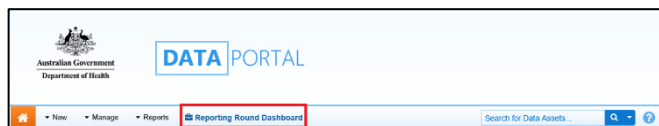




To update and submit a *direct load* OSR data asset in the Health Data Portal:

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

The Data Portal Home screen will display.



3. From the Data Portal Home screen, select **Reporting Round Dashboard** to open the **Reporting Round Dashboard** and locate your draft OSR data asset that has been automatically created through the *direct load* process.



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

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



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

The OSR Form will display.

Each section of the OSR form is displayed on a separate tab on the left-hand side of the form. Most of the tabs will contain a , as each of these sections have cells that still need to be completed. For each of the sections containing a , the *Notifications Tray* will display the

accompanying data validation flag in the top right-hand corner of the form (*not shown in screenshot*).

5. Update/complete the first section of the OSR form (*Organisation Profile*) as required.

The floating *Notifications Tray* will display on the right-hand side of the form and any data validation flags for the section will display here. To "dock" the tray at the bottom of the section underneath the cells, select



If the *Notifications Tray* doesn't display, select or at the top of the form to open the *Notifications Tray* so you can address the validation issues/read the comments that display.

6. Read the data validation flags displayed in the Notifications Tray to determine whether any data values in the section are incorrect and need to be amended, or if the data values referred to are correct in your view but may require further explanation.

If data values need to be amended:

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





If you are unsure which value(s) needs to be amended, hover your mouse pointer to the right of the applicable 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 **Save** at the bottom of the form.

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




- c. If the data validation flag hasn't disappeared, repeat the process of making amendments to the data and selecting **Save** until this occurs.



 If you wish to add a comment 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 are to be added to the data:

- In the *Notifications Tray*, hover your mouse pointer to the right of the validation flag title and select

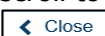



 If you wish to add a comment to the data that is not in direct response to the validation flag that appears, simply select . Also, select  if you wish to add a comment and highlight particular cells to add more detail to the comment for the recipient.

- 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 .
- Repeat this process for any other value(s) in the section that need to be explained.

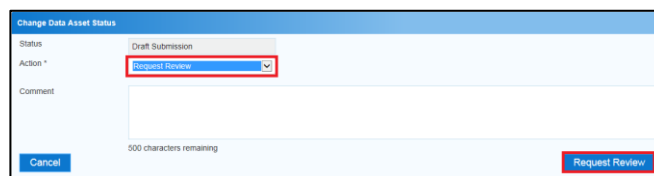
 The  on the tab will change to a  if all data validation flags for the section have been responded to. This shows that you have responded as required to the data validation flags for the section and can submit the data asset to the AIHW if there are no flags to be actioned on any other sections. The comment(s) has been added and can be viewed by anyone accessing the data asset in the Data Portal.

- Repeat the process for all sections of the OSR form as required.


- Once all sections of the OSR form have been completed, to exit the form and be taken to the Data Asset Details screen, scroll to the bottom of the form and select .

- To progress the data asset to the next stage of the submission workflow, select either  or the workflow progress bar at the top of the screen.

The Change Data Asset Status dialog box will display.




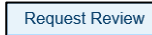
The dialog box titled 'Change Data Asset Status' contains a 'Status' field with 'Draft Submission' selected. The 'Action' field has a dropdown menu with 'Request Review' selected and highlighted with a red box. Below the action field is a large text area for 'Comment'. At the bottom, there are 'Cancel' and 'Request Review' buttons. A status bar at the bottom indicates '500 characters remaining'.

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

The available actions are:

- Remove Data Asset** - Select this action to remove the data asset from the Data Portal (it may have been created in error).
- 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.

 If you have the ability to 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 AIHW for processing.

- In the **Comment** field, enter any comments regarding the action being performed on the data asset.
- 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:
 - 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.
 - To submit the data asset directly for approval to your CEO or their



representative, select [Request Approval](#)

. See the *Approve an IHDR Data Asset Submission* QRG for the next step in the process.

- c. To remove the data asset from the Data Portal (it may have been created in error) select

[Remove Data Asset](#)

The *direct load* OSR 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 (*Reviewer* or *Approver*) notifying them the data asset has been submitted to them for action.



For a more detailed description of how to submit an OSR direct load data asset in the Data Portal, see *Submit an IHDR OSR 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 OSR data for the current reporting round in your CIS, 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.



In order 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*, *Submission Returned to Uploader*, *Removed Draft Submission*, *Removed Submission*.