been added and can be viewed by anyone accessing your Performance Report in the Data Portal.

11. To save your changes, select Save at the bottom of the form.
12. To exit the Performance Report form, scroll to the bottom of the form and select Close.

The Data Portal home screen will display with the Reporting Dashboard open.

13. Once your Performance Report has been reviewed and updated as required, select Submission Ready For Review in the Reporting Dashboard and, in the Change Data Asset Status dialog box, in the **Action** field, select and select the required action.

The available actions are:

- **Request Approval** – Select this action to send your Performance Report to your CEO or their representative again for re-approval.
- **Approve for Submission** – Your CEO or nominated representative can select this action if they are approving your Performance Report as well as reviewing it.

- **Request Interim Processing** – Select this action to progress your Performance Report to your DSS FAM for review prior to it going to your CEO or their representative for approval. This process is known as Interim Processing.
- **Revision Required** – Select this action to return your Performance Report to the *Submission Uploader* again for further amendment.

14. In the **Comment** field, enter any comments regarding the action being performed on your Performance Report.

Any user with access to view your IAHP PHC Performance Report will be able to view any comments entered here.

15. One of the following options can now be selected when submitting your Performance Report, depending on the action that has been selected in the **Action** field:
    i. To send your Performance Report back to your CEO or their representative for approval, select Request Approval. For the next step in the process, see *Step 5 - Approve your IAHP PHC Performance Report based on DSS FAM Feedback (Submission Approved)*.
    ii. To approve your Performance Report and send it back to your DSS FAM for processing again, select Approve for Submission. For the next step in the process, see *Process an IAHP PHC Performance Report*.
    iii. To send your Performance Report to your FAM for initial review prior to sending it to your CEO or their representative for approval, select Request Interim Processing. For the next step in the process, see *Interim Processing of an IAHP PHC Performance Report*.
    iv. To send your Performance Report back to your *Submission Uploader* for further amendment, select Revision Required. For the next step in the process, see *Step 3 - Amend your IAHP PHC Performance Report based on DSS FAM Feedback (Submission Uploader)*.

Your IAHP PHC Performance Report has now been reviewed and either sent for approval again or sent back to your *Submission Uploader* for further revision.

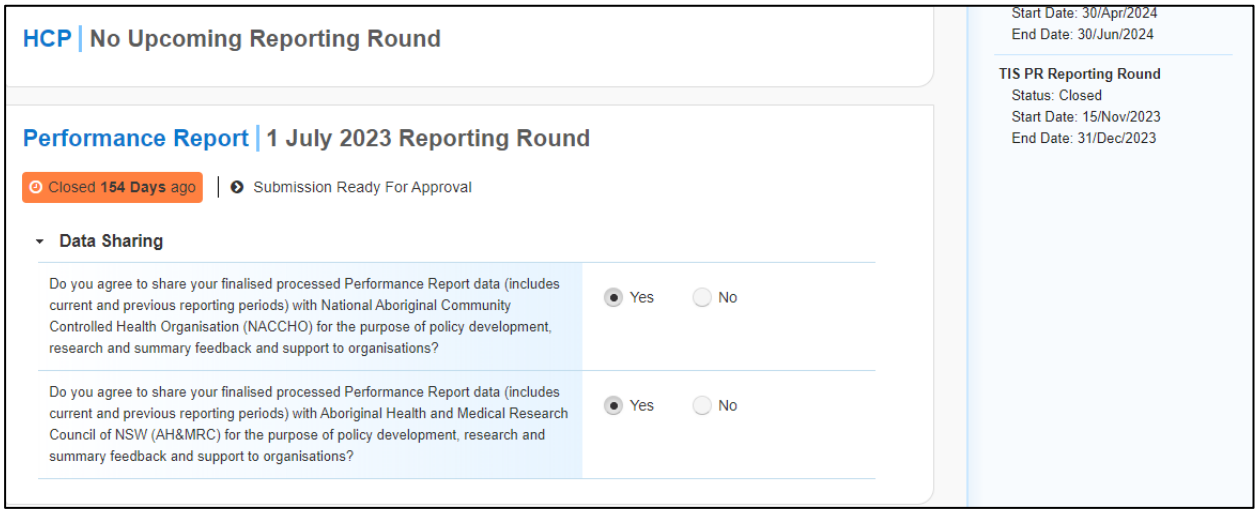
Step 5 – Approve the IAHP PHC Performance Report based on DSS FAM Feedback (Submission Approved)

Once your IAHP PHC Performance Report has been returned to your health service by your DSS FAM due to issues with the information that has been entered, one of your *Submission Uploaders* will need to make the required changes to the data and then send the Performance Report back through the internal review and approval process prior to the amended Performance Report being sent back to your DSS FAM for processing.

The following procedure is used to approve your IAHP PHC Performance Report in the Data Portal based on DSS FAM feedback.

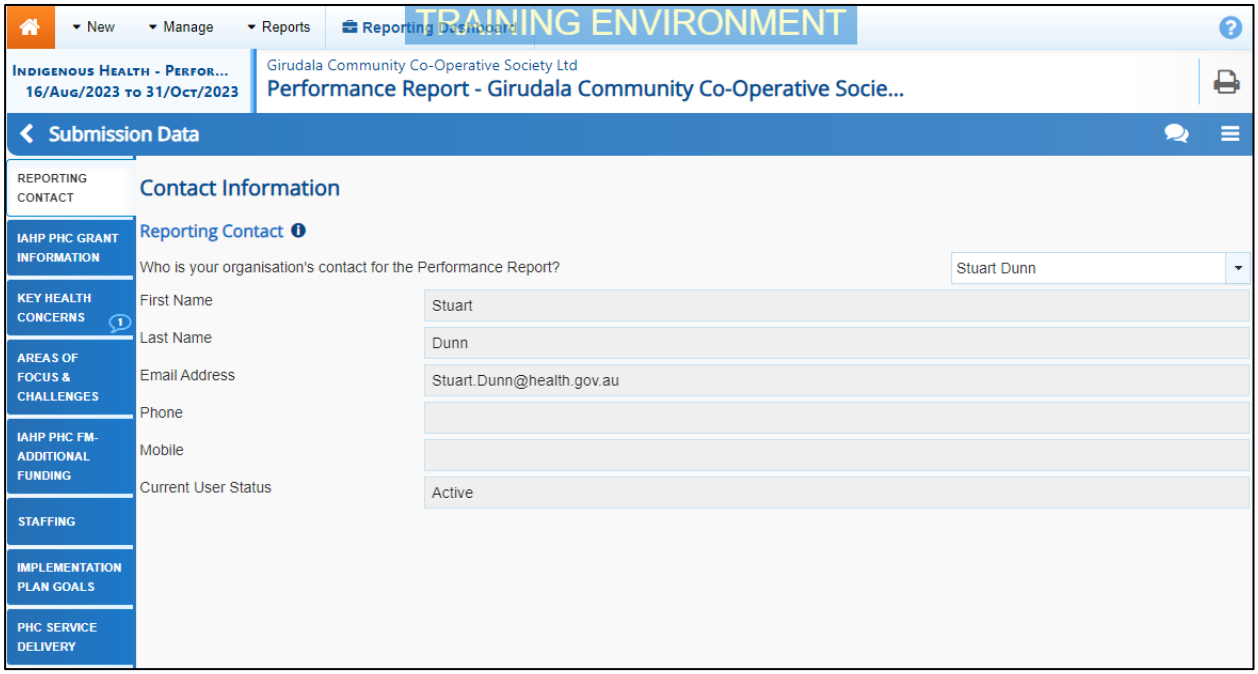
1. Ensure you have logged in to the Data Portal and the Data Portal home screen is displayed with the Reporting Dashboard open.

