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Australian Government

**Department of Health,
Disability and Ageing**

THE IAHP PHC PERFORMANCE REPORT IN THE HEALTH DATA PORTAL

2 SEPTEMBER 2025

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About This Guide

The *IAHP PHC Performance Report in the Health Data Portal* user guide has been developed to assist health service users with performing their required tasks when submitting their IAHP PHC Performance Report within the Health Data Portal (the Data Portal) each September as part of the reporting process.

This user guide contains step-by-step instructions and other valuable information for health service users involved in the submission of the IAHP PHC Performance Report through the Data Portal.

Health service end users will perform the following functions when submitting their IAHP PHC Performance Report in the Data Portal:

- Create the IAHP PHC Performance Report and send it on to the next stage of the submission process.
- Review the IAHP PHC Performance Report.
- Amend the IAHP PHC Performance Report.
- Approve the IAHP PHC Performance Report.
- Amend the IAHP PHC Performance Report based on FDSS feedback.
- Participate in Interim Processing for the IAHP PHC Performance Report if needed.
- Export the IAHP PHC Performance Report form offline Word version.

Version History

This section details the different versions of this user guide and what they contain, allowing you to decide if/when you need to download an updated version of the guide for your use.

Version Number	Date	Change
1.0	2 April 2024	Original version
1.1	11 September 2024	Updated to reflect September 2024 form enhancements
1.2	2 September 2024	Updated to reflect September 2025 form enhancements

Introduction to the IAHP PHC Performance Report

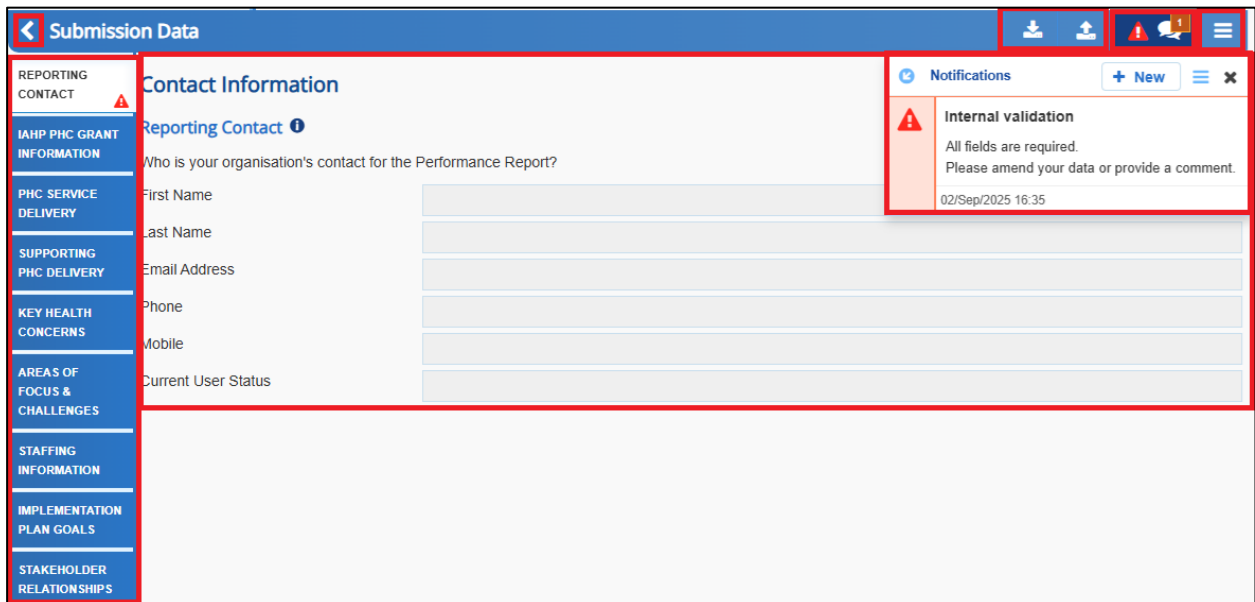
The *IAHP PHC Performance Report* is submitted by health services each September through the Data Portal.

The *IAHP PHC Performance Report* contains the following sections that need to be completed by health services when submitting the form:

- **Reporting Contact** – The person within your service who will be the primary contact for you IAHP PHC Performance Report, should anyone outside of your service need to contact you about it.
- **IAHP PHC Grant Information** – Your service’s grant information will display here and can be reviewed as needed.
- **PHC Service Delivery** – Give your service a rating for the 2024/25 financial year for each of the PHC Service Delivery objectives pulled from your 2024/25 Activity Work Plan. Then, for each objective, detail your achievements.
- **Supporting PHC Delivery** - Give your service a rating for the 2024/25 financial year for each of the Supporting PHC Delivery objectives pulled from your 2024/25 Activity Work Plan. Then, for each objective, detail your achievements.
- **Key Health Concerns** – Enter information regarding how you addressed each key health need your service has, as pulled through from your 2024/25 IAHP PHC Activity Work Plan.
- **Areas of Focus & Challenges** – Detail your progress against each area of focus and challenge your service has, as pulled through from your 2024/25 IAHP PHC Activity Work Plan.
- **Staffing Information** – Detail any staffing challenges you had during the year and how you are addressing these challenges.
- **Implementation Plan Goals** – This tab will display your targets and results for selected nKPI’s for the two most recent collection periods. If you did not achieve any of your targets for the most recent collection period, enter an explanation as to why.
- **Stakeholder Relationships** – Give your service a rating here for how effective your different stakeholder relationships have been over the year. You can also add detail regarding your achievements and challenges regarding these relationships.
- **Governance, Leadership & Culture** - Give your service a rating here for how effectively you have met your governance, leadership, and culture objectives over the year. You can also add detail regarding your achievements and challenges regarding these objectives.
- **Good News Stories** – This section of the IAHP PHC Performance Report gives you the opportunity to share any good news stories your service has for the 2024/25 financial year, if you haven’t already detailed these earlier in the report.
- **Income and Expenditure** - Upload your IAHP PHC activity Income and Expenditure details for the 2024/25 financial year, if possible. This is optional.
- **General Upload** - Upload any documents that support the submission of your IAHP PHC Performance Report (e.g., newsletters, case studies, photo montages). This is optional.

Introduction to the IAHP PHC Performance Report form

There are several different tasks available within the IAHP PHC Performance Report form in the Data Portal that can be used to help you submit your data as quickly and as accurately as possible.

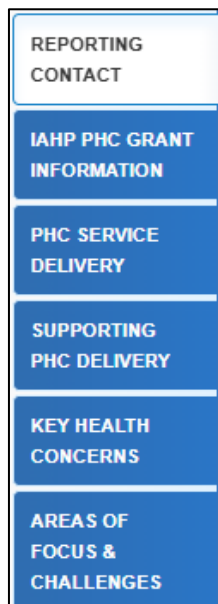


1. Cancel and go back to overview



- Allows you to quickly navigate away from the form and back to the Data Portal home screen.



2. The Tabs List



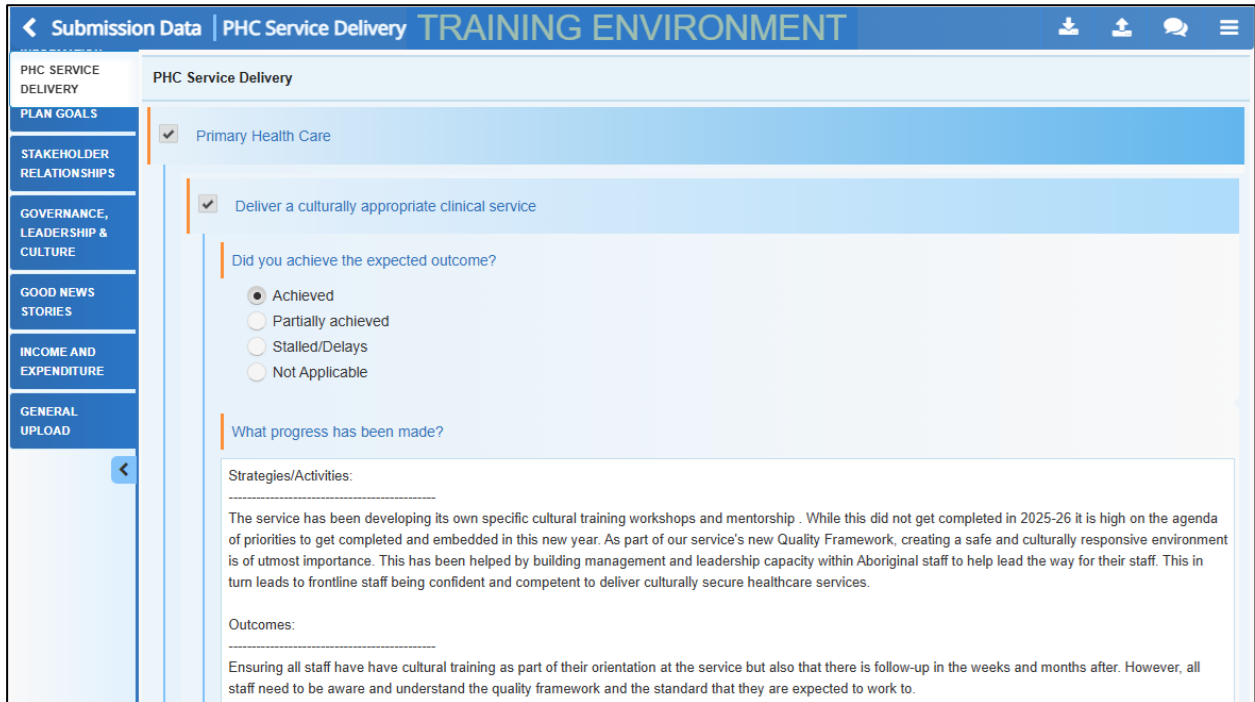
Allows you to move through the different sections of the form by selecting the tab/section you wish to view/work on from the left-hand side of the form.



A will display on any tabs containing data validation flags that need to be addressed due to cells on the tab not being completed.

This section can be hidden if needed by selecting  at the bottom of the tabs. The section can then be reopened when needed by selecting , now at the top of the form.

3. Main Form Window



This section of the form contains the data entry cells for the tab that has been selected on the left-hand side of the form. This is where all data is entered in the form.

4. Export and Import Offline Form buttons





These buttons allow you to work with the IAHP PHC Performance Report form outside of the Data Portal, if you would like to collaborate with your colleagues on the form content, or if you have had issues in the past with your information not saving in the IAHP PHC Performance Report form in the Data Portal.

The *Export* button allows you to take the form out of the Data Portal for completion and the *Import* button then allows you to upload the completed form to the Data Portal once you have entered the required information into the form.

5. Open notifications - Some comments require action buttons



If there are any data validation flags that need to be addressed in a particular section of the Performance Report form,  will display in the blue *Submission Data* bar in the top right-hand corner of the form.



If there are any comments that have been added to the section by a user,  will display in the blue *Submission Data* bar in the top right-hand corner of the form.

To view a validation flag or user entered comment in the *Notifications Tray*, simply select the applicable button.

6. The Options Menu






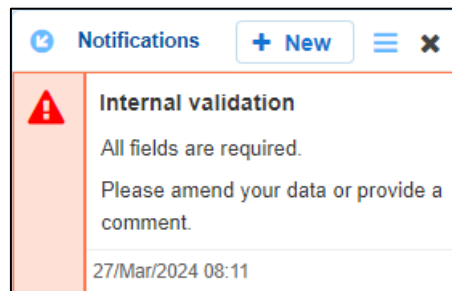
The *Options Menu* groups together additional functions that can be completed from within the form. The functions available through the *Options Menu* in the Performance Report form are:







-  **Summary View** - Displays all sections of the form in the one view so the whole form can be printed if needed.
-  **Populate empty cells with zeros** - Adds zeros to any empty cells in the selected section of the form. Numbers are not used in the IAHP PHC Performance Report so this function would not be used.

7. The Notifications Tray

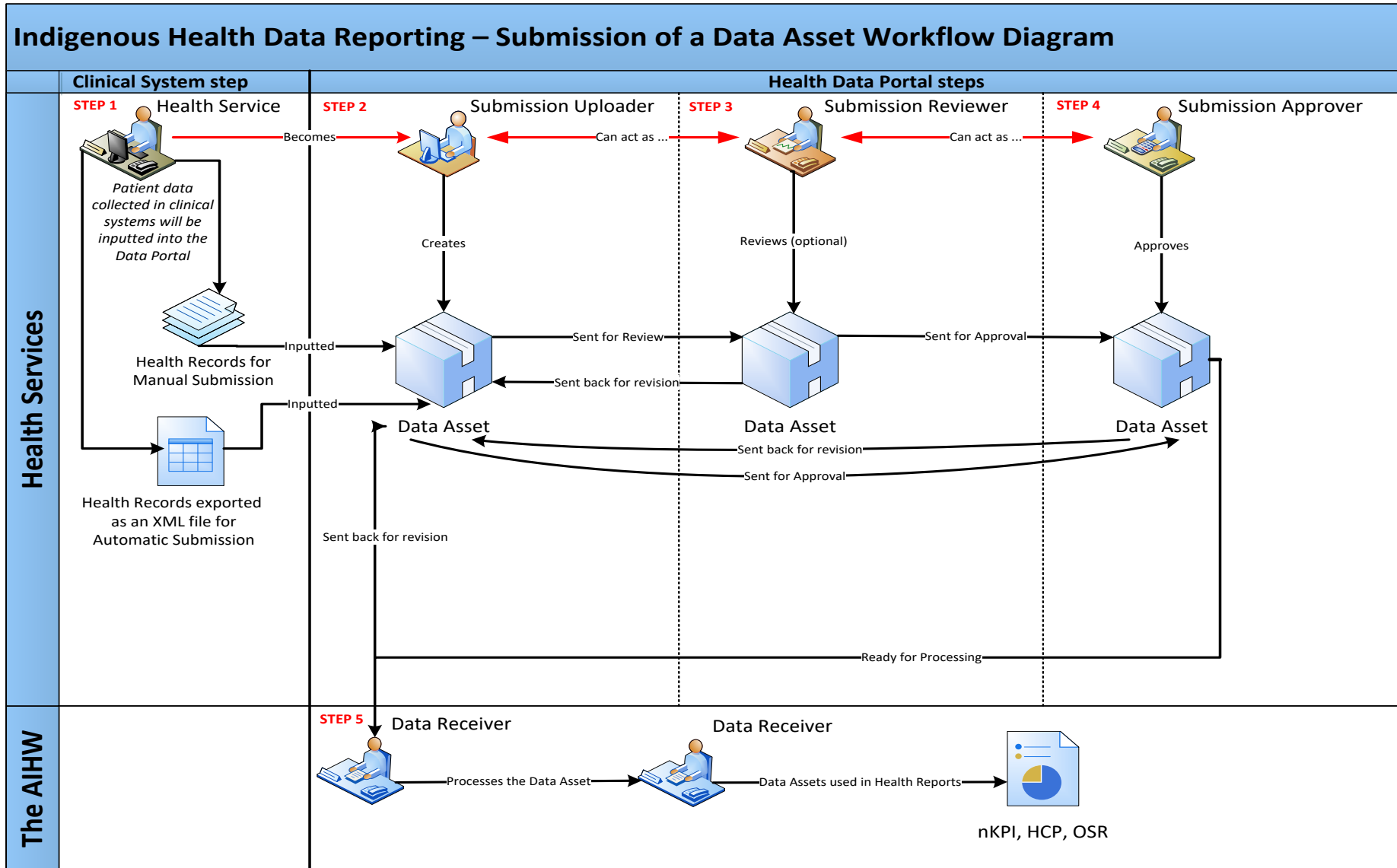
All data validation flags and user generated comments in the Performance Report form are displayed in a *Notifications Tray*.

 To open the *Notifications Tray* if it does not display by default in the form, select either  or .



- To dock the tray at the bottom of the section or undock it so you can move it around the form, select .
- To add a new comment, select .
- To search for a particular validation flag/user comment, or to show completed comments in the tray, select .
- To close the tray, select .
- To respond to a validation flag/user comment, hover your mouse pointer to the right of the title so the available buttons display, and then select .
- To view any highlighted cells accompanying the flag/comment, select .

IAHP PHC Performance Report Health Data Portal Submission Workflow



Submit your IAHP PHC Performance Report

Each September, all IAHP PHC-funded health services will need to submit their IAHP PHC Performance Reports through the Health Data Portal.

The IAHP PHC Performance Report reports progress against the health service's IAHP PHC Activity Work Plan, submitted through the Data Portal each June. The Performance Report in the Health Data Portal will behave like a manual submission, needing to be created and populated by the health service's *Submission Uploader*.

Please note that as an alternative to entering your information into the IAHP PHC Performance Report form in the Data Portal, you can now export a Word version of the form, complete this form outside of the Data Portal, and then upload the completed form to the Data Portal, automatically populating the IAHP PHC Performance Report form. For details on how to do this, please see the [Use the Offline Form to complete your IAHP PHC Performance Report](#) section later in this guide.




The IAHP PHC Performance Report Health Data Portal reporting round runs from *1 September* to *31 October* each year.

The following procedure is used to submit your IAHP PHC Performance Report through the Data Portal.

1. Ensure you have logged in to the Data Portal and the Data Portal home screen is displayed with the **Reporting Dashboard** open.

The Performance Report tile will display on your Reporting Dashboard.

1. To commence the submission of your IAHP PHC Performance Report, select  to the right of the **Performance Report** reporting round text in the **Reporting Dashboard**.



The IAHP PHC Performance Report can also be created by selecting *New > Asset for Submission* on the menu bar.

The IAHP PHC Performance Report form will display, broken down by tabs on the left-hand side of the screen, and the *Contact Information* section will display by default.

The screenshot shows the 'Contact Information' section of the IAHP PHC Performance Report form. The left-hand side has a navigation menu with tabs: REPORTING CONTACT, IAHP PHC GRANT INFORMATION, PHC SERVICE DELIVERY, SUPPORTING PHC DELIVERY, KEY HEALTH CONCERNS, AREAS OF FOCUS & CHALLENGES, and STAFFING INFORMATION. The main content area is titled 'Contact Information' and contains a 'Reporting Contact' section with a dropdown menu labeled 'Select Value'. Below this are input fields for 'First Name', 'Last Name', 'Email Address', 'Phone', 'Mobile', and 'Current User Status'.

