



# PMHC-MDS User Documentation

Version 1.0.13

A dedicated **Help Desk** is available to support Primary Health Networks and Provider Organisations implementing PMHC in relation to the minimum dataset system. All enquiries should be directed to: [support@pmhc-mds.com](mailto:support@pmhc-mds.com).

As at 3 May, 2019

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# 1. Passwords

As required by the Australian Government's Protective Security Policy Framework passwords have to be changed every 3 months. If you do not change your password it will expire and you will not be able to login to the system without resetting your password.

Passwords are to be:

- 13 or more characters with no complexity requirements, or
- a minimum of 10 characters with at least 3 of the following character sets
  - lowercase characters (a-z)
  - uppercase characters (A-Z)
  - digits (0-9)
  - punctuation and special characters
- changed at least every 90 days
- changed by users no more than once a day
- not reused from any of the preceding eight changes

Please note: Users will be reminded via an email sent from [support@strategicdata.com.au](mailto:support@strategicdata.com.au) 14 days prior to when their password is due to expire, and on PMHC MDS login 7 days prior to the password expiry. - See see [Password Expiry Notifications](#)

If a password expires the user will not be able to access the PMHC MDS until they reset their password - see [Forgotten or Expired Password](#).

## 1.1. Password Expiry Notifications

As required by the Australian Government's Protective Security Policy Framework passwords have to be changed every 3 months.

Users will be reminded via an email sent from [noreply@strategicdata.com.au](mailto:noreply@strategicdata.com.au) each day for 14 days prior to when their password is due to expire, and will also be reminded on PMHC MDS login 7 days prior to the password expiry.

It is quicker to reset your password before it expires:

1. Click on the password rest link to open <https://auth.strategicdata.com.au/>.  
either on the password reminder email

[support@strategicdata.com.au](mailto:support@strategicdata.com.au)

Password Expiry Reminder

To: [REDACTED]

Hello [REDACTED]

Your Strategic Data password will expire in 13 days.

This password provides you access to online services provided by Strategic Data Pty Ltd including the following

- \* PMHC MDS.

Please change your password at <https://auth.strategicdata.com.au/>

As required by the Australian Government's Protective Security Policy Framework passwords must be:

- \* 13 or more characters with no complexity requirements, or
- \* a minimum of 10 characters with at least 3 of the following character sets
  - \* lowercase characters (a-z)
  - \* uppercase characters (A-Z)
  - \* digits (0-9)
  - \* punctuation and special characters
- \* changed at least every 90 days
- \* changed by users no more than once a day
- \* not reused from any of the preceding eight changes

Please contact [support@strategicdata.com.au](mailto:support@strategicdata.com.au) if you have any questions or require assistance.

Thank you

or on PMHC MDS login click the 'Sign in' button.

## Login to PMHC MDS successful.

Welcome [REDACTED]

Your password will expire in 7 days.

[Change your password now.](#)

[Continue to site.](#)

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3. When your profile management page opens, you will be shown this screen.

## Change your password

Passwords are to be:

- 13 or more characters with no complexity requirements, or
- a minimum of 10 characters with at least 3 of the following character sets
  - lowercase characters (a-z)
  - uppercase characters (A-Z)
  - digits (0-9)
  - punctuation and special characters
- changed at least every 90 days
- changed by users no more than once a day
- not reused from any of the preceding eight changes

Current Password  \* response required

Password:  \* response required

Confirm password:  \* response required

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### ***Fig. 1.1 Enter your current password in the first box Enter your new password in the second and third box.***

Please note; \* if you see the message 'Password unacceptably weak' after entering your new password, the password is not of sufficient complexity. Please check the password requirements. (Current users have indicated they find it easier to create a password that is 13 or more characters to avoid the complexity requirements) \* if you receive a message that your current password is incorrect, please reset your password through the [Forgotten or Expired Password](#).

3. Click 'Submit'.
4. You will receive confirmation when your new password has been successfully saved.

Your new password has been saved.

It may take up to 5 minutes for your password to be updated on all the systems. Please change any stored passwords in email programs and or mobile devices.

5. Log out of your profile management site.
6. Navigate back to the PMHC MDS <https://pmhc-mds.com/> and sign in.

### **1.2. Forgotten or Expired Password**

As required by the Australian Government's Protective Security Policy Framework passwords have to be changed every 3 months. If you do not change your password it will expire and you will not be able to login to the system without resetting your password.

If you have forgotten your password or it has expired:

1. Navigate to <https://pmhc-mds.net/> and click the 'Sign in' button.
2. Click 'Forgot Password'.

## Resetting password

This form is to be used to reset a forgotten password. Please enter your primary email address. An email with further instructions will be sent to the email addresses we have on file.

Email or Username  \* response required

I'm not a robot   
reCAPTCHA  
Privacy - Terms

3. You will be prompted to enter your email address or user name recorded for the PMHC MDS.
4. Click the 'I'm not a robot' checkbox.
5. Click 'Submit'.
6. An email with further instructions will be sent from [noreply@strategicdata.com.au](mailto:noreply@strategicdata.com.au) to the email address the PMHC MDS has on file for the user. Additionally, if you have set a backup email, then an email will also have been sent there. An SMS with a verification code will have been sent to the mobile phone number we have on record.

## Resetting password

Thank you for requesting a password reset.

An email has been dispatched to your primary address with details on how to reset your password. If you have a backup address registered, then an email will also have been dispatched to it.

Please follow the link in this email to complete the process.

If you don't receive this email please contact [nobody@nowhere.com.au](mailto:nobody@nowhere.com.au).

7. Open the email sent from [noreply@strategicdata.com.au](mailto:noreply@strategicdata.com.au) and open the link in the email.



Hello [REDACTED]

Someone has requested a password reset on 2018-10-22, and so this email has been dispatched to all email addresses that are on record for your user.

Please verify your identity for the PMHC MDS, PMHC MDS authentication system.

Follow the link below, and then enter the code which has been sent to your mobile phone.

<https://auth.strategicdata.com.au/x/verify/E57665FD743AC55DC22CEE6C>

If you can't click the link, please copy the entire link and paste it into your browser.

If you don't receive the SMS please contact [support@strategicdata.com.au](mailto:support@strategicdata.com.au).

Note that this invite will automatically expire after 7 days. If that happens, then the process will need to begin again.

Thank you.

8. Enter the verification code you were sent via SMS.

## User Verification

Enter SMS code:

Submit

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9. Click 'Submit'.
10. You will be shown a 'Password reset' page.

## Password reset

Passwords are to be:

- 13 or more characters with no complexity requirements, or
- a minimum of 9 characters with at least 3 of the following character sets
  - lowercase characters (a-z)
  - uppercase characters (A-Z)
  - digits (0-9)
  - punctuation and special characters
- changed at least every 90 days
- changed by users no more than once a day
- not reused from any of the preceding eight changes

Please enter a new password:

Password:  \* response required

Confirm password:  \* response required

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11. Enter your new password.
12. Confirm your new password.
13. Click 'Submit'.
14. Your password will be reset.

## Password reset

FirstName Surname, your Strategic Data password has been reset  
You may now log in using that password.

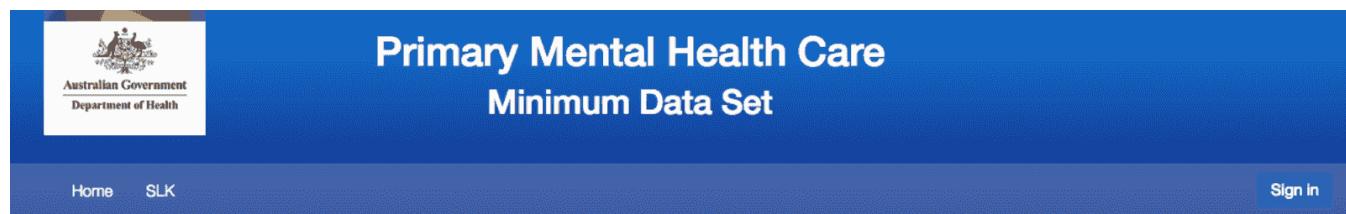
© Strategic Data 2016

15. Logout of your profile management site.
16. Navigate back to <https://pmhc-mds.com/> and sign in.

## 2. Home

To use the PMHC MDS navigate to <https://pmhc-mds.net>.

The first page you will see is the Home page. The home page shows you the most recent announcements made via the [PMHC mailing list](#).



### Home

The Primary Mental Health Care Minimum Data Set (PMHC MDS) will provide the basis for PHNs and the Department of Health to monitor and report on the quantity and quality of service delivery, and to inform future improvements in the planning and funding of primary mental health care services funded by the Australian Government.

For more information please visit [www.pmhc-mds.com](http://www.pmhc-mds.com)

### Announcements

#### **UPDATE regarding the Primary Mental Health Care Minimum Data Set - Request for nominations to be early adopters October 14, 2016**

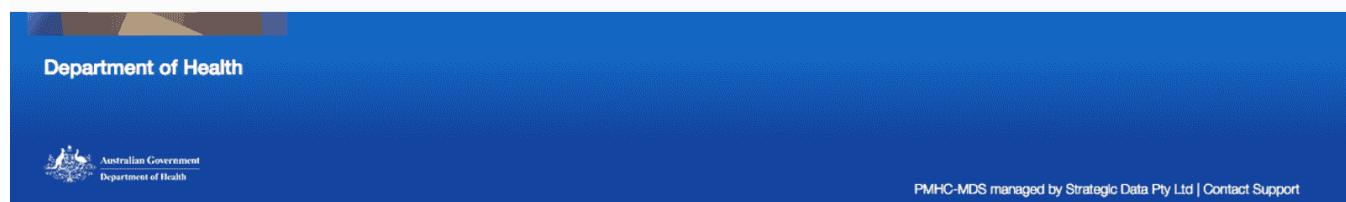
PMHC MDS Data Specifications Update v1.0.1 was released on October 6, 2016. This update includes the following changes: Episode - Principal Focus of Treatment Plan - Updated response 4 from 'Complex care package for adults' to 'Complex care package'. Episode - Source of Cash Income - Added 0 as a valid response. This is to be used when the client is aged less than 16 years. Added a field to all data items to specify whether a response value is required.

#### **Update to the PMHC MDS Data Specifications - 6/10/2016**

The below circular was sent to PHN CEOs on Friday 14 October 2016. ----- Dear PHN CEOs The Primary Mental Health Care Minimum Data Set (PMHC MDS) will be available for all Primary Health Networks (PHNs) to commence uploading data in early December. Prior to this we are looking for between 5 and 10 PHNs to volunteer as early adopters.

#### **Primary Mental Health Care Minimum Data Set Circular September 28, 2016**

Dear PMHC MDS Reference Group, Please find attached the Primary Mental Health Care Minimum Data Set (PMHC MDS) Circular, that was sent to PHN CEOs on Thursday 23 September 2016. This circular provides advice on the commencement and implementation arrangements for the PMHC MDS. This circular will also be available through the PHN website soon, at the following link: [Open URL]. Regards, Mental Health Data and Funding Section Mental Health Services Branch Health Services Division Department of Health



An announcements archive link is now available on the Home tab under the three most recent announcements - Click [View Archive](#) to view all the PMHC MDS announcements.

### 2.1. Accepting an invitation to become a PMHC MDS User

To become a PMHC MDS user you will be sent an invitation by email and a verification code via SMS. In order to gain access to the PMHC MDS you will need to accept this invitation within 7 days, by following these steps:

noreply@strategicdata.com.au

To: [REDACTED]

PMHC MDS Verification



Hello [REDACTED]

You have been invited to sign up by [REDACTED] and they will be notified once you complete the process.

Please verify your identity for the PMHC MDS authentication system.

Follow the link below, and then enter the code which has been sent to your mobile phone.

<http://auth.strategicdata.com.au/x/verify/E5CCF94F63C4FDE6A6EA4996>

If you can't click the link, please copy the entire link and paste it into your browser.

If you don't receive the SMS please contact [nobody@nowhere.com.au](mailto:nobody@nowhere.com.au).

Note that this invite will automatically expire after 7 days. If that happens, then the process will need to begin again.

Thank you.

1. Click on the link contained in the email. You will be shown a page where you will need to input the SMS you have been sent.

## User Verification

Enter SMS code:

Submit

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2. Input your verification code.
3. Click 'Submit'.
4. You will be shown a page where you need to choose a password.

*Please note: This is a single use token - please don't navigate away from this page until you have successfully set your password.*

# Activate account

Please enter a password

Passwords are to be:

- 13 or more characters with no complexity requirements, or
- a minimum of 9 characters with at least 3 of the following character sets
  - lowercase characters (a-z)
  - uppercase characters (A-Z)
  - digits (0-9)
  - punctuation and special characters
- changed at least every 90 days
- changed by users no more than once a day
- not reused from any of the preceding eight changes

Password:  \* response required

Confirm password:  \* response required

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5. Enter your password.
6. Confirm your password.
7. Click 'Submit'.
8. Your account will now be activated.

# Activate account

Thank you FirstName1 Surname1, your Strategic Data account is now activated.  
Please proceed to the [Login page](#) now.

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9. Navigate to <https://pmhc-mds.net/> and follow the [Logging In](#) instructions.

## 2.2. Logging In

After navigating to <https://pmhc-mds.net/> click the 'Sign in' button to login.

## Sign In

E-mail or username:

Password:

[Sign in](#)

[Forgot Password](#) | [Help](#)

You will be presented with a login form. Enter your email address or username and then your password and click 'Sign in'.

If it is your first time logging in, you will be asked to set a backup email address.

## Login to PMHC MDS successful.

Welcome FirstName Surname.

You do not have a backup email stored. This email is used to allow you to reset your password if you lose access to your primary account. It is advisable to set a backup email.

[Set a backup email now.](#)

[Continue to site.](#)

The backup email address is used when resetting your password. If you forget your password an email is sent to both your primary email address and your backup email address. This allows you to regain access to your account in the event that you no longer have access to your primary email address.

1. Click 'Set a backup email now.'
2. You will be shown the manage details page.

## Manage Details

[Profile](#)[Attributes](#)

You're currently enrolled in the following sites:

- PMHC MDS

Name:

FirstName Surname

[Change personal details](#)

## Manage Security Credentials

Username: firstnames

Email Address: firstname.surname@email.example.com

[Change email address](#)Email address: 

\* response required

[Submit](#)

Mobile Phone:

0401111222

[Change mobile phone number](#)

## Password lifetime

Last changed:  
Expires at:03 Nov 2016 03:41 UTC  
01 Feb 2017 03:41 UTC

© Strategic Data 2016

3. Under 'Manage Security Credentials' there will be an 'Email address' field.
4. Type in your backup email.
5. Click 'Submit'

## Manage Security Credentials

Username: firstnames

Email Address: firstname.surname@email.example.com

[Change email address](#)

ur request to change your backup email address has been noted.

An email has been dispatched to that address with details on how to confirm the change.

Please follow the link in this email to complete your backup email update.

If you don't receive that email then please check that the address was entered correctly. If the problem persists, please contact [nobody@nowhere.com.au](mailto:nobody@nowhere.com.au)

6. You now need to confirm the email address. You will have been sent an email to the address you specified and an SMS to the mobile phone number we have on record. Please follow the link in the email and enter the code that has been sent to your mobile.

# User Verification

Enter SMS code:

**Submit**

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7. Click 'Submit'
8. Your backup email is now confirmed.

## Confirm update email

FirstName Surname, your backup Strategic Data email has been updated.

© Strategic Data 2016

9. Navigate back to <https://pmhc-mds.net/> and sign in.
10. What you see once you login will depend upon what [Users Roles](#) you have been assigned.

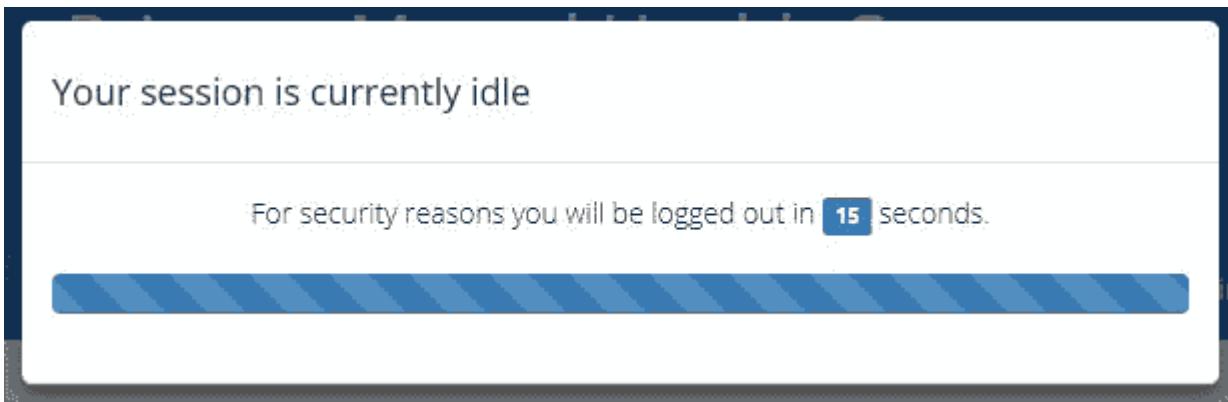
## 2.3. Logging Out

Once logged in, logout by:

1. Clicking on the button to the right of the menubar that says 'Logged in as [Name]'.
2. A drop down menu will appear.
3. Click 'Logout'.

We highly encourage users to logout once they have completed their tasks.

*Please note - the PMHC MDS will automatically log out users after 15 minutes of inactivity. You will see a pop up box that will provide a count down feature prior to automatically logging out the idle user.*



## 2.4. Updating your details

Once signed in, to edit your details:

1. Click on the button to the right of the menubar that says 'Logged in as [Name]'.  
2. A drop down menu will appear.  
3. Click 'Profile'.  
4. You will be taken to the Profile Management system.  
5. Login using your PMHC MDS email/username and password.

The screenshot shows the 'Login to Strategic Data Profile' page. At the top, there are 'Login' and 'Help' buttons. Below them is a form with two input fields: 'Email or Username:' and 'Password:', each with a clear icon. In the center is a 'Login' button. To the right of the buttons are three links: '→ Forgotten password', '→ Reset expired password', and '→ Request an account'. At the bottom left, there is a copyright notice: '© Strategic Data 2018'.

6. You will see the 'Manage Details' page.

# Manage Details

Profile    Attributes

You're currently enrolled in the following sites:

- PMHC MDS

Name: FirstName Surname

[Change personal details](#)

## Manage Security Credentials

Username: firstnames  
Email Address: firstname.surname@email.example.com  
Backup Email Address: firstname.surname@backup.example.com  
Mobile Phone: 0401111222

[Change email address](#)  
[Change backup email address](#)  
[Change mobile phone number](#)

## Password lifetime

Last changed: 03 Nov 2016 04:31 UTC  
Expires at: 01 Feb 2017 04:31 UTC

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7. To update your name, click the 'Change personal details' link.
8. To update your primary email address, click the 'Change email address' link.
9. To update your backup email address, click the 'Change backup email address' link.
10. To update your mobile phone number, click the 'Change mobile phone number' link.
11. The last section on the page 'Password lifetime', tells you when you last changed your password and when it will expire. Passwords have to be changed every 3 months.