The Reporting Dashboard will display details for your Performance Report.



2. To approve your IAHP PHC Performance Report, hover your mouse pointer to the right of the Performance Report reporting round test in the Reporting Dashboard and select .

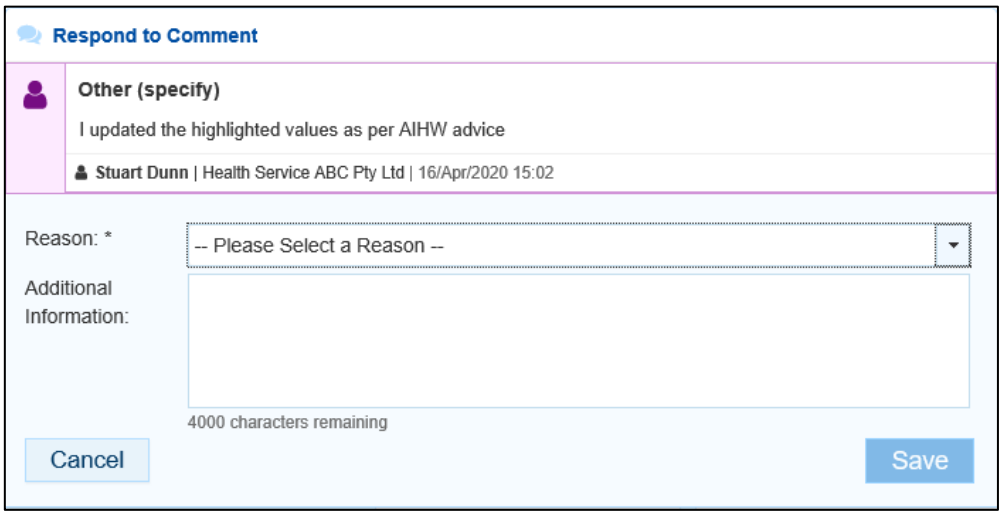
The IAHP PHC Performance Report form will display



3. Review the information in the form as required.

4. To respond to a particular comment made by your *Submission Uploader* or *Submission Reviewer*, select next to the comment in the **Notifications Tray**.

The Respond to Comment dialog box will display.



5. Select in the **Reason** field and select the reason the comment is being added from the drop-down list.
6. Enter an explanatory comment in the **Additional Information** field.
7. To save the response, select Save.

Your comment can be edited by selecting and selecting *Edit Comment* or deleted by selecting and selecting *Delete Comment.*

The comment(s) has been added and can be viewed by anyone accessing your Performance Report.

8. To save any changes, select Save at the bottom of the form.
9. To exit your Performance Report form, scroll to the bottom and select Close.

The Data Portal home screen will display with the Reporting Dashboard open.

10. Once your Performance Report has been reviewed and updated as required, select Submission Ready For Approval in the Reporting Dashboard and, in the Change Data Asset Status dialog box, in the **Action** field, select and select the required action.

The available actions are:

- **Approve for Submission** – Select this action to approve your Performance Report for processing by your DSS FAM.
- **Revision Required** – Select this action if your Performance Report needs to be returned to your *Submission Uploader* again for further amendment.

11. In the **Comment** field, enter any comments regarding the action being performed on your Performance Report.

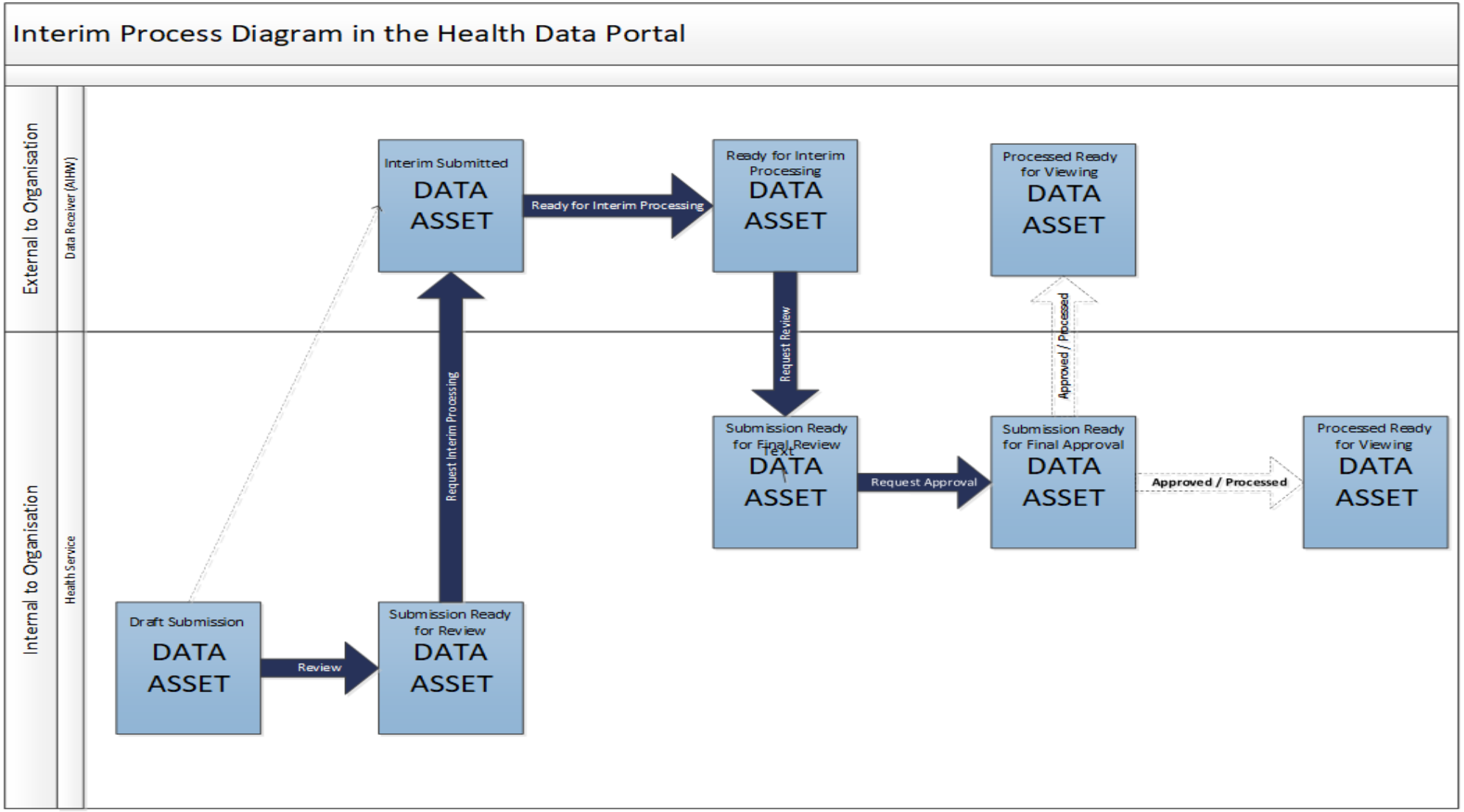
Any user with access to view your Performance Report will be able to view any comments entered here.