The reporting contact for your organisation is the person who will be contacted by your DSS Funding Agreement Manager (FAM) if any part of your report needs further discussion.

To view help text for the *Reporting Contact - Contact Information* section, select .

- To record your reporting contact, select and then select the person within your service who will be your reporting contact.

The details of the selected person will now display in the cells on the form.

- To save the selection, select at the bottom of the form.
- To continue completing your IAHP PHC Performance Report, select the **IAHP PHC Grant Information** tab on the left-hand side of the form.

The *Grant Information* section will display.

The screenshot shows the 'Grant Information' section of the IAHP PHC Performance Report form. The left-hand side navigation menu is the same as in the previous screenshot. The main content area is titled 'Grant Information' and contains input fields for 'Grant Agreement ID' (4-JP1KP4G), 'Program Schedule ID' (4-JP1KPD4), 'Activity ID' (4-JP1Q013), 'Program / Activity Name' (Comprehensive Primary Health Care), and 'Organisation (Party ID)' (1-1IX-98). At the bottom, there is a message: 'Please check that this information is correct. If any change is required, please email the Health Data Portal team.' and an 'Update Grant Information' button.

Your health service's grant information will pre-populate here.

If any of your grant information listed here is incorrect, select , enter the correct information in the email that displays and then send the email. The Health Data Portal team will then use this information to update your grant information in GPS.

- To continue, select the **PHC Service Delivery** tab on the left-hand side of the form.

The *Primary Health Care Service Delivery* section will display.

The screenshot shows a web application interface for reporting. At the top, there's a navigation bar with 'New', 'Reports', and 'Reporting Dashboard'. The main header area displays 'INDIGENOUS HEALTH - PERFOR...' and 'Oak Valley (Maralinga) Aboriginal Corporation Performance Report - Oak Valley (Maralinga) Aboriginal Corpo...'. Below this is a 'Submission Data' section. The main content area is titled 'Primary Health Care Service Delivery' and contains instructions for reporting on PHC Service Delivery Objectives, Strategies/Activities and Targets. It includes a 'PHC Service Delivery' section with a list of objectives, including 'Primary Health Care' and 'Deliver a culturally appropriate clinical service'. A question 'Did you achieve the expected outcome?' is shown with radio button options for 'Achieved' and 'Partially achieved'.

The *Primary Health Care Service Delivery* section of the IAHP PHC Performance Report form will display the information entered in your 2024/25 Activity Work Plan for the following objectives:

- Primary Health Care
 - Child and Family Health
 - Chronic Disease Management
 - In a Primary Health Care Setting.
6. For each selected secondary objective, for the **Did you achieve the expected outcome?** question, select your result against your expected outcomes for the 2024/25 financial year. The options are *Achieved*, *Partially Achieved*, *Stalled/Delays* and *Not Applicable*.
 7. In the corresponding **What progress has been made?** field, detail the progress you have made during the year against the selected objective. Only enter 1 or 2 sentences here to outline your key achievements.




If you selected the *Not Applicable* option for the **Did you achieve the expected outcome?** question, explain why this objective wasn't applicable for the year in the **What progress has been made?** field.

The *Response from 2024/25 Activity Work Plan* section underneath each **What progress has been made?** field contains the information entered by you or a colleague in your 2024/25 Activity Work Plan (AWP) for that objective, broken down by *Strategies/Activities*, *Outcomes* and *Stakeholder/Community*. In the **What progress has been made?** field, you should detail your progress against the information entered in your AWP.

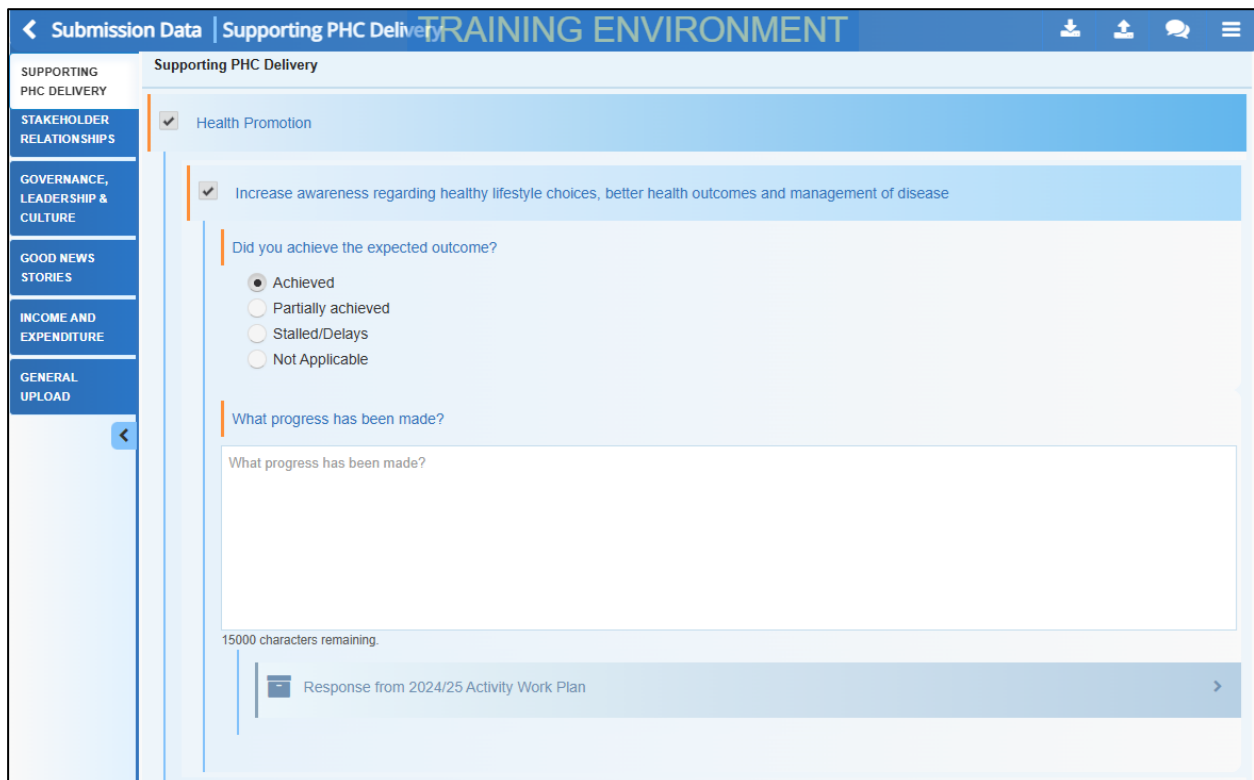
8. To assist with this, you can add the information from the *Response from 2024/25 Activity Work Plan* section to your response by selecting .

9. If you would like to include a portion of the AWP text only, select the text to be included from the *Response from 2024/25 Activity Work Plan* section and then select Insert Selected.

 If you have made progress against an objective that was not selected in your AWP, select either + Add Secondary Objective or + Add Primary Objective, enter the objective name, select the applicable result and then detail the progress you have made against the objective during the year.

10. To save this information, select Save at the bottom of the form.

11. To continue, select the **Supporting PHC Delivery** tab on the left-hand side of the form. The *Supporting the Delivery of Primary Health Care* section will display.




The *Supporting PHC Delivery* section of your IAHP PHC Performance Report form will display the information entered in your 2024/25 Activity Work Plan for the following objectives:

- Health Promotion
- Continuous Quality Improvement (CQI)
- Specialist and Allied Health.

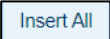
12. For each selected secondary objective, for the **Did you achieve the expected outcome?** question, select your result against your expected outcomes for the 2024/25 financial year. The options are *Achieved*, *Partially Achieved*, *Stalled/Delays* and *Not Applicable*.

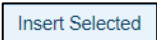
13. In the **What progress has been made?** field, detail the progress you have made during the year against the selected objective. Only enter 1 or 2 sentences here to outline your key achievements.


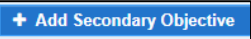
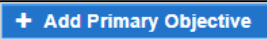
 If you selected the *Not Applicable* option for the **Did you achieve the expected outcome?** question, explain why this objective wasn't applicable for the year in the **What progress has been made?** field.

The *Response from 2024/25 Activity Work Plan* section underneath each **What progress has been made?** field contains the information entered in your 2024/25 Activity Work Plan (AWP) for that objective, broken down by *Strategies/Activities*, *Outcomes* and *Stakeholder/Community*.

In the **What progress has been made?** field, you should detail your progress against the information entered in your AWP.

14. To assist with this, you can add the information from the *Response from 2024/25 Activity Work Plan* section to your response by selecting .

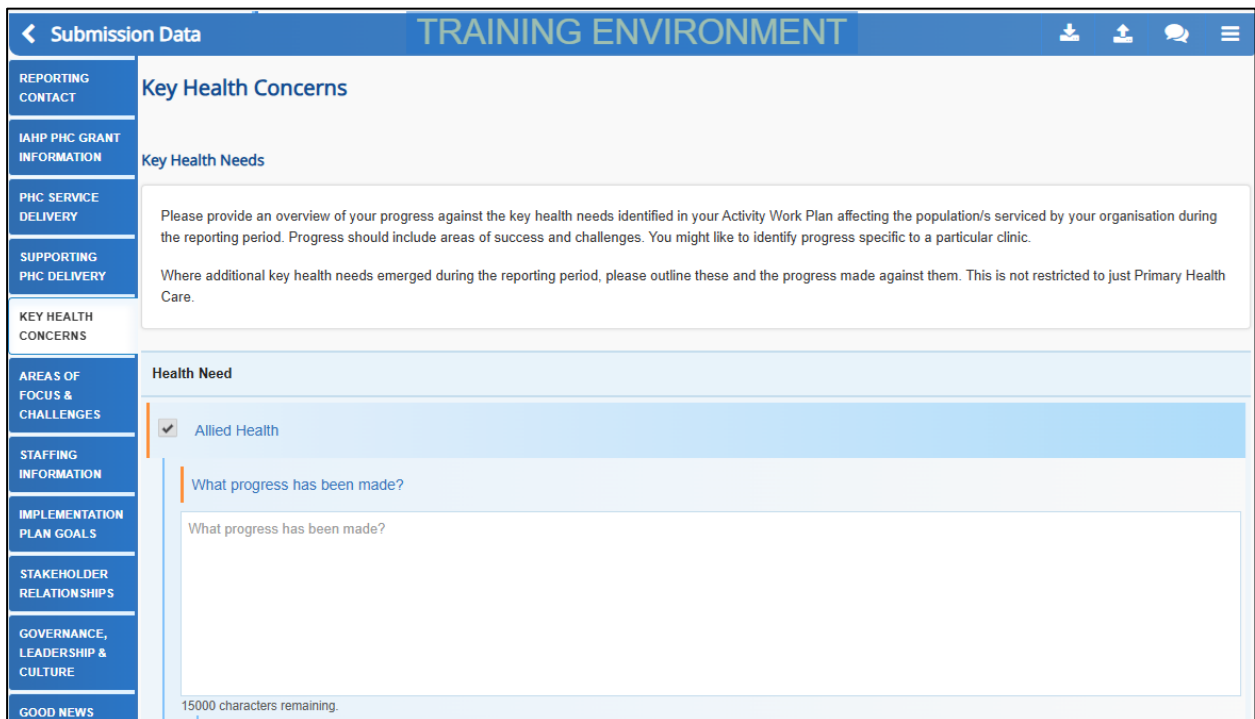
15. If you would like to include a portion of the AWP text only, select the text to be included from the *Response from 2024/25 Activity Work Plan* section and then select .

 If you have made progress against an objective that was not selected in your AWP, select either  or , enter the objective name, select the applicable result and then detail the progress you have made against the objective during the year.

16. To save this information, select  at the bottom of the form.

17. To continue, select the **Key Health Concerns** tab on the left-hand side of the form.


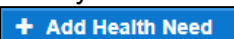
The *Key Health Concerns* section will now display.



The *Key Health Concerns* section of your IAHP PHC Performance Report form will display the information entered in your 2024/25 Activity Work Plan regarding your health service's key health concerns for the upcoming year.

18. In the **What progress has been made?** field for the first objective pulled from your 2024/25 AWP, detail the progress you have made against the objective, using the *Response from 2024/25 Activity Work Plan* section as needed, as detailed in earlier steps. Only enter 1 or 2 sentences here on how you addressed the concerns from your AWP.

19. Repeat the process for all other key health concerns that were selected in your 2024/25 AWP and pulled into your Performance Report.

 If you have addressed a key health need that was not selected in your AWP, select  and enter in the name of the need and how it has been addressed. Repeat this process for any other additional key health needs you have addressed during the year.

20. To save your key health concerns information, select  at the bottom of the form.


21. To continue, select the **Areas of Focus & Challenges** tab on the left-hand side of the form.

The *Areas of Focus & Challenges* section will display.

The screenshot displays the 'Areas of Focus & Challenges' section of the IAHP PHC Performance Report form. The interface features a sidebar on the left with navigation tabs: 'AREAS OF FOCUS & CHALLENGES', 'IMPLEMENTATION PLAN GOALS', 'STAKEHOLDER RELATIONSHIPS', 'GOVERNANCE, LEADERSHIP & CULTURE', 'GOOD NEWS STORIES', 'INCOME AND EXPENDITURE', and 'GENERAL UPLOAD'. The main content area is titled 'TRAINING ENVIRONMENT' and is divided into two sections: 'Area of Focus' and 'Challenge'. In the 'Area of Focus' section, a checkbox is checked next to 'Maternal Health and/or Child Development'. Below this, there is a text input field labeled 'What progress has been made?'. A 'Response from 2024/25 Activity Work Plan' section is visible below the input field, with a dropdown arrow. A '15000 characters remaining' indicator is present. A '+ Add Area of Focus' button is located below the input field. In the 'Challenge' section, a checkbox is checked next to 'Staff Accommodation'. Below this, there is a text input field labeled 'What progress has been made?'.

The *Areas of Focus & Challenges* section of your IAHP PHC Performance Report form will display the information entered in your 2024/25 Activity Work Plan regarding your health service's areas of focus and challenges for the upcoming year.

22. In the **What progress has been made?** field for the first objective pulled from your 2024/25 AWP, detail the progress you have made against the objective, using the *Response from 2024/25 Activity Work Plan* section as needed, as detailed in earlier steps. Only enter 1 or 2 sentences here on how you addressed the areas of focus in your AWP.
23. Repeat the process for all areas of focus that detailed in your 2024/25 AWP and pulled into your Performance Report.
24. Now repeat the process for any challenges that were identified in your 2024/25 AWP and pulled into your Performance Report. Only enter 1 or 2 sentences here on how you addressed the challenges in your AWP

 If you have addressed an area of focus and/or challenge that was not selected in your AWP, select either **+ Add Area of Focus** or **+ Add Challenge** and enter in the name of the area of focus/challenge and how it has been addressed. Repeat this process for any other additional areas of focus/challenges you have addressed during the year.

25. To save the key focus and challenges information, select **Save** at the bottom of the form.

26. Now select the **Staffing Information** tab on the left-hand side of the form.

The *Staffing Information* section will display.

27. Enter 1 or 2 sentences regarding any staff related challenges you have faced in the last twelve months and how these are being addressed.



Don't enter FTE information here as this has already been provided through your OSR.

28. To save this information, select **Save** at the bottom of the form.


29. To continue, select the **Implementation Plan Goals** tab.

The *Implementation Plan Goals* section will display.

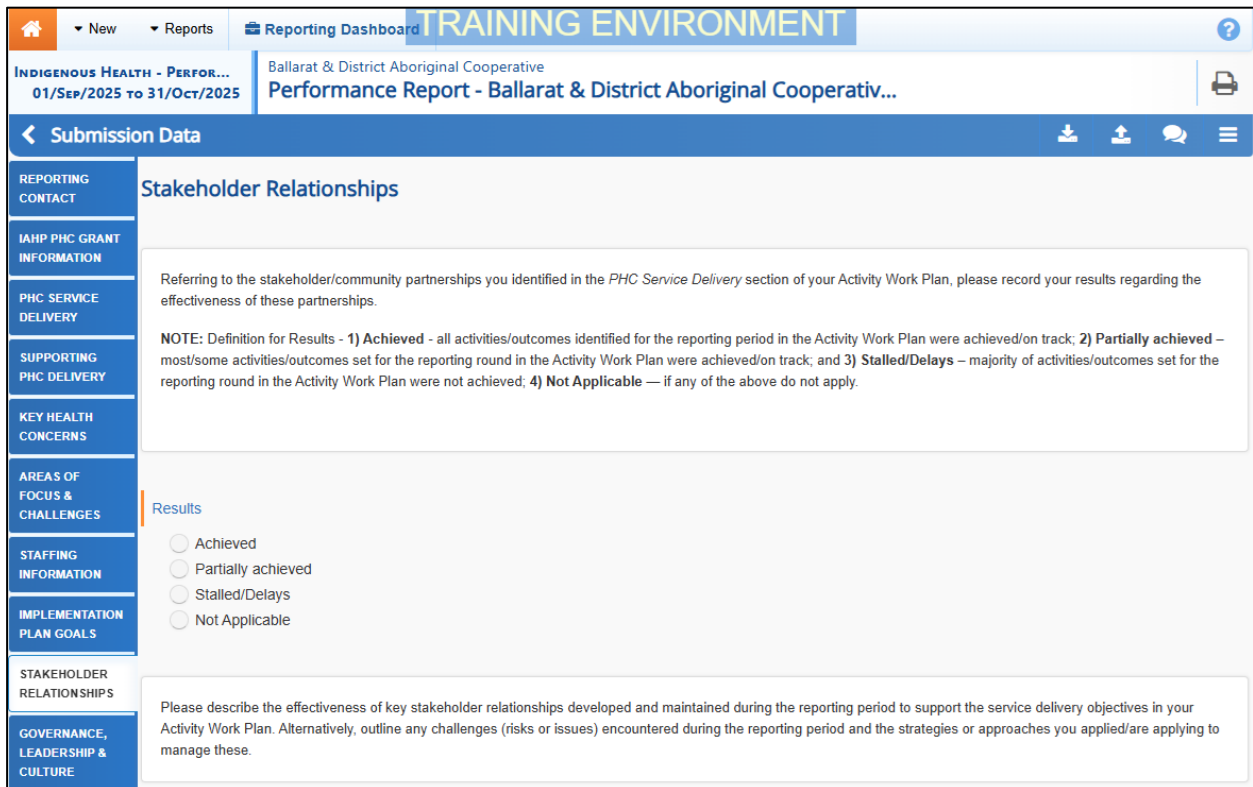
nKPI Identifier (PI)	nKPI Description	Your nKPI target for December 2021 (%)	nKPI result for December 2021 (%)	Your nKPI target for June 2022 (%)	nKPI result for June 2022 (%)	If you did not achieve your targets, please provide reasons
PI03	Percentage of children 0-4 years with a current completed Indigenous health assessment within the previous 12 months	30	34	35	34	<input type="text"/> 4000 characters remaining
PI03	Percentage of adults 25-54 with a current completed Indigenous health assessment within the previous 24	55	55	57	58	<input type="text"/> 4000

The *Implementation Plan Goals* section will list each of the indicators you are asked to enter your self-determined targets against in your nKPI form, along with your targets and results for each of these indicators for the last two collection periods.

