



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 *Register for and Log in to the Health Data Portal* QRG.




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



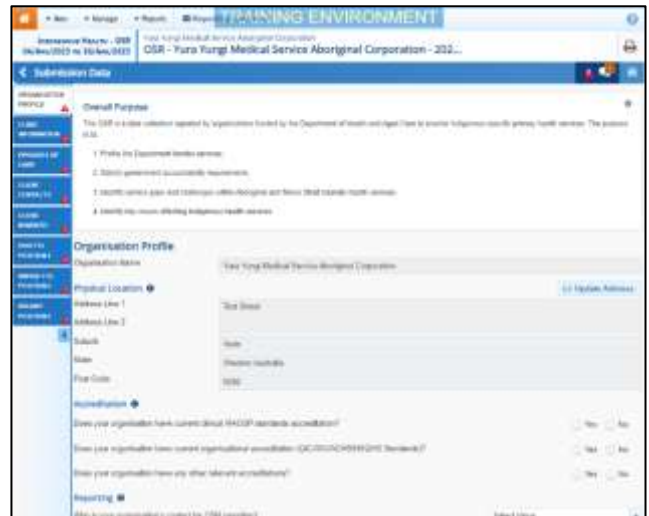
The OSR data asset that has been created as part of the Direct Load transfer from your Clinical Information System (CIS) will display here (as *highlighted in red above*).


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

3. To open the OSR form attached to the data asset, hover your mouse pointer to the right of the OSR reporting round text in the **Reporting 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 do this in the Data Asset Details screen by selecting  next to  and then selecting *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.

4. 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 data validation issues/read the comments that display.


5. 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 data validation flag(s).

 If you are unsure which value(s) needs to be amended, 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(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  until this occurs.


 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 are to be added to the data:



- a. In the **Notifications Tray**, hover your mouse pointer to the right of the 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 .

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

 The  on the tab on the left-hand side of the form 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.

6. Repeat the process for all sections of the OSR form as required.
7. Once all sections of the OSR form have been completed, to exit the form and be returned 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.

8. Before progressing the data asset through the submission workflow, answer either **Yes** or **No** to the two data sharing consent questions that display under **Data Sharing**.
9. To save the changes, select .
10. 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 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 text area. At the bottom right of the text area, it says "500 characters remaining". A "Cancel" button is located at the bottom left of the dialog box.

11. 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 AIHW for processing.

12. In the **Comment** field, enter any comments regarding the action being performed on the data asset.
13. 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 Indigenous Health 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 Indigenous Health Data Asset Submission* QRG for the next step in the process.

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 (*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 OSR direct load data asset in the Data Portal, see *Submit an OSR Data Asset (Direct Load)* in the *Indigenous Health Data Reporting 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 (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.