12. One of the following options can now be selected when submitting your Performance Report, depending on the action that has been selected in the **Action** field:
    i. To approve your Performance Report and send it to your DSS FAM for processing, select Approve for Submission. For the next step in the process, see *Process an IAHP PHC Performance Report*.

ii. To send your Performance Report back to your *Submission Uploader* for further amendment, select Revision Required. For the next step in the process, see *Step 3 - Amend your IAHP PHC Performance Report based on DSS FAM Feedback (Submission Uploader)*.

Your IAHP PHC Performance Report has now been approved and sent back to your DSS FAM for processing. For more information, see *Process an IAHP PHC Performance Report.*

The IAHP PHC Performance Report Interim Processing Workflow



Interim Processing of an IAHP PHC Performance Report

Interim Processing of an IAHP PHC Performance Report will be available to health services during a reporting round, to allow them to send their Performance Report on to their DSS FAM for review and processing prior to it going to the health service's CEO, or their representative, for formal approval.

Doing this avoids the situation of a CEO approving the Performance Report only to have your DSS FAM send it back to you again for amendment, so it needs to be approved again. Some health service CEOs may prefer to be the last person to see the Performance Report and give formal approval once all other parties have reviewed and approved the Performance Report as required. In these cases, *Interim Processing* will be the most suitable process for the health service to follow.

To send the Performance Report for interim processing, the health service user must have the role of *Submission Reviewer* in the Data Portal. Interim processing can't be initiated by the *Submission Uploader*.

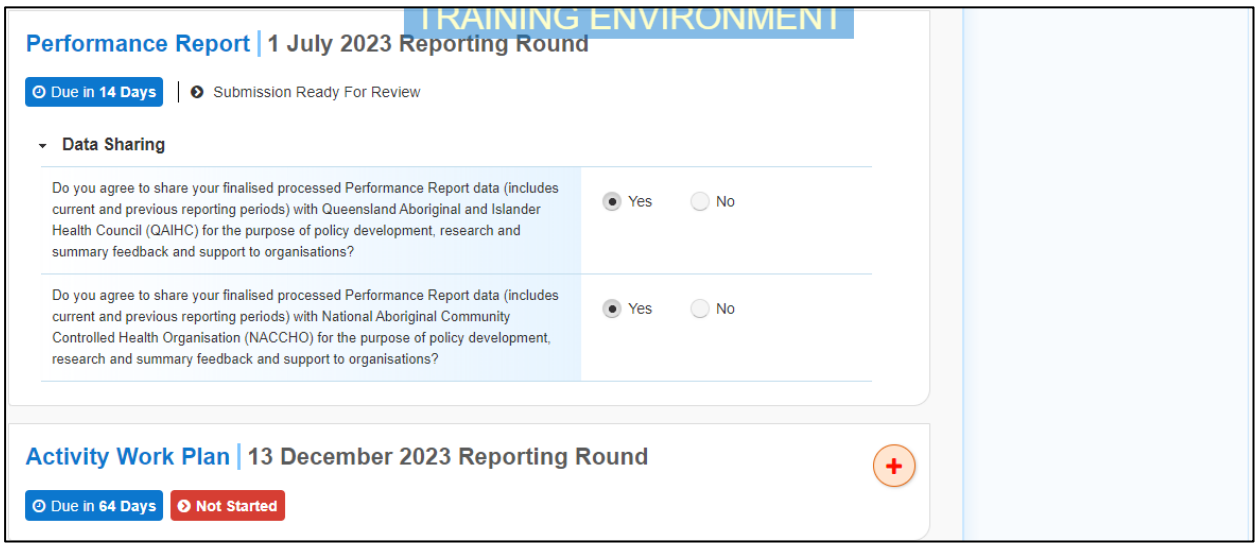
Step 1 - Initiate Interim Processing (Submission Reviewer)

When a Performance Report has been created by a *Submission Uploader* in your health service and sent to your *Submission Reviewer* for review, the *Submission Reviewer* can choose to send it to your DSS FAM for review and approval prior to it going to your CEO or their representative for approval. This is known as *Interim Processing*.

This section of the user guide shows the process of initiating interim processing with the Performance Report at the status of *Submission Ready for Review*. Please note though that interim processing can also be initiated when the Performance Report is at the status of *Draft Submission* if the user has the *Submission Reviewer* role. This means the user doesn't have to set the Performance Report to *Submission Ready for Review* before instigating interim processing.

1. Ensure you have logged in to the Data Portal and the Data Portal home screen is displayed with the Reporting Dashboard open.

The Reporting Dashboard will display details for your Performance Report.



2. Before progressing your IAHP PHC Performance Report through the submission workflow, select the **Data Sharing** link (if the section doesn't open by default) and answer either **Yes** or **No** to the data sharing consent questions that display, if the questions haven't already been answered.

If your health service is in the ACT only the NACCHO question will display here.

3. To initiate interim processing, select Submission Ready For Review in the Reporting Dashboard and, in the Change Data Asset Status dialog box, in the **Action** field, select and select *Request Interim Processing*.

4. In the **Comment** field, enter any comments for the DSS FAM, if needed.

Any user with access to view your Performance Report will be able to view any comments entered here.

5. To send your Performance Report to your DSS FAM for interim processing, select Request Interim Processing.

The status of your IAHP PHC Performance Report has now been set to *Interim Submitted* and your DSS FAM can now review your Performance Report as required to assess its suitability before it goes to your CEO or their representative for approval.

Step 2 – Review the IAHP PHC Performance Report (DSS)

Once your *Submission Reviewer* has requested interim processing of your Performance Report, its status will be set to *Interim Submitted* and it will be sent to DSS for review.

Your DSS FAM will now go into your Performance Report and set it to the status of *Ready for Interim Processing* to inform your health service that the report has been removed from their backlog and is now being worked on.

Step 3 – Process the IAHP PHC Performance Report (DSS)

When your Performance Report has progressed to the status of *Ready for Interim Processing*, it can be reviewed by your DSS FAM and sent back to your health service for your final review and approval.

If any issues are identified with the information as part of the FAM's review, the FAM will add comments to the form and send it back to your health service's *Submission Uploaders* for amendment as per the normal exception reporting process. For more information, see *Exception Reporting* earlier in this guide.

