




Step 1 – Prepare the Performance Report for Review

Once a health service has completed their *Performance Report* in the Data Portal and submitted it to you for review, you will receive an email notifying you of this.

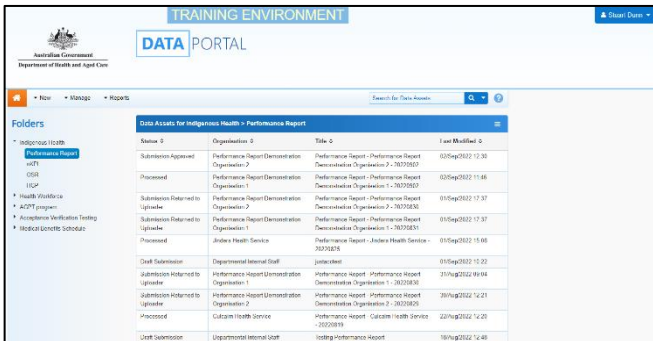
When you are ready to review the *Performance Report* in the Data Portal, you will need to set its status to *Ready for Processing* so you can review its content and add any comments as/if needed.

 All DSS FAMs will receive an email notification when a *Performance Report* is submitted by a health service. If you do not wish to receive these emails, you may need to create an email rule to facilitate this.

To review a *Performance Report* in the Data Portal:

1. Open the 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.



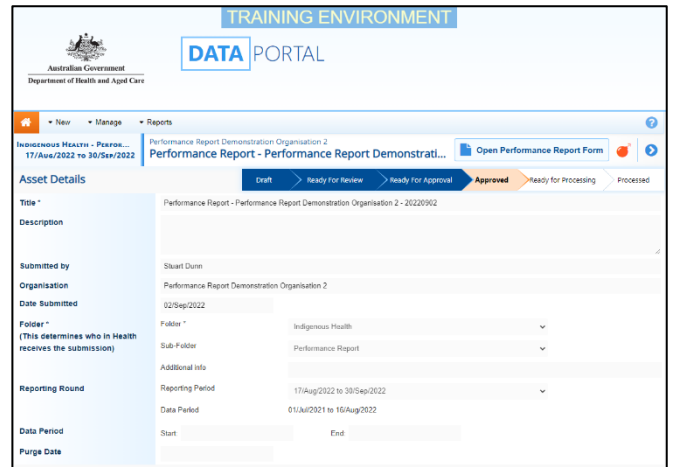
3. From the Data Portal home screen, search for the *Performance Report* you need to review.

 The Performance Report will have the status of *Submission Approved*.


For more information on how to search for a data asset, see the *Get Started in the Health Data Portal QRG*.

4. In the **Data Assets for Indigenous Health** table, select the *Performance Report* to be reviewed.


The Data Asset Details screen will display.




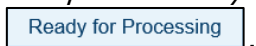
You now need to move the *Performance Report* to *Ready for Processing* so you can review its content and progress it as needed.

5. To do this, select either  or the workflow progress bar at the top of the screen.

The Change Data Asset Status dialog box will display.

6. In the **Action** field, select  and select *Ready for Processing*.

 If the health service has asked you to return the *Performance Report* as it has been submitted in error, select *Return to Uploader*.

7. To set the *Performance Report* to *Ready for Processing*, select .

The *Performance Report's* status will change to *Ready for Processing* and it is now ready to be reviewed and actioned as needed.

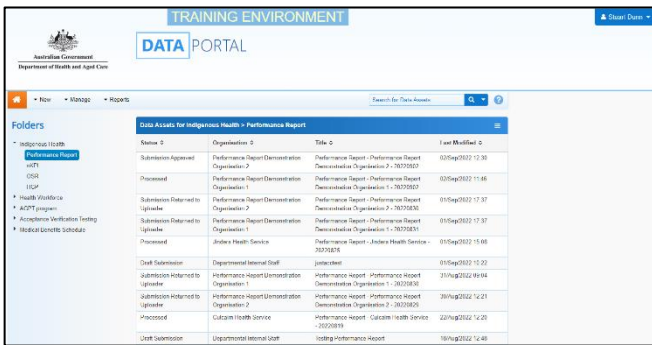


Step 2 – Review and action the Performance Report

Once the *Performance Report* has been set to *Ready for Processing*, you can start reviewing its content to determine whether it can be processed as complete or requires amendment.