30. If your nKPI results for the applicable indicators for the most recent collection period have not reached the corresponding targets for these indicators, please explain why in the applicable **If you did not achieve your targets, please provide reasons** cell.


31. If any of your targets or results do not display here, an additional text box will display at the bottom of the tab, asking you to explain why the information has not displayed (For example, you may not have completed the most recent nKPI report due to a change in Clinical Information System).
32. If you do not report on nKPI's, simply explain this in the text box that displays.
33. To save this information, select  at the bottom of the form.
34. To continue, select the **Stakeholder Relationships** tab.


The *Stakeholder Relationships* section will display.



The screenshot shows a web interface for reporting performance. The top navigation bar includes 'New', 'Reports', and 'Reporting Dashboard'. The main header is 'TRAINING ENVIRONMENT'. The page title is 'Ballarat & District Aboriginal Cooperative Performance Report - Ballarat & District Aboriginal Cooperativ...'. The left sidebar contains various tabs: REPORTING CONTACT, IAHP PHC GRANT INFORMATION, PHC SERVICE DELIVERY, SUPPORTING PHC DELIVERY, KEY HEALTH CONCERNS, AREAS OF FOCUS & CHALLENGES, STAFFING INFORMATION, IMPLEMENTATION PLAN GOALS, STAKEHOLDER RELATIONSHIPS, and GOVERNANCE, LEADERSHIP & CULTURE. The 'Stakeholder Relationships' section is active, displaying instructions and a 'Results' section with radio buttons for 'Achieved', 'Partially achieved', 'Stalled/Delays', and 'Not Applicable'. Below this is a text field for describing the effectiveness of key stakeholder relationships.

35. Under **Results**, select either *Achieved*, *Partially Achieved*, *Stalled/Delays* or *Not Applicable* depending on the effectiveness of the partnerships identified in your 2024/25 IAHP PHC AWP.

 If you select *Not Applicable*, the *Key Achievements and/or Key Challenges* text field will disappear, and you won't be required to enter any information.

36. In the **Key Achievements and/or Key Challenges** field, enter 1 or 2 sentences on the key achievements you have made in engaging with your stakeholders, mentioning any challenges you have had along the way if applicable.
37. To save this information, select  at the bottom of the form.
38. To continue, select the **Governance, Leadership & Culture** tab on the left-hand side of the form.

The *Governance, Leadership & Culture* section of the form will now display.

The screenshot shows a web interface for a performance report. The top navigation bar includes 'New', 'Reports', and 'Reporting Dashboard'. The main header identifies the user as 'Institute for Urban Indigenous Health Ltd' and the report as 'Performance Report - Institute for Urban Indigenous Health Ltd...'. The left sidebar lists various report sections, with 'Governance, Leadership & Culture' currently selected. The main content area contains a note about reporting objectives, a list of objectives (with 'Effective Governing Board' checked), and a question 'Did you achieve the expected outcome?' with radio button options for 'Achieved', 'Partially achieved', 'Stalled/Delays', and 'Not Applicable'.

39. Under **Did you achieve the expected outcome?** select either *Achieved*, *Partially Achieved*, *Stalled/Delays* or *Not Applicable* depending on the effectiveness of the service's governance, leadership and culture, as identified in your 2024/25 IAHP PHC AWP.
40. In the **What progress has been made?** field for the first objective pulled from your 2024/25 AWP, write 1 or 2 sentences on the progress you have made against the objective, using the *Response from 2024/25 Activity Work Plan* section as needed, as detailed in earlier steps.
41. Repeat the process for all other governance, leadership and culture objectives that were selected in your 2024/25 AWP and pulled into your Performance Report.
42. Now repeat the process for any challenges in this area that were identified in your 2024/25 AWP and pulled into your Performance Report.




If you have addressed a governance, leadership and culture objective or challenge that was not selected in your AWP, select **+ Add Objective** or **+ Add Challenge** and enter in the name of the objective/challenge and how it has been addressed. Repeat this process for any other additional objectives/challenges you have addressed during the year.

43. To save this information, select **Save** at the bottom of the form.
44. To continue, select the **Good News Stories** tab on the left-hand side of the form.

The *Good News Stories or Health Service Innovations* section of the form will now display.

The screenshot shows a web interface for a performance report. The top navigation bar includes 'New', 'Reports', and 'Reporting Dashboard'. The main header area displays 'TRAINING ENVIRONMENT' and the report title 'Performance Report - Oak Valley (Maralinga) Aboriginal Corpo...'. A left-hand sidebar contains menu items: 'REPORTING CONTACT', 'IAHP PHC GRANT INFORMATION', 'PHC SERVICE DELIVERY', 'SUPPORTING PHC DELIVERY', 'KEY HEALTH CONCERNS', and 'AREAS OF FOCUS & CHALLENGES'. The main content area is titled 'Good News Stories or Health Service Innovations' and contains two sections. The first section asks: 'Are there any good news stories or health service innovations that you would like to share? This provides an opportunity for you to showcase outcomes achieved, innovative practices, client case studies and/or other PHC projects.' Below this is a text input field. The second section asks: 'Are there any innovations you have put in place that you would like to share?' with three radio button options: 'Yes', 'No', and 'Already detailed in previous answers'.

45. If you have any good news stories or innovations you would like to share, select the **Yes** option and enter the detail in the text field that displays.

 If you have good news stories but feel you have already detailed these in earlier sections of the form, select the *Already detailed in previous answers* option.

46. To save this information, select  at the bottom of the form.

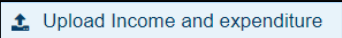
47. To continue, select the **Income and Expenditure** tab on the left-hand side of the form.

The *Income and Expenditure* section of the form will now display.

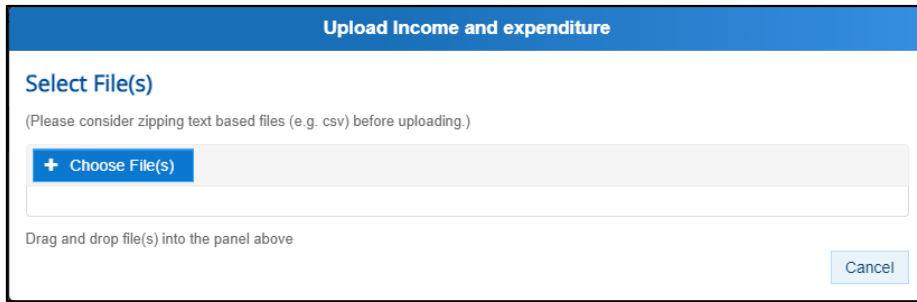
The screenshot shows the 'Income and Expenditure' section of the form. The top navigation and header are similar to the previous screenshot, but the report title is 'Performance Report - Ballarat & District Aboriginal Cooperativ...'. The left-hand sidebar is the same. The main content area is titled 'Income and Expenditure' and contains a single question: 'Do you wish to upload your Income and Expenditure information to your report?' with two radio button options: 'Yes' and 'No'.

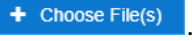
48. If you have 2024/25 income and expenditure information you would like to upload to your Performance Report, select **Yes** in the **Do you wish to upload...** question.

 The upload of income and expenditure information to your Performance Report is optional, as it isn't a formal part of your Performance Report milestone, so you can select *No* if needed.

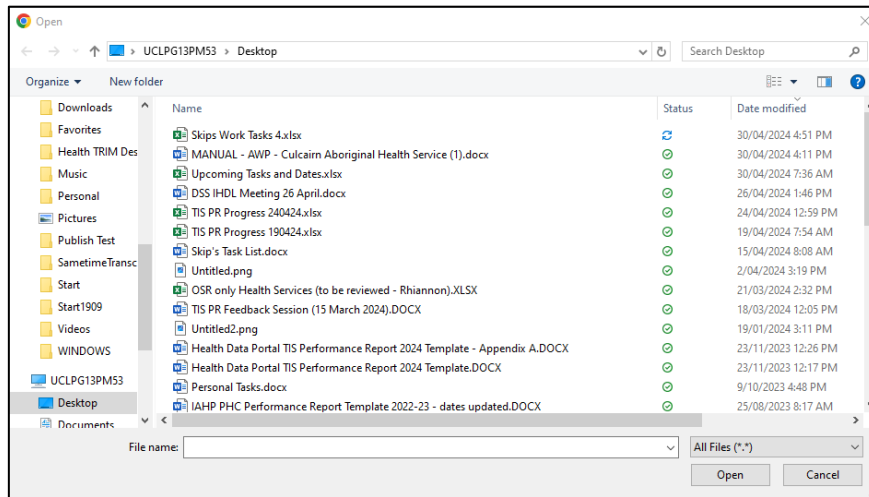
49. To upload the applicable income and expenditure document to your IAHP PHC Performance Report form, select .

The Upload Income and expenditure window will display.





50. To continue, select .

The Open window will display.



51. Navigate to where you have stored your income and expenditure document and then double-click it to select it.

Your income and expenditure document has now been uploaded to the *Income and Expenditure* tab of your IAHP PHC Performance Report form.


 If you need to remove the document for any reason, select .

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

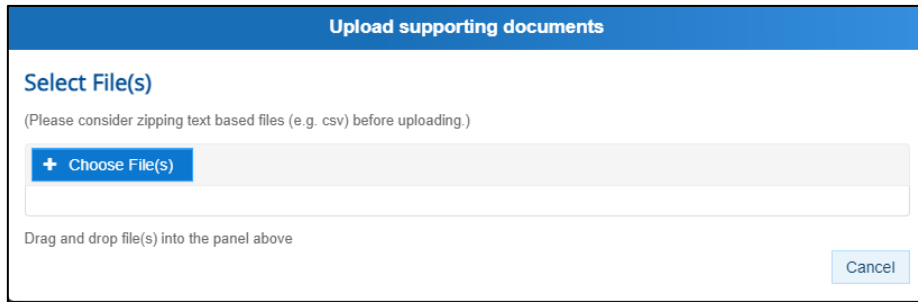
53. To continue, select the **General Upload** tab on the left-hand side of the form.

The *General Upload* section of the form will now display.



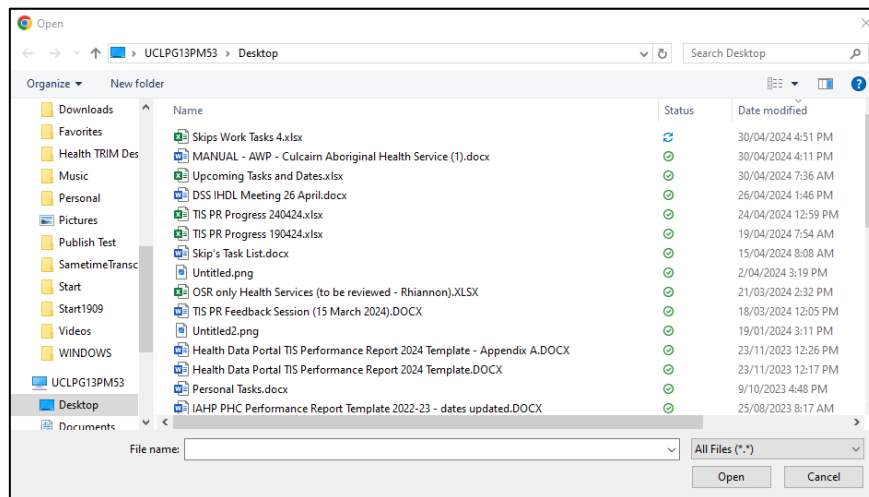
54. If you have supporting documents you would like to upload to your IAHP PHC Performance Report, such as newsletters, case studies or photo montages, select **Yes** and then select .

The Upload Income and expenditure window will display.





55. To continue, select **+ Choose File(s)**.

The Open window will display.



56. Navigate to where you have stored your document and then double-click it to select it. Your supporting document has now been uploaded to the *General Upload* tab of your IAHP PHC Performance Report form.

 If you need to remove the document for any reason, select .


57. To save your changes, select **Save** at the bottom of the form.

58. To close out of your IAHP PHC Performance Report, select **Close** at the bottom of the form.


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

59. Before progressing your IAHP PHC Performance Report through the submission workflow, answer either **Yes** or **No** to the data sharing consent question(s) that display under **Data Sharing** in the **Reporting Dashboard**, regarding whether you are happy to share your finalised, processed data with NACCHO and/or your state sector support organisation.

 If your health service is in the ACT, only the NACCHO question will display here.


60. To progress the IAHP PHC Performance Report to the next stage of the submission workflow, select  **Draft Submission** in the **Reporting Dashboard**.

The Change Data Asset Status window will display.


61. In the **Action** field, select  and select the required action from the list that displays.

The available actions are:



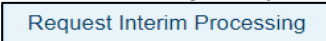
- **Request Review** – Select this action to send your IAHP PHC Performance Report to your *Submission Reviewer* for review prior to it being submitted to your CEO or their representative for approval.
- **Request Approval** – Select this action to send your IAHP PHC Performance Report to your CEO or their representative for approval.
- **Request Interim Processing** – Select this action to progress your IAHP PHC Performance Report to your DSS FAM for review prior to it going to your CEO or their representative for final approval. This process is known as *Interim Processing*. This option will only appear if you have the *Submission Reviewer* role.


 If you have the access to approve IAHP PHC Performance Reports, you will see the *Approve for Submission* option in the *Action* list. This allows you to approve the IAHP PHC Performance Report and submit it directly to DSS for processing.

62. In the **Comment** field, enter any comments regarding the action being performed on your IAHP PHC Performance Report, if needed.

 Any user with access to view your IAHP PHC Performance Report will be able to view any comments entered here.

63. One of the following options can now be selected when submitting your IAHP PHC Performance Report, depending on the action that has been selected in the **Action** field:

- i. To submit your IAHP PHC Performance Report for internal review, select . For the next step in the process, see [Review your IAHP PHC Performance Report \(Submission Reviewer\)](#).
- ii. To submit your IAHP PHC Performance Report to your CEO or their representative for approval, select . For the next step in the process, see [Approve your IAHP PHC Performance Report \(Submission Approver\)](#).
- iii. To send your IAHP PHC Performance Report to your DSS FAM for initial review prior to sending it to your CEO or their representative for approval, select . For the next step in the process, see [Interim Processing of an IAHP PHC Performance Report](#).

 To save your IAHP PHC Performance Report as a draft without sending it on to the next stage of the submission process, select  at the bottom of the screen.


Your IAHP PHC Performance Report has now been created and submitted to either your *Submission Reviewer* for review or your CEO or their representative for approval.

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 your IAHP PHC Performance Report has been submitted to them for action. One of your *Submission Reviewers* or *Submission Approvers* can now action your IAHP PHC Performance Report as required.

Use the Offline Form to complete your IAHP PHC Performance Report

If there are people within your health service who need to be involved in the development of your IAHP PHC Performance Report that don't have access to the Health Data Portal, you can easily export a Word version of the IAHP PHC Performance Report from the Data Portal so these people can provide input into the report.

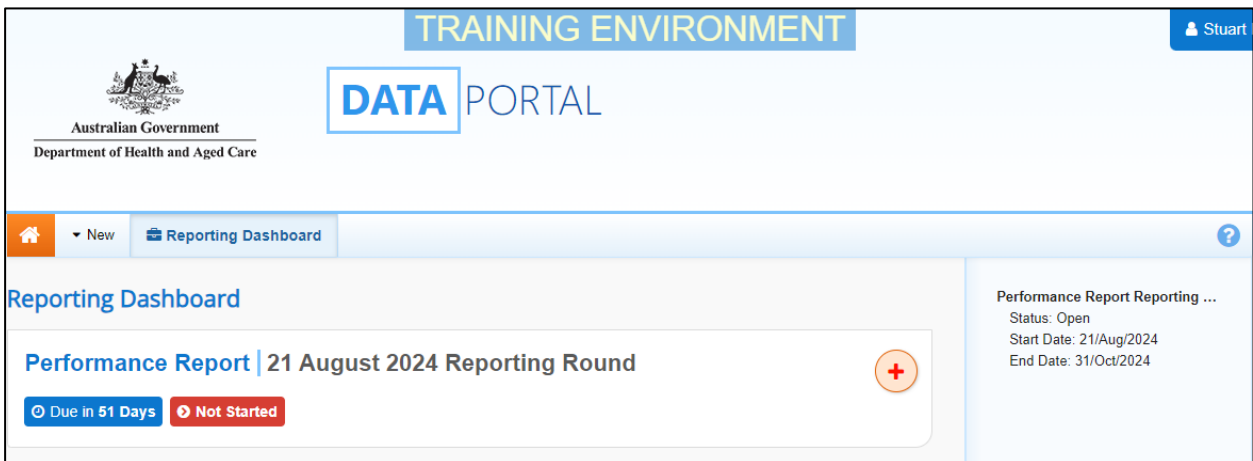
You may also choose to complete your IAHP PHC Performance Report using the offline form if you have previously had issues with losing data in the Health Data Portal narrative forms. Exporting the form, completing it offline and then automatically uploading the information into the Health Data Portal form will prevent this from happening.