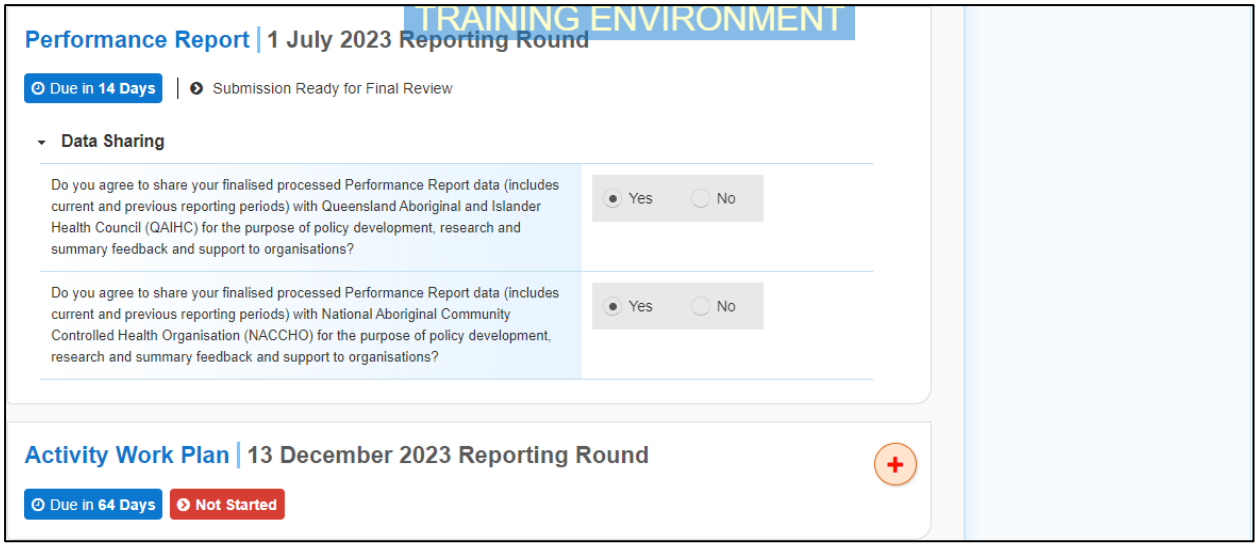
Step 4 – Conduct a Final Review of your IAHP PHC Performance Report (Submission Reviewer)

If your DSS FAM has reviewed your Performance Report and is happy with it, they will send it on to your health service's *Submission Reviewer* for final review prior to approval. Your Performance Report's status will be set to *Submission Ready for Final Review*.

The following procedure is used to conduct a final review on your IAHP PHC Performance Report sent for Interim Processing in the Data Portal.

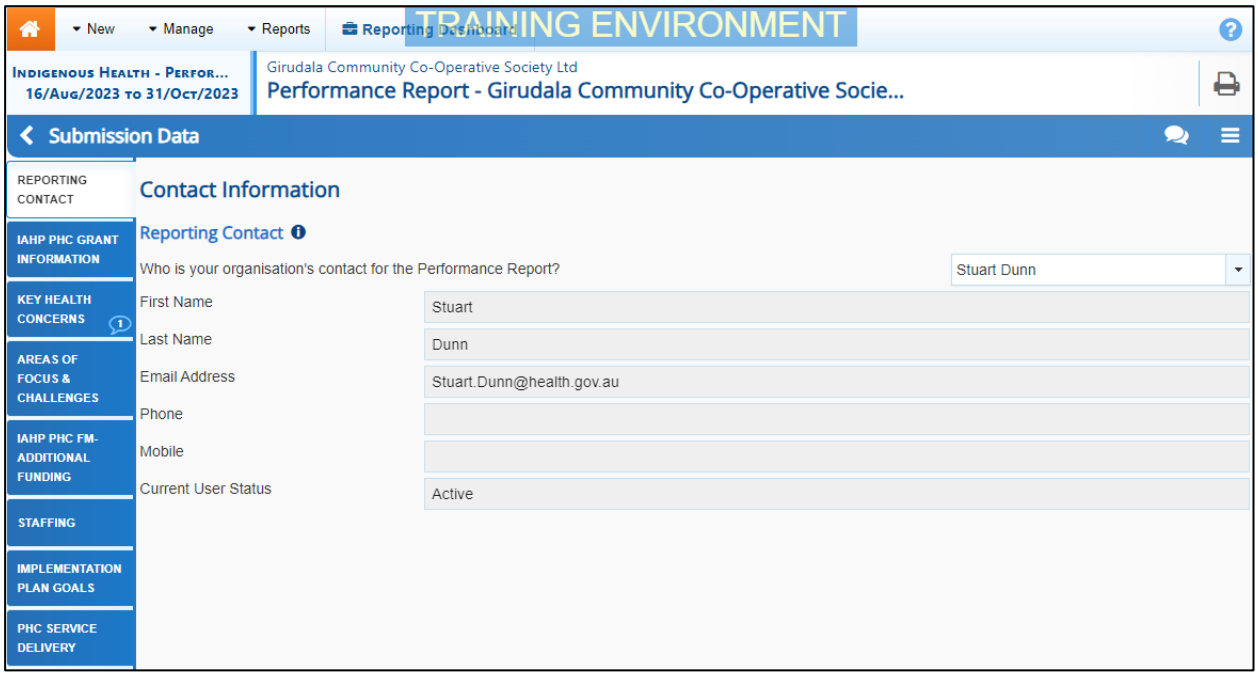
1. Ensure you have logged in to the Data Portal and the Data Portal home screen is displayed with the Reporting Dashboard open.

The Reporting Dashboard will display details for your Performance Report.



2. To conduct a final review of your Performance Report, hover your mouse pointer to the right of the Performance Report reporting round text in the Reporting Dashboard and select .

The IAHP PHC Performance Report form will display and the information in the form can be reviewed for accuracy.



3. Once the content of your Performance Report form has been reviewed, select Close at the bottom of the form.

The Data Portal home screen will again display with the Reporting Dashboard open.

4. To action the form, select Submission Ready for Final Review in the Reporting Dashboard and, in the Change Data Asset Status dialog box, in the **Action** field, select and select **Request Approval**.

If changes need to be made to any of the information in your Performance Report, select *Revision Required* to send it back to your *Submission Uploader* for amendment.

5. In the **Comment** field, enter any comments regarding the action being performed on your Performance Report.

Any user with access to view your Performance Report will be able to view any comments entered here.

6. To send your Performance Report on to your CEO or their representative for approval, select Request Approval.

your IAHP PHC Performance Report has been sent to your CEO or their representative for final approval.

