# Submit an OSR Data Asset (Direct Load) Screencast – Accessible Version

Introduction

Welcome to the *Submit an OSR Data Asset (Direct Load)* screencast.

This screencast will show you how to submit an Online Services Report (OSR) direct load data asset as part of an Indigenous health data reporting round. This process is only applicable if your health service’s PIRS/CIS can transfer your OSR data to the Health Data Portal (the Data Portal).

By the end of this screencast, you should know how to locate your OSR direct load data asset, complete the attached form, and then submit the data asset on to a *Submission Reviewer* within your health service.

Direct Load Overview

At the commencement of a reporting round, health services required to report on their OSR data will be notified via email that the reporting round has commenced.

Those health services whose PIRS/CIS will allow them to, will produce and review the required report in the applicable system, and then transfer this report directly to the Heath Data Portal as an XML file (known as a data file or form). This is known as direct load and automatically creates a draft OSR data asset submission in the Data Portal.

If there are any issues with the data at the time of the direct load process, the health service will receive an email informing them of this. The health service’s *Submission Uploader* can then log in to the Data Portal and address any issues with the data before submitting the data asset for review and/or approval as needed.

Submit an OSR Data Asset (Direct Load)

1. On the Data Portal home screen, the **Reporting Dashboard** will display each of the data assets you are required to submit for the current reporting round. The OSR data asset’s status will be at *Draft Submission*.

In your *Reporting Dashboard*, you can see the status of your OSR data asset, if there are any unresolved issues that need to be addressed and how much time you have left to submit the data asset. The data sharing consent questions that need to be answered will also display here.From here you can open the form for OSR your data asset to review and update your data as required as part of the data asset submission workflow process.

1. To open the form for your OSR data asset from the **Reporting Dashboard**, select the **Open Submission Form** button.

**Note:** If you need to update the title or description of your data asset or change the data asset to be a *Trial Submission*, you can open the Data Asset Details screen by selecting the button with the three dots and then *Open Data Asset*.

The OSR form displays with the *Organisation Profile* information displaying by default. Most of the tabs on the form will contain a data validation flag (red triangle) as there will be blank cells on each tab that you will need to complete as you go through the form.**Note:** As you work through the tabs on the OSR form, you can enter an explanatory comment for your colleagues and/or the AIHW by selecting the *New* button in the *Notifications Tray* and entering the applicable comment.

You can now review the data in the OSR form, noting that any issues with the data that were identified as part of the automated data validation process will display as a data validation flag in the *Notifications Tray* on the right-hand side of the form.

As part of the direct load process, your *Organisation Profile*, *Episodes of Care*, *Client Contacts* and *Client Numbers* data should have transferred to your data asset in the Data Portal and will just need checking. You will, however, need to enter your *Governance*, *Clinic* and *Workforce Profile* information as this isn’t stored in your CIS.

The first tab that displays when you open the OSR form is the *Organisation Profile* tab. The information entered here will allow greater accuracy in reporting and analysis. The tab contains seven different sections that need to be completed.

* The *Physical Location* section displays your organisation’s address. If this information is incorrect, select the **Update Address** button and email the correct details to the Department of Health and Aged Care.
* The *Accreditation* section is used to identify the number of organisations that have achieved the appropriate accreditations. Enter your organisation’s accreditation information as applicable.
* The *Reporting* section is used to nominate your organisation’s contact for OSR reporting. This information may be used by the Department of Health and Aged Care and/or the AIHW if they need to contact your health service.
* The *Governance* section is where you can update your recorded governance model if it is incorrect. To do this, select the **Update Governance Model** button to send an email to the Department of Health and Aged Care with the correct governance model for your organisation.
* The *Smoke Free Workplace* section allows you to provide information regarding your organisation’s smoke free workplace status.
* The *Incorporation/Registration Status* section allows you to specify whether your health service is incorporated and, if so, who with. You are also asked to specify whether your service is not-for-profit and, if so, how many fee-paying members you have.

1. Enter the required information into each of the sections and select **Save** at the bottom of the form.
2. Select the **Governance** tab.