 You may also choose to use the offline form as a way of storing a copy of your completed IAHP PHC Performance Report, rather than using the existing PDF/print functionality, available through the summary view of the form.



The following procedure is used to complete your IAHP PHC Performance Report in the offline form and then upload it to the Data Portal.

1. Ensure you have logged in to the Data Portal and the Data Portal home screen is displayed with the **Reporting Dashboard** open.

The Performance Report tile will display on your Reporting Dashboard.



2. To commence the submission of your IAHP PHC Performance Report, select  to the right of the **Performance Report** reporting round text on the **Reporting Dashboard**.

 If you have already started the draft of your IAHP PHC Performance Report, simply select  instead.

Your IAHP PHC Performance Report form will display.

The screenshot shows the 'Submission Data' section of the IAHP PHC Performance Report form. The left sidebar contains a navigation menu with the following items: REPORTING CONTACT, IAHP PHC GRANT INFORMATION, PHC SERVICE DELIVERY, SUPPORTING PHC DELIVERY, KEY HEALTH CONCERNS, AREAS OF FOCUS & CHALLENGES, STAFFING INFORMATION, IMPLEMENTATION PLAN GOALS, STAKEHOLDER RELATIONSHIPS, GOVERNANCE, LEADERSHIP & CULTURE, and GOOD NEWS STORIES. The main content area is titled 'Contact Information' and includes a 'Reporting Contact' section with the question 'Who is your organisation's contact for the Performance Report?' and a dropdown menu labeled 'Select Value'. Below this are input fields for 'First Name', 'Last Name', 'Email Address', 'Phone', 'Mobile', and 'Current User Status'.

Before exporting your IAHP PHC Performance Report form from the Data Portal into a Word version so you and your colleagues can start completing it, you should go through each of the sections in the form and add the applicable responses from last year's report, so they appear in the Word version of your form once you export it.

This will make completing the report in the offline Word version easier for those working on it, as they will be able to use last year's responses as a reference as they go.

3. To start, select the **PHC Service Delivery** tab.

The *Primary Health Care Service Delivery* section will display with the objectives you selected and entered information for in your 2024/25 AWP showing.

The screenshot shows the 'PHC Service Delivery' section of the IAHP PHC Performance Report form. The left sidebar is the same as in the previous screenshot. The main content area is titled 'Primary Health Care Service Delivery' and contains the following text: 'Referring to the PHC Service Delivery Objectives, Strategies/Activities and Targets outlined in your Activity Work Plan, please record your results and Key Achievements and/or Challenges during the reporting period. When determining your results, please refer to the nKPIs relevant to Primary Health Care service delivery and the targets you set in your nKPI reporting.' Below this is a note: 'The targets are visible on the Implementation Plan Goals tab of your Performance Report or in your nKPI report in the Health Data Portal.' Further down, it says: 'Please report on all objectives that apply to your service and that you have identified in your Activity Work Plan. If a particular area does not apply, simply select the Not Applicable option.' A 'NOTE' section defines the results: '1) Achieved - all activities/outcomes identified for the reporting period in the Activity Work Plan were achieved/on track; 2) Partially achieved - most/some activities/outcomes set for the reporting round in the Activity Work Plan were achieved/on track; and 3) Stalled/Delays - majority of activities/outcomes set for the reporting round in the Activity Work Plan were not achieved; 4) Not Applicable - if any of the above do not apply.' The 'PHC Service Delivery' section is expanded to show a list of objectives. The first objective is 'Primary Health Care', which is checked. Underneath it is the objective 'Deliver a culturally appropriate clinical service', which is also checked. Below this objective is the question 'Did you achieve the expected outcome?' with two radio button options: 'Achieved' (selected) and 'Partially achieved'.

If you would like to include the information you entered for each of the selected *PHC Service Delivery* objectives in your 2024/25 AWP in your offline IAHP PHC Performance Report form as part of your Performance Report response, you can utilise the *Response from 2024/25 Activity Work Plan* section that displays under each *What progress has been made?* text field.

- To do this, select the applicable **Response from 2024/25 Activity Work Plan** section to open it.

The *Response from 2024/25 Activity Work Plan* section will update to display the information you entered for the selected objective in your 2024/25 AWP, grouped by *Strategies/Activities*, *Outcomes* and *Stakeholder/Community*.

The screenshot shows a web form interface. On the left is a vertical navigation pane with a tab labeled 'PHC SERVICE DELIVERY'. The main content area is titled 'What progress has been made?' and contains a large text input field. Below the input field, it indicates '15000 characters remaining.' Below this is a section titled 'Response from 2024/25 Activity Work Plan' with two buttons: 'Insert All' and 'Insert Selected'. The section contains three sub-sections: 'Strategies/Activities:', 'Outcomes:', and 'Stakeholder/Community:'. Each sub-section has a dashed line separator and contains text describing the service's progress and future plans.

- Read the information in the *Response from 2024/25 Activity Work Plan* section to see how you can best use it to inform your Performance Report response for the selected objective.
- If you would like to add all the information from your AWP to the **What progress has been made?** text field, select .
- If you would like to include a portion of the text only, select the text to be included and then select .

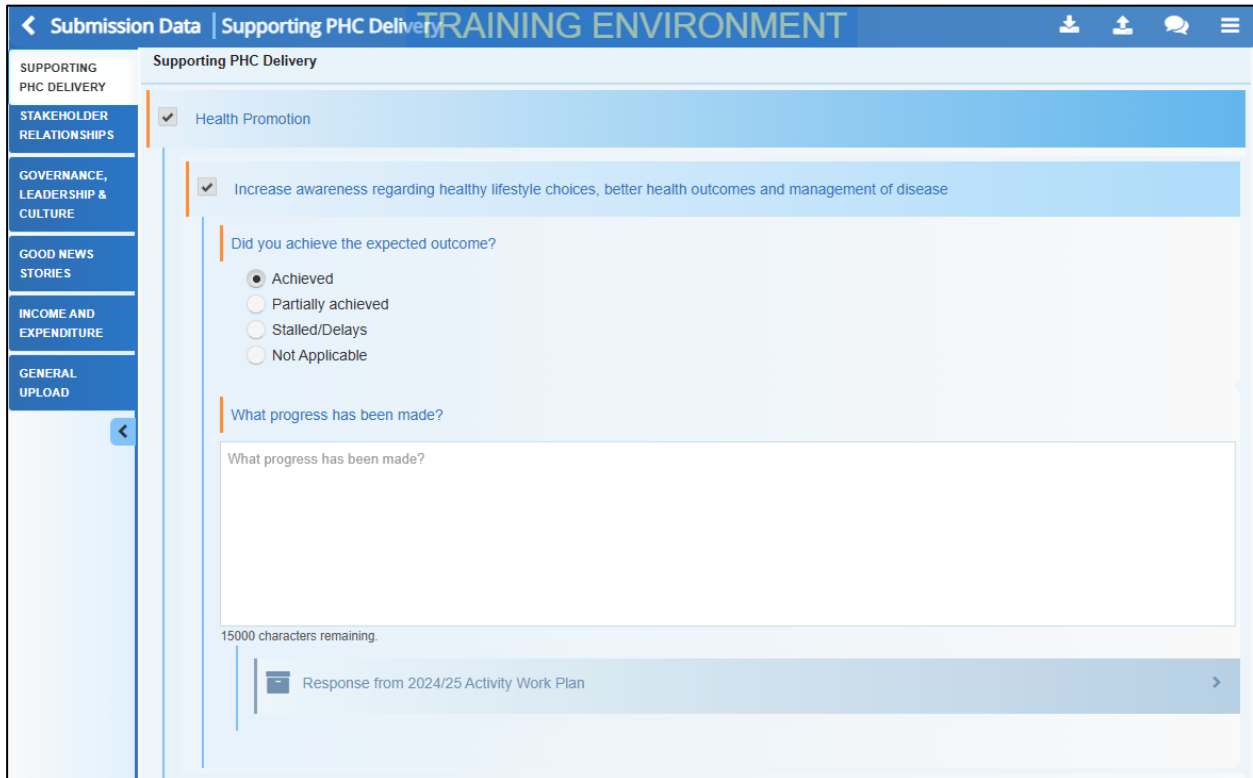


You may choose to simply use the information in the *Response from 2024/25 Activity Work Plan* section as a reference and enter your response without inserting any of this information into the text field.

The selected text has now been added to the field and will display in your offline form once exported to Word.

- Repeat the process for all applicable objectives in the *Primary Health Care Service Delivery* section of the form.
- Once you have made the required selections on this tab, select at the bottom of the form.
- Once you have made the required selections on the *PHC Service Delivery* tab, select the **Supporting PHC Delivery** tab.

The *Supporting the Delivery of Primary Health Care* section will display with the objectives you selected and entered information for in your 2024/25 AWP showing.




If you would like to include the information you entered for each of the selected *Supporting PHC Delivery* objectives in your 2024/25 AWP in your offline IAHP PHC Performance Report form as part of your Performance Report response, you can utilise the *Response from 2024/25 Activity Work Plan* section that displays under each *What progress has been made?* text field.

11. To do this, select the applicable **Response from 2024/25 Activity Work Plan** section to open it.

The *Response from 2024/25 Activity Work Plan* section will update to display the information you entered for the selected objective in your 2024/25 AWP, grouped by *Strategies/Activities*, *Outcomes* and *Stakeholder/Community*.

12. Read the information in the *Response from 2024/25 Activity Work Plan* section to see how you can best use it to inform your Performance Report response for the selected objective.
13. If you would like to add all the information from your AWP to the **What progress has been made?** text field, select .
14. If you would like to include a portion of the text only, select the text to be included and then select .

 You may choose to simply use the information in the *Response from 2024/25 Activity Work Plan section* as a reference and enter your response without inserting any of this information into the text field.

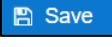
The selected text has now been added to the field and will display in your offline form once exported to Word.

15. Repeat the process for all applicable objectives in the *Supporting PHC Delivery* section of the form.
16. Once you have made the required selections on this tab, select at the bottom of the form.

17. Once you have made the required selections on the *Supporting PHC Delivery* tab, select the **Key Health Concerns** tab.

If you would like to include the information from your 2024/25 AWP in your offline IAHP PHC Performance Report form, you can utilise the *Response from 2024/25 Activity Work Plan* section that displays under each text field, as mentioned earlier in these instructions.


18. Once you have done this, select  at the bottom of the form.

19. Repeat this process for all applicable sections of the form, and then select  at the bottom of the form.

Once you have inserted the required information from your 2024/25 AWP in your IAHP PHC Performance Report form and made any required text updates, you are ready to export the Word version of the form for updating as needed.


20. To do this, select  on the blue **Submission Data** bar at the top of the form.

The Health Data Portal will now create the offline version of your IAHP PHC Performance Report form.


21. To open the offline form once it has finished downloading, select  in the top right-hand corner of the screen and select the Word document that displays in the menu.

The offline version of your IAHP PHC Performance Report form will now display, ready for you to complete as needed.


The screenshot shows a two-column form. The left column contains the report title, organization name, reporting period, and instructions for using the form. The right column contains the 'Primary Health Care Service Delivery' section, which includes a note about reporting objectives and a list of checkboxes for service delivery types.


 When working in the offline version of your IAHP PHC Performance Report, please do not change the file name of the form or remove the protection, as this will prevent the completed form from importing back into the Data Portal.

22. Complete the offline version of your IAHP PHC Performance Report, collaborating with your colleagues as needed.

 When completing the offline form in Word, you may find it easier to remove the page breaks




in the document by selecting the *View* tab and then . You may also choose to turn the *Navigation Pane* on (also through the *View* tab) to make navigating the form easier.

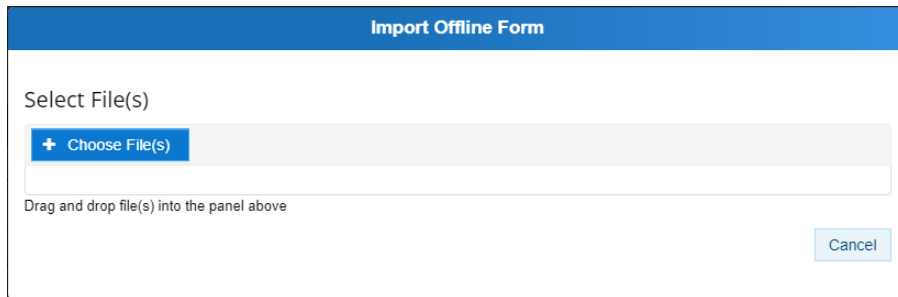
23. When you are ready to upload the completed version of the offline form to the Data Portal, open your IAHP PHC Performance Report form and select .

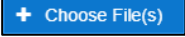
The Import Offline Form window will display.



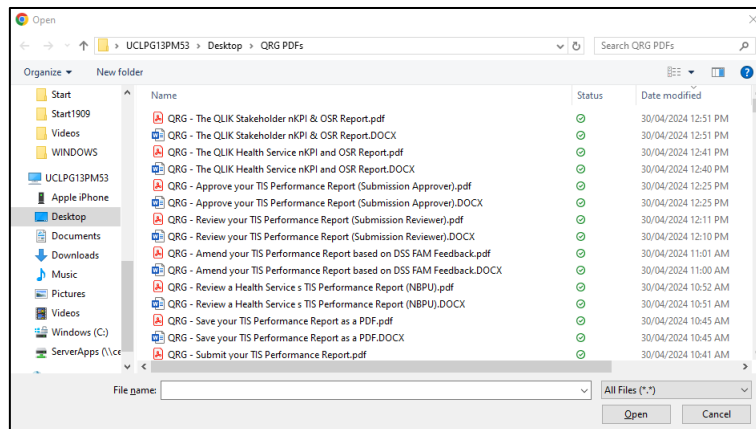
24. To continue, select .

The Import Offline Form window will again display.



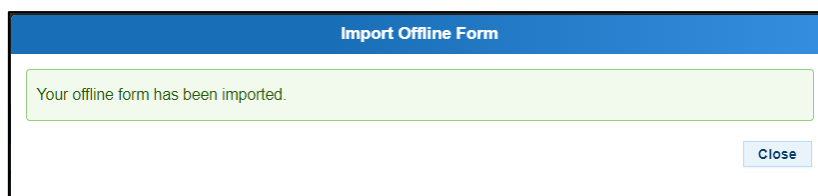
25. To continue, select .


The Open window will display.



26. Navigate to where you have stored the offline version of your IAHP PHC Performance Report form and then double-click it to select it.

A message will display in the Data Portal asking you to wait while it processes your form. The message will then update to tell you the form has been imported.



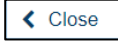
27. To continue, select .

Your IAHP PHC Performance Report form will display and has now been populated with the information you entered in the offline version of the form.

28. You can now complete the rest of the form in the Data Portal as needed, updating to the information you entered in the offline version of the form as you go.



If applicable, you will need to complete the *Income and Expenditure* and *General Upload* tabs in the IAHP PHC Performance Report Data Portal form as normal, as you can't upload documents through the offline version of the form. You will also need to review and update (if needed) the *Implementation Plan Goals* tab in the Portal form as well.

29. Once you have completed the *IAHP PHC Performance Report* form and are ready to send it through the submission workflow process as normal, select  at the bottom of the form.

Your IAHP PHC Performance Report form has been completed as required and you can now send it off for review or approval as needed.

Retrieve your IAHP PHC Performance Report (Submission Uploader)





If a health service's *Submission Uploader* has submitted an IAHP PHC Performance Report for either review or approval in error, they can recall the IAHP PHC Performance Report so the required amendments can be made before resubmitting it for review.

The following procedure is used to retrieve your IAHP PHC Performance Report sent in error through the Data Portal.

1. Ensure you have logged in to the Data Portal and the Data Portal home screen is displayed with the **Reporting Dashboard** open.

The Reporting Dashboard will display details for your IAHP PHC Performance Report.

The screenshot shows the 'Reporting Dashboard' for the '1 September 2025 Reporting Round'. At the top, it says 'TRAINING ENVIRONMENT' and 'Stuart Dunn'. The Australian Government logo is on the left. The main content area shows 'Performance Report | 1 September 2025 Reporting Round' with a status of 'Due in 58 Days' and 'Submission Ready For Review'. There are two 'Data Sharing' sections, each with a 'Yes' radio button selected. A right-hand sidebar shows 'Performance Report Reporting ...' with status 'Open', start date '01/Sep/2025', and end date '31/Oct/2025'.

2. In the **Reporting Dashboard**, to retrieve your IAHP PHC Performance Report, select the **Performance Report** status link ( **Submission Ready For Review** or  **Submission Ready For Approval**).
3. In the Change Data Asset Status window, in the **Action** field, select  and select **Revision Required**.
4. To continue, select .

Your IAHP PHC Performance Report has now been retrieved from the next step of the submission workflow process and can be amended as required prior to being resubmitted for review or approval.

Review your IAHP PHC Performance Report (Submission Reviewer)

When an IAHP PHC Performance Report has been submitted for review by the health service *Submission Uploader*, it can be reviewed in the Data Portal by anyone within that health service with the *Submission Reviewer* role.



Even though any user in the health service with the *Submission Reviewer* role can review the IAHP PHC Performance Report, only one user can make changes at a time.

The following procedure is used to review your IAHP PHC Performance Report in the Data Portal.

1. Ensure you have logged in to the Data Portal and the Data Portal home screen is displayed with the **Reporting Dashboard** open.

The Reporting Dashboard will display details for your IAHP PHC Performance Report.