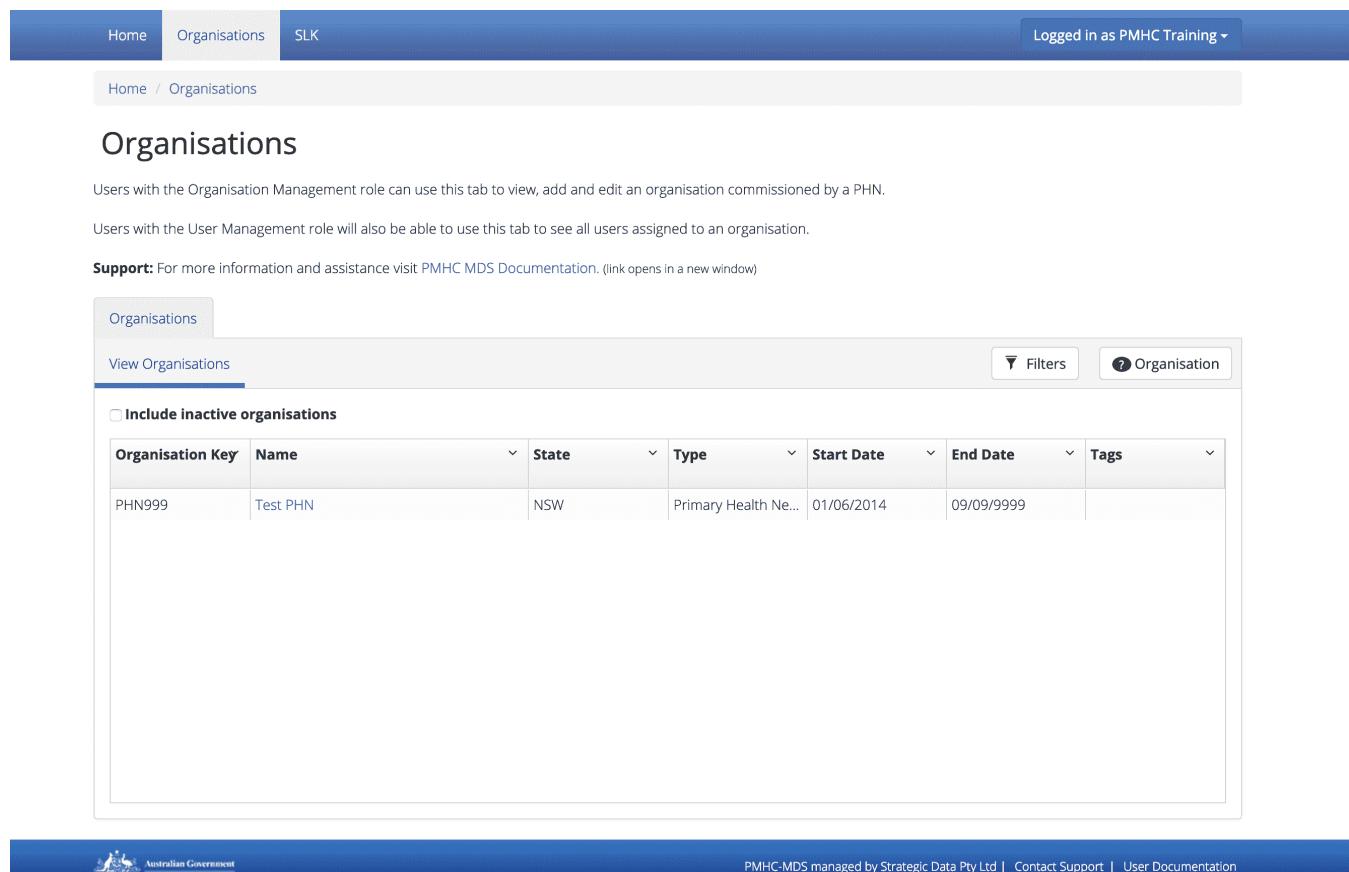
### 3. Organisations

You will be able to see the Organisations tab if you have been assigned the ‘Organisation Management’, or the ‘User Management’ role, when logged into the PMHC MDS on <https://pmhc-mds.net>.

If you believe you should have access to an organisation and it doesn’t appear in your list please contact someone who has the ‘User Management’ role in that provider organisation or the provider organisation’s commissioning PHN.

If you are unsure who has the ‘User Management’ role please email the PMHC helpdesk at [support@pmhc-mds.com](mailto:support@pmhc-mds.com)

After navigating to the organisation tab, you will be presented with a list of top level organisations for which you have been assigned the ‘Organisation Management’ or the ‘User Management’ role.



The screenshot shows the PMHC MDS web application interface. At the top, there is a blue header bar with navigation links: 'Home', 'Organisations' (which is the active tab), and 'SLK'. On the right side of the header, it says 'Logged in as PMHC Training' with a dropdown arrow. Below the header, the page title is 'Organisations'. A breadcrumb trail indicates the current location: 'Home / Organisations'. The main content area is titled 'Organisations' and contains a sub-section 'View Organisations'. There is a checkbox labeled 'Include inactive organisations'. A table lists one organization: PHN999, Test PHN, NSW, Primary Health Ne..., 01/06/2014, 09/09/9999. To the right of the table are buttons for 'Filters' and 'Organisation'. At the bottom of the page, there is a footer bar with the Australian Government Department of Health logo, and links to 'PMHC-MDS managed by Strategic Data Pty Ltd | Contact Support | User Documentation'.

#### 3.1. Viewing a PHN

You can view a PHN organisation’s details through the Organisations tab, by following these steps:

1. Navigate to the Organisations tab.
2. Click on the PHN name in blue text displayed within the table list.

The PHN organisations details will be displayed, along with a provider organisations tab. If you have the ‘User Management’ role will also include a ‘Users’ tab listing the users that belong to this PHN.

The screenshot shows the 'View Details' page for 'PHN 'Test PHN''. At the top, there's a breadcrumb navigation: Home / Organisations / PHN999 / View Details. Below the title 'PHN 'Test PHN'' is a yellow star icon and a question mark icon. There are two tabs: 'Details' (selected) and 'Provider Organisations'. Under 'Details', there are sections for 'View Details' and 'Tags'. The main content area contains the following data:

|                          |             |                         |                        |
|--------------------------|-------------|-------------------------|------------------------|
| <b>Organisation Path</b> | PHN999      | <b>Organisation Key</b> | PHN999                 |
| <b>Name</b>              | Test PHN    | <b>Legal Name</b>       |                        |
| <b>ABN</b>               | 92156423755 | <b>Type</b>             | Primary Health Network |
| <b>State</b>             | NSW         |                         |                        |
| <b>Start Date</b>        | 01/06/2014  | <b>End Date</b>         | 09/09/9999             |

### 3.2. Searching for a Provider Organisation

You can search for a provider organisation by sorting and filtering the provider organisations of a PHN. Follow these steps:

1. Navigate to the Organisations tab.
2. Click on the PHN name in blue text displayed within the table list.
3. Click on the ‘Provider Organisations’ tab.
4. Sort the listed provider organisations by simply clicking on a column header of the provider organisations table. Alternately you can click on the arrow beside a column header for more sort options, as follows:
  - Sort Ascending
  - Sort Descending
  - Remove Sort
  - Hide Column

To filter the listed provider organisations:

1. Click the grey ‘Filters’ button.
2. Start typing in an edit box now displayed under the column headers.

## ★ ? PHN 'Test PHN'

[Details](#)[Provider Organisations](#)[View Provider Organisations](#)[Add Provider Organisation](#)[Filters](#)[? Provider Organisation](#) [Include inactive organisations](#)

| Organisation Key       | Name                                    | State | Type                  | Start Date | End Date   | Tags |
|------------------------|---|-------|-----------------------|------------|------------|------|
| PHN999:0001            | Test Provider Organisation 1            | VIC   | General Medical ...   | 01/06/2014 | 09/09/9999 | 1569 |
| PHN999:0002            | Test Provider Organisation 2            | VIC   | General Medical ...   | 01/06/2014 | 09/09/9999 |      |
| PHN999:0003            | Test Provider Organisation 3 (inactive) | VIC   | General Medical ...   | 01/06/2014 | 09/09/9999 |      |
| PHN999:ATSI-PO1        | Test ATSI Provider One                  | VIC   | Aboriginal Health/... | 01/06/2016 | 09/09/9999 |      |
| PHN999:[Centre Nam...] | Headspace test                          | NSW   | Community-mana...     | 01/06/2014 | 09/09/9999 |      |
| PHN999:NFP52           | Test inactive PO 52                     | VIC   | General Medical ...   | 01/02/2015 | 01/01/2020 |      |
| PHN999:PO1             | Test Provider Organisation NFP1         | NSW   | Community-mana...     | 01/06/2014 | 09/09/9999 |      |
| PHN999:PO2             | Test Provider Organisation NFP2         | NSW   | General Medical ...   | 01/06/2014 | 09/09/9999 |      |

3. To remove the filter, click the grey cross within the edit box beside any entered text.

### 3.3. Viewing a Provider Organisation

You can view a provider organisation's details through the Organisations tab, by following these steps:

1. Navigate to the Organisations tab.
2. Click on the PHN name in blue text displayed within the table list.
3. Click on the 'Provider Organisations' tab.
4. Click on the provider organisation's name from the 'View Provider Organisations' table

## ? Provider Organisation "Test Provider Organisation 1" at PHN "Test PHN"

[Details](#)[View Details](#)[Edit Details](#)

#### Tags

1569

#### Organisation Path

PHN999:0001

#### Organisation Key

0001

#### Name

Test Provider Organisation 1

#### Legal Name

#### ABN

70134174128

#### Type

General Medical Practice

#### State

VIC

#### OMSSS Provider Organisation Email

#### Start Date

01/06/2014

#### End Date

09/09/9999

### 3.4. Adding a Provider Organisation

If you have the 'Organisation Management' role you can add provider organisations through the organisation tab by following these steps:

1. Navigate to the Organisations tab.
2. Click on the PHN name in blue text displayed within the table list.
3. Click on the 'Provider Organisations' tab.
4. Click the 'Add Provider Organisation' tab.

Home / Organisations / PHN999 / Add Provider Organisations

★ ? PHN 'Test PHN'

Details    Provider Organisations

View Provider Organisations    Add Provider Organisation    [Provider Organisation](#)

**Tags**  
Add a tag

**Organisation Path**  
PHN999:

**Name \***

**ABN \***

**State \***

**Start Date \***

**Organisation Key \***

**Legal Name**

**Type \***

**OMSSS Provider Organisation Email**

**End Date**

5. Complete all the mandatory fields marked with an \* in the add Provider Organisation form.
6. Click the blue 'Save' button.

You will receive confirmation that the organisation has been saved, and it will now be displaying in the PHN's Provider Organisations list.

Saved successfully X

### 3.5. Editing a Provider Organisation

If you have the 'Organisation Management' role you can edit a Provider Organisation's details through the organisation tab, by following these steps:

1. Navigate to the Organisations tab.

2. Click on the PHN name in blue text displayed within the table list.

Home / Organisations / PHN999 / View Details

## ★ ? PHN 'Test PHN'

Details Provider Organisations

View Details

**Tags**

|                                    |                                       |
|------------------------------------|---------------------------------------|
| <b>Organisation Path</b><br>PHN999 | <b>Organisation Key</b><br>PHN999     |
| <b>Name</b><br>Test PHN            | <b>Legal Name</b>                     |
| <b>ABN</b><br>92156423755          | <b>Type</b><br>Primary Health Network |
| <b>State</b><br>NSW                |                                       |
| <b>Start Date</b><br>01/06/2014    | <b>End Date</b><br>09/09/9999         |

3. Click on the 'Provider Organisation' tab.
4. Click on the Provider Organisation name in blue text displayed within the Provider Organisations table.

Home / Organisations / PHN999 / PHN999:0001 / View Details

## ? Provider Organisation "Test Provider Organisation 1" at PHN "Test PHN"

Details

View Details Edit Details

**Tags**  
1569

|   |  |
|---|--|
| <b>Organisation Path</b><br>PHN999:0001     | <b>Organisation Key</b><br>0001          |
| <b>Name</b><br>Test Provider Organisation 1 | <b>Legal Name</b>                        |
| <b>ABN</b><br>70134174128                   | <b>Type</b><br>General Medical Practice  |
| <b>State</b><br>VIC                         | <b>OMSSS Provider Organisation Email</b> |
| <b>Start Date</b><br>01/06/2014             | <b>End Date</b><br>09/09/9999            |

3. If you have permission to edit the Provider Organisation an 'Edit Details' tab will be displayed.
4. Click the blue 'Edit' button.

## Provider Organisation "Test Provider Organisation 1" at PHN "Test PHN"

Details

View Details Edit Details

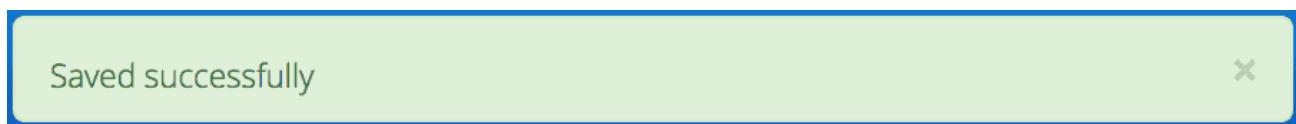
Tags  
1569 [Add a tag](#)

|   |  |
|---|--|
| <b>Organisation Path</b><br>PHN999:0001       | <b>Organisation Key</b><br>0001                                  |
| <b>Name *</b><br>Test Provider Organisation 1 | <b>Legal Name</b><br><input type="text"/>                        |
| <b>ABN *</b><br>70134174128                   | <b>Type *</b><br>General Medical Practice                        |
| <b>State *</b><br>VIC                         | <b>OMSSS Provider Organisation Email</b><br><input type="text"/> |
| <b>Start Date *</b><br>01/06/2014             | <b>End Date</b><br>09/09/9999 <a href="#">Calendar</a>           |

[Save](#)

4. Update the organisations details. Mandatory fields are marked with an \*
5. Click the blue 'Save' button.

You will receive confirmation that the updated organisation details have been saved..



### 3.6. Inactivate a Provider Organisation

You can make a provider organisation inactive by entering an 'End Date' in the provider organisation details. The 'End Date' can be in the future.

Once an end date is saved, there will be a 90 day grace period in which the users of this inactive provider organisation can finalise adding their data. Users of an inactive provider organisation will not be able to add data after the grace period has passed.

*Please note: Service Contact data and Outcome Collection Occasion data will not be able to be recorded after an organisation's end date.*

*Please note: Only organisations that are active within a reporting period will be displayed in the reports organisation field.*

### 3.7. Viewing an inactive Provider Organisation

You can view an inactive provider organisation's details through the Organisations tab, by following these steps:

1. Navigate to the Organisations tab.
2. Click on the PHN name in blue text displayed within the table list.
3. Click on the 'Provider Organisations' tab.
4. Select the 'Include inactive organisations' box.
5. Click on the provider organisation's name from the 'View Provider Organisations' table

Inactive organisations will be displayed with an ZZZ icon and will be greyed out.

The screenshot shows a web-based application interface for managing provider organisations. At the top, there is a breadcrumb navigation: Home / Organisations / PHN999 / View Provider Organisations. Below this is a header with the title '★ ⓘ PHN 'Test PHN'' and tabs for 'Details' and 'Provider Organisations'. The 'Provider Organisations' tab is selected. Underneath the tabs are buttons for 'View Provider Organisations' and 'Add Provider Organisation', and a 'Filters' button. A checked checkbox labeled 'Include inactive organisations' is visible. The main content area is a table with the following columns: Organisation Key, Name, State, Type, Start Date, End Date, and Tags. The table lists several provider organisations, including some marked as inactive (indicated by a ZZZ icon and greyed-out text). The rows are as follows:

| Organisation Key       | Name                                    | State | Type                   | Start Date | End Date   | Tags          |
|------------------------|---|-------|------------------------|------------|------------|---------------|
| PHN999:0003            | Test Provider Organisation 3 (inactive) | VIC   | General Medical ...    | 01/06/2014 | 09/09/9999 |               |
| PHN999:ATSI-PO1        | Test ATSI Provider One                  | VIC   | Aboriginal Health/...  | 01/06/2016 | 09/09/9999 |               |
| PHN999:[Centre Nam...] | Headspace test                          | NSW   | Community-mana...      | 01/06/2014 | 09/09/9999 |               |
| zz PHN999:Inactive     | Inactive Prodiver Organisation          | VIC   | Private Hospital       | 01/06/2016 | 30/06/2018 | Inactive      |
| zz PHN999:InactivePO   | InactivePO                              | VIC   | General Medical ...    | 01/06/2016 | 31/12/2018 | InactivePO    |
| PHN999:NFP01           | Not for Profit 1                        | NSW   | Private Allied Heal... | 01/06/2014 | 09/09/9999 | active, Inspt |
| PHN999:NFP02           | Not for Profit 2                        | NSW   | Private Allied Heal... | 01/06/2014 | 09/09/9999 | active        |
| PHN999:NFP42           | Organisation NFP42                      | VIC   | General Medical ...    | 02/07/2018 | 09/09/9999 |               |
| zz PHN999:NFP43        | Organisation NFP43                      | VIC   | General Medical ...    | 01/07/2017 | 01/07/2018 |               |
| PHN999:NFP52           | Test inactive PO 52                     | VIC   | General Medical ...    | 01/02/2015 | 01/01/2020 |               |
| PHN999:NSPT            | NSPT                                    | VIC   | Other                  | 01/06/2016 | 09/09/2020 | Inspt         |

### 3.8. Deleting a Provider Organisation

You cannot delete a provider organisation. If you believe an organisation should be deleted please email [support@pmhc-mds.com](mailto:support@pmhc-mds.com).

