



To update and submit a *direct load* Health Care Provider (HCP) data asset in the Health Data Portal:

1. Open the Health Data Portal through [Health Data Portal](#).
2. Log in using the information provided in the *Registering for and Logging in to the Health Data Portal* QRG.

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

The HCP data asset that has been created as part of the Direct Load transfer from your Clinical Information System (CIS) will display here (*as highlighted above in red*).

The data asset's status will be *Draft Submission*.

3. To open the HCP form attached to the data asset, hover your mouse pointer to the right of the HCP Reporting Period text in the **Reporting Dashboard** and select

If you need to change the *Title* or *Description* of the data asset or switch it to a *Trial Submission*, you can do this in the Data Asset Details screen first to by selecting next to and then selecting *Open Data Asset*.

The HCP Form will display.

The HCP form contains the Health Care Provider names and numbers for your health service that have been transferred from your Clinical Information System (CIS).

An "All fields are required" data validation flag will display in the *Notifications Tray* on the right-hand side of the form, as information regarding whether or not your providers are salaried is not contained within your CIS and, therefore, not transferred to the HCP form in the Data Portal as part of the direct load process.

4. To complete the **Salaried** section of the form, select on the **Bulk update:** button (either at the top or bottom of the form) and select the applicable option from the second half of the list that displays. The options are **Mark empty Salaried as Yes, Mark empty Salaried as No, Mark all Salaried as Yes** and **Mark all Salaried as No**.

You can also complete the *Salaried* section of the form either by simply selecting *Yes* or *No* for each listed provider or by selecting the *Bulk Select* check box for the applicable provider and then selecting on the *Bulk update:* button and selecting either *Mark selected Salaried as Yes* or *Mark selected Salaried as No*.

5. To save your changes, select

The "All fields are required" data validation flag should now be removed from the *Notifications Tray*.






Other data validation flags may also display in the HCP form *Notifications Tray* for the following reasons:

- One of your provider numbers does not meet the required numbering format.
 - The *Last Name* field is empty for one of your providers.
6. If any other data validation flags do display in the *Notifications Tray*, read the message to determine what action needs to be taken.



If data values need to be amended:

- Update the incorrect data value(s) in the required cell(s) to address the data validation issue(s).



 If you are unsure which value(s) needs to be updated, hover your mouse pointer to the right of the applicable data validation flag title in the *Notifications Tray*, select  and the applicable cell(s) will be highlighted in red.


- To save the amendment and run data validation again, select  at the bottom of the form.



The data validation flag relating to the data value you have just amended should now have disappeared from the *Notifications Tray*.



 If you wish to add a comment for your colleagues explaining the changes you have made to the data values, select  at the top of the *Notifications Tray* and add the details.


If explanatory comments need to be added:

- In the **Notifications Tray**, hover your mouse pointer to the right of the applicable data validation flag title and select .
- Select  in the **Reason** field that displays and select the reason you are adding a comment from the drop-down list.


- Enter your comment in the **Additional Information** field.
- To save the comment, select .

 If an additional Health Care Provider needs to be added to the form, select  either at the top or bottom of the form and add the provider's details.

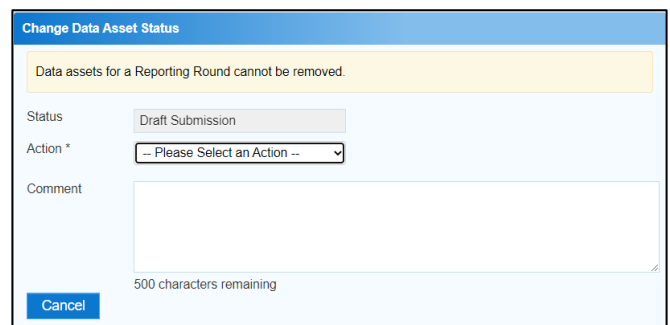
 If provider information needs to be removed from the form (perhaps providers from a different clinic have been included in the report) select the applicable *Bulk select* check boxes at the end of the rows and then select  on the **Bulk update:** button (either at the top or bottom of the form) and select *Delete all selected* from the list that displays.

- Once all validation issues in the HCP form have been addressed, to exit the form and return to the Data Portal Home screen, scroll to the bottom of the form, and select .


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

- To progress the data asset through the workflow, select  **Draft Submission** for the applicable data asset.

The Change Data Asset Status dialog box will display, informing you that your draft data asset cannot be removed.



The screenshot shows a dialog box titled "Change Data Asset Status". At the top, a yellow warning banner states "Data assets for a Reporting Round cannot be removed." Below this, there are three fields: "Status" with a dropdown menu showing "Draft Submission", "Action *" with a dropdown menu showing "-- Please Select an Action --", and "Comment" with a large text area. At the bottom left is a "Cancel" button. A small text at the bottom right of the text area says "500 characters remaining".


- In the **Action** field, select  and select the appropriate action.

The available actions are:

- **Request Review** – Select this action to send the data asset to someone within your health service for review prior to it being submitted for approval.




- **Request Approval** – Select this action to send the data asset directly to your CEO or their representative for approval.
- **Request Interim Processing** – If you are a *Submission Reviewer* as well as a *Submission Uploader*, you can select this action to send the data asset to the AIHW for review prior to it going to your CEO or their representative for approval. This process is known as *Interim Processing*.

 If you can approve data asset submissions yourself, you will see the *Approve for Submission* option in the list. This allows you to immediately approve the data asset and submit it directly to the Department of Health for processing.

10. One of the following options can now be selected when submitting the data asset, depending on the action you have selected in the **Action** field:
 - a. To send the data asset for internal review, select . See the *Review an IHDR Data Asset Submission* QRG for the next step in the process.
 - b. To submit the data asset directly for approval to your CEO or their representative, select . See the *Approve an IHDR Data Asset Submission* QRG for the next step in the process.


The *direct load* data asset has now been updated and sent to either the internal *Submission Reviewer* for review or your CEO or their representative for approval.


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

 For a more detailed description of how to submit an HCP data asset in the Data Portal, see *Submit an HCP Data Asset (Direct Load)* in the *IHDR in the Health Data Portal for Health Services* user guide on the *User Support* section of the Data Portal.

Refresh Your Direct Load Data Asset

If there have been updates to your data for the current reporting round in your CIS (or perhaps an error in the CIS has been fixed) then you can transfer the data across to the Health Data Portal again and the values in the existing data asset in the Data Portal for the matching/current reporting round will be updated to reflect the new values. The updated data asset can then be progressed through the data asset submission workflow as normal.

 For this to be possible, the data asset in the Data Portal needs to be “with” the *Submission Uploader*. That is, it needs to be at one of the following statuses: *Draft Submission*, *Submission Revision Required* or *Submission Returned to Uploader*.

 If you need to complete the Direct Load process again to update your data in the Data Portal, **DO NOT** try to remove the data asset, just follow the process above.