The screenshot shows the 'Reporting Dashboard' for the '1 September 2025 Reporting Round'. The dashboard is in a 'TRAINING ENVIRONMENT' and the user is logged in as 'Stuart Dunn'. The main content area shows the report status as 'Due in 58 Days' and 'Submission Ready For Review'. Under the 'Data Sharing' section, there are two questions with radio button options for 'Yes' and 'No':

- Do you agree to share your finalised processed Performance Report data (includes current and previous reporting periods) with National Aboriginal Community Controlled Health Organisation (NACCHO) for the purpose of policy development, research and summary feedback and support to organisations? (Yes selected)
- Do you agree to share your finalised processed Performance Report data (includes current and previous reporting periods) with Aboriginal Health Council of South Australia (AHCSA) for the purpose of policy development, research and summary feedback and support to organisations? (Yes selected)

On the right side, a sidebar shows 'Performance Report Reporting ...' with details: Status: Open, Start Date: 01/Sep/2025, End Date: 31/Oct/2025.





To be eligible for review, your IAHP PHC Performance Report's status will need to be *Submission Ready for Review*.


2. To review your IAHP PHC Performance Report, hover your mouse pointer to the right of the **Performance Report** reporting round text in the **Reporting Dashboard** and select








Review your IAHP PHC Performance Report (Submission Reviewer) The IAHP PHC Performance Report in the Health Data Portal


The IAHP PHC Performance Report form will display.

Any sections that still have cells to be completed will contain a  on the applicable tab for easy identification. Any sections with data validation flags that have been addressed through the addition of a response by the *Submission Uploader*, will contain a .


3. Review the data in each section as required and enter information into any cells that need to be completed, so the data validation flag  disappears.


 If the *Notifications Tray* doesn't display by default, select  or  in the top right-hand corner of the form.



 To add a new internal comment for your *Submission Uploader* or *Approver* that you may not wish your DSS FAM to see, select  **New** in the *Notifications Tray*.

4. To exit the IAHP PHC Performance Report form, scroll to the bottom of the form and select  **Close**.

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

5. Before progressing the IAHP PHC Performance Report through the submission workflow, select  next to the **Data Sharing** link (if the section doesn't open by default) and answer either **Yes** or **No** to the data sharing consent questions that display, if the questions haven't already been answered.

 If your health service is in the ACT only the NACCHO question will display here.

6. Once your IAHP PHC Performance Report has been reviewed and updated as required, select  **Submission Ready For Review** in the **Reporting Dashboard** and, in the Change Data Asset Status window, in the **Action** field, select  and select the required action.

The available actions are:

- **Request Approval** – Select this action to send your IAHP PHC Performance Report to your CEO or their representative for approval.
- **Approve for Submission** – Your CEO or their nominated representative can select this action if they are approving your IAHP PHC Performance Report as well as reviewing it.
- **Request Interim Processing** – Select this action to progress your IAHP PHC Performance Report to the *Data Receiver* for review prior to it going to your CEO or their representative for final approval. This process is known as *Interim Processing*.

The IAHP PHC Performance Report in the Health Data Portal Review your IAHP PHC Performance Report (Submission Reviewer)

- **Revision Required** – Select this action to return your IAHP PHC Performance Report to the *Submission Uploader(s)* within your health service for amendment.
7. In the **Comment** field, enter any comments regarding the action being performed on your IAHP PHC Performance Report.



Any user with access to view your IAHP PHC Performance Report will be able to view any comments entered here.

8. One of the following options can now be selected when submitting your IAHP PHC Performance Report, depending on the action that has been selected in the **Action** field:
- To send your IAHP PHC Performance Report to your CEO or their representative for approval, select . For the next step in the process, see [Approve your IAHP PHC Performance Report \(Submission Approver\)](#).
 - To approve your IAHP PHC Performance Report and send it directly to your DSS FAM for processing, select . For the next step in the process, see [Process an IAHP PHC Performance Report \(DSS FAM\)](#).
 - To send your IAHP PHC Performance Report to your DSS FAM for initial review prior to sending it to your CEO or their representative for approval, select . For the next step in the process, see [Interim Processing of an IAHP PHC Performance Report](#).
 - To send your IAHP PHC Performance Report back to your *Submission Uploader* for amendment, select . For the next step in the process, see [Amend your IAHP PHC Performance Report \(Submission Uploader\)](#).

Your IAHP PHC Performance Report has now been reviewed and either sent to your CEO or their representative for approval or sent back to your *Submission Uploader* for revision as required.

Amend your IAHP PHC Performance Report (Submission Uploader)

There may be times when your IAHP PHC Performance Report is returned to the *Submission Uploader* for amendment by the representative in your health service the Performance Report has been sent to for review or approval in the Data Portal.


When it is returned for amendment, the IAHP PHC Performance Report will have a status of *Submission Revision Required*.

The following procedure is used to amend your IAHP PHC Performance Report in the Data Portal.

1. Ensure you have logged in to the Data Portal and the Data Portal home screen is displayed with the **Reporting Dashboard** open.

The Reporting Dashboard will display details for your IAHP PHC Performance Report.



The screenshot shows the Reporting Dashboard interface. At the top, it says 'HCP | No Upcoming Reporting Round'. Below that, the main section is titled 'Performance Report | 1 July 2023 Reporting Round'. A status bar indicates 'Closed 154 Days ago' and 'Submission Revision Required'. There are two data sharing questions, each with 'Yes' and 'No' radio buttons. On the right side, there is a sidebar with status information: 'Status: Pending', 'Start Date: 30/Apr/2024', 'End Date: 30/Jun/2024', and 'TIS PR Reporting Round' with 'Status: Closed', 'Start Date: 15/Nov/2023', and 'End Date: 31/Dec/2023'.


2. To amend your IAHP PHC Performance Report that has been returned by the *Submission Reviewer* or *Submission Approver*, hover your mouse pointer to the right of the **Performance Report** reporting round text in the **Reporting Dashboard** and select .

The IAHP PHC Performance Report form will display.

The screenshot shows the IAHP PHC Performance Report form. The top navigation bar includes 'New', 'Reports', and 'Reporting Dashboard'. The main header is 'TRAINING ENVIRONMENT'. Below that, there is a breadcrumb trail: 'INDIGENOUS HEALTH - PERFOR... 01/Sep/2025 to 31/Oct/2025' and 'Oak Valley (Maralinga) Aboriginal Corporation Performance Report - Oak Valley (Maralinga) Aboriginal Corpo...'. The form is titled 'Submission Data' and has a sidebar with various sections: 'REPORTING CONTACT', 'IAHP PHC GRANT INFORMATION', 'PHC SERVICE DELIVERY', 'SUPPORTING PHC DELIVERY', 'KEY HEALTH CONCERNS', 'AREAS OF FOCUS & CHALLENGES', and 'STAFFING INFORMATION'. The 'REPORTING CONTACT' section is expanded to show 'Contact Information'. The 'Reporting Contact' field is highlighted, and the question 'Who is your organisation's contact for the Performance Report?' is displayed. Below this are input fields for 'First Name', 'Last Name', 'Email Address', 'Phone', and 'Mobile'. The 'Current User Status' field is also visible.


The IAHP PHC Performance Report in the Health Data Portal Amend your IAHP PHC Performance Report (Submission Uploader)



Any sections of the form that still have cells to be completed will display a  on the applicable tab on the left-hand side of the form. Any sections with data validation flags that have been addressed through the addition of a response by your *Submission Reviewer or Approver*, will contain a .

3. Review the data in each tab as required, focussing on any comments made by your *Submission Reviewer or Submission Approver* asking you to amend data values.
4. If required, update the value(s) in the required cell(s) based on your *Submission Reviewer/Submission Approver's* comments, saving as you go.
5. To exit your IAHP PHC Performance Report form, scroll to the bottom of the form and select .

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


6. Before progressing your IAHP PHC Performance Report through the submission workflow, select  next to the **Data Sharing** link (if the section doesn't open by default) and answer either **Yes** or **No** to the data sharing consent questions that display, if the questions haven't already been answered.

 If your health service is in the ACT only the NACCHO question will display here.

7. Once your IAHP PHC Performance Report has been reviewed and updated as required, select  **Submission Revision Required** in the **Reporting Dashboard** and, in the Change Data Asset Status window, in the **Action** field, select  and select the required action.

The available actions are:

- **Request Review** – Select this action to send your IAHP PHC Performance Report back to your *Submission Reviewer* for review again.
- **Request Approval** – Select this action to send your IAHP PHC Performance Report directly to your CEO or their representative for approval.

 If you have access to approve your IAHP PHC Performance Report, you will also see the *Approve for Submission* option in the action list. This allows you to approve your IAHP PHC Performance Report and submit it directly to your DSS FAM for processing.

8. In the **Comment** field, enter any comments regarding the action being performed on your IAHP PHC Performance Report, if needed.

 Any user with access to view your IAHP PHC Performance Report will be able to view any comments entered here.

Amend your IAHP PHC Performance Report (Submission Uploader) The IAHP PHC Performance Report in the Health Data Portal

9. One of the following options can now be selected when submitting your IAHP PHC Performance Report, depending on the action that has been selected in the **Action** field:
 - i. To send your IAHP PHC Performance Report to your *Submission Reviewer* for review again, select . For the next step in the process, see [Review your IAHP PHC Performance Report \(Submission Reviewer\)](#).
 - ii. To send your IAHP PHC Performance Report to your CEO or their representative for approval, select . For the next step in the process, see [Approve your IAHP PHC Performance Report \(Submission Approved\)](#).

Your IAHP PHC Performance Report has now been amended and either sent back to your *Submission Reviewer* for review or sent straight on to your CEO or their representative for approval.

An automated email will be sent to all users within your health service that have been assigned the applicable role in the Data Portal (*Reviewer* or *Approver*) notifying them your IAHP PHC Performance Report has been submitted to them for action. One of your *Submission Reviewers* or *Submission Approvers* can now action your IAHP PHC Performance Report again as required.

Approve your IAHP PHC Performance Report (Submission Approved)

Your IAHP PHC Performance Report can be approved by anyone within your health service with the *Submission Approver* role in the Data Portal. Traditionally, the task of approval in a health service will be reserved for your CEO or their representative. In smaller health services, the person approving the IAHP Performance Report may also be the person who has reviewed and/or submitted the IAHP PHC Performance Report.

The following procedure is used to approve your IAHP PHC Performance Report in the Data Portal.

1. Ensure you have logged in to the Data Portal and the Data Portal home screen is displayed with the **Reporting Dashboard** open.

The Reporting Dashboard will display details for your IAHP PHC Performance Report.

The screenshot shows the 'Reporting Dashboard' interface. At the top, it says 'HCP | No Upcoming Reporting Round'. Below this, the main section is titled 'Performance Report | 1 July 2023 Reporting Round'. There are two status indicators: 'Closed 154 Days ago' and 'Submission Ready For Approval'. Under the 'Data Sharing' section, there are two questions with 'Yes' and 'No' radio button options:

- Do you agree to share your finalised processed Performance Report data (includes current and previous reporting periods) with National Aboriginal Community Controlled Health Organisation (NACCHO) for the purpose of policy development, research and summary feedback and support to organisations? (Yes selected)
- Do you agree to share your finalised processed Performance Report data (includes current and previous reporting periods) with Aboriginal Health and Medical Research Council of NSW (AH&MRC) for the purpose of policy development, research and summary feedback and support to organisations? (Yes selected)

On the right side, there is a sidebar with reporting round details: 'Start Date: 30/Apr/2024', 'End Date: 30/Jun/2024', and 'TIS PR Reporting Round' with 'Status: Closed', 'Start Date: 15/Nov/2023', and 'End Date: 31/Dec/2023'.


2. To approve your IAHP PHC Performance Report, hover your mouse pointer to the right of the **Performance Report** reporting round text in the **Reporting Dashboard** and select






The IAHP PHC Performance Report form will display, with each section on the form displayed as a separate tab on the left-hand side of the form.




The screenshot shows the 'IAHP PHC Performance Report' form in a 'TRAINING ENVIRONMENT'. The breadcrumb trail is 'New > Reports > Reporting Dashboard'. The form title is 'Performance Report - Oak Valley (Maralinga) Aboriginal Corporation'. The left-hand navigation menu includes: 'REPORTING CONTACT', 'IAHP PHC GRANT INFORMATION', 'PHC SERVICE DELIVERY', 'SUPPORTING PHC DELIVERY', 'KEY HEALTH CONCERNS', 'AREAS OF FOCUS & CHALLENGES', and 'STAFFING INFORMATION'. The 'REPORTING CONTACT' section is active, showing 'Contact Information' and 'Reporting Contact' details. The 'Reporting Contact' question is 'Who is your organisation's contact for the Performance Report?' with a dropdown menu set to 'Select Value'. Below this are input fields for 'First Name', 'Last Name', 'Email Address', 'Phone', and 'Mobile'. The 'Current User Status' field is also present.


Approve your IAHP PHC Performance Report (Submission Approved) The IAHP PHC Performance Report in the Health Data Portal

Review the information in your IAHP PHC Performance Report form, focussing on any sections of the form displaying a  on the corresponding tab, if there are any.

 If any sections of the form contain a , you should send your IAHP PHC Performance Report back to your *Submission Uploader* and ask them to address the issue before returning the submission to you for approval.

3. In the first section of the form displaying a , read the comment that has been left for you in the **Notifications Tray**.




 If the *Notifications Tray* doesn't display by default, select  or  in the top right-hand corner of the form to open it.


4. If the comment is just for your information, or you're happy it has been addressed as needed through the data that has been entered into the section, select  at the top of the comment in the **Notifications Tray**.

5. In the Notifications window that displays, select .



The comment has now been removed from your IAHP PHC Performance Report form.


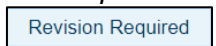
6. Repeat steps 3 to 5 as needed for each comment that has been left in the form by your *Submission Uploader/Reviewer*.

 If you need to respond to one of the comments that has been left by your *Submission Uploader* or *Reviewer*, select  in the comment in the Notifications Tray. In the window that displays, select a reason and enter your response in the *Additional Information* field and select . Your response has now been added and can be addressed by your *Submission Uploader* as needed once you send your IAHP PHC Performance Report back to them for amendment.

7. To exit the IAHP PHC Performance Report form, scroll to the bottom of the form and select .

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

8. Once your IAHP PHC Performance Report has been reviewed and updated as required, select  **Submission Ready For Approval** in the **Reporting Dashboard** and, in the Change Data Asset Status window, in the **Action** field, select  and select **Approve for Submission**.

 If you responded to one of the comments in the form and need to send it back to your *Submission Uploader* so they can address your response, select *Revision Required* and then select .

9. In the **Comment** field, enter any comments about the action being performed on your IAHP PHC Performance Report.

10. To approve your IAHP PHC Performance Report and send it for processing by your DSS FAM, select .

Your IAHP PHC Performance Report has now been approved and sent to your DSS FAM for processing in the Data Portal.

Process an IAHP PHC Performance Report (DSS FAM)

Once your IAHP PHC Performance Report has been approved by your CEO or their representative, it will be sent to your DSS FAM for processing in the Data Portal in their role as the external *Data Receiver*.

The first step of processing the IAHP PHC Performance Report in the Data Portal is for your DSS FAM to review the IAHP PHC Performance Report form to ensure the information contained within is complete and correct.

Once your FAM has reviewed the IAHP PHC Performance Report form and is comfortable with the content, it can be processed as complete in the Data Portal ready to be used in any reports and publications produced by DSS and Health, Disability and Ageing as required.

Step 1 – Review the IAHP PHC Performance Report (DSS FAM)

Once your DSS FAM has received your approved IAHP PHC Performance Report, they will need to review it to ensure it is ready to go to the next stage of the process. For the IAHP PHC Performance Report to be processed by DSS, it will need to have the status of *Submission Approved*.

Once your DSS FAM has reviewed the IAHP PHC Performance Report in the Data Portal and actioned it as ready to be processed, the IAHP PHC Performance Report's status will change to *Ready for Processing*.

All *Submission Uploaders* from your health service will then receive an email informing them the status of the IAHP PHC Performance Report has been changed to *Ready for Processing*. This tells you your DSS FAM has taken the IAHP PHC Performance Report from their backlog and is now working on it.

Step 2 – Process the IAHP PHC Performance Report (DSS FAM)


Once your IAHP PHC Performance Report has the status of *Ready for Processing* in the Data Portal, DSS will process it. Once DSS has processed your IAHP PHC Performance Report in the Data Portal, its status will change to *Processed* and the processing of the IAHP PHC Performance Report is now complete.

The information within the IAHP PHC Performance Report form can now be used by DSS and Health, Disability and Ageing in any reports and publications that need to be produced.

Exception Reporting

Once your IAHP PHC Performance Report has been approved by your CEO or their representative, it will be sent to your DSS FAM for processing. To action the IAHP PHC Performance Report in the Data Portal, your DSS FAM needs to have the *Data Receiver* role.

If, upon review of the IAHP PHC Performance Report, your DSS FAM feels amendments are needed to the information in your IAHP PHC Performance Report, they will initiate the exception reporting process to add comments to your IAHP PHC Performance Report describing what amendments are required and will send the IAHP PHC Performance Report back to you for amendment.

 If the information in the IAHP PHC Performance Report is correct and no changes are needed, your DSS FAM can process the Performance Report as complete to finish the submission process. For more information, see [Process an IAHP PHC Performance Report \(DSS FAM\)](#) earlier in this guide.

The *first* step in initiating the exception reporting process is for your DSS FAM to update the status of the IAHP PHC Performance Report to *Ready for Processing* in the Data Portal, so guiding comments can be added to the relevant sections of the Performance Report form to assist you when you amend the form.

The *second* step of the process is for the FAM to go into the IAHP PHC Performance Report form and add the required comments to the applicable sections, so your *Submission Uploader(s)* can easily see the changes they need to make in the form before the Performance Report can be processed as complete by the FAM.

Once your FAM has reviewed the form and made any comments against the applicable sections, they will send it back to your health service. One of the *Submission Uploaders* in your health service should then amend the IAHP PHC Performance Report as needed and send it back through the Data Portal submission workflow process as required.