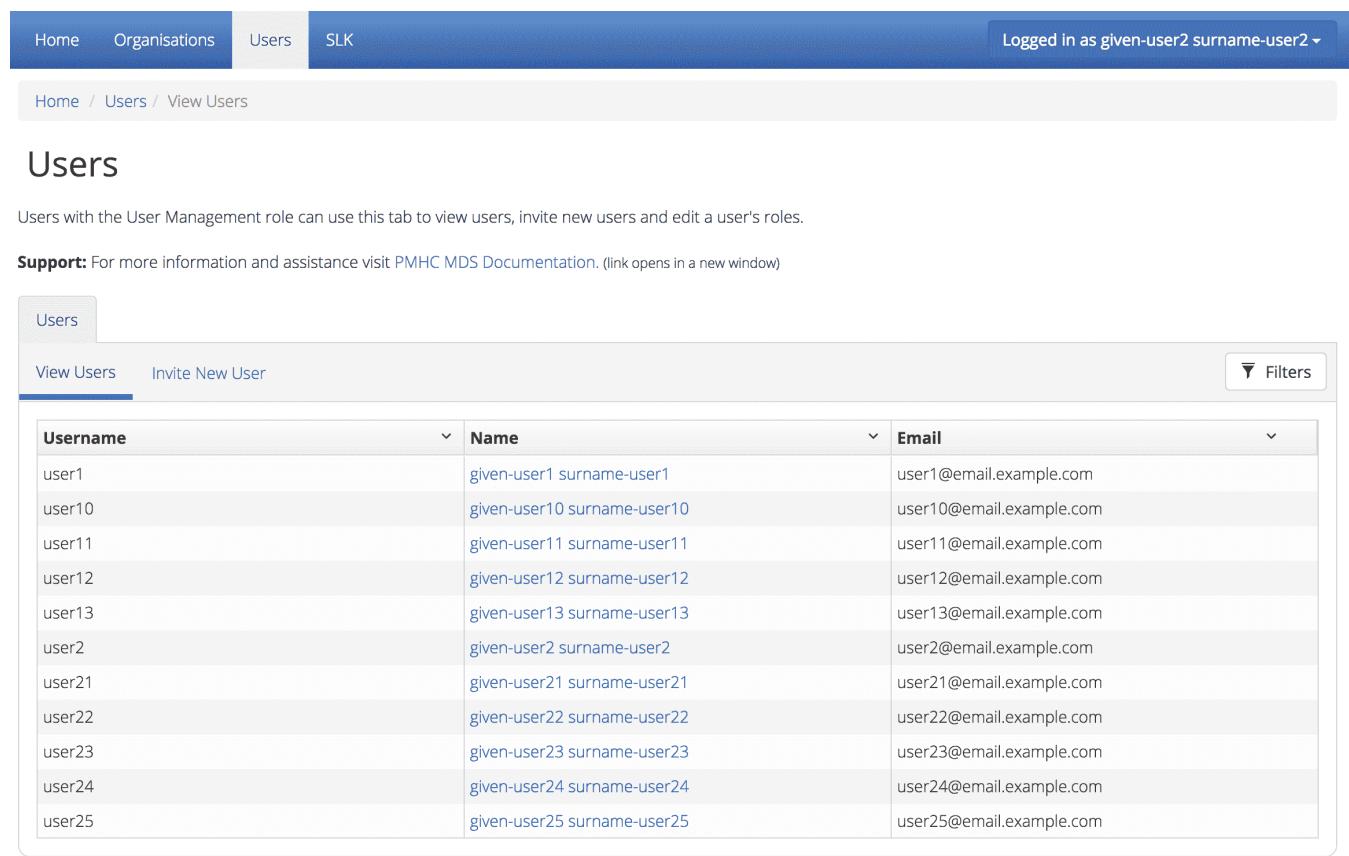
## 4. Users

You will only be able to see the Users tab if you have been assigned the ‘User Management’ role, when logged into the PMHC MDS on <https://pmhc-mds.net>.

If you don’t have access to the Users tab and you believe you should, please contact someone in your provider organisation or provider organisation’s PHN who has the ‘User Management’ role.

If you are unsure who has the ‘User Management’ role please email the PMHC Helpdesk at [support@pmhc-mds.com](mailto:support@pmhc-mds.com)

After navigating to the Users tab, you will be presented with a list of the users that are assigned to the organisations for which you have the ‘User Management’ role.



The screenshot shows the 'Users' tab selected in the top navigation bar. The page displays a table of user information with columns for Username, Name, and Email. Each row contains a user's login name followed by their full name and a corresponding email address. The table includes 25 rows of data, starting from user1 and ending at user25. A 'Filters' button is located in the top right corner of the table area.

| Username | Name                        | Email                    |
|----------|-----------------------------|--------------------------|
| user1    | given-user1 surname-user1   | user1@email.example.com  |
| user10   | given-user10 surname-user10 | user10@email.example.com |
| user11   | given-user11 surname-user11 | user11@email.example.com |
| user12   | given-user12 surname-user12 | user12@email.example.com |
| user13   | given-user13 surname-user13 | user13@email.example.com |
| user2    | given-user2 surname-user2   | user2@email.example.com  |
| user21   | given-user21 surname-user21 | user21@email.example.com |
| user22   | given-user22 surname-user22 | user22@email.example.com |
| user23   | given-user23 surname-user23 | user23@email.example.com |
| user24   | given-user24 surname-user24 | user24@email.example.com |
| user25   | given-user25 surname-user25 | user25@email.example.com |

### 4.1. Users Roles

Access to the PMHC MDS is based around roles. The following table provides a summary of each of the roles that currently exist within the PMHC MDS:

| Role                    | Tasks allowed  |
|-------------------------|--|
| Organisation Management | A user with the Organisation Management role for a PHN can manage provider organisations for that PHN.   |
| User Management         | A user with the User Management role for an organisation can manage user accounts for that organisation  |
| Upload                  | A user with the Upload role can upload data to the associated organisation                               |
| Reporting               | A user with the Reporting role can run reports and download data from the associated organisation        |
| Data Entry              | A user with the Data Entry role can enter client data and practitioners from the associated organisation |

Each role allows a user to perform specific tasks. A user can have more than one role. Each role is granted for a user against an organisation. An organisation can either be a Primary Health Network or a provider organisation. If a user is granted a role for a Primary Health Network (PHN) they will also have this role for any provider organisation's of that PHN. A user can be invited to have a role at more than one organisations. There is no limit to the number of users per organisation.

What users see once they are logged in will depend upon what roles they have been assigned. The table below lists the tabs that will be shown for each role:

| Role                    | Tab                   |
|-------------------------|-----------------------|
| Organisation Management | Organisations         |
| User Management         | Organisations, Users  |
| Upload                  | Upload                |
| Reporting               | Reports, Data Extract |
| Data Entry              | Data Entry            |
| All users               | SLK                   |

## 4.2. Finding a user

You can sort and filter the listed users through the Users tab.

Please note: Newly invited users will not be visible until they have successfully accepted their invitation.

Sort the listed users by simply clicking on the column header. Alternately you can click on the arrow beside a column header for more sort options, as follows:

- Sort Ascending
- Sort Descending
- Remove Sort

- Hide Column

To filter the listed users:

1. Click the grey 'Filters' button.
2. Start typing in an edit box now displayed under the column headers.
3. To remove the filter, click the grey cross within the edit box beside any entered text.

The screenshot shows a user management interface. At the top, there are tabs for 'Users' and 'Invite New User'. Below this is a 'List' section with three columns: 'Username', 'Name', and 'Email'. A 'Filters' button is located at the top right of the list area. In the 'Name' column header, there is an input field containing the number '1', which serves as a filter. The table data includes two rows: one for 'orga.user1' and another for 'user1'. The 'Name' column for both rows contains the full name 'given-orga.user1 surname-orga.user1' and 'given-user1 surname-user1' respectively. The 'Email' column lists 'orga.user1@email.example.com' and 'user1@email.example.com'.

| Username   | Name                                | Email                        |
|------------|-------------------------------------|------------------------------|
| orga.user1 | given-orga.user1 surname-orga.user1 | orga.user1@email.example.com |
| user1      | given-user1 surname-user1           | user1@email.example.com      |

### 4.3. Viewing a User's details

You can view a user's details through the user tab, by following these steps:

1. Navigate to the Users tab.
2. Click on the user's name in blue displayed within the table list.

The screenshot shows a detailed view of a user's profile. At the top, there is a breadcrumb navigation: 'Home / Users / given-user1 surname-user1 details'. Below this is a title 'given-user1 surname-user1 details'. There are two tabs: 'Details' (which is selected) and 'Roles'. Under the 'Details' tab, there is a 'View Details' button. The main content area displays several user attributes in pairs: 'Username' (user1), 'Email' (user1@email.example.com), 'Name' (given-user1 surname-user1), and 'Login Status' (1).

A page will display showing the user's details and the [Users Roles](#) they have at particular organisations. See [Viewing a user's roles](#).

## 4.4. Editing a User's details

A user can edit their own contact details.

See [Updating your details](#)

## 4.5. Adding a new user

Note: PHNs can devolve 'user management' authority to one or more users in a provider organisation so that the provider organisation can manage their own logins, or a PHN can choose to keep user management authority at the level of the PHN requiring each provider organisation to contact the PHN when they need a new user added.

Each individual staff member should be set up with their own unique login access. Generic login accounts are not encouraged to be set up and used within the PMHC MDS, and usernames/passwords should not be shared with other individuals. This process ensures that when a staff member leaves, their access can be easily disabled and it doesn't affect other users or the security of the organisation's data. A user's account, should not be passed from one staff member to the next.

Before inviting a user, it is always best to inform them that they will receive a PMHC MDS invitation by email from [noreply@strategicdata.com](mailto:noreply@strategicdata.com) and a verification code via SMS. You can also provide them with the link to the online user-docs to read the steps they will need to complete the steps outlined in [Accepting an invitation to become a PMHC MDS User](#).

The next step to adding a new user is to invite them through the Users tab, by following these steps:

1. Navigate to the Users tab.
2. Click the 'Invite New User' tab.

The screenshot shows a user interface for adding a new user. At the top, there are two tabs: 'Users' and 'Invite New User'. The 'Invite New User' tab is currently active, indicated by a blue background and white text. Below the tabs, the word 'Invite' is displayed in bold. The form consists of several input fields and dropdown menus. On the left, there is a 'First Name \*' field with a placeholder 'John' and an 'Email \*' field containing 'example@test.com'. To the right, there is a 'Surname \*' field and a 'Mobile \*' field containing '0402 030 405'. Below these are dropdown menus for 'Organisation \*' and 'Roles \*'. The 'Organisation \*' dropdown has a placeholder 'Select Organisation'. The 'Roles \*' dropdown contains five options: 'Organisation Management', 'User Management', 'Reporting', 'Data Entry', and 'Upload', each preceded by a small square checkbox. At the bottom of the form are two buttons: a blue 'Invite' button and a white 'Clear' button.

3. Complete all the fields with the new users contact details. (Mandatory fields are marked with an \* )

- Select an organisation, either a PHN or Provider Organisation.
- Assign one or more [Users Roles](#). (extra roles can be added after the user has access to the system. See [Editing a user's roles](#))

The screenshot shows the 'Invite' form interface. It includes fields for First Name, Surname, Email, Mobile, Organisation, and Roles. The 'Organisation' dropdown is set to 'Test PO 1 ( PHN999:NFP01 )'. The 'Roles' section contains several checkboxes: Organisation Management (unchecked), User Management (checked), Reporting (unchecked), Data Entry (checked), and Upload (checked). At the bottom are 'Invite' and 'Clear' buttons.

- Click the blue 'Invite' button.
- You will receive confirmation that the user has been sent an email to invite them to the PMHC MDS. They will also be sent an SMS containing a verification code. The user will need to follow the instructions in the email before they can gain access to the system. This invitation will be valid for 7 days.
- When the user has accepted the invitation you will be sent an email to let you know. This user will now be listed in the View Users table.

**noreply@strategicdata.com.au**  
**To:** [firstname.surname@email.example.com](mailto:firstname.surname@email.example.com)  
**PMHC MDS invitation accepted**

Hello,

A short while ago you invited FirstName1 Surname1 to sign up to the PMHC MDS authentication system.

They have now completed the sign-up process, so you are now able to assign roles to them, by searching for their email address: [firstname1.surname1@po1.example.com](mailto:firstname1.surname1@po1.example.com)

Thank you.

Please note: An invitation for a new user is valid for 7 days. You can not re-invite this user within this time, unless the verification code has expired, or they have :ref:` accepted the invitation <accepting-invitation>`.

## 4.6. Deleting an invitation

You cannot delete a new users invitation after it is sent. If you believe an invitation should be deleted please email [support@pmhc-mds.com](mailto:support@pmhc-mds.com).

## 4.7. Adding an existing user

Note: An existing user must have completed the required steps for [Accepting an invitation to become a PMHC MDS User](#) from their initial PMHC MDS invitation before they can be added again.

Before adding an existing user please ensure you have the same email and mobile number as their current PMHC MDS Profile. By ensuring these are identical, the system will automatically pick up if a user already exists in the PMHC MDS.

You can invite an existing user through the Users tab, by following these steps:

1. Navigate to the Users tab.
2. Click the 'Invite New User' tab.
3. Complete all the mandatory fields marked with an \* in the 'Invite User' form, ensuring these are the same details as their existing PMHC MDS Profile.
4. Select an organisation and assign their [Users Roles](#).

The screenshot shows the 'Invite' form within a web-based application. The top navigation bar has tabs for 'Users' and 'Invite New User', with 'Invite New User' being active. The main form area is titled 'Invite'. It contains several input fields: 'First Name \*' with a placeholder 'John', 'Surname \*' with a placeholder 'Doe', 'Email \*' with a placeholder 'example@test.com', and 'Mobile \*' with a placeholder '0402 030 405'. Below these are dropdown menus for 'Organisation \*' and 'Roles \*'. The 'Organisation' dropdown is currently empty. The 'Roles' section contains five checkboxes: 'Organisation Management', 'User Management', 'Reporting', 'Data Entry', and 'Upload'. At the bottom of the form are two buttons: a blue 'Invite' button and a grey 'Clear' button.

5. Click the blue 'Invite' button.
6. You will receive confirmation that the roles have been added to the existing user.
7. Please note: You will need to notify the user that they have been added to the organisation and confirm their authorised roles. The system will not automatically do this.

## 4.8. Viewing a user's roles

A user can have more than one role. Each role is granted for a user against an organisation you have the User Management Role at.

You can edit and assign extra roles to an existing user by following these steps:

1. Navigate to the Users tab.
2. Click on the user's name in blue displayed within the table list.
3. Click the 'Roles' tab to show the user's assigned roles.

## given-user54 surname-user54 details

The screenshot shows a user interface for managing roles. At the top, there are two tabs: 'User Details' (in blue) and 'Roles' (selected). Below the tabs, there are two buttons: 'View Roles' and 'Edit Roles' (underlined in blue). A note below the buttons says: 'Note: Organisations can be filtered by typing or selecting criteria below.' A table follows, with columns: Organisation P..., Organisation N..., Organisation ... (partially visible), User Managem..., Reporting, Data Entry, and Upload. The first row has a light grey background. The second row contains 'PHN999' and 'Test PHN'. The third row contains '— PHN999:NFP01' and 'Test PO 1'. The fourth row contains '— PHN999:NFP02' and 'Test PO 2'. The fifth row contains '— PHN999:NFP03' and 'Test PO 3'. Each row has a checkbox in the first column, and each cell in the second column contains a checked checkbox.

| Organisation P... | Organisation N... | Organisation ...                    | User Managem...                     | Reporting                           | Data Entry                          | Upload                              |
|-------------------|-------------------|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|
|                   |                   |                                     |                                     |                                     |                                     |                                     |
| PHN999            | Test PHN          | <input checked="" type="checkbox"/> |
| — PHN999:NFP01    | Test PO 1         |                                     | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| — PHN999:NFP02    | Test PO 2         |                                     | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| — PHN999:NFP03    | Test PO 3         |                                     | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |

A tick displays the user currently has this role assigned at the relevant organisation.

### 4.9. Editing a user's roles

A user can have more than one role. Each role is granted for a user against an organisation you have the User Management Role at.

You can edit and assign extra roles to an existing user by following these steps:

1. Navigate to the Users tab.
2. Click on the user's name in blue displayed within the table list.
3. Click the 'Roles' tab.
4. Click the 'Edit Roles' tab.

## given-user54 surname-user54 details

The screenshot shows a user interface for managing roles. At the top, there are tabs for 'User Details' and 'Roles'. Below that, two buttons are visible: 'View Roles' and 'Edit Roles', with 'Edit Roles' being the active tab. A warning message states: 'Warning: Roles will be automatically saved when edited.' The main area is a table with columns: Organisation P..., Organisation N..., Organisation ... (partially visible), User Managem..., Reporting, Data Entry, and Upload. The rows represent different roles assigned to the user, with each row corresponding to an organisation and its name. The first row is for PHN104, and the second row is for PHN999. The third row is for PHN999, which has three sub-rows: NFP01, NFP02, and NFP03. Each row contains checkboxes for each of the six columns. Ticks in the checkboxes indicate the user has that role assigned at that organisation.

| Organisation P... | Organisation N... | Organisation ...                    | User Managem...                     | Reporting                           | Data Entry                          | Upload                              |
|-------------------|-------------------|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|
| PHN104            | phnonehundreda    | <input type="checkbox"/>            |
| — PHN104:0001     | phnonehundreda    |                                     | <input type="checkbox"/>            | <input type="checkbox"/>            | <input type="checkbox"/>            | <input type="checkbox"/>            |
| — PHN104:0002     | phnonehundreda    |                                     | <input type="checkbox"/>            | <input type="checkbox"/>            | <input type="checkbox"/>            | <input type="checkbox"/>            |
| PHN999            | Test PHN          | <input checked="" type="checkbox"/> |
| — PHN999:NFP01    | Test PO 1         |                                     | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| — PHN999:NFP02    | Test PO 2         |                                     | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| — PHN999:NFP03    | Test PO 3         |                                     | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |

6. A tick indicates the user currently has this role assigned at the relevant organisation. Multiple roles can be assigned and these roles are shown as blue tickets.

Add a role by clicking the empty checkbox.

Remove a role by clicking the ticked checkbox.

7. All changes are automatically saved.
8. You will need to notify the user of these role changes. The system will not automatically do this.

Please note: you will still see users in your list that have had all their roles removed.

## 4.10. Deleting a user

A user can be deleted from an organisation by removing all the roles the user has at that organisation.

See [Editing a user's roles](#)

## 4.11. Viewing all Organisational Users

You can view users assigned to an organisation through the organisation tab, by following these steps:

1. Navigate to the tab showing either the PHNs details or the provider organisations details.
2. Click on the PHNs or provider organisations name in blue displayed within the table list. If you are unsure how to view the details see [Viewing a PHN](#) or [Viewing a Provider Organisation](#)
3. Under the 'Users' tab, you can view a table list of the organisation's users.

4. You can filter the users within this table list, click the grey 'Filters' button and start typing in an edit box now displayed under the column headers. To remove the filter, click the grey cross within the edit box beside any entered text.