* The *Governance Model* section displays your organisation’s governance model. If this information is incorrect, select the **Update Governance Model** button and email the correct details to the Department of Health and Aged Care.
* The *Governing Committee or Board* section allows you to specify whether your health service has a board and, if so, who these Board members are, how many Board members you have, how many of these Board members are Aboriginal or Torres Strait Islander and if you have any independent board members.

**Note:** If your service doesn’t have a Governing Committee/Board, then simply select **No** to the question that displays. If you do have a Board but don’t know any details about the Board and its members, you can specify as such by answering **No** to the question that displays after answering **Yes** to the initial one.

1. Select the **Clinic Information** tab.

The *Clinic Information* section of the OSR form will display the service delivery sites currently on record for you in the Health Data Portal.

1. If any of your service delivery clinic are missing, or there is incorrect information displayed for any of them, select the **Update Clinic sites** button and enter the correct information into the email that displays.
2. Select **Send** to send the email to the Health Data Portal team so they can update the details in the Data Portal.
3. For the clinics that display here, answer either **Yes** or **No** to the “Do you offer 24-hour emergency care at this clinic?” question.

The **What days of the week are services available at this clinic?** Cells will now populate based on your answer to the previous question.

1. Detail the catchment areas serviced by each of your clinics in the applicable **Catchment Areas** cells.
2. Select the applicable check box for each of the **Functions and Services** your clinics provide.

In addition to the information about your days of operation etc, you will also be asked to enter your *Client Numbers* by clinic.

Your total client numbers for the entire health service will display first in the blue shaded box, *Total – whole organisation*, and the numbers contained within are pulled directly from the *Client Numbers* tab further down the OSR form.

Below this section, you will then see a similar section for each clinic your service has. You now need to enter your client numbers for each clinic and ensure they add up to the total in the blue shaded section.

**Note:** If your service only has one clinic, the *Client Numbers* section will not display.

1. Once you have completed the clinic information, select the **Save** button at the bottom of the form.
2. Select the **Episodes of care** tab.

The *Episodes of care* tab will display your service’s episodes of care data, which has been transferred from your CIS. An episode of care is a contact between a client and your service. All contacts with a client on one day are considered one episode of care.

1. Check and update your episodes of care values as needed and ensure you select an option regarding whether your figures are estimates.

**Note:** Only whole numbers are accepted in the cells on the OSR form. Entering decimals will lead to a data validation flag appearing.

1. Once you have completed the **Episodes of Care** tab, select the **Save** button and select the **Client Contacts** tab.

The *Client Contacts* section of the OSR form will display your service’s client contacts data, which has been transferred from your CIS. This is the number of contacts clients have had with your health service’s health workers during the previous twelve months.

1. Check and update your client contact data for your different worker types, including H*ealth Workers*, *Transport Workers*, *Medical specialists*, *Social and Emotional Well Being staff* and *Allied health professionals*.
2. Once you have updated the values on the **Client Contacts** tab, select the **Save** button and then select the **Client Numbers** tab.

The *Client Numbers* tab will display how many individual clients (by age group) received healthcare at your health service during the previous twelve months. This information will be transferred from your CIS.

1. Check and update your client numbers as needed and ensure you select an option regarding whether your figures are estimates.
2. Once you have updated the values on the **Client Numbers** tab, select the **Save** button and then select the **Paid FTE Positions** tab.

The *Paid FTE Positions* section of the OSR form is used to record the number of paid Full Time Equivalent (FTE) positions for your health service. This section of the form will be blank as this information is not stored in your CIS.

**Note:** If you have downloaded your Workforce Profile spreadsheet from a previous OSR data asset and entered in the FTE values for this collection period, you can upload the values from the spreadsheet using the *Options Menu*and select *Upload Workforce Profile.* The values from the spreadsheet will now be populated into the *Paid FTE Positions* and *Unpaid FTE Positions* tabs.

1. If you need assistance calculating the FTE for a position, select the **FTE Calculator** (pencil and paper) button in the corner of the applicable cell.
2. In the FTE Calculator, enter the number of hours per day the selected position works and then select the **Apply** button.

**Note:** If needed, you can change *Hours* to *Days*, *Weeks* etc using the down arrow in the second and third fields as needed.