Step 1 – Set the IAHP PHC Performance Report’s status to *Ready for Processing (DSS)*

Once it has been confirmed by your DSS FAM that there is information in the IAHP PHC Performance Report that will need to be amended by the health service, the DSS FAM will need to change the status of the Performance Report to *Ready for Processing* so they can add explanatory comments for the health service to the relevant sections of the form.

Step 2 – Add Comments to the Form and Return it to the Health Service for Amendment (DSS)

Once an IAHP PHC Performance Report has the status of *Ready for Processing*, your DSS FAM can add comments to any information they feel needs to be amended and can then return it to your health service’s *Submission Uploaders* for amendment.

Once this is done, the IAHP Performance Report’s status will change to *Submission Returned to Uploader* and one of your health service’s *Submission Uploaders* now need to address the comments your DSS FAM has made in the form before sending the Performance Report back through the submission approval process.

 Even though your DSS FAM has sent the IAHP PHC Performance Report back to you, they will still be able to access the Performance Report in “read only” mode so they can provide you with support in amending any information within the Performance Report as required.

Step 3 – Amend your IAHP PHC Performance Report based on DSS FAM feedback (Submission Uploader)

There may be times when an approved IAHP PHC Performance Report is returned to you for amendment by your DSS FAM due to issues they have identified with elements of the information in the form.

When your IAHP PHC Performance Report is returned, all *Submission Uploaders* in your health service will receive an email detailing the comments the FAM has made regarding the information in your Performance Report form that needs to be amended.

A *Submission Uploader* within your health service will then need to amend the information in the form, directly addressing the comments made by your FAM.



When your IAHP PHC Performance Report is returned to you by your DSS FAM, it will have the status of *Submission Returned to Uploader*.

The following procedure is used to amend your IAHP PHC Performance Report based on DSS FAM feedback.

1. Ensure you have logged in to the Data Portal and the Data Portal home screen is displayed with the **Reporting Dashboard** open.

The Reporting Dashboard will display details for your IAHP PHC Performance Report.

The screenshot shows a web interface for a 'TRAINING ENVIRONMENT'. The main heading is 'Performance Report | 29 February 2024 Reporting Round'. Below this, there are two status indicators: 'Due in 14 Days' (in a blue box) and 'Submission Returned to Uploader' (with a circular icon). A dropdown menu is open for 'Data Sharing', showing two questions with radio button options for 'Yes' and 'No'. Both 'Yes' options are selected.

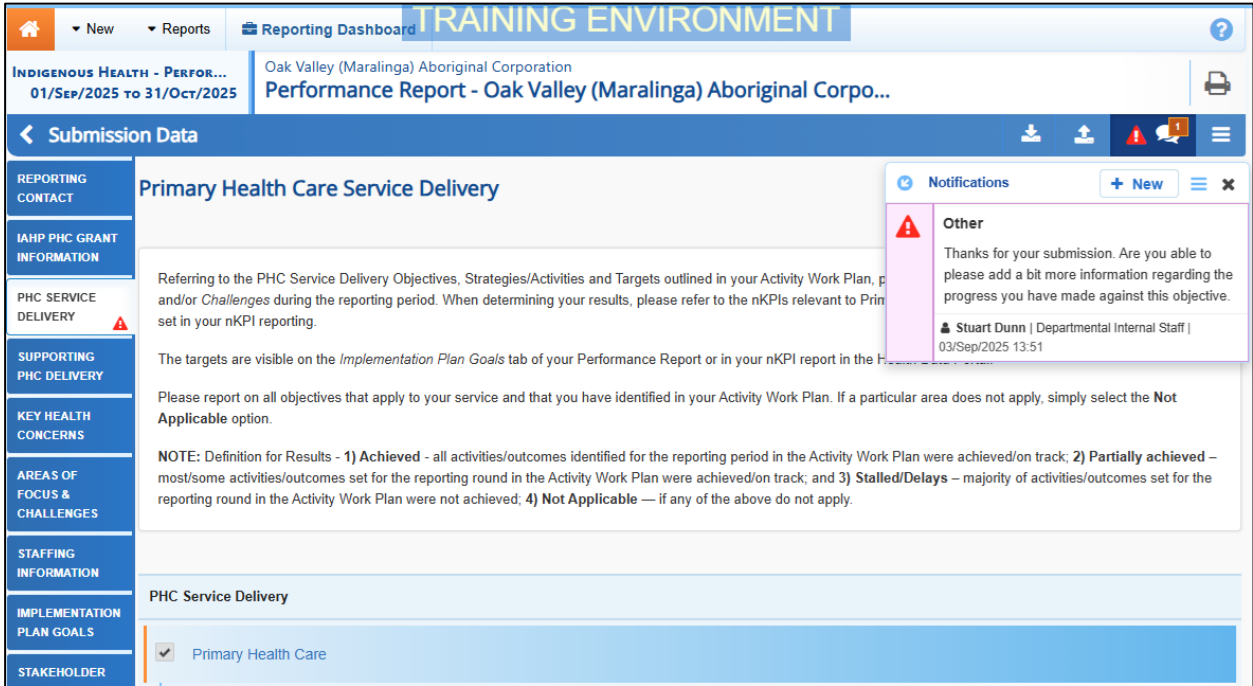
Do you agree to share your finalised processed Performance Report data (includes current and previous reporting periods) with Aboriginal Health and Medical Research Council of NSW (AH&MRC) for the purpose of policy development, research and summary feedback and support to organisations? Yes No

Do you agree to share your finalised processed Performance Report data (includes current and previous reporting periods) with National Aboriginal Community Controlled Health Organisation (NACCHO) for the purpose of policy development, research and summary feedback and support to organisations? Yes No

2. To amend your IAHP PHC Performance Report, hover your mouse pointer to the right of the **Performance Report** reporting round text in the **Reporting Dashboard** and select



The IAHP PHC Performance Report form will display and the *Notifications Tray* for each tab will display any comments your DSS FAM has made about the information entered in the form.



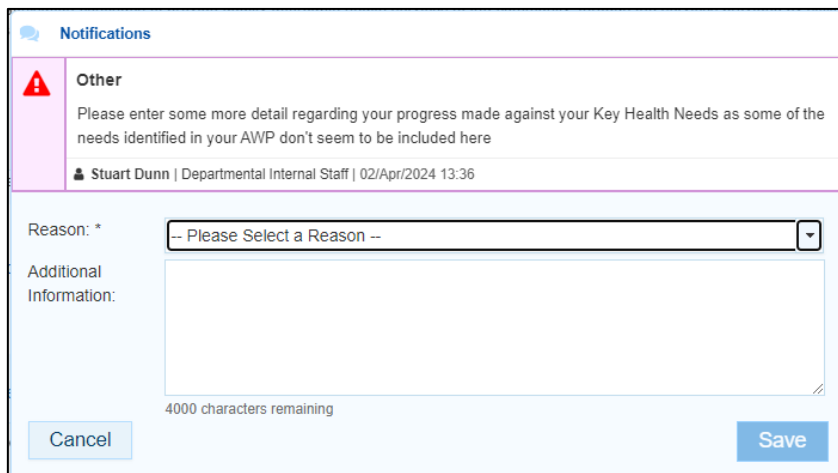
If the *Notifications Tray* doesn't display by default, select or in the top right-hand corner of the screen.

3. Navigate to the first section of the form with a displaying and review the first comment that has been made by your DSS FAM regarding your IAHP PHC Performance Report information.
4. If you are unsure which cell in the section the comment refers to, select and the cell will be highlighted for you.
5. If it is clear to you what amendment your DSS FAM needs you to make, update the information in the applicable cells as needed, ensuring the updates are addressing your FAM's comment.


Once you have made the required text amendments, you will also need to respond to the DSS FAM's comment in the *Notifications Tray*.



6. To do this, select next to the applicable comment in the **Notifications Tray**.


The *Notifications* window will display.






7. In the *Notifications* window, select in the **Reason** field and select **Other (specify)**.

8. In the **Additional Information** field, enter text explaining the amendments you have made. If needed, you can add instructions here on where the changes have been made if you think the text you have added/changed may be difficult for your DSS FAM to find.
9. To save your response, select .
10. Repeat steps 3 to 9 for any other changes that need to be made to the information in this section of the form in response to the comments made by your DSS FAM.

Your responses have now been added to the FAM's comments and the  for the section should now have been replaced by .



11. To save the text changes you have made to the section, select  at the bottom of the IAHP PHC Performance Report form.

12. Repeat this process for all sections of the form displaying a .

 If you have made the required amendments to your information and would like to add an explanatory comment for the DSS FAM, select  at the top of the *Notifications Tray*, select a *Reason* and add your comment in the *Additional Information* field.


The comments have now been added and can be viewed by anyone accessing the IAHP PHC Performance Report in the future.

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


13. Once the IAHP PHC Performance Report has been reviewed and updated as required, select  **Submission Returned to Uploader** in the **Reporting Dashboard** and, in the Change Data Asset Status window, in the **Action** field, select  and select the required action.

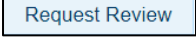
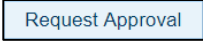
The available actions are:

- **Request Review** – Select this action to send your IAHP PHC Performance Report to your *Submission Reviewer* for review again.
- **Request Approval** – Select this action to send your IAHP PHC Performance Report back to your CEO or their representative for approval.

 If you can approve your IAHP PHC Performance Report, you will see the *Approve for Submission* option in the action list. This allows them to approve your IAHP PHC Performance Report and submit it directly to your DSS FAM for processing again.

14. In the **Comment** field, enter any comments regarding the action being performed on your IAHP PHC Performance Report, if needed.

 Any user with access to view your IAHP PHC Performance Report will be able to view any comments entered here.

15. One of the following options can now be selected when submitting your IAHP PHC Performance Report, depending on the action that was selected in the **Action** field:
 - i. To send your IAHP PHC Performance Report to your *Submission Reviewer* for review again, select . For the next step in the process, see [Step 4 - Review your IAHP PHC Performance Report based on DSS FAM Feedback \(Submission Reviewer\)](#).
 - ii. To send your IAHP PHC Performance Report back to your CEO or their representative for approval, select . For the next step in the process, see [Step 5 - Approve your IAHP PHC Performance Report based on DSS FAM Feedback \(Submission Approver\)](#).

Your IAHP PHC Performance Report has now been amended and either sent on to your *Submission Reviewer* for further review or sent straight on to your CEO or their representative for approval again.

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 your IAHP PHC Performance Report has been submitted to them for action.

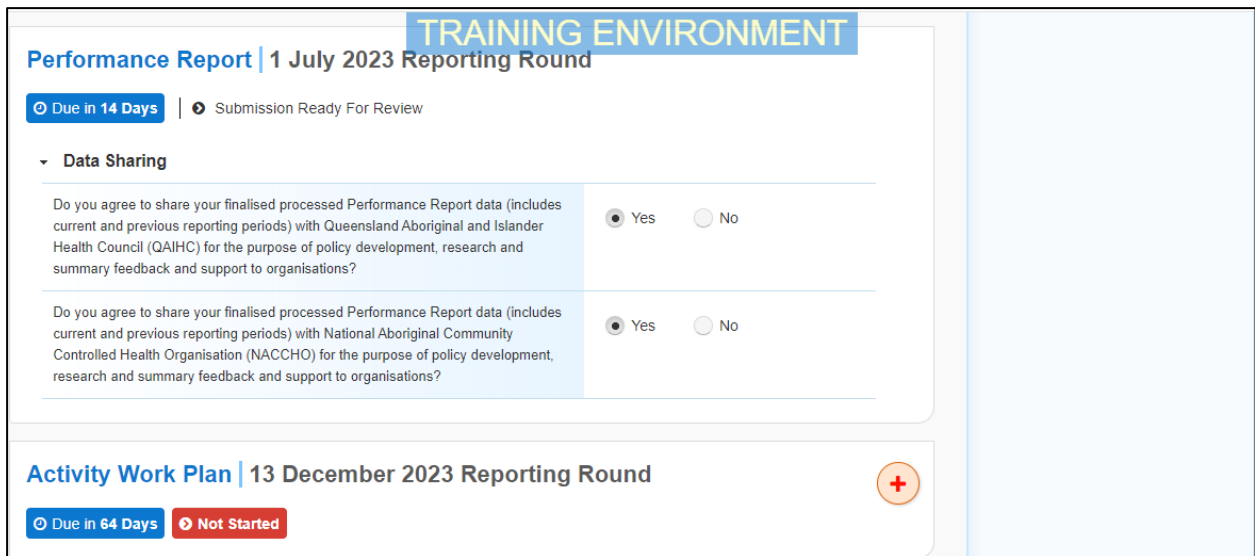
Step 4 – Review your IAHP PHC Performance Report based on DSS FAM Feedback (Submission Reviewer)

If your DSS FAM has identified issues with any of the information you have entered in the IAHP PHC Performance Report form, they will add comments to the form and send it back to your health service for amendment. Once the *Submission Uploader* in your health service has addressed the comments made, they may send the amended Performance Report on to the *Submission Reviewer* to be reviewed again prior to being sent again for internal approval.

The following procedure is used to review your IAHP PHC Performance Report in the Data Portal based on DSS FAM feedback.

1. Ensure you have logged in to the Data Portal and the Data Portal home screen is displayed with the **Reporting Dashboard** open.

The Reporting Dashboard will display details for your IAHP PHC Performance Report.



2. To review your IAHP PHC Performance Report, hover your mouse pointer to the right of the **Performance Report** reporting round text in the **Reporting Dashboard** and select




The IAHP PHC Performance Report form will display.

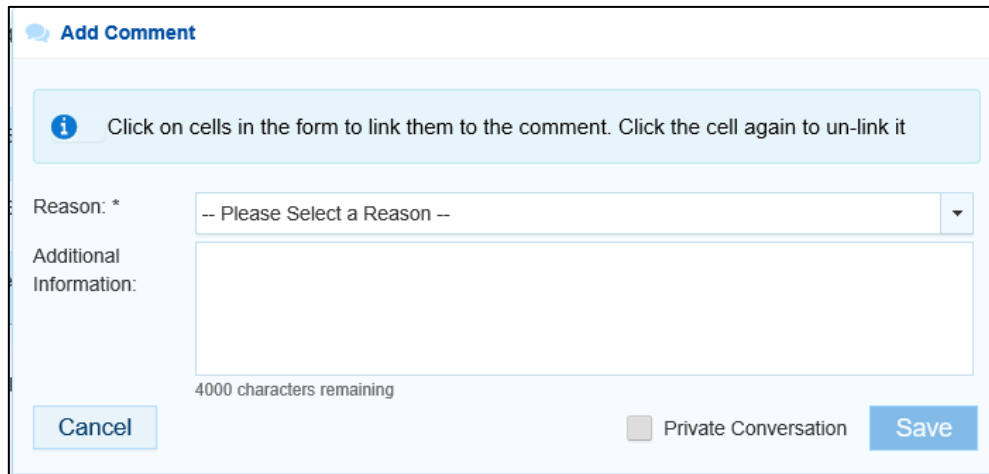




3. Review the information in the form and any accompanying comments as required.




Each of the comments added to a section of the form can be read to see the changes that were requested by your DSS FAM, and the subsequent updates made by your *Submission Uploader* in response.

4. Update any information if needed, including addressing DSS FAM comments if needed.
5. To add a comment for your colleagues explaining any change you have made to the data, select  at the top of the **Notifications Tray**.



The Add Comment window will display.





6. If needed, select the cell(s) to be linked to the comment you are adding.
7. Select  in the **Reason** field and select the reason the comment is being added from the drop-down list.
8. Enter an explanatory comment in the **Additional Information** field.
9. To make the comment private so the external *Data Receivers* can't see it, select the **Private Conversation** check box.
10. To save the response, select .

 Your comment can be edited by selecting  and selecting *Edit Comment* or deleted by selecting  and selecting *Delete Comment*.

The comment(s) has been added and can be viewed by anyone accessing your IAHP PHC Performance Report in the Data Portal.

11. To save your changes, select  at the bottom of the form.
12. To exit the IAHP PHC Performance Report form, scroll to the bottom of the form and select .

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

13. Once your IAHP PHC Performance Report has been reviewed and updated as required, select  **Submission Ready For Review** in the **Reporting Dashboard** and, in the Change Data Asset Status window, in the **Action** field, select  and select the required action.

The available actions are:

- **Request Approval** – Select this action to send your IAHP PHC Performance Report to your CEO or their representative again for re-approval.
- **Approve for Submission** – Your CEO or nominated representative can select this action if they are approving your IAHP PHC Performance Report as well as reviewing it.

- **Request Interim Processing** – Select this action to progress your IAHP PHC Performance Report to your DSS FAM for review prior to it going to your CEO or their representative for approval. This process is known as Interim Processing.
 - **Revision Required** – Select this action to return your IAHP PHC Performance Report to the *Submission Uploader* again for further amendment.
14. In the **Comment** field, enter any comments regarding the action being performed on your IAHP PHC Performance Report.



Any user with access to view your IAHP PHC Performance Report will be able to view any comments entered here.

15. One of the following options can now be selected when submitting your IAHP PHC Performance Report, depending on the action that has been selected in the **Action** field:
- i. To send your IAHP PHC Performance Report back to your CEO or their representative for approval, select . For the next step in the process, see [Step 5 - Approve your IAHP PHC Performance Report based on DSS FAM Feedback \(Submission Approved\)](#).
 - ii. To approve your IAHP PHC Performance Report and send it back to your DSS FAM for processing again, select . For the next step in the process, see [Process an IAHP PHC Performance Report \(DSS FAM\)](#).
 - iii. To send your IAHP PHC Performance Report to your DSS FAM for initial review prior to sending it to your CEO or their representative for approval, select . For the next step in the process, see [Interim Processing of an IAHP PHC Performance Report](#).
 - iv. To send your IAHP PHC Performance Report back to your *Submission Uploader* for further amendment, select . For the next step in the process, see [Step 3 - Amend your IAHP PHC Performance Report based on DSS FAM Feedback \(Submission Uploader\)](#).

Your IAHP PHC Performance Report has now been reviewed and either sent for approval again or sent back to your *Submission Uploader* for further revision.