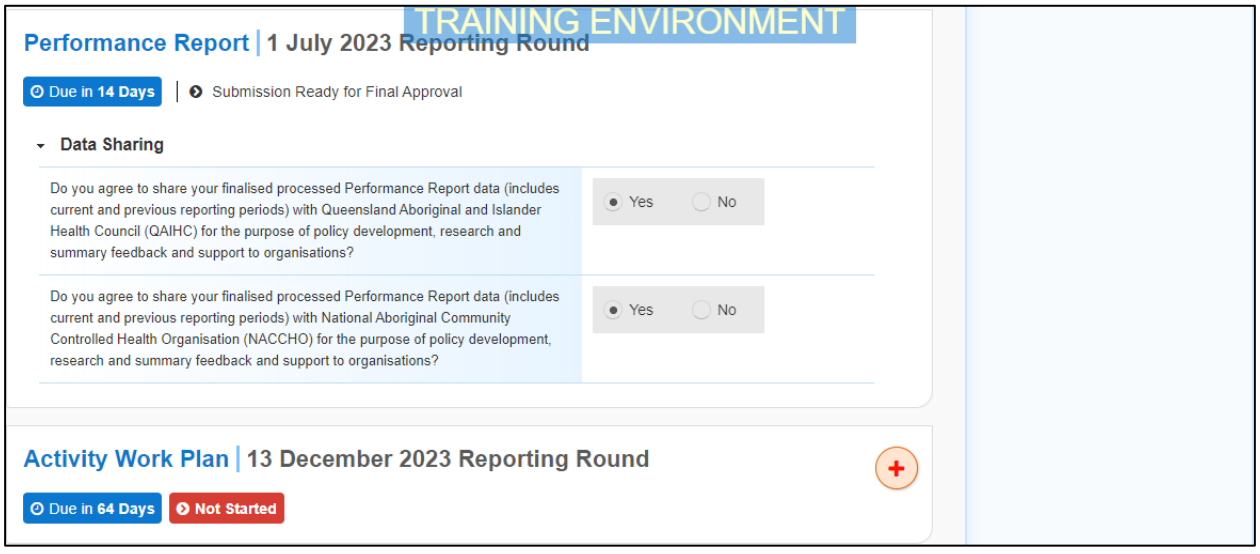
Step 5 – Approve your IAHP PHC Performance Report (Submission Approver)

When your Performance Report has the status of *Submission Ready for Final Approval*, it can be approved by your *Submission Approver* (usually your CEO or their representative) and progressed on to the status of *Processed*.

The following procedure is used to approve your IAHP PHC Performance Report submission as part of Interim Processing in the Data Portal.

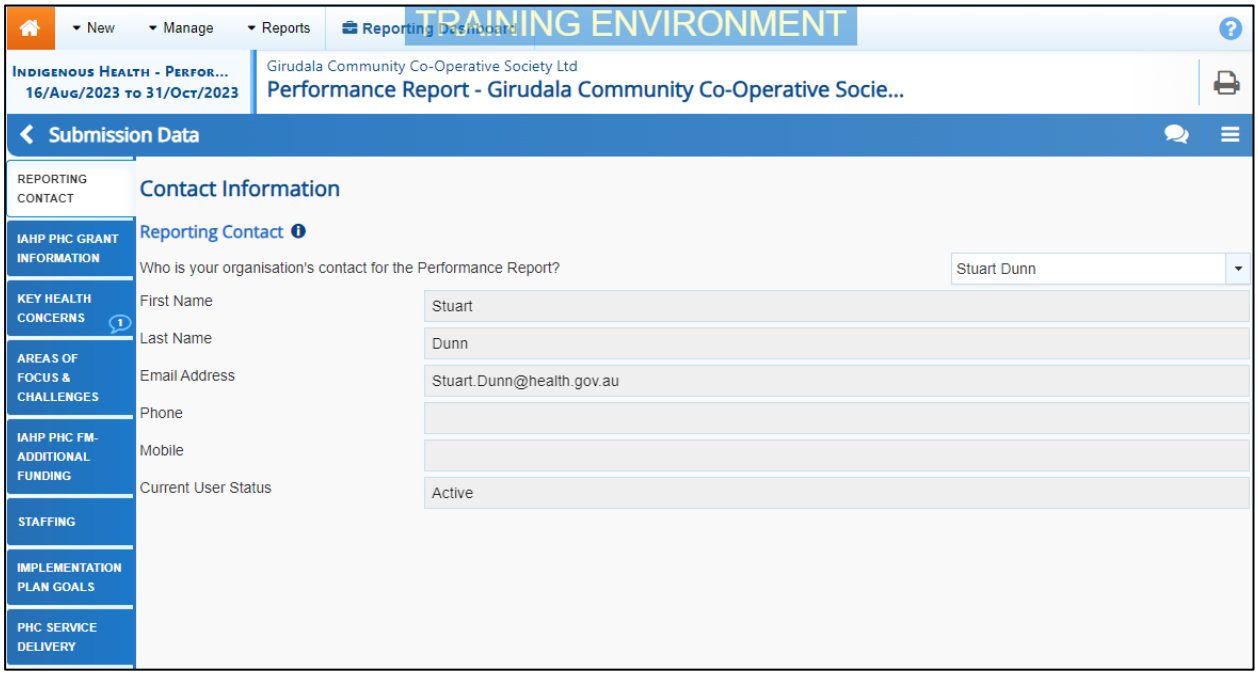
1. Ensure you have logged in to the Data Portal and the Data Portal home screen is displayed with the Reporting Dashboard open.

The Reporting Dashboard will display details for your Performance Report.



2. To approve your Performance Report, hover your mouse pointer to the right of the Performance Report reporting round text in the Reporting Dashboard and select .

The IAHP PHC Performance Report form will display and the information in the form can be reviewed for accuracy.



3. Once the content of the IAHP PHC Performance Report form has been reviewed, select Close at the bottom of the form.

4. To approve your Performance Report, select Submission Ready For Approval in the Reporting Dashboard and, in the Change Data Asset Status dialog box, in the **Action** field, select and select **Approve for Submission**.

If changes need to be made to any of the information in your Performance Report, select *Revision Required* to send it back to the *Submission Uploader* for amendment.

5. In the **Comment** field, enter any comments regarding the action being performed on your Performance Report.

Any user with access to view your Performance Report will be able to view any comments entered here.

6. To approve your Performance Report, select Approve for Submission.

Your IAHP PHC Performance Report has been progressed to the status of *Processed* and Interim Processing is now complete.

Work with Comments in your IAHP PHC Performance Report form

As part of the IAHP PHC Performance Report submission workflow process in the Data Portal, it is important for your health service and your DSS FAM to be able to engage in a “conversation” regarding the information that has been entered in the Performance Report.

There may be times, for example, when your health service needs to explain to your FAM why particular information has been included in the Performance Report, or not included as the case may be. The FAM may then need to respond if further explanation is needed from your health service.

There may also be times when the participating users from your health service need to have an internal, private “conversation” in the Data Portal regarding your data, separate to those conversations held with your DSS FAM in response to a data validation issue.

To ensure the different scenarios above can occur, the concept of “threaded comments” has been introduced in the Data Portal. This allows conversations to occur in the Data Portal both between your health service and your DSS FAM and internally within your health service. It also allows for these conversations to be marked as complete by the relevant parties once a conversation has come to its conclusion.

Respond to DSS FAM comments in your form

When your DSS FAM has added comments to your IAHP PHC Performance Report form asking you to make amendments, not only will you need to make the amendments that have been asked for, but you will need to respond to the DSS FAM comments explaining what you have done.

The following procedure is used to respond to a DSS FAM’s comments in your IAHP PHC Performance Report form.

1. Ensure your Performance Report form is displayed.
2. Open the first section of the form your DSS FAM has added a comment to. The section will be marked with a .
3. Navigate to the **Notifications Tray** containing the DSS FAM comment(s) you need to respond to.