Home / Organisations / Test PHN / Roles of Assigned Users

## ★ PHN "Test PHN"

Details   Provider Organisations   Roles of Assigned Users

**View Roles**

**Filters**

| Username | Name                        | Role   |
|----------|-----------------------------|--|
| user1    | given-user1 surname-user1   | Organisation Management                                |
| user2    | given-user2 surname-user2   | User Management  |
| user3    | given-user3 surname-user3   | Organisation Management, User Management               |
| user4    | given-user4 surname-user4   | User Management, Upload                                |
| user5    | given-user5 surname-user5   | Organisation Management, Reporting, Upload             |
| user6    | given-user6 surname-user6   | Organisation Management, User Management, Upload       |
| user50   | given-user50 surname-user50 | Organisation Management, User Management, Reporting... |

## 4.12. Assigning Extra Roles to an Organisational User

You can assign extra roles to an existing organisational user, by following these steps:

1. Once [Viewing a Client's details](#)
2. Click the users name
3. Follow on from Step 3 at [Editing a user's roles](#).

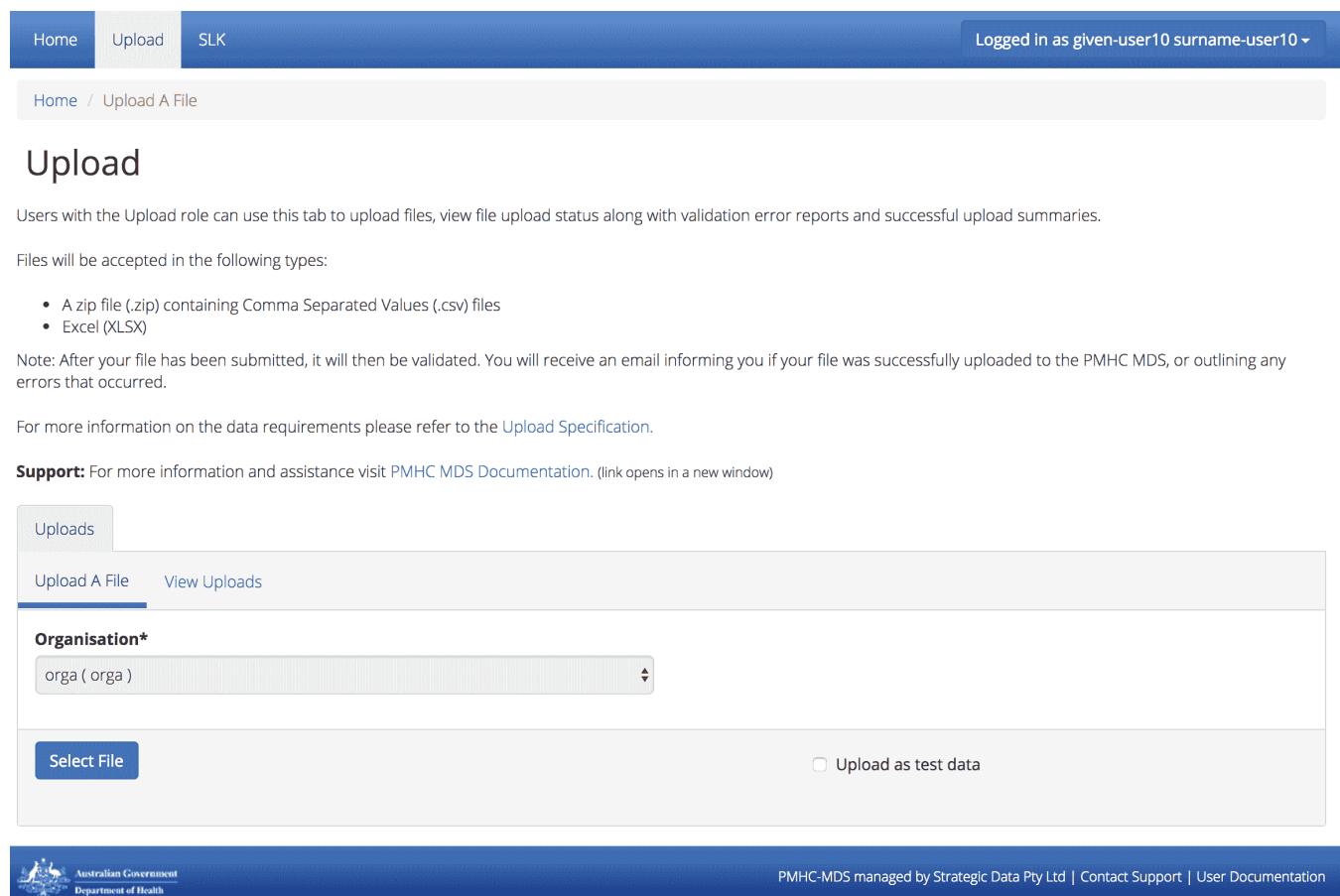
## 5. Upload

You will only be able to see the Upload tab if you have been assigned the 'Upload' role, when logged into the PMHC MDS on <https://pmhc-mds.net>.

If you don't have access to the Upload tab and you believe you should, please contact someone in your provider organisation or provider organisation's PHN who has the 'User Management' role.

If you are unsure who has the 'User Management' role please email the PMHC helpdesk at [support@pmhc-mds.com](mailto:support@pmhc-mds.com)

After navigating to the Upload tab, you will be presented with a drop down list of the organisations to which you can upload.



The screenshot shows the PMHC MDS interface. At the top, there is a blue header bar with three tabs: 'Home', 'Upload' (which is highlighted in grey), and 'SLK'. To the right of the tabs, it says 'Logged in as given-user10 surname-user10 ▾'. Below the header, a breadcrumb navigation shows 'Home / Upload A File'. The main content area has a title 'Upload' with a sub-instruction: 'Users with the Upload role can use this tab to upload files, view file upload status along with validation error reports and successful upload summaries.' It lists accepted file types: 'A zip file (.zip) containing Comma Separated Values (.csv) files' and 'Excel (XLSX)'. A note states: 'Note: After your file has been submitted, it will then be validated. You will receive an email informing you if your file was successfully uploaded to the PMHC MDS, or outlining any errors that occurred.' Below this, a link 'For more information on the data requirements please refer to the [Upload Specification](#)' is provided. A 'Support' link is also present. The form itself has sections for 'Organisation\*' (with a dropdown menu showing 'orga ( orga )'), 'Select File' (with a button to choose a file), and an optional checkbox 'Upload as test data'. At the bottom, there is a footer with the Australian Government Department of Health logo and links to 'PMHC-MDS managed by Strategic Data Pty Ltd | Contact Support | User Documentation'.

### 5.1. Uploading a file

After navigating to the Upload tab, you will be able to upload data files to organisations for which you have the 'Upload' role.

You can upload data files through the upload tab, by following these steps:

1. Navigate to the 'Upload' tab.

2. The Primary Health Network (PHN) will be pre-filled in the 'Organisation' field, unless you are allowed to upload to more than one PHN which will allow you to select the PHN whose data you are uploading.

The screenshot shows a user interface for file uploads. At the top, there's a navigation bar with 'Uploads', 'Upload A File', and 'View Uploads'. Below this is a form field labeled 'Organisation\*' with a dropdown menu open. The dropdown contains three items: 'Primary Health Networks', 'Test Strategic Data ( TestStratDat )', and 'Training PHN ( PHN999 )'. To the right of the dropdown is a checkbox labeled 'Upload as test data'. At the bottom left is a blue 'Select File' button, and at the bottom right is a grey 'Upload as test data' checkbox.

4. Click the blue 'Select File' button.
5. Navigate to where the upload file is saved on your system. Select the file and click the grey 'Open' button.

The screenshot shows the same 'Uploads' page after the user has selected an organization. The 'Organisation\*' dropdown now shows 'Training PHN ( PHN999 )'. Below it are two buttons: a blue 'Select File' button and a green 'Upload' button. Above the buttons, a message says 'File to upload: ~\$fixtures/training.x.xlsx'. To the right is a grey 'Upload as test data' checkbox.

6. Check to ensure you have selected the correct file by reviewing the file name now displayed below the 'Select File' button.
7. Click the green 'Upload' button.

You will receive confirmation that your file has been accepted. The file will now be validated and you will shortly receive a confirmation notification and an email. You can click on the link confirmation notification or open the email to view the upload status informing you if your file was successfully uploaded to the PMHC MDS, or informing you of any errors that occurred. See [Viewing Previous Uploads](#)

Please email [support@pmhc-mds.com](mailto:support@pmhc-mds.com) if you don't receive an email within one hour.

Further discussion about the error messages can be found at [Error messages](#).

## 5.2. Uploading a file in Test Mode

A file can be uploaded in Test Mode. When uploading in test mode, the file is validated, however the data is not updated in the PMHC MDS database.

After navigating to the Upload tab, you will be able to upload in Test Mode data files to organisations for which you have the 'Upload' role.

You can upload data files in Test Mode through the upload tab, by following these steps:

1. Navigate to the 'Upload' tab.
2. If you are allowed to upload to more than one organisation you will be asked to select an organisation name.
3. Select the name of the organisation whose data you are uploading from the drop down list.
4. Click the blue 'Select File' button.
5. Navigate to where the upload file is saved on your system. Select the file and click the grey 'Open' button.
6. Check to ensure you have selected the correct file by reviewing the file name now displayed below the 'Select File' button.
7. Click the 'Upload as test data' checkbox on the right hand side.

The screenshot shows a user interface for file uploads. At the top, there's a navigation bar with 'Uploads' selected. Below it are buttons for 'Upload A File' and 'View Uploads'. A dropdown menu labeled 'Organisation\*' contains the option 'Test Strategic Data ( TestStratDat )'. At the bottom, there are two buttons: a blue 'Select File' button and a grey 'Upload as test data' button with a checked checkbox.

8. Click the green 'Upload' button.

You will receive confirmation that your file has been accepted. The file will now be validated and you will shortly receive an email informing you if your file was valid, or informing you of any errors that occurred.

*Even if your file was valid, the data will not be updated in the PMHC MDS database.*

| Upload Details         |                        |
|------------------------|------------------------|
| File Name              | fixtures-training.xlsx |
| Upload ID              | 37fb099b               |
| Upload Date            | 29/08/2018 04:28:52 PM |
| Status                 | complete               |
| Uploader               | PMHC Training          |
| Specification          | PMHC 1.0               |
| <b>Messages</b>        |                        |
| Completed in Test Mode |                        |

### 5.3. Viewing Previous Uploads

The PMHC MDS allows you to review previous uploads.

| Uploads       |                        |                   |          |               |               |      |          |         |
|---------------|------------------------|-------------------|----------|---------------|---------------|------|----------|---------|
| Upload A File |                        | View Uploads      |          |               |               |      |          | Filters |
| Upload ID     | Date Uploaded          | Organisation Name | Username | File Name     | Specification | Test | Status   |         |
| 6e0413ec      | 01/11/2018 01:34:18 PM | Test PHN          | PMHCT    | fixtures.xlsx | PMHC 1.0      | No   | accept   |         |
| a2e60b3d      | 31/10/2018 02:23:37 PM | Test PHN          | PMHCT    | fixtures.xlsx | PMHC 1.0      | No   | complete |         |
| 506aa42f      | 29/10/2018 09:18:10 AM | Test PHN          | PMHCT    | fixtures.xlsx | PMHC 1.0      | Yes  | complete |         |
| 216d1fa5      | 25/10/2018 09:39:28 AM | Test PHN          | PMHCT    | fixtures.xlsx | PMHC 1.0      | Yes  | error    |         |

When an upload has been completed, regardless of whether it validated successfully or not, the upload will be added to the table.

The 'Status of Previous Uploads' table refreshes once files finish the validation process. Types of status results are:

- **accept** - the file is currently going through the validation process
- **complete** - the file has successfully passed the validation process
- **error** - the file has returned errors through the validation process. Please review the error messages and correct the data to upload again

Further discussion about the error messages can be found at [Error messages](#).

## 5.4. Viewing Upload Details

You can view the results of an upload by following these steps:

1. Navigate to the 'Upload' tab.
2. Click the 'Upload Status' tab.
3. Locate the date and time of the upload you are interested in.
4. Click on the filename of the relevant upload.
5. You will be shown the 'Upload Detail' page.

## 5.5. Complete uploads

[Viewing Upload Details](#) for complete uploads will display data verification information by listing the number of data records present and if those records are added, updated, or deleted, within the MDS records.

**Messages**

| File/Worksheet   | Present | Added | Updated | Deleted |
|------------------|---------|-------|---------|---------|
| organisations    | 1       | 0     | 1       | 0       |
| practitioners    | 11      | 0     | 11      | 0       |
| clients          | 27      | 2     | 25      | 0       |
| episodes         | 27      | 2     | 25      | 0       |
| service contacts | 114     | 20    | 94      | 0       |
| k10p             | 10      | 2     | 8       | 0       |
| k5               | 0       | 0     | 0       | 0       |
| sdq              | 0       | 0     | 0       | 0       |

## 5.6. Error messages

If the status of your file shows error, you can view the returned errors through [Viewing Previous Uploads](#).

| Upload Details                               |                              |                                  |   |
|--|------------------------------|----------------------------------|---|
| View Details                                 |                              |                                  |   |
| <b>File Name</b><br>fixtures-training-x.xlsx | <b>Upload ID</b><br>537e4d0d | <b>Status</b><br>error           |   |
| <b>Upload Date</b><br>29/08/2018 06:17:30 PM |                              |                                  |   |
| <b>Uploader</b><br>PMHC Training             |                              | <b>Specification</b><br>PMHC 1.0 |   |
| <b>Errors</b>                                |                              |                                  |   |
| File/Worksheet                               | Row                          | Column Name                      | Error   |
| Practitioners                                | 7                            | atsi_cultural_training           | Invalid ATSI Cultural Training. "Not required" is reserved only for practitioners who are of ATSI descent or employed by an Aboriginal Community Controlled Health Service. Therefore practitioner_atsi_status must have the value "Aboriginal but not Torres Strait Islander origin", "Torres Strait Islander but not Aboriginal origin" or "Both Aboriginal and Torres Strait Islander origin" or the Provider Organisation must have the type "Aboriginal Health/Medical Service". |
| Clients                                      | 12                           | date_of_birth                    | required to have a date between 01011900 and today's date.  |
| Clients                                      | 24                           | client_atsi_status               | value of "5" is invalid.  |
| Clients                                      | 30                           | client_gender                    | required.   |
| Clients                                      | 30                           | client_gender                    | value of "[blank]" is invalid.  |
| Clients                                      | 34                           | organisation_path / client_key   | value of "PHN999:PO2 / CL1003" is not unique. A previous row in the file contains the same values.  |
| Episodes                                     | 7                            | episode_end_date                 | required to have a date between 01012016 and today's date.  |
| Episodes                                     | 12                           | referral_date                    | required to have a date between 01012014 and today's date.  |
| Service contacts                             | 72                           | service_contact_date             | required to have a date between 01012014 and today's date.  |
| Service contacts                             | 74                           | organisation_path / episode_key  | value of "PHN999:PO2 / EP000039" is invalid. There is no matching row in the Episodes file/worksheet with this identifier.  |
| K10p   | 11                           | measure_date                     | required to have a date between 01012016 and today's date.  |
| Sdq  | 4                            | sdq_total                        | Inconsistent sdq_total. The Total Difficulties Score doesn't match the sum on the underlying subscales.   |

## 5.7. Correcting upload errors

Any data errors will need to be corrected in your internal system and a new upload file created. Or if you manually record data on the upload file, you can edit the data records directly on the file.

The definition of each data item has associated notes that will provide guidance on why an error is returned. By visiting the data specifications documentation and clicking on the [Record formats](#) field name this will take you to the field definition which outlines the associated notes.

In the Frequently Asked Questions guide there are questions about some of the common and unusual upload error messages. These answers contain information on what you can do to fix the error. See - [Uploading Data FAQs](#).

If you require assistance in understanding an error message, please email [support@pmhc-mds.com](mailto:support@pmhc-mds.com).

## 6. Data Entry

You will only be able to see the Data Entry tab if you have been assigned the 'Data Entry' [Users Roles](#), when logged into the PMHC MDS on <https://pmhc-mds.net>.

If you don't have access to the Data Entry tab and you believe you should, please contact someone in your provider organisation or provider organisation's PHN who has the 'User Management' role. If you are unsure who has the 'User Management' role please email the PMHC Helpdesk at [support@pmhc-mds.com](mailto:support@pmhc-mds.com)

After navigating to the Data Entry tab, you will be presented with three search boxes which will allow you to easily find and view the client data for the organisations you have permission to access.

The screenshot shows the 'Data Entry' page. At the top, there are navigation links for 'Home', 'Data Entry', and 'SLK'. On the right, it says 'Logged in as given-user8 surname-user8'. Below the navigation, a breadcrumb trail shows 'Home / Data Entry / Clients / View Clients'. The main title is 'Data Entry'. A sub-header states: 'Users with the Data Entry role can use this tab to add, view and edit client records.' A 'Support' link is provided for more information. The interface includes tabs for 'Clients' and 'Practitioners', with 'Clients' selected. Below this, there are two buttons: 'View Clients' and 'Add New Client'. On the right, there is a 'Client' help icon. The central part of the screen features three search fields separated by 'OR': 1) 'Client Key \*' with a 'Clear Search' button and a 'Search' button. 2) 'SLK \*' with a 'Clear Search' button and a 'Search' button. 3) 'DOB \*' with a 'Clear Search' button and a 'Search' button. Each search field has a date picker icon. At the bottom left is the Australian Government Department of Health logo. At the bottom right, it says 'PMHC-MDS managed by Strategic Data Pty Ltd | Contact Support | User Documentation'.

### 6.1. Client Data

#### 6.1.1. Finding a Client

There are three [Search Fields](#) options available to find a client.

##### 6.1.1.1. Search Fields

You can choose any one of three search options to search for a client, depending on the client information that you have available to you at the time.

- **Client Key** - You can use this field to type in a whole [Client Key](#), or start thereof.
- **SLK** - You can use this field to type in a client's [Statistical Linkage Key](#).
- **DOB** - You can use this field to type in a client's [Date of Birth](#).

The image shows three separate search boxes arranged horizontally. Each box contains a text input field, a 'Clear Search' button, and a blue 'Search' button.

- Client Key \***: Contains a text input field with placeholder text and a 'Search' button.
- OR**: A bolded word indicating an alternative search method.
- SLK \***: Contains a text input field with placeholder text and a 'Search' button.
- OR**: A bolded word indicating an alternative search method.
- DOB \***: Contains a text input field with placeholder text, a calendar icon, and a 'Search' button.

After entering information into one of these **Search Fields**, simply click the blue 'Search' button to see **Client Search Results**

Use the grey 'Clear Search' button to removed any previously entered text.

### 6.1.2. Client Search Results

A display of the details used within the **Search Fields** used in **Finding a Client** will be visible above the search results table, when results are available.

You can sort the listed client search results through either of the above three search features for **Search Fields**.

