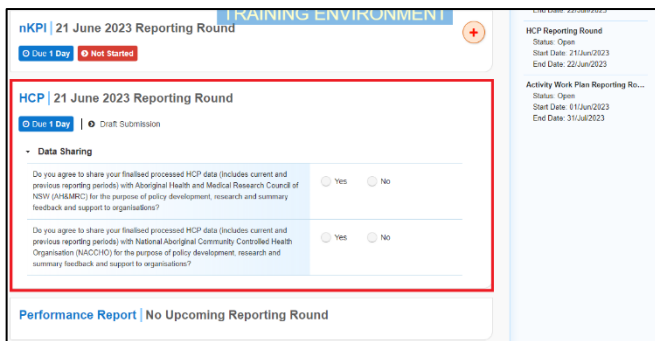





To update and submit a *direct load* Health Care Provider (HCP) submission in the Health Data Portal:

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

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






The HCP submission 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*).

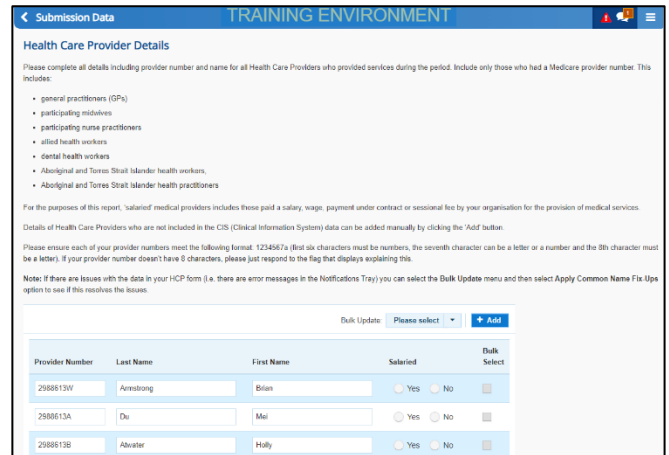
 The submission's status will be *Draft Submission*.

3. To open the HCP form attached to the submission, hover your mouse pointer to the right of the HCP reporting round text in the **Reporting Dashboard** and select



 If you need to change the *Title* or *Description* of the 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.

5. To save your changes, select  at the bottom of the form.

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 or more of your provider numbers do not meet the required numbering format.
 - The *Last Name* cell is empty for one or more of your providers.
 - One of the name cells for one or more of your providers contains a salutation (e.g. Dr, Prof).
6. If any other data validation flags do display in the *Notifications Tray*, read the message to determine what action needs to be taken.
7. You can then either make the required change in the applicable cell(s) or, for any validation flags relating to provider names, select and then select **Apply Common Name Fix Ups** from the list that displays.
8. Select in the window that displays.
9. Select at the bottom of the form.

Any validation flags associated with the provider names will now be resolved.


If data values need to be amended:

- a. 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.


- b. 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:

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

10. 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.

11. Before progressing the submission through the submission workflow, answer either **Yes** or **No** to the data sharing consent questions that display under **Data Sharing**.

12. To save the changes, select .



13. To progress the HCP submission through the workflow, select **Draft Submission**.

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

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

The available actions are:

- **Request Review** – Select this action to send the submission to someone within your health service for review prior to it being submitted for approval.
- **Request Approval** – Select this action to send the submission 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 submission 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 HCP submissions yourself, you will see the *Approve for Submission* option in the list. This allows you to immediately approve the submission and submit it directly to the Department of Health and Aged Care for processing.

15. One of the following options can now be selected when submitting the submission, depending on the action you have selected in the **Action** field:

- To send the submission for internal review, select . See the *Review an HCP Submission* QRG for the next step in the process.
- To submit the submission directly for approval to your CEO or their representative, select

. See the *Approve an HCP Submission* QRG for the next step in the process.

The *direct load* submission 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 report in the Data Portal, see *Submit a HCP Report (Direct Load)* in the *HCP Reporting in the Health Data Portal* user guide on the *User Support* section of the Data Portal.

Refresh Your Direct Load Submission

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 submission in the Data Portal for the matching/current reporting round will be updated to reflect the new values. The updated submission can then be progressed through the submission workflow as normal.

For this to be possible, the submission 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 submission, just follow the process above.