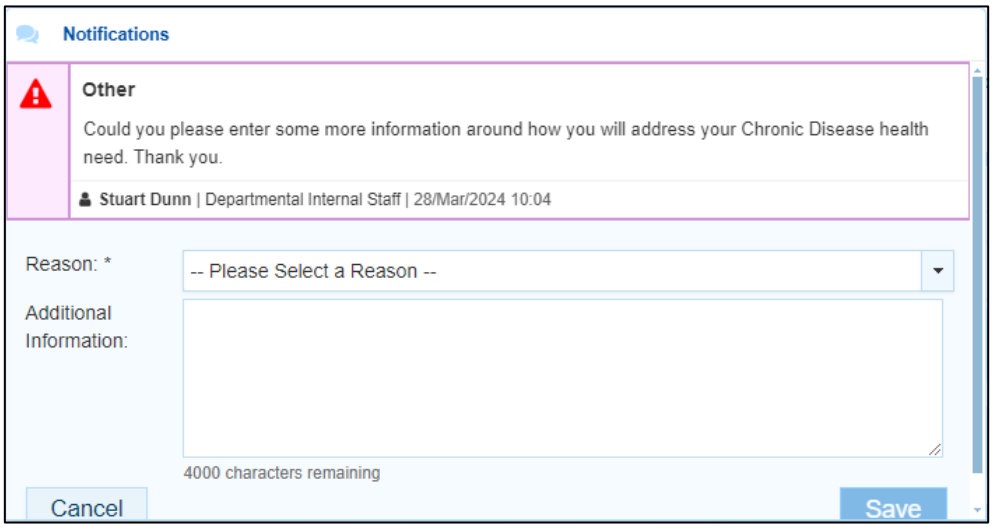
If the *Notifications Tray* doesn’t display by default, select in the top right-hand corner of the form.

4. If needed, select next to the comment to confirm the cell your FAM’s comment refers to.
5. Make the required amendments in the applicable cell, as instructed by your DSS FAM in their comment .

Once you have made the required amendments to the Performance Report, you need to respond to the DSS FAM comment, explaining what you have done.

6. To add your response, in the **Notifications Tray**, select next to the applicable DSS FAM comment.

The Notifications window will display.



7. In the Notifications window, select in the **Reason** field and select **Other (specify).**
8. In the **Additional Information** field, enter text explaining the amendments you have made. If needed, you can add instructions here on where the changes have been made if you think the text you have added/changed may be difficult for your FAM to find.
9. To save your response, select Save.

You can now submit your Performance Report through the Data Portal submission workflow and both the reviewers and approvers within your health service, and your DSS FAM, will be able to view your comment and respond to it if needed.

Add a new “internal comment” for use within your Health Service

As part of the submission of a Performance Report in the Data Portal, you may wish to add a comment to a particular section of your form that you only wish to share with other users within your health service. For example, you may wish as the *Submission Reviewer* to ask a question about some of the information in the form, or you may want to provide an explanation about why some of the information has been entered to your CEO, so they understand the context around the information before considering whether to approve your Performance Report.

In these instances, you would not want your FAM to see these comments, as they were purely for use within your health service.

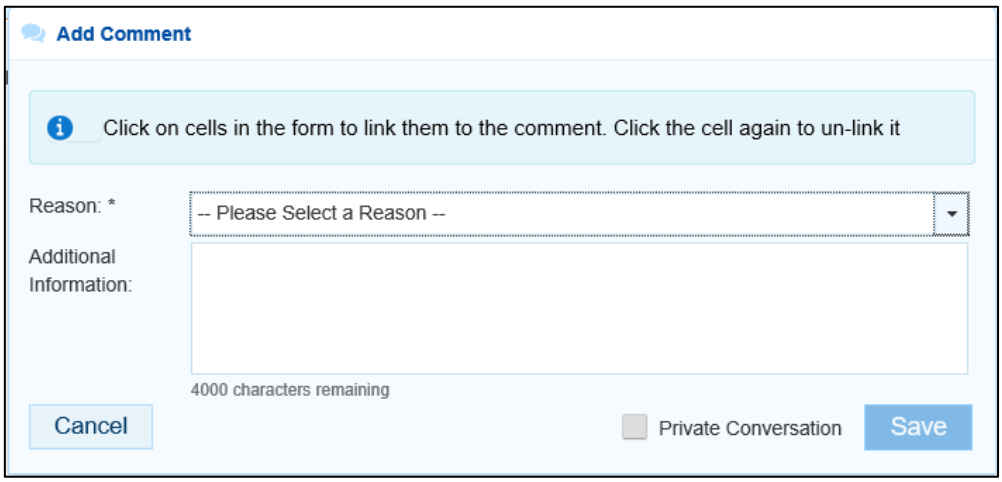
The following procedure is used to commence a private conversation in your IAHP PHC Performance Report form by adding an “internal comment”.

1. Ensure the Performance Report form is displayed.
2. Open the section you wish to add a new “internal comment” to.
3. Navigate to the **Notifications Tray**.

If the *Notifications Tray* doesn’t display by default, select in the top right-hand corner of the form.

4. To add your “internal comment”, select + New at the top of the **Notifications Tray**.

The Add Comment dialog box will display.



5. Select in the **Reason** field that displays and select **Other (specify)**.
6. Select the cell or cells your comment relates to. This provides additional context for your colleagues reading your comment. For more information, see *Link a Comment to Particular Cells*.
7. Enter an explanatory comment in the **Additional Information** field.
8. To mark the comment as private so the *Data Receiver* can't see it, select the **Private Conversation** check box.
9. To save the comment, select Save.

Your new comment can now be viewed by anyone within your health service with access to the Performance Report, but not external your DSS FAM.

Mark an Internal Comment as Complete

If a private conversation has been conducted in your Performance Report using the "internal comment" functionality, someone within your health service (*Submission Uploader*, *Reviewer* or *Approver*) can mark this conversation as complete prior to the Performance Report being sent to your DSS FAM for processing if they would like to remove the comment from the Performance Report.

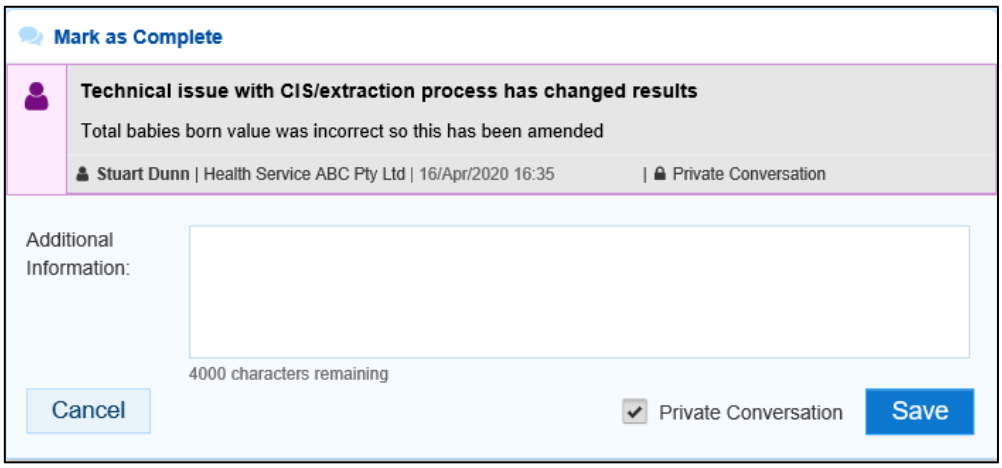
The following procedure is used to mark a private conversation as complete in the Data Portal.