Sort the listed clients by simply clicking on the column header. Alternately you can click on the arrow beside a column header for more sort options, as follows:

- Sort Ascending
- Sort Descending
- Remove Sort
- Hide Column

The image shows a client search results table with the following columns: Client Key, Organisation Path, SLK, Date Of Birth, Gender, Last Known Postcode, and Last Contact Date. The table displays 10 rows of data, each representing a client record.

| Client Key ▲ ▼ | Organisation Path | SLK ▾                | Date Of Birth ▾ | Gender ▾                | Last Known Postcode | Last Contact Date |
|----------------|-------------------|----------------------|-----------------|-------------------------|---------------------|-------------------|
| CL0001         | PHN999:NFP01      | Z4H4TBAEASY0T27J0... | 17/02/1983      | Female                  | 2101                | 21/07/2016        |
| CL0002         | PHN999:NFP01      | BBR6G3CWCQAKEBT...   | 24/09/2007      | Male                    | 2102                | 17/07/2016        |
| CL0003         | PHN999:NFP01      | S9F9MSJSPKPS9Y2EZ... | 09/09/9999      | Not stated/Inadequat... | 2103                | 19/06/2016        |
| CL0003         | PHN999:NFP02      | S9F9MSJSPKPS9Y2EZ... | 09/09/9999      | Not stated/Inadequat... | 2614                | 22/11/2016        |
| CL0004         | PHN999:NFP01      | 222J04BDNZYKPNXj7... | 08/07/1970      | Female                  | 2104                | 25/06/2016        |
| CL0005         | PHN999:NFP01      | KD75EHJ6RTMRGJPW...  | 17/02/1983      | Other                   |                     |                   |
| CL0006         | PHN999:NFP01      | MN65F3CEKY47K3V3...  | 04/01/1958      | Male                    | 2106                | 24/07/2016        |
| CL0007         | PHN999:NFP01      | G6MMH6SXPW819SJ...   | 09/09/9999      | Not stated/Inadequat... | 2107                | 10/05/2016        |
| CL0008         | PHN999:NFP01      | B07MMQ44YAM5EQF...   | 28/02/1978      | Female                  | 2108                | 30/09/2016        |
| CL0009         | PHN999:NFP01      | CXN263HSPMB0ZK6T...  | 19/06/2002      | Other                   | 2109                | 15/07/2016        |
| CL0010         | PHN999:NFP01      | B07MMQ44YAM5EQF...   | 28/02/1978      | Female                  | 2111                | 20/04/2016        |

To filter the listed clients:

1. Click the grey 'Filters' button.
2. Start typing in an edit box now displayed under the column headers.
3. To remove the filter, click the grey cross within the edit box beside any entered text or click the grey 'Filters' button.

Showing results for Client Key "CL0"

| Client Key ▲ ▼ | Organisation Path ▼ | SLK ▼                | Date Of Birth ▼ | Gender ▼                | Last Known Postcode ▼ | Last Contact Date |
|----------------|---------------------|----------------------|-----------------|-------------------------|-----------------------|-------------------|
| CL0011         | PHN999:NFP02        | KJBEZMRKM6G1442P...  | 04/11/1967      | Female                  | 2905                  | 15/11/2016        |
| CL0015         | PHN999:NFP02        | B94PBNCCHKPG9V7...   | 01/01/1993      | Female                  | 2905                  | 02/12/2016        |
| CL0020         | PHN999:NFP02        | 86MXGSSQZSFK8TW...   | 07/04/1983      | Other                   | 2905                  | 27/01/2017        |
| CL0021         | PHN999:NFP02        | BXEJ336F6WX2XBZBR... | 01/04/2009      | Not stated/Inadequat... | 2902                  | 19/11/2016        |

You can clear the search results and start a new search by clicking on the blue 'Edit Search' button.

### 6.1.3. Viewing a Client's details

You can view a client's details through the [Client Search Results](#) available on the Data Entry tab, by following these steps:

1. Create [Client Search Results](#).
2. Click on the Client Key in blue displayed within the table list.
3. This is the Client's summary view, with summary details along with a snapshot of the five most recent episodes.

## Client "CL0001" at PHN "Test PHN", Provider Organisation "Test PO 1"

Summary Details Episodes (2)

[View Summary](#)

**Client Key**

CL0001

**Gender**

Female

**Date Of Birth**

17/02/1983

CL0001-E01

Suicide Referral 

**Start Date:** 13/02/2016

**Episode Concluded:** Yes

**Last Service Contact:** 05/04/2016

**Number of service contacts:** 4

**Principal Focus of Treatment Plan:** Low intensity psychological intervention

**Outcome Measure Summary**

Episode start

Review

Episode end

CL0001-E02

**Start Date:** 21/07/2016

**Episode Concluded:** No

**Last Service Contact:** 21/07/2016

**Number of service contacts:** 1

**Principal Focus of Treatment Plan:** Psychological therapy

**Outcome Measure Summary**

Episode start

Review

Episode end

4. Click Details tab for more information on the Client.

A page will display the Client's details as recorded via the [Client Data Elements](#).

## Client "CL0001" at PHN "Test PHN", Provider Organisation "Test PO 1"

Summary    **Details**    Episodes (2)

[View Details](#)    [Edit Details](#)    Delete

|   |   |
|---|---|
| <b>Organisation Path</b><br>PHN999:NFP01  | <b>Client Key</b><br>CL0001   |
| <b>Date of Birth</b><br>17/02/1983  | <b>Estimated Date of Birth Flag</b><br>Date of birth is accurate  |
| <b>Gender</b><br>Female   | <b>Statistical Linkage Key</b><br>Z4H4TBAEASY0T27J0GMX3P2N4C3BCYSN  |
| <b>Aboriginal and Torres Strait Islander Status</b><br>Aboriginal but not Torres Strait Islander origin | <b>Country of Birth</b><br>Australia  |
| <b>Main Language Spoken at Home</b><br>English  | <b>Proficiency in Spoken English</b><br>Not applicable (persons under 5 years of age or who speak only English) |
| <b>Tags</b><br>tag1   |   |

### 6.1.4. Editing a Client

You can edit a clients's details through the [Client Search Results](#) available on the Data Entry tab, by following these steps:

1. Create [Client Search Results](#).
2. From the Client Search table, click the Client Key.
3. Click Details tab, to view Client's details.
4. Click Edit Details tab.
5. Update the Client's details. Mandatory fields are marked with an \* . ([Specification Client Data Elements](#))

*Please note: You can edit the Client Key from this screen. See [Editing a Client Key](#).*

Home / Data Entry / Clients / CL0001@PHN999:NFP01 / Edit Client Details

## Client "CL0001" at PHN "Test PHN", Provider Organisation "Test PO 1"

Summary    **Details**    Episodes (2)

[View Details](#)    [Edit Details](#)

|  |  |
|--|--|
| <b>Organisation Path</b><br>PHN999:NFP01   | <b>Client Key</b><br><a href="#">Edit Key</a><br>CL0001  |
| <b>Date of Birth *</b><br>17/02/1983 <a href="#">Calendar</a>  | <b>Estimated Date of Birth Flag *</b><br>Date of birth is accurate <a href="#">Edit</a>  |
| <b>Gender *</b><br>Female <a href="#">Edit</a>   |  |
| <b>Statistical Linkage Key *</b>   |  |
| Enter SLK <a href="#">Generate SLK</a>   |  |
| <b>SLK</b><br>Z4H4TBAEASY0T27J0GMX3P2N4C3BCYSN <a href="#">Edit</a>  |  |
| <b>Aboriginal and Torres Strait Islander Status *</b><br>Aboriginal but not Torres Strait Islander origin <a href="#">Edit</a> | <b>Country of Birth *</b><br>Australia <a href="#">Edit</a>  |
| <b>Main Language Spoken at Home *</b><br>English <a href="#">Edit</a>  | <b>Proficiency in Spoken English *</b><br>Not applicable (persons under 5 years of age or who speak only English) <a href="#">Edit</a> |
| <b>Tags</b><br>tag1 <a href="#">Edit</a>   |  |
| <a href="#">Save</a>   |  |

*Please note: If you edit the 'Date of Birth' or 'Gender' you will be required to update the 'Statistical Linkage Key' field. You can choose to 'Enter' or 'Generate' a Client's SLK. The SLK is generated on your device, the names used are not stored or transmitted over the network.*

**Statistical Linkage Key \***

Enter SLK [Generate SLK](#)

|   |  |                          |
|---|--|--------------------------|
| <b>First Name</b><br><input type="text"/> | <b>Last Name</b><br><input type="text"/> | <a href="#">Generate</a> |
|---|--|--------------------------|

The SLK is generated on your device, the names used to construct it are not stored or transmitted over the network.  
[View Documentation](#).

Values that are used to generate an SLK have changed, please regenerate or re-enter this client's SLK. The old SLK was 'Z4H4TBAEASY0T27J0GMX3P2N4C3BCYSN'.

6. Click the blue 'Save' button. (If you decide not to save changes, you can simply navigate away from this screen)

You will receive confirmation that the Client's details have been saved, and it will now be displaying these new details in the Clients View Details tab.

Saved successfully



If you receive an error message, the data will need to be corrected before the record is saved and added to the PMHC MDS. See Validation Rules - [Client](#).

#### 6.1.4.1. Editing a Client Key

You can edit a clients's identification key through [Editing a Client](#) available on the Data Entry tab, by following these steps:

1. In step five when [Editing a Client](#).
2. From the Client Edit Details tab, click the 'Edit Key' button.

The screenshot shows a 'Client Edit Details' form. On the left, there are fields for 'Organisation Path' (PHN999:NFP01), 'Date of Birth \*' (17/02/1983), 'Gender \*' (Female), and 'Statistical Linkage Key \*' (with options 'Enter SLK' and 'Generate SLK'). On the right, a modal dialog box titled 'Edit Key' is open. It has two input fields: 'Old Client Key' containing 'CL0001' and 'New Client Key' which is currently empty. At the bottom of the dialog is a 'Next' button.

3. Type in the new client key and click 'Next'.
4. Double check the new key is correct and click save. (If it is incorrect, click back to re-enter the key or click the 'cross' in the top right to cancel this key change request)

You will receive confirmation that the Client's key has been saved, and the screen will now be displaying the updated client key details in the Clients View Details tab.

Successfully updated client's key as CL00001



#### 6.1.5. Adding a New Client

You can add a clients through the [Client Search Results](#) available on the Data Entry tab, by following these steps:

1. Create [Client Search Results](#)
2. Firstly double check the client is not already added.
3. Click the blue 'Add New Client' button.
4. Choose the Provider Organisation from the drop down list.
5. Enter the Client's details. Mandatory fields are marked with an \*. (Specification [Client Data Elements](#))

*Please note: With the 'Statistical Linkage Key' field you can choose to 'Enter' or 'Generate' a Client's SLK. The SLK is generated on your device, the names used are not stored or transmitted over the network.*

**Statistical Linkage Key \***

Enter SLK   Generate SLK

**First Name**  **Last Name**

**Generate**

The SLK is generated on your device, the names used to construct it are not stored or transmitted over the network.  
[View Documentation.](#)

6. Click the blue 'Save' button. (If you decide not to add this client, you can simply navigate away from this screen)

Home / Data Entry / Clients / Add New Client

## Data Entry

Users with the Data Entry role can use this tab to add, view and edit client records.

**Support:** For more information and assistance visit [PMHC MDS Documentation](#). (link opens in a new window)

Clients   Practitioners

[View Clients](#)   [Add New Client](#)

**Organisation Path \***

**Client Key \***

**Date of Birth \***  

**Estimated Date of Birth Flag \***

**Gender \***

**Statistical Linkage Key \***

Enter SLK   Generate SLK

**SLK**

**Aboriginal and Torres Strait Islander Status \***

**Country of Birth \***

**Main Language Spoken at Home \***

**Proficiency in Spoken English \***

**Tags**

**Save**

You will receive confirmation that the Client has been saved, and it will now be displaying the client's saved information in the Clients View Details tab.

Saved successfully



If you receive an error message, the data will need to be corrected before the record is saved and added to the PMHC MDS. See Validation Rules - [Client](#).

### 6.1.6. Deleting a Client

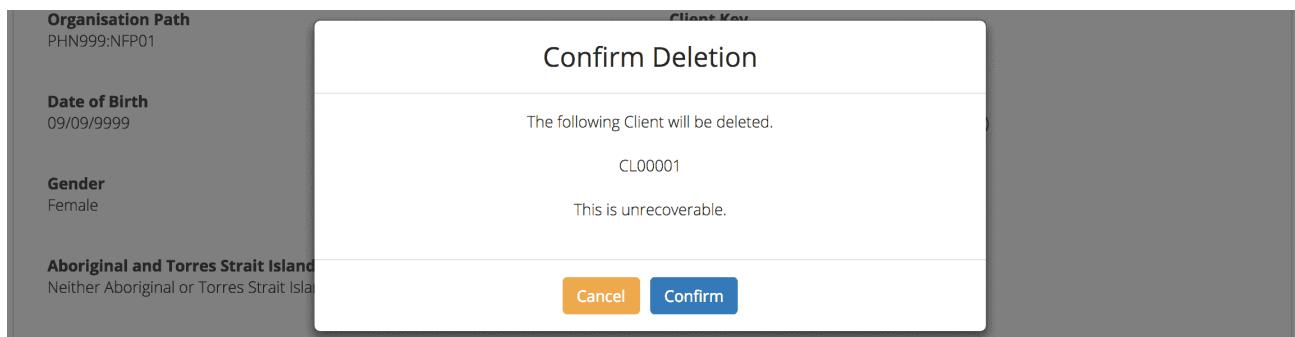
You can delete a client through '[Viewing a Client's details](#)' available on the Data Entry tab, by following these steps:

1. [Search](#) for the client.
2. From the [Client Search Results](#) table, click the Client Key.
3. Click Details tab, to [view Client's details](#).
4. Click the red 'Delete' button.
5. You will either be displayed a '[Confirm Delete](#)' screen or a '[Cannot Delete](#)' screen.

#### 6.1.6.1. Confirm Delete

**Please note: Once the client is deleted, you will not be able to recover this client data.**

1. Click the blue 'Confirm' button to delete this client. (or click the orange 'Cancel' button if you decide not to delete this client data)



After you click 'Confirm', you will receive confirmation that the Client has been deleted, and you will be redirected to the [Client Search Results](#) where the client will no longer be displayed.

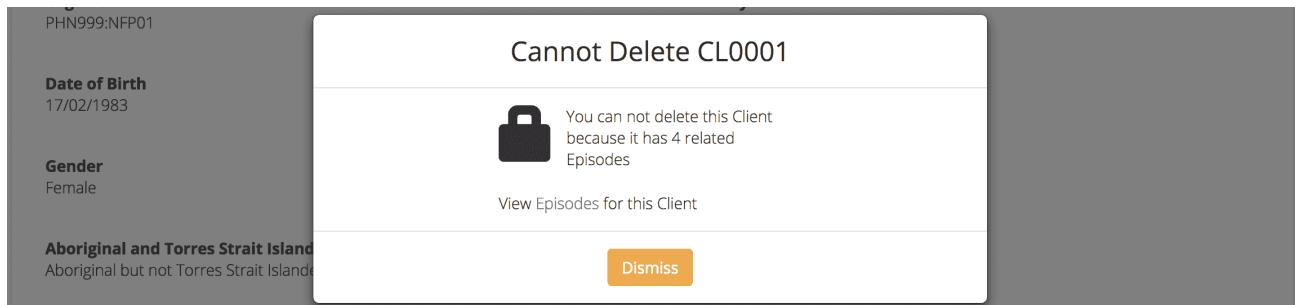
CL00001 successfully deleted



### **6.1.6.2. Cannot Delete**

If the client you are trying to delete has any dependant records, you will not be able to proceed with deleting this client until all the related records have been deleted.

1. You can click on the link provided to View the Client's Episodes, or click the orange 'Dismiss' button



See [Deleting an Episode](#)

## **6.2. Episodes**

### **6.2.1. Viewing a Client's Episodes**

You can view a clients's episodes through the [Viewing a Client's details](#) available on the Data Entry tab, by following these steps:

1. Once [Viewing a Client's details](#)
2. From the Client's Summary tab, you can shortcut straight to an episode by clicking the Blue Episode Key displayed in the snapshot of the five most recent episodes.

## Client "CL0001" at PHN "Test PHN", Provider Organisation "Test PO 1"

Summary Details Episodes (2)

View Summary

**Client Key**

CL0001

**Gender**

Female

**Date Of Birth**

17/02/1983

CL0001-E01

**Suicide Referral** !**Start Date:** 13/02/2016**Episode Concluded:** Yes**Last Service Contact:** 05/04/2016**Number of service contacts:** 4**Principal Focus of Treatment Plan:** Low intensity psychological intervention**Outcome Measure Summary** Episode start Review Episode end

CL0001-E02

**Start Date:** 21/07/2016**Episode Concluded:** No**Last Service Contact:** 21/07/2016**Number of service contacts:** 1**Principal Focus of Treatment Plan:** Psychological therapy**Outcome Measure Summary** Episode start Review Episode end

3. Alternately, if you would like to view all episodes you can click on the Episode Tab. The heading for this tab displays in brackets the total number of episodes recorded in the PMHC MDS for this client at Provider Organisations for which you have access.

A table will display all the Client's Episodes at Provider Organisations for which you have access.

## Client "CL0001" at PHN "Test PHN", Provider Organisation "Test PO 1"

Summary Details Episodes (2)

View Episodes Add New Episode

All Episodes

| Suicide Referral | Episode Key | Start Date | End Date   | Completion Status    | Principal Focus        | Number of Servic... | Date of Last Ser... |
|------------------|-------------|------------|------------|----------------------|------------------------|---------------------|---------------------|
| !                | CL0001-E01  | 13/02/2016 | 18/06/2016 | Episode closed ad... | Low intensity psych... | 4                   | 05/04/2016          |
|                  | CL0001-E02  | 21/07/2016 |            | Episode open         | Psychological ther...  | 1                   | 21/07/2016          |

A Drop down list is available to view:

- All Episodes
- Currently Open Episodes
- Closed Episodes

| Summary  | Details    | Episodes (2)    |            |                      |                       |   |            |
|--|------------|-----------------|------------|----------------------|-----------------------|---|------------|
| View Episodes                                    |            | Add New Episode |            |                      |                       |   |            |
| <input checked="" type="checkbox"/> All Episodes |            |                 |            |                      |                       |   |            |
| <input type="checkbox"/> Currently Open Episodes |            |                 |            |                      |                       |   |            |
| <input type="checkbox"/> Closed Episodes         |            |                 |            |                      |                       |   |            |
| !  | CL0001-E01 | 13/02/2016      | 18/06/2016 | Episode closed ad... | Low intensity psyc... | 4 | 05/04/2016 |
|  | CL0001-E02 | 21/07/2016      |            | Episode open         | Psychological ther... | 1 | 21/07/2016 |

4. To view the Client's Episode details, click the Blue Episode Key.

Client "CL0001" at PHN "Test PHN", Provider Organisation "Test PO 1"

## Episode starting 13/02/2016

Details    Collection Occasions (3)    Service Contacts (4)

**Suicide Referral** !

[View Details](#)    [Edit Details](#)    [Delete](#)

|   |  |
|---|--|
| <b>Organisation Path</b><br>PHN999:NFP01                                    | <b>Episode Key</b><br>CL0001-E01   |
| <b>Client Key</b><br>CL0001   | <b>End Date</b><br>18/06/2016  |
| <b>Client Consent to Anonymised Data</b><br>Yes                             | <b>Completion Status</b><br>Episode closed administratively - client moved out of area |
| <b>Referral Date</b><br>12/02/2016  | <b>Principal Focus of Treatment Plan</b><br>Low intensity psychological intervention   |
| <b>GP Mental Health Treatment Plan Flag</b><br>Yes                          | <b>Homelessness Flag</b><br>Sleeping rough or in non-conventional accommodation        |
| <b>Area of usual residence, postcode</b><br>2101                            | <b>Labour Force Status</b><br>Unemployed   |
| <b>Employment Participation</b><br>Not applicable - not in the labour force | <b>Source of Cash Income</b><br>Other pension or benefit (not superannuation)          |
| <b>Health Care Card</b><br>Yes  | <b>NDIS Participant</b><br>No  |
| <b>Marital Status</b><br>Never married                                      | <b>Suicide Referral Flag</b><br>Yes  |
| <b>Principal Diagnosis</b><br>Acute stress disorder                         | <b>Additional Diagnosis</b><br>Mixed anxiety and depressive symptoms                   |
| <b>Medication Antipsychotics (N05A)</b><br>No                               | <b>Medication Anxiolytics (N05B)</b><br>No   |
| <b>Medication Hypnotics and sedatives (N05C)</b><br>No                      | <b>Medication Antidepressants (N06A)</b><br>No   |
| <b>Medication Psychostimulants and nootropics (N06B)</b><br>No              | <b>Referrer Profession</b><br>Psychiatrist   |
| <b>Referrer Organisation Type</b><br>General Practice                       | <b>Tags</b><br>tag3  |

A page will display the Client's Episode details as recorded via the [Episode Data Elements](#).