Step 5 – Approve the IAHP PHC Performance Report based on DSS FAM Feedback (Submission Approved)

Once your IAHP PHC Performance Report has been returned to your health service by your DSS FAM due to issues with the information that has been entered, one of your *Submission Uploaders* will need to make the required changes to the data and then send the Performance Report back through the internal review and approval process prior to the amended Performance Report being sent back to your DSS FAM for processing.

The following procedure is used to approve your IAHP PHC Performance Report in the Data Portal based on DSS FAM feedback.

1. Ensure you have logged in to the Data Portal and the Data Portal home screen is displayed with the **Reporting Dashboard** open.

The Reporting Dashboard will display details for your IAHP PHC Performance Report.

HCP | No Upcoming Reporting Round

Start Date: 30/Apr/2024
End Date: 30/Jun/2024

Performance Report | 1 July 2023 Reporting Round

Closed 154 Days ago | Submission Ready For Approval

Data Sharing

Do you agree to share your finalised processed Performance Report data (includes current and previous reporting periods) with National Aboriginal Community Controlled Health Organisation (NACCHO) for the purpose of policy development, research and summary feedback and support to organisations? Yes No

Do you agree to share your finalised processed Performance Report data (includes current and previous reporting periods) with Aboriginal Health and Medical Research Council of NSW (AH&MRC) for the purpose of policy development, research and summary feedback and support to organisations? Yes No

TIS PR Reporting Round
Status: Closed
Start Date: 15/Nov/2023
End Date: 31/Dec/2023

2. To approve your IAHP PHC Performance Report, hover your mouse pointer to the right of the **Performance Report** reporting round test in the **Reporting Dashboard** and select



The IAHP PHC Performance Report form will display

TRAINING ENVIRONMENT

INDIGENOUS HEALTH - PERFOR... 01/Sep/2025 to 31/Oct/2025

Oak Valley (Maralinga) Aboriginal Corporation
Performance Report - Oak Valley (Maralinga) Aboriginal Corpo...

Submission Data

REPORTING CONTACT **Contact Information**

IAHP PHC GRANT INFORMATION **Reporting Contact**

Who is your organisation's contact for the Performance Report?

PHC SERVICE DELIVERY First Name

Last Name


SUPPORTING PHC DELIVERY Email Address

KEY HEALTH CONCERNS Phone



Mobile




AREAS OF FOCUS & CHALLENGES Current User Status

STAFFING INFORMATION



3. Review the information in the form as required.
4. To respond to a particular comment made by your *Submission Uploader* or *Submission Reviewer*, select  next to the comment in the **Notifications Tray**.

The Respond to Comment window will display.



5. Select  in the **Reason** field and select the reason the comment is being added from the drop-down list.
6. Enter an explanatory comment in the **Additional Information** field.
7. To save the response, select .

 Your comment can be edited by selecting  and selecting *Edit Comment* or deleted by selecting  and selecting *Delete Comment*.

The comment(s) has been added and can be viewed by anyone accessing your IAHP PHC Performance Report.


8. To save any changes, select  at the bottom of the form.
9. To exit your IAHP PHC Performance Report form, scroll to the bottom and select .

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

10. Once your IAHP PHC Performance Report has been reviewed and updated as required, select  **Submission Ready For Approval** in the **Reporting Dashboard** and, in the Change Data Asset Status window, in the **Action** field, select  and select the required action.

The available actions are:

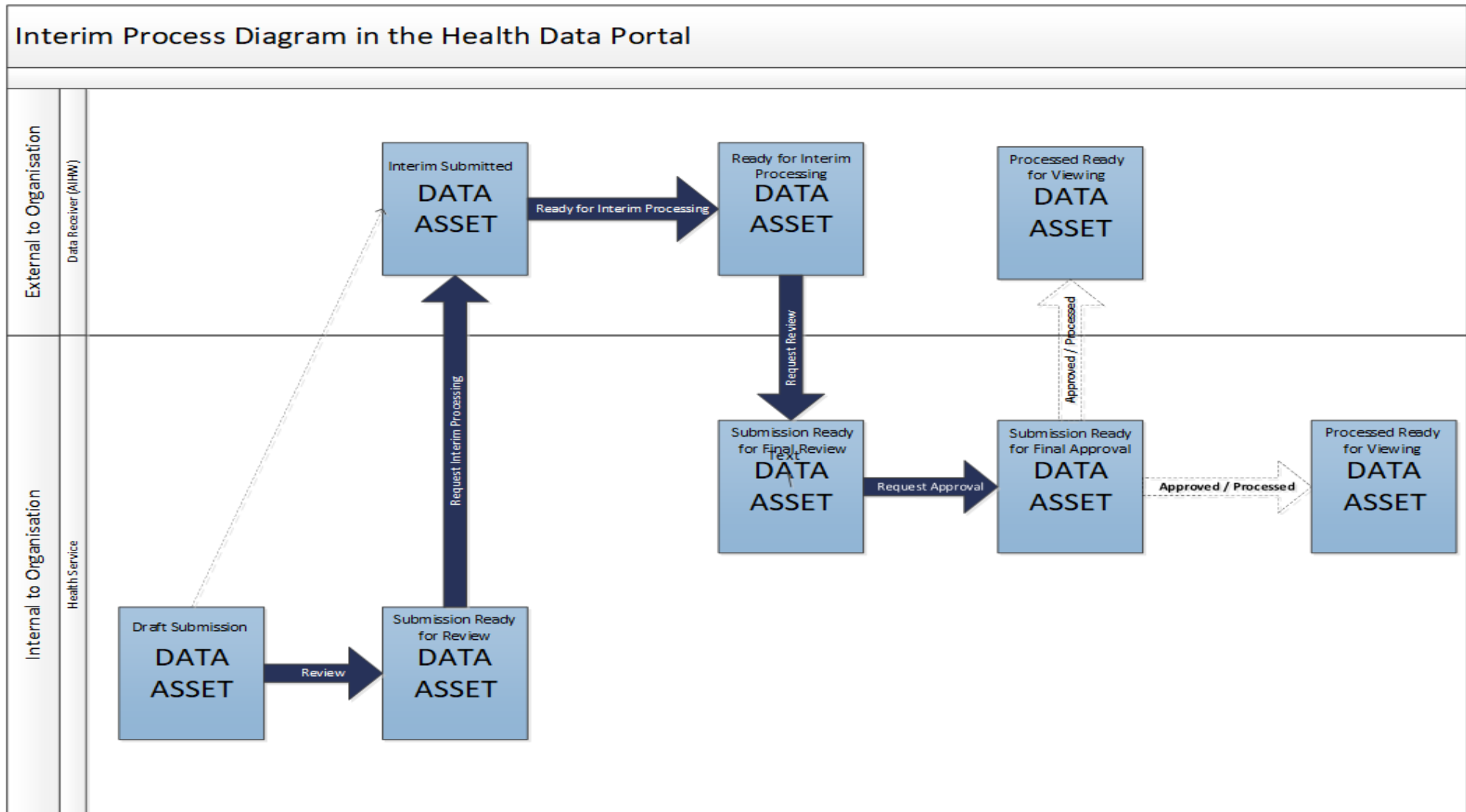
- **Approve for Submission** – Select this action to approve your IAHP PHC Performance Report for processing by your DSS FAM.
 - **Revision Required** – Select this action if your IAHP PHC Performance Report needs to be returned to your *Submission Uploader* again for further amendment.
11. In the **Comment** field, enter any comments regarding the action being performed on your IAHP PHC Performance Report.

 Any user with access to view your IAHP PHC Performance Report will be able to view any comments entered here.

12. One of the following options can now be selected when submitting your IAHP PHC Performance Report, depending on the action that has been selected in the **Action** field:
- i. To approve your IAHP PHC Performance Report and send it to your DSS FAM for processing, select . For the next step in the process, see [Process an IAHP PHC Performance Report \(DSS FAM\)](#).
 - ii. To send your IAHP PHC Performance Report back to your *Submission Uploader* for further amendment, select . For the next step in the process, see [Step 3 - Amend your IAHP PHC Performance Report based on DSS FAM Feedback \(Submission Uploader\)](#).

Your IAHP PHC Performance Report has now been approved and sent back to your DSS FAM for processing. For more information, see [Process an IAHP PHC Performance Report \(DSS FAM\)](#).


The IAHP PHC Performance Report Interim Processing Workflow



Interim Processing of an IAHP PHC Performance Report


Interim Processing of an IAHP PHC Performance Report will be available to health services during a reporting round, to allow them to send their Performance Report on to their DSS FAM for review and processing prior to it going to the health service's CEO, or their representative, for formal approval.

Doing this avoids the situation of a CEO approving the IAHP PHC Performance Report only to have your DSS FAM send it back to you again for amendment, so it needs to be approved again. Some health service CEOs may prefer to be the last person to see the IAHP PHC Performance Report and give formal approval once all other parties have reviewed and approved the Performance Report as required. In these cases, *Interim Processing* will be the most suitable process for the health service to follow.

 To send the IAHP PHC Performance Report for interim processing, the health service user must have the role of *Submission Reviewer* in the Data Portal. Interim processing can't be initiated by the *Submission Uploader*.

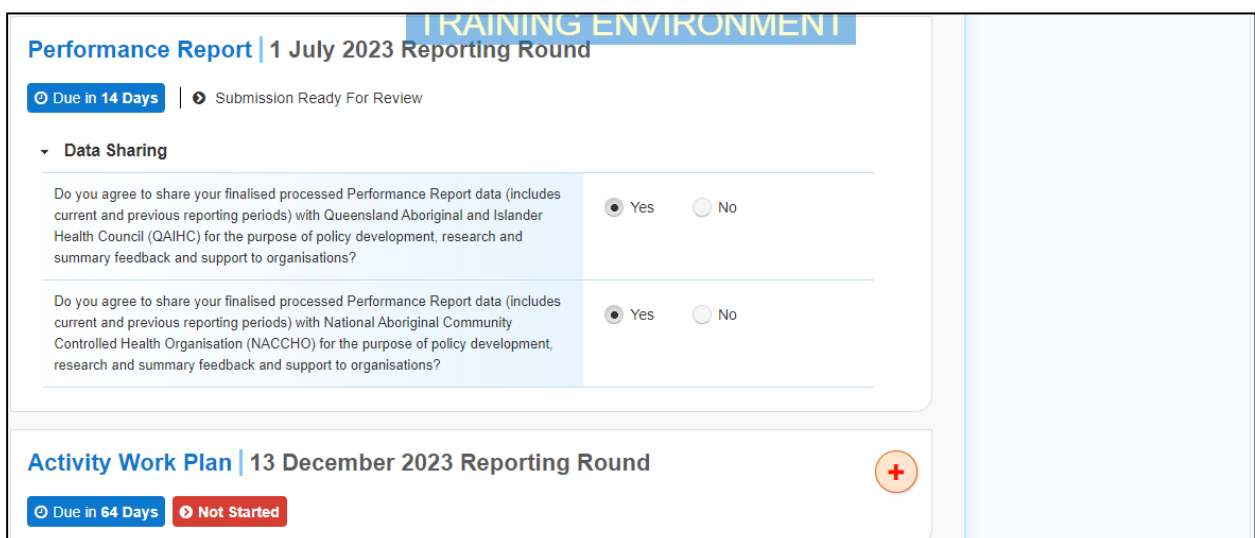
Step 1 - Initiate Interim Processing (Submission Reviewer)

When an IAHP PHC Performance Report has been created by a *Submission Uploader* in your health service and sent to your *Submission Reviewer* for review, the *Submission Reviewer* can choose to send it to your DSS FAM for review and approval prior to it going to your CEO or their representative for approval. This is known as *Interim Processing*.


 This section of the user guide shows the process of initiating interim processing with the IAHP PHC Performance Report at the status of *Submission Ready for Review*. Please note though that interim processing can also be initiated when the Performance Report is at the status of *Draft Submission* if the user has the *Submission Reviewer* role. This means the user doesn't have to set the Performance Report to *Submission Ready for Review* before instigating interim processing.




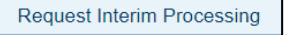
1. Ensure you have logged in to the Data Portal and the Data Portal home screen is displayed with the **Reporting Dashboard** open.

The Reporting Dashboard will display details for your IAHP PHC Performance Report.



2. Before progressing your IAHP PHC Performance Report through the submission workflow, select the **Data Sharing** link (if the section doesn't open by default) and answer either **Yes** or **No** to the data sharing consent questions that display, if the questions haven't already been answered.

 If your health service is in the ACT only the NACCHO question will display here.

3. To initiate interim processing, select  **Submission Ready For Review** in the Reporting Dashboard and, in the Change Data Asset Status window, in the **Action** field, select  and select *Request Interim Processing*.
 4. In the **Comment** field, enter any comments for the DSS FAM, if needed.
-  Any user with access to view your IAHP PHC Performance Report will be able to view any comments entered here.
5. To send your IAHP PHC Performance Report to your DSS FAM for interim processing, select .

The status of your IAHP PHC Performance Report has now been set to *Interim Submitted* and your DSS FAM can now review your Performance Report as required to assess its suitability before it goes to your CEO or their representative for approval.


Step 2 – Review the IAHP PHC Performance Report (DSS)

Once your *Submission Reviewer* has requested interim processing of your IAHP PHC Performance Report, its status will be set to *Interim Submitted* and it will be sent to DSS for review.

Your DSS FAM will now go into your Performance Report and set it to the status of *Ready for Interim Processing* to inform your health service that the report has been removed from their backlog and is now being worked on.

Step 3 – Process the IAHP PHC Performance Report (DSS)

When your IAHP PHC Performance Report has progressed to the status of *Ready for Interim Processing*, it can be reviewed by your DSS FAM and sent back to your health service for your final review and approval.

 If any issues are identified with the information as part of the FAM's review, the FAM will add comments to the form and send it back to your health service's *Submission Uploaders* for amendment as per the normal exception reporting process. For more information, see [Exception Reporting](#) earlier in this guide.

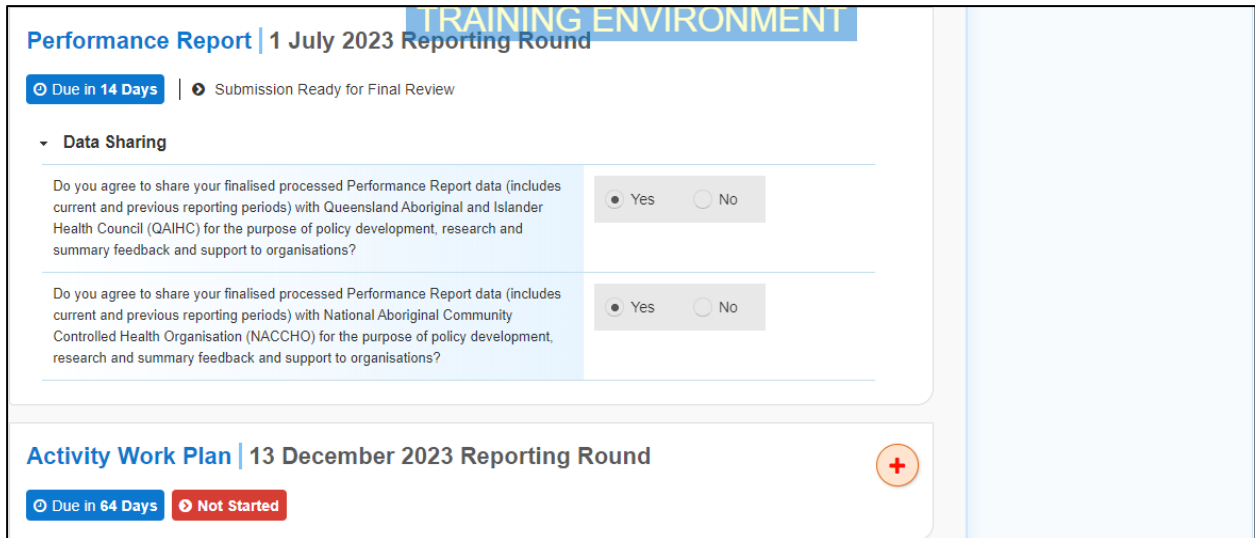
Step 4 – Conduct a Final Review of your IAHP PHC Performance Report (Submission Reviewer)


If your DSS FAM has reviewed your IAHP PHC Performance Report and is happy with it, they will send it on to your health service’s *Submission Reviewer* for final review prior to approval. Your Performance Report’s status will be set to *Submission Ready for Final Review*.

The following procedure is used to conduct a final review on your IAHP PHC Performance Report sent for Interim Processing in the Data Portal.

1. Ensure you have logged in to the Data Portal and the Data Portal home screen is displayed with the **Reporting Dashboard** open.


The Reporting Dashboard will display details for your IAHP PHC Performance Report.



2. To conduct a final review of your IAHP PHC Performance Report, hover your mouse pointer to the right of the **Performance Report** reporting round text in the **Reporting Dashboard** and select .



The IAHP PHC Performance Report form will display and the information in the form can be reviewed for accuracy.




3. Once the content of your IAHP PHC Performance Report form has been reviewed, select  at the bottom of the form.

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

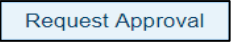
The IAHP PHC Performance Report in the Health Data Portal Interim Processing of an IAHP PHC Performance Report

- To action the form, select  **Submission Ready for Final Review** in the **Reporting Dashboard** and, in the Change Data Asset Status window, in the **Action** field, select  and select **Request Approval**.

 If changes need to be made to any of the information in your IAHP PHC Performance Report, select *Revision Required* to send it back to your *Submission Uploader* for amendment.

- In the **Comment** field, enter any comments regarding the action being performed on your IAHP PHC Performance Report.

 Any user with access to view your IAHP PHC Performance Report will be able to view any comments entered here.

- To send your IAHP PHC Performance Report on to your CEO or their representative for approval, select .

Your IAHP PHC Performance Report has been sent to your CEO or their representative for final approval.