The FTE for the position will now display in green in the last field in the FTE Calculator.

1. To apply the FTE value to the cell, select the **Apply** button.

The calculated FTE for the position will now display in the applicable cell in the form.

1. To continue, close the FTE Calculator using the **Close (x)** button.
2. Continue entering the values for your health service’s Paid FTE positions.
3. For positions you don’t have any FTE values for, select the **Options Menu** button in the top-right hand corner of the form and select **Populate empty cells with zeros**.
4. If you have FTE values that need to be entered for paid positions that aren’t listed in the **Paid FTE Positions** section of the form, select the **Add Row** button to add the FTE values for these positions.
5. In the window that displays, select the paid position you wish to add FTE values for.
6. To continue, select the applicable position.
7. Now enter the FTE values for the selected position in the applicable cell(s).

**Note:** Ensure you enter a zero into the other cell in the window if there are no FTE values for that cell.

1. Once you have entered the required values, select the **Save** button to close the window.

The selected position will now display, along with the corresponding FTE value, at the bottom of the *Health professionals / workers* section of the tab.

1. Once you have finished entering your **Paid FTE Positions**values, select the **Unpaid FTE Positions** tab.

The *Unpaid FTE Positions* section of the OSR form is used to record the number of unpaid Full Time Equivalent (FTE) positions for your health service. This section of the form will be blank as this information is not stored in your CIS. If you need assistance calculating the FTE for an unpaid position, select the *FTE Calculator* button in the corner of the applicable cell and use it as discussed earlier.

1. Once you have finished entering your **Unpaid FTE Positions**values, select the **Vacant Positions** tab.
2. In the **Vacant Positions**section of the OSR form, specify whether your health service has any vacant positions.

**If the answer is no:**

* 1. Select **No**.

**If the answer is yes:**

1. Select **Yes**, and then select the **Add** **Row** button in the **Vacant Staff Positions** section that displays.
2. In the list that displays, select the type of position your service has a vacancy for.
3. Enter the details of the vacant position, including the position title, the number of FTE (up to 1) and the number of weeks the position has been vacant for.
4. Select the **Save** button.
5. Repeat the process for each vacant position as required.

While you would normally close the OSR form at this stage, you have noticed that a data validation flag has appeared on the *Client Contacts* tab after the completion of the *Workforce Profile* tabs. This flag now needs to be addressed.

1. To move back to the **Client Contacts** section of the form, select the **Client Contacts** tab.
2. On the **Client Contacts** tab, a data validation flag appears in the **Notifications Tray** explaining the issue with your client contacts data.

Once you have read the data validation flag, you have two options:

* Amend the values in question to address the issue and remove the flag
* Leave the values and respond to the flag explaining to the AIHW why the values are correct.

The values are correct, so we are going to respond to this data validation flag explaining this.

**Note:** If you need more information regarding the cell(s) containing the issues, select the *Eye* button.

1. To enter an explanation for your values, select the **Respond** button in the **Notifications Tray**.
2. In the **Reason** field, select the applicable reason.
3. In the **Additional Information** field, enter any additional explanation as required.
4. To save the response, select the **Save** button.

Your response has now been added to the data validation flag in the *Notifications Tray* and the data validation flag has been removed from the tab and replaced by a speech bubble.

1. Select the **Close** button at the bottom of the form to close the OSR form.
2. Before submitting the data asset through the submission workflow, you will need to answer either **Yes** or **No** to the data sharing consent questions listed in the **Data Sharing** section of the **Reporting Dashboard**.
3. From the Data Portal home screen, to submit the data asset for review, select the **Draft Submission** link to open the Change Data Asset Status dialog box and allow you to select the required action.
4. Select down arrow in the **Action** field and select **Request Review**.

Selecting *Request Review* will send the data asset to someone within your health service/clinic for review, prior to it being submitted for approval.

**Note:** If you wish to send the data asset directly for approval, select *Request Approval*.

1. You can choose to write a comment in the **Comment** field if needed.
2. To send the data asset on for review, select the **Request Review** button.

The data asset has now been updated and sent to the *Submission Reviewer* for review.

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 the data asset has been submitted to them for action.