### 6.2.2. Editing a Client's Episode data

You can edit a Client's Episode details through the [Viewing a Client's details](#) available on the Data Entry tab, by following these steps:

1. Once [Viewing a Client's Episodes](#).
2. From the Client's Episode table, click the Episode Key.

3. Click Edit Details tab.
4. Update the Client's Episode details. Mandatory fields are marked with an \* . (Specification [Episode Data Elements](#))

*Please note: You can edit the Episode Key from this screen. See [Editing a Episode Key](#).*

Home / Data Entry / Clients / CL0001@PHN999:NFP01 / Client Episodes / CL0001-E01 / Edit Details

Client "CL0001" at PHN "Test PHN", Provider Organisation "Test PO 1"

### Episode starting 13/02/2016

| Details   | Collection Occasions (3)  | Service Contacts (4) |
|---|---|----------------------|
| <b>Suicide Referral</b>              |   |                      |
| <a href="#">View Details</a> <a href="#">Edit Details</a>   |   |                      |
| <b>Organisation Path</b><br>PHN999:NFP01  | <b>Episode Key</b><br><a href="#">Edit Key</a><br>CL0001-E01  |                      |
| <b>Client Key</b><br>CL0001   | <b>End Date</b><br>18/06/2016  |                      |
| <b>Client Consent to Anonymised Data *</b><br>Yes   | <b>Completion Status</b><br>Episode closed administratively - client moved out of area                            |                      |
| <b>Referral Date</b><br>12/02/2016  | <b>Principal Focus of Treatment Plan *</b><br>Low intensity psychological intervention                            |                      |
| <b>GP Mental Health Treatment Plan Flag *</b><br>Yes  | <b>Homelessness Flag *</b><br>Sleeping rough or in non-conventional accommodation                                 |                      |
| <b>Area of usual residence, postcode *</b><br>2101  | <b>Labour Force Status *</b><br>Unemployed  |                      |
| <b>Employment Participation *</b><br>Not applicable - not in the labour force   | <b>Source of Cash Income *</b><br>Other pension or benefit (not superannuation)                                   |                      |
| <b>Health Care Card *</b><br>Yes  | <b>NDIS Participant *</b><br>No   |                      |
| <b>Marital Status *</b><br>Never married  | <b>Suicide Referral Flag *</b><br>Yes   |                      |
| <b>Principal Diagnosis *</b><br>107 - Acute stress disorder   | <b>Additional Diagnosis *</b><br>903 - Mixed anxiety and depressive symptoms                                      |                      |
| <b>Medication Antipsychotics (N05A) *</b><br>No   | <b>Medication Anxiolytics (N05B) *</b><br>No  |                      |
| <b>Medication Hypnotics and sedatives (N05C) *</b><br>No  | <b>Medication Antidepressants (N06A) *</b><br>No  |                      |
| <b>Medication Psychostimulants and nootropics (N06B) *</b><br>No  | <b>Referrer Profession *</b><br>Psychiatrist  |                      |
| <b>Referrer Organisation Type *</b><br>General Practice   | <b>Tags</b><br>tag3   |                      |
| <input type="button" value="Save"/>   |   |                      |

5. Click the blue 'Save' button. (If you decide not to save changes, you can simply navigate away from this screen)

You will receive confirmation that the Client's Episode details have been saved, and it will now be displaying these new details in the Episode View Details tab.

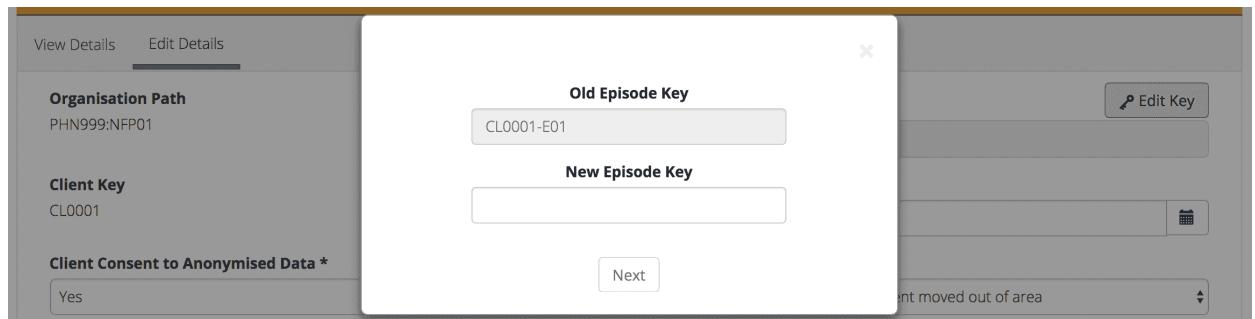


If you receive an error message, the data will need to be corrected before the record is saved and added to the PMHC MDS. See Validation Rules - [Episode](#).

#### 6.2.2.1. Editing a Episode Key

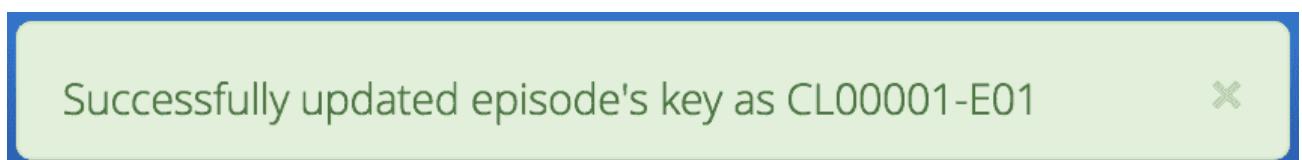
You can edit an episode's identification key through [Viewing a Client's Episodes](#) available on the Data Entry tab, by following these steps:

1. In step five when [Editing a Client's Episode data](#).
2. From the Episode Edit Details tab, click the 'Edit Key' button.



3. Type in the new episode key and click 'Next'.
4. Double check the new key is correct and click save. (If it is incorrect, click back to re-enter the key or click the 'cross' in the top right to cancel this key change request)

You will receive confirmation that the Episode's key has been saved, and the screen will now be displaying the updated episode key details in the Episodes View Details tab.



#### 6.2.3. Adding a Client's Episode data

You can add a clients through the [Viewing a Client's details](#) available on the Data Entry tab, by following these steps:

1. Once [Viewing a Client's Episodes](#).

2. Firstly double check the client does not have any open episode already showing. (A client can only have one open episode at a provider organisation. [Episode](#))
3. Click the Add Episode tab.
4. Enter the Client's Episode details. Mandatory fields are marked with an \* . (Specification [Episode Data Elements](#))

## Client "CL0001" at PHN "Test PHN", Provider Organisation "Test PO 1"

Summary    Details    **Episodes (2)**

[View Episodes](#)    [Add New Episode](#)

|  |  |
|--|--|
| <b>Organisation Path</b><br>PHN999:NFP01                           | <b>Episode Key *</b><br><input type="text"/>                                       |
| <b>End Date</b><br><input type="text"/>                            | <b>Client Consent to Anonymised Data *</b><br><input type="text"/>                 |
| <b>Completion Status</b><br><input type="text"/>                   | <b>Referral Date</b><br><input type="text"/>                                       |
| <b>Principal Focus of Treatment Plan *</b><br><input type="text"/> | <b>GP Mental Health Treatment Plan Flag *</b><br><input type="text"/>              |
| <b>Homelessness Flag *</b><br><input type="text"/>                 | <b>Area of usual residence, postcode *</b><br><input type="text"/>                 |
| <b>Labour Force Status *</b><br><input type="text"/>               | <b>Employment Participation *</b><br><input type="text"/>                          |
| <b>Source of Cash Income *</b><br><input type="text"/>             | <b>Health Care Card *</b><br><input type="text"/>                                  |
| <b>NDIS Participant *</b><br><input type="text"/>                  | <b>Marital Status *</b><br><input type="text"/>                                    |
| <b>Suicide Referral Flag *</b><br><input type="text"/>             | <b>Principal Diagnosis *</b><br><input type="text"/>                               |
| <b>Additional Diagnosis *</b><br><input type="text"/>              | <b>Medication Antipsychotics (N05A) *</b><br><input type="text"/>                  |
| <b>Medication Anxiolytics (N05B) *</b><br><input type="text"/>     | <b>Medication Hypnotics and sedatives (N05C) *</b><br><input type="text"/>         |
| <b>Medication Antidepressants (N06A) *</b><br><input type="text"/> | <b>Medication Psychostimulants and nootropics (N06B) *</b><br><input type="text"/> |
| <b>Referrer Profession *</b><br><input type="text"/>               | <b>Referrer Organisation Type *</b><br><input type="text"/>                        |
| <b>Tags</b><br><input type="text"/>                                |  |
| <b>Save</b>  |  |

5. Click the blue 'Save' button. (If you decide not to add this client's episode, you can simply navigate away from this screen)

You will receive confirmation that the Client's Episode details have been added, and it will now be displaying these new details in the Episode View Details tab.



If you receive an error message, the data will need to be corrected before the record is saved and added to the PMHC MDS. See Validation Rules - [Episode](#).

#### **6.2.4. Closing a Client's Episode**

You can close a Client's Episode details through the [Viewing a Client's details](#) available on the Data Entry tab, by following these steps:

1. Once [Viewing a Client's Episodes](#).
2. From the Client's Episode table, click the Episode Key of the open episode.
3. Click Edit Details tab.
4. Update the Client's Episode details, by entering an 'End Date' and 'Completion Status'. ([Specification Episode Data Elements](#))

Client "CL0001" at PHN "Test PHN", Provider Organisation "Test PO 1"

## Episode starting 13/02/2016

Details    Collection Occasions (3)    Service Contacts (4)

### Suicide Referral !

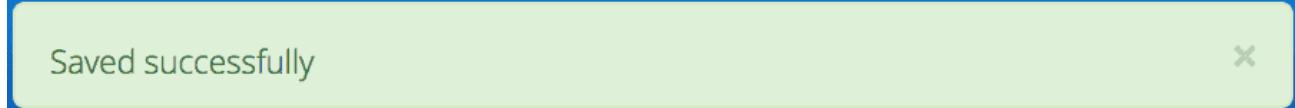
[View Details](#)    [Edit Details](#)

|   |  |
|---|--|
| <b>Organisation Path</b><br>PHN999:NFP01                                      | <b>Episode Key</b> <a href="#">Edit Key</a><br>CL0001-E01                              |
| <b>Client Key</b><br>CL0001   | <b>End Date</b><br>18/06/2016  |
| <b>Client Consent to Anonymised Data *</b><br>Yes                             | <b>Completion Status</b><br>Episode closed administratively - client moved out of area |
| <b>Referral Date</b><br>12/02/2016  | <b>Principal Focus of Treatment Plan *</b><br>Low intensity psychological intervention |
| <b>GP Mental Health Treatment Plan Flag *</b><br>Yes                          | <b>Homelessness Flag *</b><br>Sleeping rough or in non-conventional accommodation      |
| <b>Area of usual residence, postcode *</b><br>2101                            | <b>Labour Force Status *</b><br>Unemployed   |
| <b>Employment Participation *</b><br>Not applicable - not in the labour force | <b>Source of Cash Income *</b><br>Other pension or benefit (not superannuation)        |
| <b>Health Care Card *</b><br>Yes  | <b>NDIS Participant *</b><br>No  |
| <b>Marital Status *</b><br>Never married                                      | <b>Suicide Referral Flag *</b><br>Yes  |
| <b>Principal Diagnosis *</b><br>107 - Acute stress disorder                   | <b>Additional Diagnosis *</b><br>903 - Mixed anxiety and depressive symptoms           |
| <b>Medication Antipsychotics (N05A) *</b><br>No                               | <b>Medication Anxiolytics (N05B) *</b><br>No   |
| <b>Medication Hypnotics and sedatives (N05C) *</b><br>No                      | <b>Medication Antidepressants (N06A) *</b><br>No                                       |
| <b>Medication Psychostimulants and nootropics (N06B) *</b><br>No              | <b>Referrer Profession *</b><br>Psychiatrist   |
| <b>Referrer Organisation Type *</b><br>General Practice                       | <b>Tags</b><br>tag3  |

[Save](#)

5. Click the blue 'Save' button. (If you decide not to save changes, you can simply navigate away from this screen)

You will receive confirmation that the Client's Episode details have been saved, and it will now be displaying these new details in the Episode View Details tab.



If you receive an error message, the data will need to be corrected before the record is saved and added to the PMHC MDS. See Validation Rules - [Episode](#).

### 6.2.5. Deleting an Episode

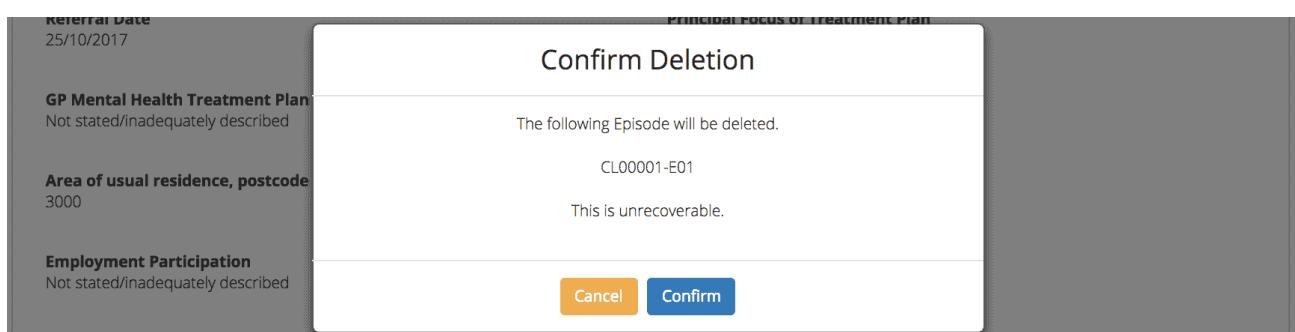
You can delete a Client's Episode through '[Viewing a Client's Episodes](#)' available on the Data Entry tab, by following these steps:

1. [Search](#) for the client.
2. From the [Client Search Results](#) table, click the Client Key.
3. Click Episodes tab, to [view Client's Episodes](#).
4. From the [View Episodes](#) table, click the Episode Key.
5. Click the red 'Delete' button.
6. You will either be displayed a '[Confirm Delete](#)' screen or a '[Cannot Delete](#)' screen.

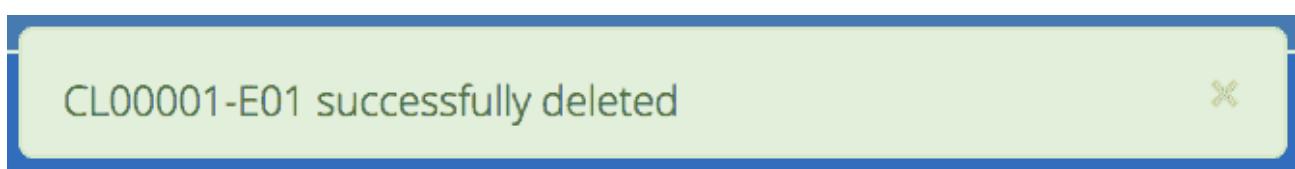
#### 6.2.5.1. Confirm Delete

Please note: Once the episode is deleted, you will not be able to recover this episode data.

1. Click the blue 'Confirm' button to delete this episode. (or click the orange 'Cancel' button if you decide not to delete this episode data)



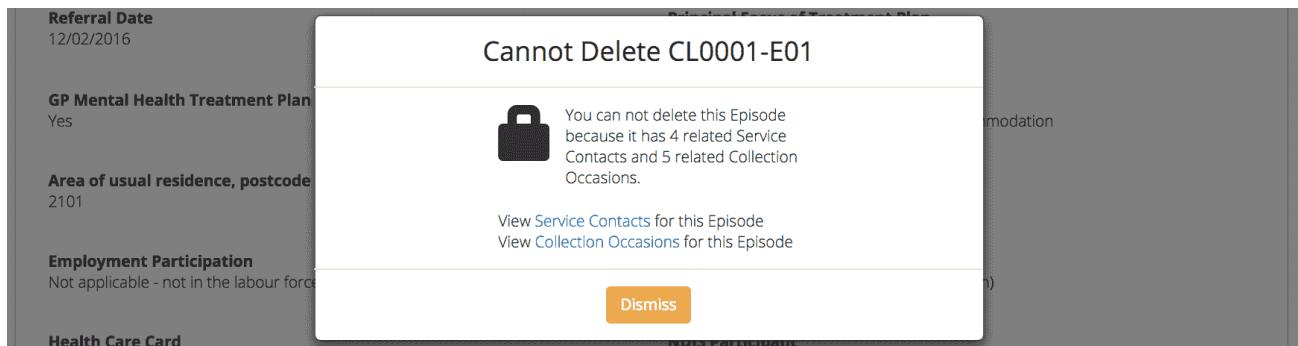
After you click 'Confirm', you will receive confirmation that the episode has been deleted, and you will be redirected to the [View Episodes](#) where the episode will no longer be displayed.