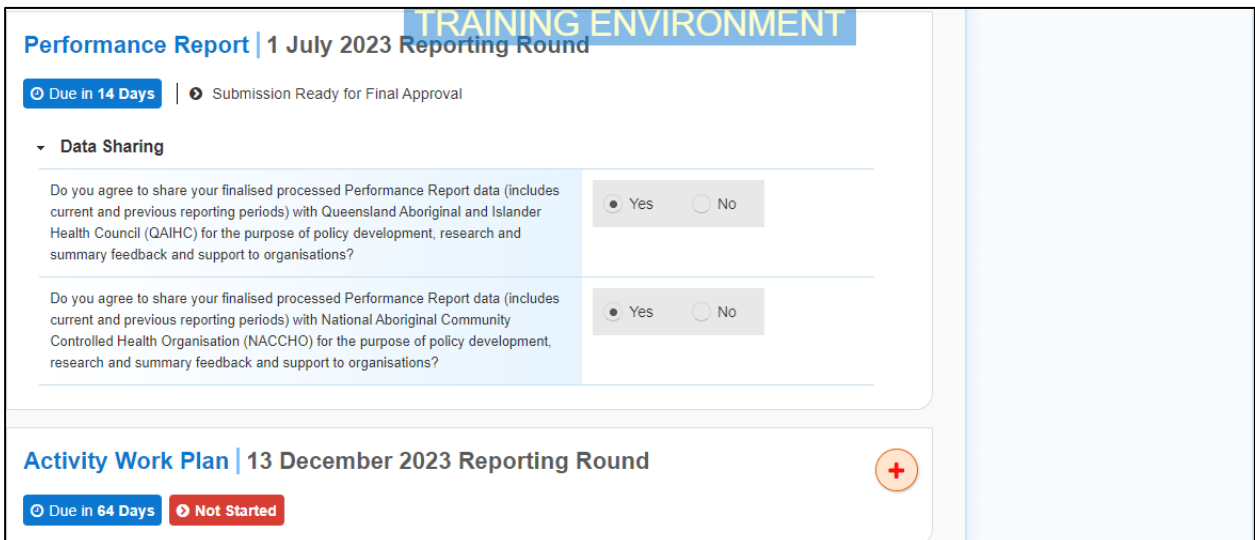
Step 5 – Approve your IAHP PHC Performance Report (Submission Approver)

When your IAHP PHC Performance Report has the status of *Submission Ready for Final Approval*, it can be approved by your *Submission Approver* (usually your CEO or their representative) and progressed on to the status of *Processed*.

The following procedure is used to approve your IAHP PHC Performance Report submission as part of Interim Processing in the Data Portal.



- Ensure you have logged in to the Data Portal and the Data Portal home screen is displayed with the **Reporting Dashboard** open.

The Reporting Dashboard will display details for your Performance Report.



Performance Report | 1 July 2023 Reporting Round


TRAINING ENVIRONMENT



 Due in 14 Days |  Submission Ready for Final Approval

▼ Data Sharing

Do you agree to share your finalised processed Performance Report data (includes current and previous reporting periods) with Queensland Aboriginal and Islander Health Council (QAIHC) for the purpose of policy development, research and summary feedback and support to organisations? Yes No

Do you agree to share your finalised processed Performance Report data (includes current and previous reporting periods) with National Aboriginal Community Controlled Health Organisation (NACCHO) for the purpose of policy development, research and summary feedback and support to organisations? Yes No

Activity Work Plan | 13 December 2023 Reporting Round 


 Due in 64 Days  Not Started



- To approve your IAHP PHC Performance Report, hover your mouse pointer to the right of the **Performance Report** reporting round text in the **Reporting Dashboard** and select




Interim Processing of an IAHP PHC Performance Report The IAHP PHC Performance Report in the Health Data Portal

The IAHP PHC Performance Report form will display and the information in the form can be reviewed for accuracy.

3. Once the content of the IAHP PHC Performance Report form has been reviewed, select  at the bottom of the form.

4. To approve your IAHP PHC Performance Report, select  **Submission Ready For Approval** in the **Reporting Dashboard** and, in the Change Data Asset Status window, in the **Action** field, select  and select **Approve for Submission**.

 If changes need to be made to any of the information in your IAHP PHC Performance Report, select *Revision Required* to send it back to the *Submission Uploader* for amendment.

5. In the **Comment** field, enter any comments regarding the action being performed on your IAHP PHC Performance Report.

 Any user with access to view your IAHP PHC Performance Report will be able to view any comments entered here.

6. To approve your IAHP PHC Performance Report, select .

Your IAHP PHC Performance Report has been progressed to the status of *Processed* and Interim Processing is now complete.

Work with Comments in your IAHP PHC Performance Report form

As part of the IAHP PHC Performance Report submission workflow process in the Data Portal, it is important for your health service and your DSS FAM to be able to engage in a “conversation” regarding the information that has been entered in the Performance Report.

There may be times, for example, when your health service needs to explain to your FAM why particular information has been included in the Performance Report. The FAM may then need to respond if further explanation is needed from your health service.


There may also be times when the participating users from your health service need to have an internal, private “conversation” in the Data Portal regarding your data, separate to those conversations held with your DSS FAM in response to a data validation issue.



To ensure the different scenarios above can occur, the concept of “threaded comments” has been introduced in the Data Portal. This allows conversations to occur in the Data Portal both between your health service and your DSS FAM and internally within your health service. It also allows for these conversations to be marked as complete by the relevant parties once a conversation has come to its conclusion.


Respond to DSS FAM comments in your form

When your DSS FAM has added comments to your IAHP PHC Performance Report form asking you to make amendments, not only will you need to make the amendments that have been asked for, but you will need to respond to the DSS FAM comments explaining what you have done.

The following procedure is used to respond to a DSS FAM’s comments in your IAHP PHC Performance Report form.

1. Ensure your IAHP PHC Performance Report form is displayed.
2. Open the first section of the form your DSS FAM has added a comment to. The section will be marked with a .
3. Navigate to the **Notifications Tray** containing the DSS FAM comment(s) you need to respond to.



 If the *Notifications Tray* doesn’t display by default, select  in the top right-hand corner of the form.

4. If needed, select  next to the comment to confirm the cell your FAM’s comment refers to.
5. Make the required amendments in the applicable cell, as instructed by your DSS FAM in their comment .

Once you have made the required amendments to the IAHP PHC Performance Report, you need to respond to the DSS FAM comment, explaining what you have done.

6. To add your response, in the **Notifications Tray**, select  next to the applicable DSS FAM comment.

The Notifications window will display.

7. In the Notifications window, select  in the **Reason** field and select **Other (specify)**.
8. In the **Additional Information** field, enter text explaining the amendments you have made. If needed, you can add instructions here on where the changes have been made if you think the text you have added/changed may be difficult for your FAM to find.
9. To save your response, select .

You can now submit your IAHP PHC Performance Report through the Data Portal submission workflow and both the reviewers and approvers within your health service, and your DSS FAM, will be able to view your comment and respond to it if needed.



Add a new “internal comment” for use within your Health Service

As part of the submission of an IAHP PHC Performance Report in the Data Portal, you may wish to add a comment to a particular section of your form that you only wish to share with other users within your health service. For example, you may wish as the *Submission Reviewer* to ask a question about some of the information in the form, or you may want to provide an explanation about why some of the information has been entered to your CEO, so they understand the context around the information before considering whether to approve your IAHP PHC Performance Report.

In these instances, you would not want your FAM to see these comments, as they were purely for use within your health service.

The following procedure is used to commence a private conversation in your IAHP PHC Performance Report form by adding an “internal comment”.



1. Ensure the IAHP PHC Performance Report form is displayed.
2. Open the section you wish to add a new “internal comment” to.
3. Navigate to the **Notifications Tray**.

 If the *Notifications Tray* doesn't display by default, select  in the top right-hand corner of the form.

4. To add your “internal comment”, select  at the top of the **Notifications Tray**.

The IAHP PHC Performance Report in the Health Data Portal Work with Comments in your IAHP PHC Performance Report form

The Add Comment window will display.



5. Select  in the **Reason** field that displays and select **Other (specify)**.
6. Select the cell or cells your comment relates to. This provides additional context for your colleagues reading your comment. For more information, see [Link a Comment to Particular Cells](#).
7. Enter an explanatory comment in the **Additional Information** field.
8. To mark the comment as private so the *Data Receiver* can't see it, select the **Private Conversation** check box.
9. To save the comment, select .

Your new comment can now be viewed by anyone within your health service with access to the IAHP PHC Performance Report, but not external your DSS FAM.

Mark an Internal Comment as Complete

If a private conversation has been conducted in your Performance Report using the “internal comment” functionality, someone within your health service (*Submission Uploader, Reviewer or Approver*) can mark this conversation as complete prior to the IAHP PHC Performance Report being sent to your DSS FAM for processing if they would like to remove the comment from the Performance Report.

The following procedure is used to mark a private conversation as complete in the Data Portal.

1. Ensure your IAHP PHC Performance Report form is displayed.
2. Open the tab you wish to mark a comment/conversation as complete for.
3. Navigate to the **Notifications Tray**.
4. If the *Notifications Tray* doesn't display by default, select  in the top right-hand corner of the form.
4. To mark a conversation as complete, select  next to the applicable comment/conversation in the **Notifications Tray**.

The Mark as Complete window will display.

5. In the **Additional Information** field, you can enter an explanation regarding why you are marking the conversation as complete, if you choose.



6. To save the comment, select .

The conversation will now disappear.

Link a Comment to Particular Cells

If there is a particular cell you would like to draw another user’s attention to, you can add a comment to the applicable tab in your form and link a particular cell or cells to that comment. For example, you may wish to clarify with your DSS FAM what information is required in a particular cell.

1. Ensure your IAHP PHC Performance Report form is displayed.
2. Open the tab you wish to add a new comment to with linked cells.
3. Navigate to the **Notifications Tray**.


 If the *Notifications Tray* doesn’t display by default, select  in the top right-hand corner of the form.

4. To add your comment, select  at the top of the **Notifications Tray**.

The Add Comment window will display and the message “Click on cells above to link them to the comment. Click on the cell again to un-link it” will display.


5. Select the cell(s) to be linked to the comment you are adding.


The selected cell(s) will now be highlighted in red.


6. Select  in the **Reason** field that displays and select **Other (specify)**.

7. Enter an explanatory comment in the **Additional Information** field.

The IAHP PHC Performance Report in the Health Data Portal Work with Comments in your IAHP PHC Performance Report form

 To mark the conversation as private so your DSS FAM can't see it, if needed, select the **Private Conversation** check box.

8. To save the comment, select .



Once your IAHP PHC Performance Report is submitted to your DSS FAM for processing, they will be able to see the cells you have linked to the comment by selecting .

View Completed Comments and Conversations

When a comment or conversation is marked as complete in the IAHP PHC Performance Report form, it disappears. If required though, you can view those completed comments/conversations and undo the completion action if you wish to bring them back into view permanently.

The following procedure is used to view a completed comment/conversation in an IAHP PHC Performance Report form in the Data Portal.


1. Ensure your IAHP PHC Performance Report form is open.
2. Open the tab you wish to view completed comments for.
3. Navigate to the **Notifications Tray**.

 If the *Notifications Tray* doesn't display by default, select  in the top right-hand corner of the form.


4. To view all "completed" comments, select  in the **Notifications Tray** and select **Show Completed Comments**.

Any comments that have previously been marked as complete will now be visible, in the *Notifications Tray*, in green.

The comment/conversation can now be read as needed.

5. If the comment/conversation needs to be made permanently visible again, in the **Notifications Tray**, select .

The selected comment/conversation has now been returned to view in the *Notifications Tray*.

 Only those comments you have previously been able to see will be returned when you select *Show completed comments* in the *Notifications Tray*. For example, if your DSS FAM has not previously been involved a particular conversation conducted by your health service, they will not be able to retrieve these "completed" comments.

Export your IAHP PHC Performance Report form

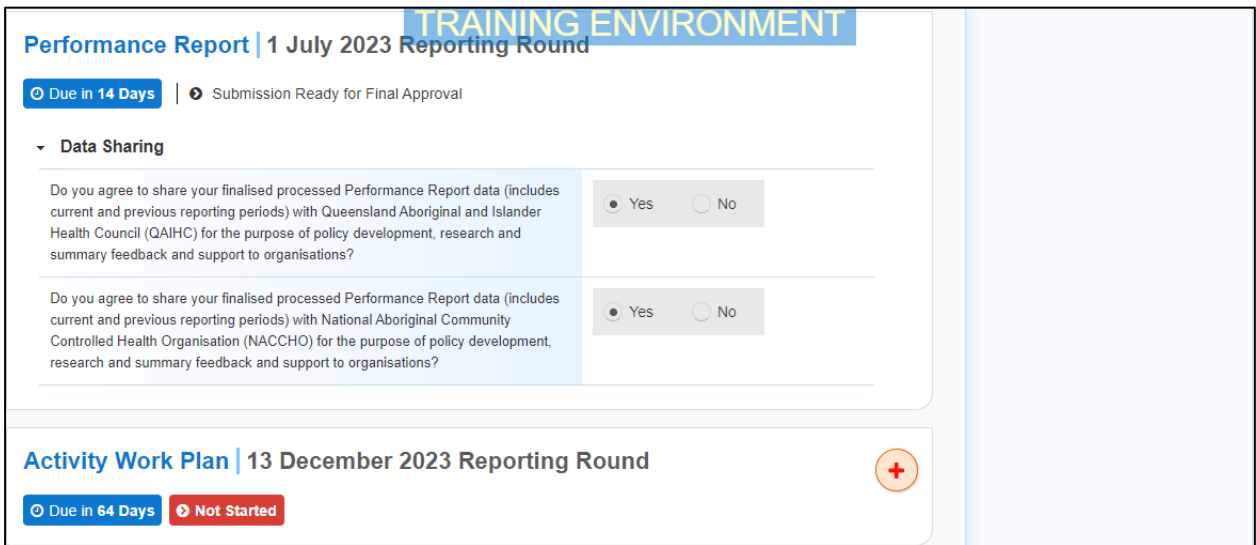
There may be times when you need to export your IAHP PHC Performance Report from the Health Data Portal so you can print it or share it with others within your health service.

For example, your CEO may need to approve your Performance Report but does not have access to the Data Portal to be able to do so online. As an alternative, you may choose to print out the form or export it and email it, so your CEO can review it in hard copy.

The following procedure is used to export your IAHP PHC Performance Report form from the Data Portal.

1. Ensure you have logged in to the Data Portal and the Data Portal home screen is displayed with the **Reporting Dashboard** open.

The Reporting Dashboard will display details for your IAHP PHC Performance Report.



2. To open your IAHP PHC Performance Report form, hover your mouse pointer to the right of the **Performance Report** reporting round text in the **Reporting Dashboard** and select



The IAHP PHC Performance Report form will display.




3. To export the offline Word version of your IAHP PHC Performance Report, select .

The IAHP PHC Performance Report in the Health Data Portal Export your IAHP PHC Performance Report form

The offline Word version of the form has now been downloaded to your web browser's download tray, highlighted in red below.



The screenshot above shows the Download tray for Google Chrome. If you use Microsoft Edge when accessing the Health Data Portal, the Download tray may be in a different spot.

- To open the offline Word version of the form, select  in the top right-hand corner of your screen and select the offline Word version of the form you have just exported from the list that displays (it should be at the top of the list).

The offline Word version of your IAHP PHC Performance Report will display.

<p>Performance Report - Ballarat & District Aboriginal Cooperative - 20240910</p> <p><i>Indigenous Health - Performance Report</i></p> <p>Organisation: Ballarat & District Aboriginal Cooperative Reporting Round Period: 21/Aug/2024 to 31/Oct/2024</p> <p>Information on using this form</p> <p>To keep this file compatible with importing, the following are important:</p> <ol style="list-style-type: none"> Avoid changing the filename. Do not remove the protection. Any change to the structure, addition of comments, or enabling of track-changes will render the file incompatible with the import function. <p>Reporting Contact</p> <table border="1"> <tr><td>Who is your organisation's contact for the Performance Report?</td><td>Stuart Dunn</td></tr> <tr><td>First Name</td><td>Stuart</td></tr> <tr><td>Last Name</td><td>Dunn</td></tr> <tr><td>Email Address</td><td>Stuart.Dunn@health.gov.au</td></tr> <tr><td>Phone</td><td></td></tr> <tr><td>Mobile</td><td></td></tr> </table> <p>Grant Information</p> <table border="1"> <tr><td>Grant Agreement ID</td><td>4-ECYFGHN</td></tr> </table>	Who is your organisation's contact for the Performance Report?	Stuart Dunn	First Name	Stuart	Last Name	Dunn	Email Address	Stuart.Dunn@health.gov.au	Phone		Mobile		Grant Agreement ID	4-ECYFGHN	<p>Please provide an overview of your progress against the key health needs identified in your Activity Work Plan.</p> <p>Key Health Needs</p> <p>Outline progress made against the Key Health Needs identified in your organisation's Activity Work Plan.</p> <p>We increased the number of health checks for our adult clients from 1320 in 2020/21 to 1486 in 201.22. Our organisation continues to provide quality affordable health services to the community, through the services provided by skilled GPs, nurses and practitioners.</p> <p>Here is the additional information you requested regarding my key health concerns progress.</p> <p>Max characters: 15000</p> <p>Are there any additional Key Health Needs that emerged during the period?</p> <p>No</p> <p>Areas of Focus & Challenges</p> <p>Please provide an overview of your progress against the key areas of focus and challenges identified in the Activity Work Plan during the reporting period, and any challenges your organisation faced with these.</p> <p>Key Areas of Focus</p> <p>Outline progress made against the Key Areas of Focus identified in your Activity Work Plan</p> <p>Ensure the service sustains a constant medical and primary health care workforce. We have managed to maintain a consistent medical and primary health care workforce over the past 12 months.</p> <p>Ensure all clients with Chronic Disease are managed effectively. Due to Covid restrictions and limitations of face to face consults we have provided ultimate care to our</p>
Who is your organisation's contact for the Performance Report?	Stuart Dunn														
First Name	Stuart														
Last Name	Dunn														
Email Address	Stuart.Dunn@health.gov.au														
Phone															
Mobile															
Grant Agreement ID	4-ECYFGHN														

You can now print and/or save the Word version of the form, so you can share it as needed.