To review a *Performance Report* in the Data Portal:

1. Ensure the Data Portal home screen is displayed.

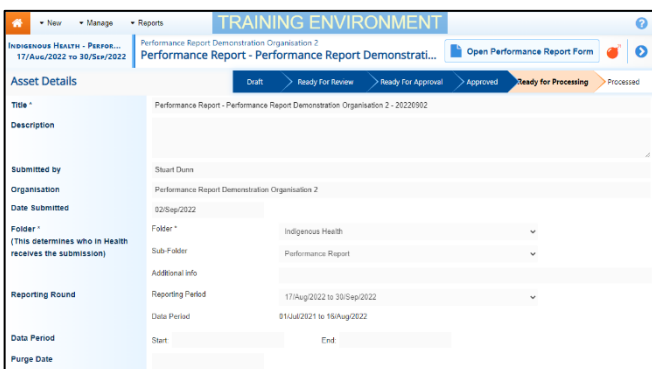


2. From the Data Portal home screen, search for the **Performance Report** to be reviewed. The report's status will be *Ready for Processing*.

For more information on how to search for a data asset, see the *Get Started in the Health Data Portal* QRG.

3. Select the *Performance Report* to be reviewed.

The Data Asset Details screen will display.



Before opening the *Performance Report*, you should scroll down the screen to see if the service has uploaded any supporting documentation to the *Performance Report*, using the *Files* section.



The XML file that displays here is the "backend" of the form and can be ignored. If there are any other documents attached here though (PDFs, Word documents etc) then these are for you and need to be extracted from the Data Portal so they can be reviewed as part of the service's submission.

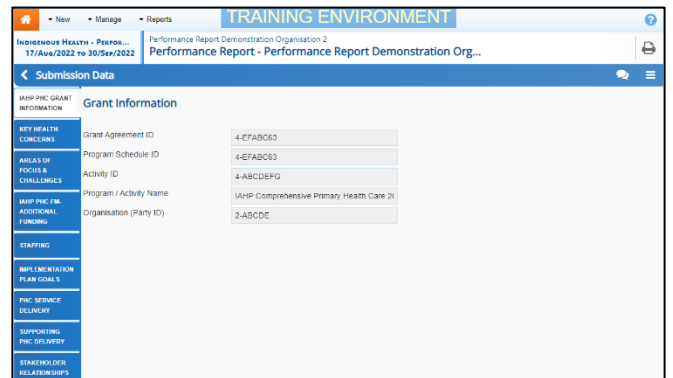
4. To extract a document from the Data Portal, simply select the applicable **File Name** link. The document can now be opened and saved as needed, from the download bar at the bottom of the screen.

5. To review the contents of the service's *Performance Report*, select



at the top of the screen.

The health service's completed *Performance Report* form will display, broken into tabs on the left-hand side of the screen.



You can now work through each of the sections of the form, by selecting the tab you wish to open, assessing the content as you go.

6. If you would like the health service to enter more information in a particular section, or you have questions about the content they have entered, you can add a comment by selecting

7. In the **Notifications Tray** that displays, select



8. In the Add Comment window, select in the **Reason** field and select **Other**.


9. In the **Additional Information**, enter your message for the health service,





specifying what it is you need them to do in this section of the form.


10. To save your comment, select .

 If you wish to delete your comment or make changes, select  and select either *Edit Comment* or *Delete Comment*.


If one of the tabs on the form has a  on it, it means the health service has either added a comment to the section or responded to a data validation flag that has displayed because a cell was left blank in the form.

11. In the **Notifications Tray**, review the comment and:

- a. To respond to the comment, providing instructions to the health service regarding what changes they need to make, select , select **Other** in the **Reason** field and then add your instructions for the health service in the **Additional Information** field and **Save** the comment.
- b. To accept the comment and mark it as "complete", hover your mouse pointer to the right of the comment title, select , select **Completed, all data accepted** in the **Reason** field and **Save** the comment.


12. To exit the form and return to the Data Asset Details screen, select  at the bottom of the form.

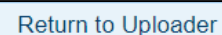
The Data Asset Details screen will display.

13. Once the **Performance Report** has been reviewed as needed, select either  or the workflow progress bar at the top of the screen.

The Change Data Asset Status dialog box will display.


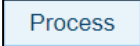
If you have added comments or responses to the *Performance Report* and need to return it to the health service:

- a. In the **Action** field, select  and select *Return to Uploader*.
- b. In the **Comment** field, enter any comments regarding the action being performed on the *Performance Report*.
- c. To return the Performance Report to the health service, select

.

The *Performance Report's* status will change to *Submission Returned to Uploader* and it has now been returned to the health service for their amendment.

If you are happy with the *Performance Report* and are ready to process it as complete:

- d. In the **Action** field, select  and select *Process*.
- e. In the **Comment** field, enter any comments regarding the action being performed on the *Performance Report*.
- f. To process the *Performance Report* as complete, select .

The *Performance Report's* status will change to *Processed* and the processing of the *Performance Report* is now complete.