1. Ensure your IAHP PHC Performance Report form is displayed.
2. Open the tab you wish to mark a comment/conversation as complete for.
3. Navigate to the **Notifications Tray**.

If the *Notifications Tray* doesn't display by default, select in the top right-hand corner of the form.

4. To mark a conversation as complete, select next to the applicable comment/conversation in the **Notifications Tray**.

The Mark as Complete dialog box will display.



5. In the **Additional Information** field, you can enter an explanation regarding why you are marking the conversation as complete, if you choose.

6. To save the comment, select Save.

The conversation will now disappear.

Link a Comment to Particular Cells

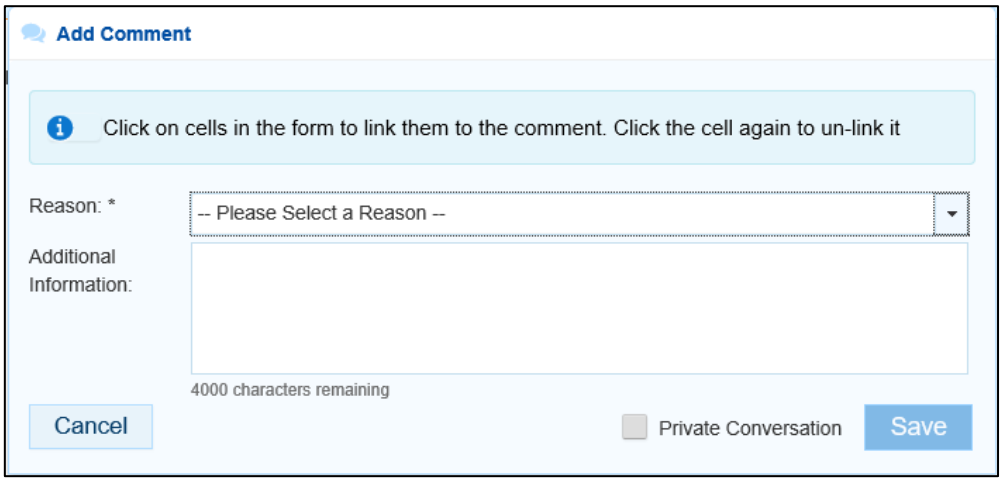
If there is a particular cell you would like to draw another user's attention to, you can add a comment to the applicable tab in your form and link a particular cell or cells to that comment. For example, you may wish to clarify with your DSS FAM what information is required in a particular cell.

1. Ensure your Performance Report form is displayed.
2. Open the tab you wish to add a new comment to with linked cells.
3. Navigate to the **Notifications Tray**.

If the *Notifications Tray* doesn't display by default, select in the top right-hand corner of the form.

4. To add your comment, select + New at the top of the **Notifications Tray**.

The Add Comment dialog box will display and the message "Click on cells above to link them to the comment. Click on the cell again to un-link it" will display.



5. Select the cell(s) to be linked to the comment you are adding.

The selected cell(s) will now be highlighted in red.

6. Select in the **Reason** field that displays and select **Other (specify)**.
7. Enter an explanatory comment in the **Additional Information** field.

To mark the conversation as private so your DSS FAM can't see it, if needed, select the **Private Conversation** check box.

8. To save the comment, select Save.

Once your Performance Report is submitted to your DSS FAM for processing, they will be able to see the cells you have linked to the comment by selecting .

View Completed Comments and Conversations

When a comment or conversation is marked as complete in the Performance Report form, it disappears. If required though, you can view those completed comments/conversations and undo the completion action if you wish to bring them back into view permanently.

The following procedure is used to view a completed comment/conversation in an IAHP PHC Performance Report form in the Data Portal.

1. Ensure your Performance Report form is open.
2. Open the tab you wish to view completed comments for.
3. Navigate to the **Notifications Tray**.

If the *Notifications Tray* doesn't display by default, select in the top right-hand corner of the form.

4. To view all "completed" comments, select in the **Notifications Tray** and select **Show Completed Comments**.

Any comments that have previously been marked as complete will now be visible, in the *Notifications Tray*, in green.

The comment/conversation can now be read as needed.

5. If the comment/conversation needs to be made permanently visible again, in the **Notifications Tray**, select .

The selected comment/conversation has now been returned to view in the *Notifications Tray*.

Only those comments you have previously been able to see will be returned when you select *Show completed comments* in the *Notifications Tray*. For example, if your DSS FAM has not previously been involved a particular conversation conducted by your health service, they will not be able to retrieve these "completed" comments.

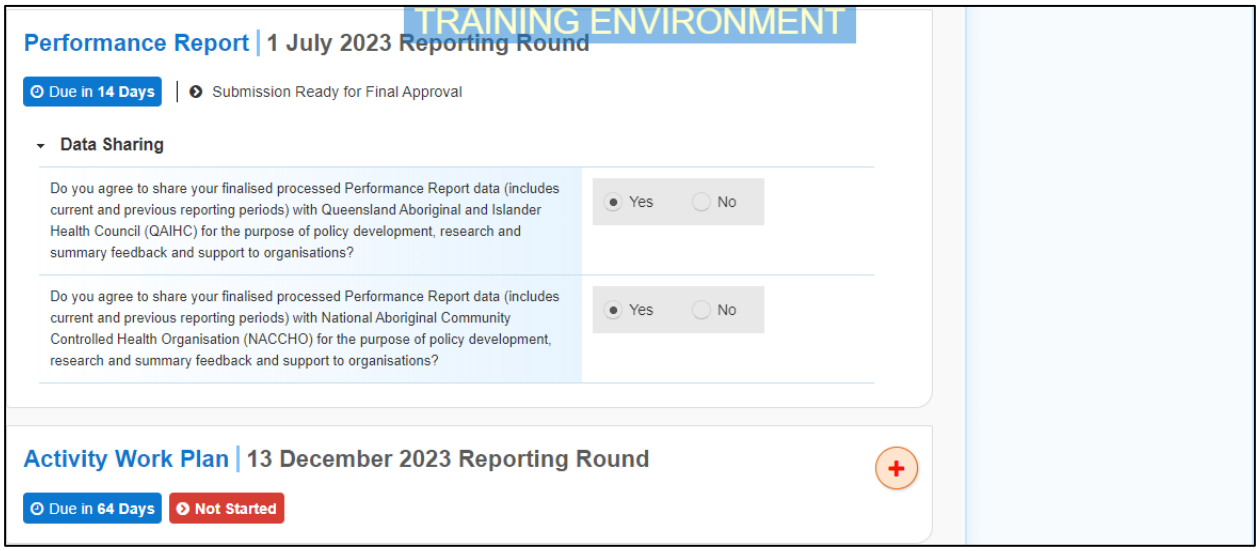
Print or PDF your IAHP PHC Performance Report form

There may be times when you need to print or PDF your Performance Report form from within the Data Portal. For example, your CEO may need to approve your Performance Report but does not have access to the Data Portal to be able to do so online. As an alternative, you may choose to print out the form or PDF it and email it, so your CEO can review it in hard copy.

The following procedure is used to print/PDF your Performance Report form from the Data Portal.