#### 6.2.5.2. Cannot Delete

If the episode you are trying to delete has any dependant records, you will not be able to proceed with deleting this episode until all the related records have been deleted.

1. You can click on the link provided to View the Client's Service Contacts and collection Occasions, or click the orange 'Dismiss' button



See [Deleting an Service Contact](#) and [Deleting an Outcome Collection Occasion](#)

## 6.3. Service Contacts

### 6.3.1. Viewing a Client's Service Contacts for an Episode

You can view a client's service contacts through the [Viewing a Client's Episodes](#) available on the Data Entry tab, by following these steps:

1. Once [Viewing a Client's Episodes](#)
2. From the Client's Episode Details tab, click the Service Contacts Tab. The heading for this tab displays in brackets the total number of service contacts recorded in the PMHC MDS for this episode.

A table will display all the Service Contacts linked to this Client's Episode.

Home / Data Entry / Clients / CL0001@PHN999:NFP01 / Client Episodes / CL0001-E01 / Service Contacts / View Service Contacts

Client "CL0001" at PHN "Test PHN", Provider Organisation "Test Provider Organisation NFP1"

**Episode starting 13/02/2016**

| Details  | Collection Occasions (3)                | Service Contacts (4)    |                     |                  |                      |         |                 |     |            |     |                 |     |            |    |                 |     |            |     |                 |     |            |    |
|--|---|-------------------------|---------------------|------------------|----------------------|---------|-----------------|-----|------------|-----|-----------------|-----|------------|----|-----------------|-----|------------|-----|-----------------|-----|------------|----|
| <a href="#">View Service Contacts</a>  | <a href="#">Add New Service Contact</a> | <a href="#">Filters</a> |                     |                  |                      |         |                 |     |            |     |                 |     |            |    |                 |     |            |     |                 |     |            |    |
| <table border="1"> <thead> <tr> <th>Service Contact Key</th> <th>Practitioner Key</th> <th>Service Contact Date</th> <th>No Show</th> </tr> </thead> <tbody> <tr> <td>CL0001-E01-SC01</td> <td>P01</td> <td>13/02/2016</td> <td>Yes</td> </tr> <tr> <td>CL0001-E01-SC02</td> <td>P01</td> <td>18/03/2016</td> <td>No</td> </tr> <tr> <td>CL0001-E01-SC03</td> <td>P01</td> <td>29/03/2016</td> <td>Yes</td> </tr> <tr> <td>CL0001-E01-SC04</td> <td>P01</td> <td>05/04/2016</td> <td>No</td> </tr> </tbody> </table> |   |                         | Service Contact Key | Practitioner Key | Service Contact Date | No Show | CL0001-E01-SC01 | P01 | 13/02/2016 | Yes | CL0001-E01-SC02 | P01 | 18/03/2016 | No | CL0001-E01-SC03 | P01 | 29/03/2016 | Yes | CL0001-E01-SC04 | P01 | 05/04/2016 | No |
| Service Contact Key  | Practitioner Key                        | Service Contact Date    | No Show             |                  |                      |         |                 |     |            |     |                 |     |            |    |                 |     |            |     |                 |     |            |    |
| CL0001-E01-SC01  | P01                                     | 13/02/2016              | Yes                 |                  |                      |         |                 |     |            |     |                 |     |            |    |                 |     |            |     |                 |     |            |    |
| CL0001-E01-SC02  | P01                                     | 18/03/2016              | No                  |                  |                      |         |                 |     |            |     |                 |     |            |    |                 |     |            |     |                 |     |            |    |
| CL0001-E01-SC03  | P01                                     | 29/03/2016              | Yes                 |                  |                      |         |                 |     |            |     |                 |     |            |    |                 |     |            |     |                 |     |            |    |
| CL0001-E01-SC04  | P01                                     | 05/04/2016              | No                  |                  |                      |         |                 |     |            |     |                 |     |            |    |                 |     |            |     |                 |     |            |    |

3. To view the Service Contacts details, click the Blue Service Contact Key.

Client "CL0001" at PHN "Test PHN", Provider Organisation "Test PO 1"

Episode starting 13/02/2016

## Service Contact on 13/02/2016

| Details  |  |
|--|--|
| <a href="#">View Details</a> <a href="#">Edit Details</a> <span style="float: right;"><span style="color: red;">Delete</span></span> |  |
| <b>Organisation Path</b><br>PHN999:NFP01   | <b>Service Contact Key</b><br>CL0001-E01-SC01                                      |
| <b>Episode Key</b><br>CL0001-E01   | <b>Practitioner Key</b><br>P01   |
| <b>Date</b><br>13/02/2016  | <b>Type</b><br>Assessment  |
| <b>Postcode</b><br>1101  | <b>Modality</b><br>Face to Face  |
| <b>Participants</b><br>Individual client   | <b>Venue</b><br>Client's Home  |
| <b>Duration</b><br>16-30 mins  | <b>Copayment</b><br>0.00   |
| <b>Client Participation Indicator</b><br>Yes   | <b>Interpreter Used</b><br>No  |
| <b>No Show</b><br>Yes  | <b>Final</b><br>Further services are planned for the client in the current episode |
| <b>Tags</b>  |  |

A page will display the Service Contacts details as recorded via the [Service Contact Data Elements](#).

### 6.3.2. Editing a Client's Service Contacts for an Episode

You can edit a client's service contacts through the [Viewing a Client's Episodes](#) available on the Data Entry tab, by following these steps:

1. Once [Viewing a Client's Service Contacts for an Episode](#).
2. From the Service Contacts table, click the Service Contact Key.
3. Click Edit Service Contact tab.
4. Update the Client's Service Contact details for that service-contact. Mandatory fields are marked with an \* .  
(Specification [Service Contact Data Elements](#))

*Please note: You can edit the Service Contact Key from this screen. See [Editing a Service Contact Key](#).*

Client "CL0001" at PHN "Test PHN", Provider Organisation "Not for Profit 1"

Episode starting 13/02/2016

## ?

 Service Contact on 13/02/2016

Details

View Details Edit Details

Tags

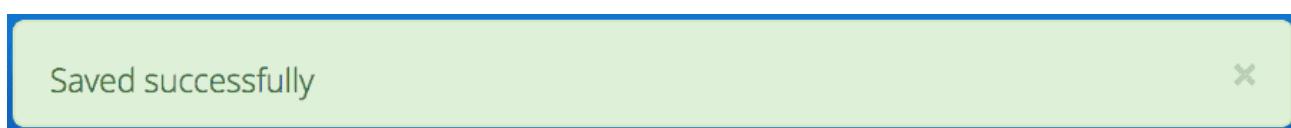
Add a tag

|  |   |
|--|---|
| <b>Organisation Path</b><br>PHN999:NFP01       | <b>Service Contact Key</b><br><a href="#">Edit Key</a><br>CL0001-E01-SC01                   |
| <b>Episode Key</b><br>CL0001-E01               | <b>Practitioner Key *</b><br><input type="checkbox"/> Include inactive practitioners<br>P01 |
| <b>Date *</b><br>13/02/2016                    | <b>Type *</b><br>Assessment   |
| <b>Postcode *</b><br>1101                      | <b>Modality *</b><br>Face to Face   |
| <b>Participants *</b><br>Individual client     | <b>Venue *</b><br>Client's Home   |
| <b>Duration *</b><br>16-30 mins                | <b>Copayment *</b><br>0.00  |
| <b>Client Participation Indicator *</b><br>Yes | <b>Interpreter Used *</b><br>No   |
| <b>No Show *</b><br>Yes                        | <b>Final *</b><br>Further services are planned for the client in the current episode        |

**Save**

- Click the blue 'Save' button. (If you decide not to save changes, you can simply navigate away from this screen)

You will receive confirmation that the Client's service contact details have been saved, and it will now be displaying these new details in the View service Contact Details tab.



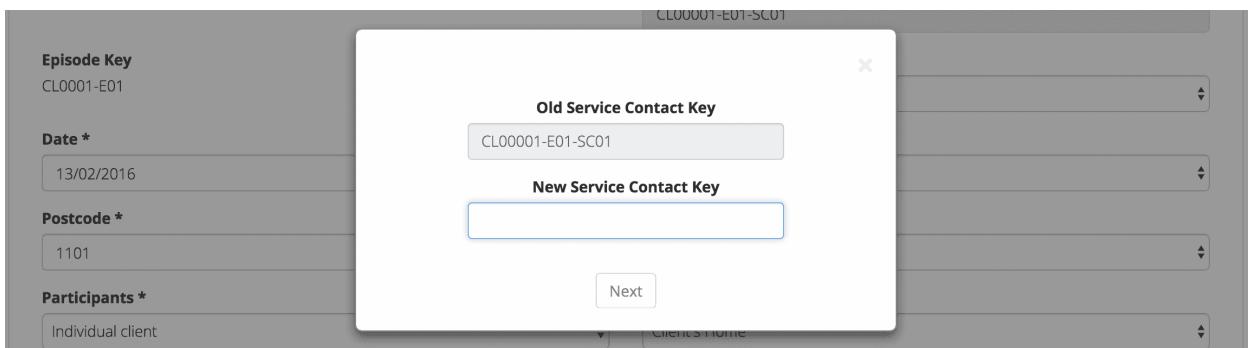
If you receive an error message, the data will need to be corrected before the record is saved and added to the PMHC MDS. See Validation Rules - [Service Contact](#).

### 6.3.2.1. Editing a Service Contact Key

You can edit an service contact's identification key through [Viewing a Client's Episodes](#) available on the Data Entry tab, by following these steps:

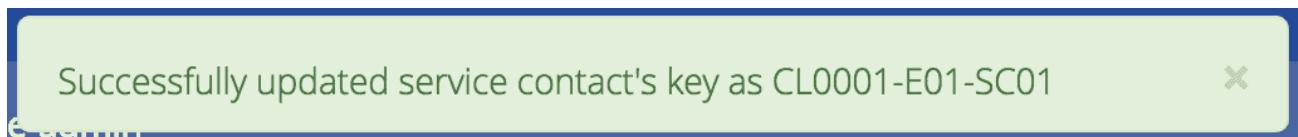
- In step five when [Editing a Client's Service Contacts for an Episode](#).

- From the Service Contact Edit Details tab, click the 'Edit Key' button.



- Type in the new service contact key and click 'Next'.
- Double check the new key is correct and click save. (If it is incorrect, click back to re-enter the key or click the 'cross' in the top right to cancel this key change request)

You will receive confirmation that the Service Contact's key has been saved, and the screen will now be displaying the updated service contact key details in the Service Contacts View Details tab.



### 6.3.3. Adding a Client's Service Contact data

You can add a client's service contacts through the [Viewing a Client's Episodes](#) available on the Data Entry tab, by following these steps:

- Once [Viewing a Client's Service Contacts for an Episode](#).
- Firstly double check the service contact is not already showing.
- Click the Add Service Contact tab.
- Enter the Client's Service Contact details for that episode. Mandatory fields are marked with an \* .  
[\(Specification Service Contact Data Elements\)](#)

Client "CL0001" at PHN "Test PHN", Provider Organisation "Not for Profit 1"

## ?

 Episode starting 13/02/2016

Details    Collection Occasions (3)    Service Contacts (4)

[View Service Contacts](#)    [Add New Service Contact](#)    [Service Contact](#)

**Tags**  
Add a tag

**Organisation Path**  
PHN999:NFP01

**Episode Key**  
CL0001-E01

**Date \***

**Postcode \***

**Participants \***

**Duration \***

**Client Participation Indicator \***

**No Show \***

**Service Contact Key \***

**Practitioner Key \***  
  Include inactive practitioners

**Type \***

**Modality \***

**Venue \***

**Copayment \***

**Interpreter Used \***

**Final \***

**Save**

- Click the blue 'Save' button. (If you decide not to add this client's episode, you can simply navigate away from this screen)

You will receive confirmation that the Client's service contact details have been added, and it will now be displaying these new details in the View service Contact Details tab.



If you receive an error message, the data will need to be corrected before the record is saved and added to the PMHC MDS. See Validation Rules - [Service Contact](#).

### 6.3.4. Deleting an Service Contact

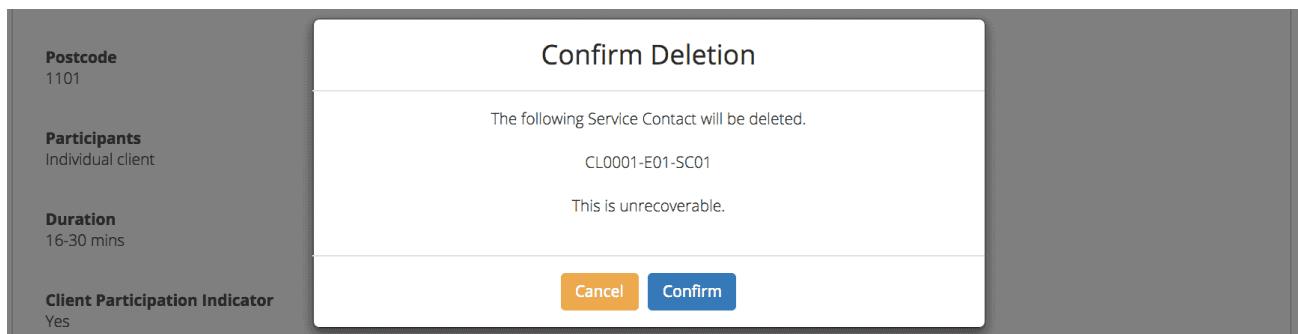
You can delete a client's service contacts through '[Viewing a Client's Service Contacts for an Episode](#)' available on the Data Entry tab, by following these steps:

- Search for the client.

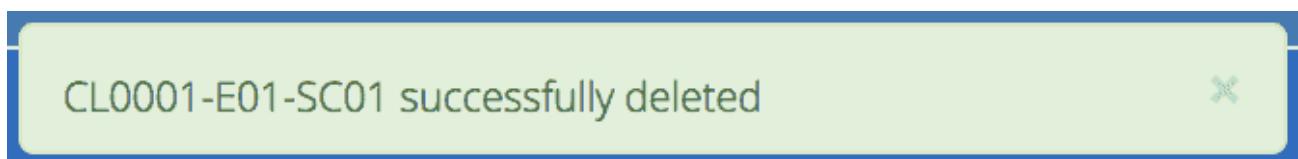
2. From the [Client Search Results](#) table, click the Client Key.
3. Click Episodes tab, to [view Client's Episodes](#).
4. From the [View Episodes](#) table, click the Episode Key.
5. Click Service Contacts tab, to [View Client's Service Contacts](#).
6. From the [View service contact](#) table, click the Service Contact Key.
7. Click the red 'Delete' button.
8. You will be displayed a 'Confirm Deletion' screen.

**Please note:** Once the service contact is deleted, you will not be able to recover this service contact data.

9. Click the blue 'Confirm' button to delete this service contact. (or click the orange 'Cancel' button if you decide not to delete this service contact data)



After you click 'Confirm', you will receive confirmation that the service contact has been deleted, and you will be redirected to the [View Service Contacts](#) where the service contact will no longer be displayed.



## 6.4. Outcome Collection Occasions

### 6.4.1. Viewing a Client's Outcome Collection Occasions for an Episode

You can view a clients's outcome collection occasions through [Viewing a Client's Episodes](#) available on the Data Entry tab, by following these steps:

1. Once [Viewing the Client's Episode](#).
2. Click the Episode Collection Occasions Tab. This tab displays in brackets the total number of collection occasions recorded in the PMHC MDS for this episode.

A table will display all the Collection Occasions linked to this Client's Episode.

Client "CL0001" at PHN "Test PHN", Provider Organisation "Test PO 1"

## Episode starting 13/02/2016

Details

Collection Occasions (3)

Service Contacts (4)

[View Collection Occasions](#)

[Add New Collection Occasion](#)

 Filters

| Collection Occasion Key | Measure Type | Measure Date | Reason        |
|-------------------------|--------------|--------------|---------------|
| CL0001-E01-CO01         | K10+         | 12/02/2016   | Episode start |
| CL0001-E01-CO02         | K10+         | 25/04/2016   | Review        |
| CL0001-E01-CO03         | K10+         | 18/06/2016   | Episode end   |

3. To view the Collection Occasions details, click the Blue Collection Occasions Key.

Client "CL0001" at PHN "Test PHN", Provider Organisation "Test PO 1"

Episode starting 13/02/2016

## K10+ Collection Occasion on 12/02/2016

Details

[View Details](#) [Edit Details](#)

 Delete

**Organisation Path**  
PHN999:NFP01

**Collection Occasion Key**  
CL0001-E01-C001

**Episode Key**  
CL0001-E01

**Measure Date**  
12/02/2016

**Reason**  
Episode start

**Tags**

1. In the last 4 weeks, about how often did you feel tired out for no good reason?

**None of the time**  **A little of the time**  **Some of the time**  **Most of the time**  **All of the time**  **Not stated / Missing** 

2. In the last 4 weeks, about how often did you feel nervous?

**None of the time**  **A little of the time**  **Some of the time**  **Most of the time**  **All of the time**  **Not stated / Missing** 

3. In the last 4 weeks, about how often did you feel so nervous that nothing could calm you down?

**None of the time**  **A little of the time**  **Some of the time**  **Most of the time**  **All of the time**  **Not stated / Missing** 

4. In the last 4 weeks, about how often did you feel hopeless?

**None of the time**  **A little of the time**  **Some of the time**  **Most of the time**  **All of the time**  **Not stated / Missing** 

5. In the last 4 weeks, about how often did you feel restless or fidgety?

**None of the time**  **A little of the time**  **Some of the time**  **Most of the time**  **All of the time**  **Not stated / Missing** 

6. In the last 4 weeks, about how often did you feel so restless you could not sit still?

**None of the time**  **A little of the time**  **Some of the time**  **Most of the time**  **All of the time**  **Not stated / Missing** 

7. In the last 4 weeks, about how often did you feel depressed?

**None of the time**  **A little of the time**  **Some of the time**  **Most of the time**  **All of the time**  **Not stated / Missing** 

8. In the last 4 weeks, about how often did you feel that everything was an effort?

**None of the time**  **A little of the time**  **Some of the time**  **Most of the time**  **All of the time**  **Not stated / Missing** 

9. In the last 4 weeks, about how often did you feel so sad that nothing could cheer you up?

**None of the time**  **A little of the time**  **Some of the time**  **Most of the time**  **All of the time**  **Not stated / Missing** 

10. In the last 4 weeks, about how often did you feel worthless?

**None of the time**  **A little of the time**  **Some of the time**  **Most of the time**  **All of the time**  **Not stated / Missing** 

11. In the past four weeks, how many days were you totally unable to work, study or manage your day to day activities because of these feelings?  
1

12. Aside from those days, in the past four weeks, how many days were you able to work or study or manage your day to day activities, but had to cut down on what you did because of these feelings?  
28

13. In the past four weeks, how many times have you seen a doctor or any other health professional about these feelings?  
3

14. In the past four weeks, how often have physical health problems been the main cause of these feelings?

**None of the time**  **A little of the time**  **Some of the time**  **Most of the time**  **All of the time**  **Not stated / Missing** 

A page will display the Collection Occasions details as recorded via the [Outcome Collection Occasion Data Elements](#).