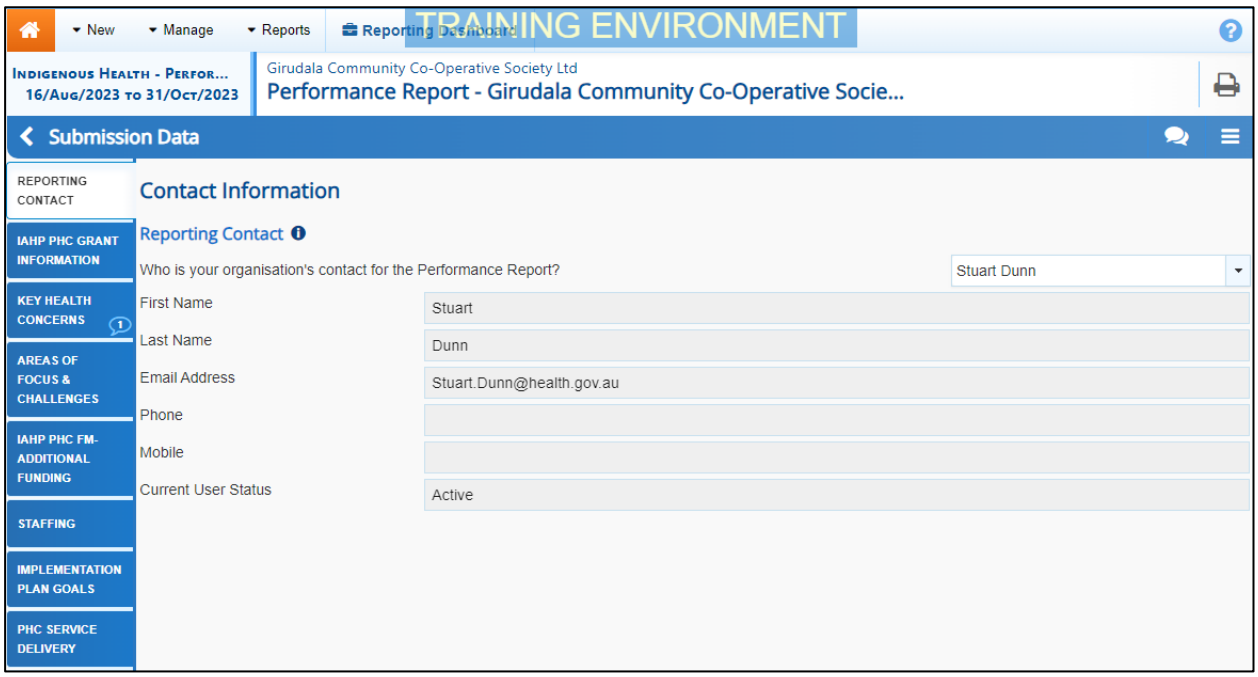
1. Ensure you have logged in to the Data Portal and the Data Portal home screen is displayed with the Reporting Dashboard open.

The Reporting Dashboard will display details for your IAHP PHC Performance Report.



2. To print/PDF your IAHP PHC Performance Report form, hover your mouse pointer to the right of the Performance Report reporting round text in the Reporting Dashboard and select .

The IAHP PHC Performance Report form will display.



3. To print the data for an individual tab, select the tab from the left-hand side of the form and then select .

4. To print the entire form at once or more easily print multiple sections, select in the top right-hand corner of the form and then select **Summary View**.

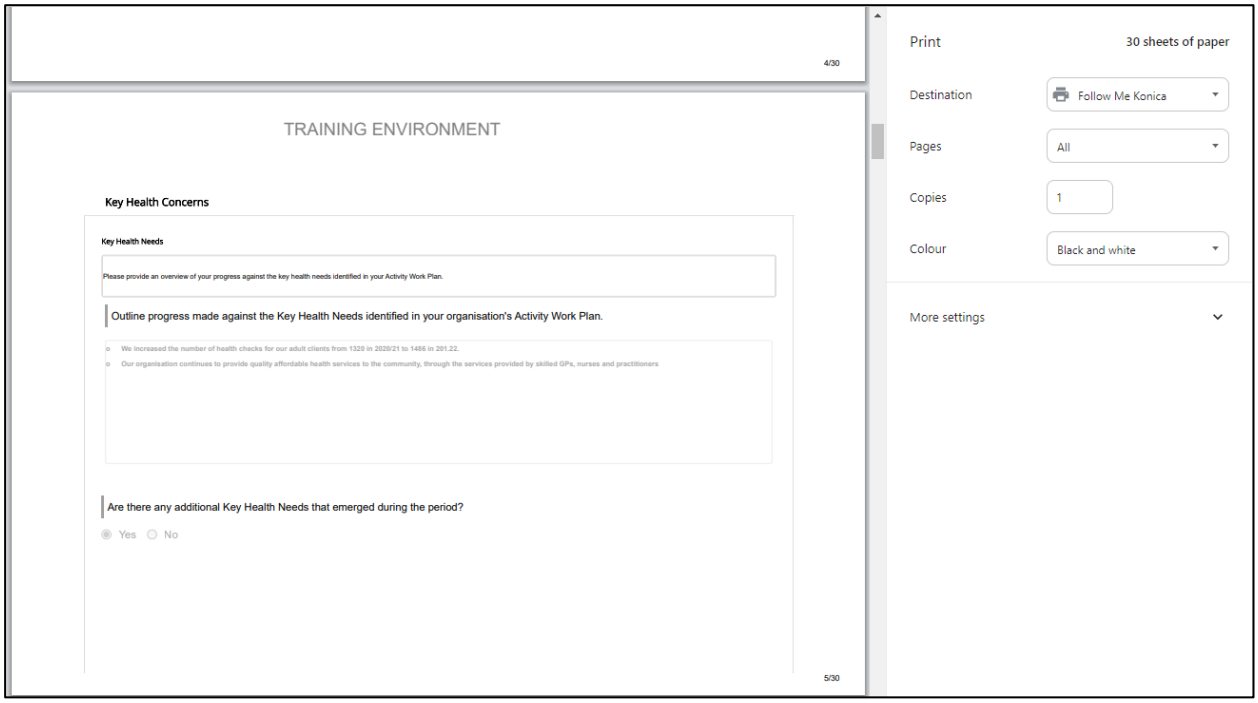
The *Summary View* contains all sections of the form with the first section of the form defaulting as open, in read-only mode. If there are any comments in the form, these will now display in the *Notifications Tray* on the right-hand side of the form.

5. To expand all the sections at once so the whole form can be printed or saved as a PDF, select at the top of the form and select **Expand all tabs**.

If needed, you can expand and collapse individual sections by selecting next to the applicable section.

6. Once all the required sections have been expanded, to print or PDF the entire form, select .

The Print dialog box will display, showing a preview of the form, with any comments now showing in the section of the form they relate to.



7. To continue, select the printer you wish to use.

If you wish to save the form rather than print it, so you can share it with colleagues or file it, select in the Print dialog box, select Save as PDF and then save the form in the desired location.

8. To print the form, select Print.

The selected elements of the form will now be printed at the selected printer.

Please note the form will be long when printed in its entirety. It may be worth printing individual sections where possible.