### 6.4.2. Editing a Client's Outcome Collection Occasions for an Episode

You can edit a client's Outcome Collection Occasions through [Viewing a Client's Outcome Collection Occasions for an Episode](#) available on the Data Entry tab, by following these steps:

1. Once [Viewing a Client's Outcome Collection Occasions for an Episode](#).
2. Click the Collection Occasions Key.
3. Click Edit Details tab.
4. Update the Client's Collection Occasions details. Mandatory fields are marked with an \*.(Specification [Outcome Collection Occasion Data Elements](#))

*Please note: You can edit the Collection Occasion Key from this screen. See [Editing a Collection Occasion Key](#).*

Home / Data Entry / Clients / CL0001@PHN999:NFP01 / Client Episodes / CL0001-E01 / Collection Occasions / CL0001-E01-CO01 / Edit Details

Client "CL0001" at PHN "Test PHN", Provider Organisation "Test PO 1"

Episode starting 13/02/2016

#### K10+ Collection Occasion on 12/02/2016

Details

[View Details](#) [Edit Details](#)

|  |   |
|--|---|
| <b>Organisation Path</b><br>PHN999:NFP01   | <b>Collection Occasion Key</b><br><a href="#">Edit Key</a><br>CL0001-E01-CO01 |
| <b>Episode Key</b><br>CL0001-E01   | <b>Measure Date *</b><br>12/02/2016 <a href="#">Edit</a>                      |
| <b>Reason *</b><br>Episode start   | <b>Tags</b><br><input type="text"/>   |
| 1. In the last 4 weeks, about how often did you feel tired out for no good reason? *   |   |
| <a href="#">None of the time</a> <a href="#">A little of the time</a> <a href="#">Some of the time</a> <a href="#">Most of the time</a> <a href="#">All of the time</a> <a href="#">Not stated / Missing</a> |   |
| 2. In the last 4 weeks, about how often did you feel nervous? *  |   |
| <a href="#">None of the time</a> <a href="#">A little of the time</a> <a href="#">Some of the time</a> <a href="#">Most of the time</a> <a href="#">All of the time</a> <a href="#">Not stated / Missing</a> |   |
| 3. In the last 4 weeks, about how often did you feel so nervous that nothing could calm you down? *  |   |
| <a href="#">None of the time</a> <a href="#">A little of the time</a> <a href="#">Some of the time</a> <a href="#">Most of the time</a> <a href="#">All of the time</a> <a href="#">Not stated / Missing</a> |   |
| 4. In the last 4 weeks, about how often did you feel hopeless? *   |   |
| <a href="#">None of the time</a> <a href="#">A little of the time</a> <a href="#">Some of the time</a> <a href="#">Most of the time</a> <a href="#">All of the time</a> <a href="#">Not stated / Missing</a> |   |
| 5. In the last 4 weeks, about how often did you feel restless or fidgety? *  |   |
| <a href="#">None of the time</a> <a href="#">A little of the time</a> <a href="#">Some of the time</a> <a href="#">Most of the time</a> <a href="#">All of the time</a> <a href="#">Not stated / Missing</a> |   |

6. In the last 4 weeks, about how often did you feel so restless you could not sit still? \*

None of the time  A little of the time  Some of the time  Most of the time  All of the time  Not stated / Missing

7. In the last 4 weeks, about how often did you feel depressed? \*

None of the time  A little of the time  Some of the time  Most of the time  All of the time  Not stated / Missing

8. In the last 4 weeks, about how often did you feel that everything was an effort? \*

None of the time  A little of the time  Some of the time  Most of the time  All of the time  Not stated / Missing

9. In the last 4 weeks, about how often did you feel so sad that nothing could cheer you up? \*

None of the time  A little of the time  Some of the time  Most of the time  All of the time  Not stated / Missing

10. In the last 4 weeks, about how often did you feel worthless? \*

None of the time  A little of the time  Some of the time  Most of the time  All of the time  Not stated / Missing

**11. In the past four weeks, how many days were you totally unable to work, study or manage your day to day activities because of these feelings?**

1

**12. Aside from those days, in the past four weeks, how many days were you able to work or study or manage your day to day activities, but had to cut down on what you did because of these feelings?**

28

**13. In the past four weeks, how many times have you seen a doctor or any other health professional about these feelings?**

3

14. In the past four weeks, how often have physical health problems been the main cause of these feelings? \*

None of the time  A little of the time  Some of the time  Most of the time  All of the time  Not stated / Missing

**Save**

5. Click the blue 'Save' button. (If you decide not to save changes, you can simply navigate away from this screen)

You will receive confirmation that the Client's Collection Occasions details have been saved, and it will now be displaying these new details in the View Collection Occasions Details tab.

Saved successfully



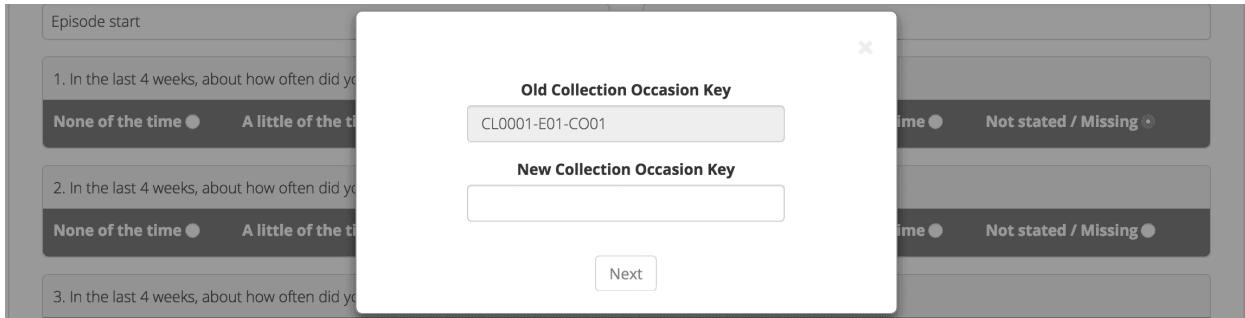
If you receive an error message, the data will need to be corrected before the record is saved and added to the PMHC MDS. See Validation Rules for:

- K10+
- K5
- SDQ

#### 6.4.2.1. Editing a Collection Occasion Key

You can edit an collection occasion's identification key through [Viewing a Client's Episodes](#) available on the Data Entry tab, by following these steps:

1. In step five when [Editing a Client's Outcome Collection Occasions for an Episode](#).
2. From the Collection Occasion Edit Details tab, click the 'Edit Key' button.



3. Type in the new collection occasion key and click 'Next'.
4. Double check the new key is correct and click save. (If it is incorrect, click back to re-enter the key or click the 'cross' in the top right to cancel this key change request)

You will receive confirmation that the Collection Occasion's key has been saved, and the screen will now be displaying the updated collection occasion key details in the Collection Occasions View Details tab.

Successfully updated collection occasion's key as CL0001-E01-CO01 ×

#### 6.4.3. Adding a Client's Outcome Collection Occasions data

You can add a Client's Outcome Collection Occasions through [Viewing a Client's Outcome Collection Occasions for an Episode](#) available on the Data Entry tab, by following these steps:

1. Once [Viewing a Client's Outcome Collection Occasions for an Episode](#).
2. Firstly double check the Collection Occasions is not already showing.
3. Click the Add New Collection Occasion tab.
4. Select the Collection Occassion Measure, either K10+, K5 or SDQ. (The SDQ items scored will be added in the near future. See Development Release Schedule [Data Entry Interface](#))

Client "CL0001" at PHN "Test PHN", Provider Organisation "Test PO 1"

## Episode starting 13/02/2016

Details

Collection Occasions (3)

Service Contacts (4)

[View Collection Occasions](#)

[Add New Collection Occasion](#)

**Organisation Path**

PHN999:NFP01

**Episode Key**

CL0001-E01

**Reason \*****Collection Occasion Key \*** **Measure Date \*** **Tags****Add Collection Occasion****Select Outcome Measure**

[Save](#)

5. Select to enter the item scores or the total score. (Individual item scores will eventually be required and should be entered when available)

*Please note: The SDQ items scored will be added in the near future. See Development Release Schedule Data Entry Interface.*

Client "CL0001" at PHN "Test PHN", Provider Organisation "Test PO 1"

## Episode starting 13/02/2016

Details

Collection Occasions (3)

Service Contacts (4)

[View Collection Occasions](#)

[Add New Collection Occasion](#)

**Organisation Path**

PHN999:NFP01

**Episode Key**

CL0001-E01

**Reason \*****Collection Occasion Key \*** **Measure Date \*** **Tags****Add Collection Occasion**

[Back](#)

K10+

[Enter item scores](#) [Enter total score](#)

[Save](#)

6. Enter the Client's Collection Occasions details for that episode. Mandatory fields are marked with an \* .  
[\(Specification Outcome Collection Occasion Data Elements\)](#)

Client "CL0001" at PHN "Test PHN", Provider Organisation "Test PO 1"

## Episode starting 13/02/2016

[Details](#) [Collection Occasions \(3\)](#) [Service Contacts \(4\)](#)[View Collection Occasions](#) [Add New Collection Occasion](#)**Organisation Path**  
PHN999:NFP01**Episode Key**  
CL0001-E01**Reason \*****Collection Occasion Key \*****Measure Date \*****Tags****Add Collection Occasion**[Back](#) K10+

1. In the last 4 weeks, about how often did you feel tired out for no good reason? \*

[None of the time](#) [A little of the time](#) [Some of the time](#) [Most of the time](#) [All of the time](#) [Not stated / Missing](#)

2. In the last 4 weeks, about how often did you feel nervous? \*

[None of the time](#) [A little of the time](#) [Some of the time](#) [Most of the time](#) [All of the time](#) [Not stated / Missing](#)

3. In the last 4 weeks, about how often did you feel so nervous that nothing could calm you down? \*

[None of the time](#) [A little of the time](#) [Some of the time](#) [Most of the time](#) [All of the time](#) [Not stated / Missing](#)

4. In the last 4 weeks, about how often did you feel hopeless? \*

[None of the time](#) [A little of the time](#) [Some of the time](#) [Most of the time](#) [All of the time](#) [Not stated / Missing](#)

5. In the last 4 weeks, about how often did you feel restless or fidgety? \*

[None of the time](#) [A little of the time](#) [Some of the time](#) [Most of the time](#) [All of the time](#) [Not stated / Missing](#)

6. In the last 4 weeks, about how often did you feel so restless you could not sit still? \*

[None of the time](#) [A little of the time](#) [Some of the time](#) [Most of the time](#) [All of the time](#) [Not stated / Missing](#)

7. In the last 4 weeks, about how often did you feel depressed? \*

[None of the time](#) [A little of the time](#) [Some of the time](#) [Most of the time](#) [All of the time](#) [Not stated / Missing](#)

8. In the last 4 weeks, about how often did you feel that everything was an effort? \*

[None of the time](#) [A little of the time](#) [Some of the time](#) [Most of the time](#) [All of the time](#) [Not stated / Missing](#)

9. In the last 4 weeks, about how often did you feel so sad that nothing could cheer you up? \*

[None of the time](#) [A little of the time](#) [Some of the time](#) [Most of the time](#) [All of the time](#) [Not stated / Missing](#)

10. In the last 4 weeks, about how often did you feel worthless? \*

[None of the time](#) [A little of the time](#) [Some of the time](#) [Most of the time](#) [All of the time](#) [Not stated / Missing](#)

11. In the past four weeks, how many days were you totally unable to work, study or manage your day to day activities because of these feelings?

12. Aside from those days, in the past four weeks, how many days were you able to work or study or manage your day to day activities, but had to cut down on what you did because of these feelings?

13. In the past four weeks, how many times have you seen a doctor or any other health professional about these feelings?

14. In the past four weeks, how often have physical health problems been the main cause of these feelings? \*

[None of the time](#) [A little of the time](#) [Some of the time](#) [Most of the time](#) [All of the time](#) [Not stated / Missing](#)

7. Click the blue 'Save' button. (If you decide not to add this client's episode, you can simply navigate away from this screen)

You will receive confirmation that the Client's Collection Occasions details have been added, and it will now be displaying these new details in the View Collection Occasions tab.



If you receive an error message, the data will need to be corrected before the record is saved and added to the PMHC MDS. See Validation Rules for:

- [K10+](#)
- [K5](#)
- [SDQ](#)

#### **6.4.4. Deleting an Outcome Collection Occasion**

You can delete a Client's Outcome Collection Occasion through '[Viewing a Client's Outcome Collection Occasions for an Episode](#)' available on the Data Entry tab, by following these steps:

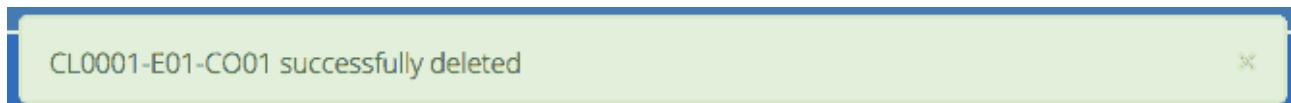
1. [Search](#) for the client.
2. From the [Client Search Results](#) table, click the Client Key.
3. Click Episodes tab, to [view Client's Episodes](#).
4. From the [View Episodes](#) table, click the Episode Key.
5. Click Collection Occasions tab, to [View Collection Occasions](#).
6. From the [View Collection Occasions](#) table, click the Collection Occasions Key.
7. Click the red 'Delete' button.
8. You will be displayed a 'Confirm Deletion' screen.

**Please note: Once the collection occasion is deleted, you will not be able to recover this collection occasion data.**

9. Click the blue 'Confirm' button to delete this collection occasion. (or click the orange 'Cancel' button if you decide not to delete this collection occasion data)



After you click 'Confirm', you will receive confirmation that the collection occasion has been deleted, and you will be redirected to the [View Collection Occasions](#) where the collection occasion will no longer be displayed.



## 6.5. Practitioners

### 6.5.1. Finding a Practitioner

You can search for practitioners assigned to an organisation through the Data Entry tab, by following these steps:

1. Click on the Practitioners tab.

Home / Data Entry / Practitioners / View Practitioners

## Data Entry

Users with the Data Entry role can use this tab to view client files.

**Support:** For more information and assistance visit [PMHC MDS Documentation](#). (link opens in a new window)

| Clients                            | Practitioners                        |                         |                      |               |          |
|------------------------------------|--------------------------------------|-------------------------|----------------------|---------------|----------|
|                                    |                                      |                         |                      |               |          |
| <a href="#">View Practitioners</a> | <a href="#">Add New Practitioner</a> |                         |                      |               |          |
|                                    |                                      | <a href="#">Filters</a> |                      |               |          |
| Practitioner Key                   | Organisation Path                    | Category                | Gender               | Year of Birth | Active   |
| P01                                | PHN999:NFP01                         | General Practitioner    | Other                | 1975          | Active   |
| P02                                | PHN999:NFP01                         | General Psychologist    | Female               | 1967          | Active   |
| P03                                | PHN999:NFP01                         | Other Medical           | Male                 | 1952          | Active   |
| P04                                | PHN999:NFP01                         | Not stated              | Not stated/Inadeq... | 1939          | Inactive |
| PR000010                           | PHN999:NFP02                         | General Psychologist    | Male                 | 1951          | Active   |
| PR000011                           | PHN999:NFP02                         | Mental Health Nurse     | Female               | 1950          | Active   |
| PR000012                           | PHN999:NFP02                         | General Psychologist    | Male                 | 1949          | Active   |
| PR000013                           | PHN999:NFP02                         | Social Worker           | Female               | 1958          | Active   |
| PR000014                           | PHN999:NFP02                         | Social Worker           | Female               | 1947          | Active   |
| PR000015                           | PHN999:NFP02                         | General Psychologist    | Female               | 1950          | Active   |
| PR000016                           | PHN999:NFP02                         | General Psychologist    | Female               | 1962          | Active   |

### 6.5.2. Viewing a Practitioner

You can view a practitioner's details through [Finding a Practitioner](#) on the Data Entry tab, by following these steps:

1. Click on the [Practitioners](#) tab.
2. Click on the practitioner's key in blue displayed within the table list.

[Home](#) / [Data Entry](#) / [Practitioners](#) / [P01@PHN999:NFP01](#) / [View Details](#)

## Practitioner "P01" at PHN "Test PHN", Provider Organisation "Test PO 1"

| Details   |                                      |
|---|--------------------------------------|
| <a href="#">View Details</a>  | <a href="#">Edit Details</a>         |
| <a href="#">Delete</a>  |                                      |
| <b>Organisation Path</b><br>PHN999:NFP01  | <b>Practitioner Key</b><br>P01       |
| <b>Category</b><br>General Practitioner   | <b>Active</b><br>Active              |
| <b>Year of Birth</b><br>1975  | <b>Gender</b><br>Other               |
| <b>Aboriginal and Torres Strait Islander Status</b><br>Aboriginal but not Torres Strait Islander origin | <b>ATSI Cultural Training</b><br>Yes |
| <b>Tags</b><br>tag1   |                                      |

Please note: You can also view a practitioner's details through the 'Client Data' tab. See [Viewing a Practitioner Providing Client Services](#)

### 6.5.3. Viewing a Practitioner Providing Client Services

You can view a practitioner's details through [Viewing a Client's Service Contacts for an Episode](#) on the Data Entry tab, by following these steps:

1. Click on the [Practitioners](#) tab.
2. From the Outcome Collection Occasions Details tab, click the Practitioner Key.

Client "CL0001" at PHN "Test PHN", Provider Organisation "Test PO 1"

Episode starting 13/02/2016

## Service Contact on 13/02/2016

Details

View Details Edit Details Delete

|  |  |
|--|--|
| <b>Organisation Path</b><br>PHN999:NFP01     | <b>Service Contact Key</b><br>CL0001-E01-SC01                                      |
| <b>Episode Key</b><br>CL0001-E01             | <b>Practitioner Key</b><br>P01   |
| <b>Date</b><br>13/02/2016                    | <b>Type</b><br>Assessment  |
| <b>Postcode</b><br>1101                      | <b>Modality</b><br>Face to Face  |
| <b>Participants</b><br>Individual client     | <b>Venue</b><br>Client's Home  |
| <b>Duration</b><br>16-30 mins                | <b>Copayment</b><br>0.00   |
| <b>Client Participation Indicator</b><br>Yes | <b>Interpreter Used</b><br>No  |
| <b>No Show</b><br>Yes                        | <b>Final</b><br>Further services are planned for the client in the current episode |
| <b>Tags</b>                                  |  |

A page will display the Practitioner's details as recorded via the [Practitioner Data Elements](#).

## Practitioner "P01" at PHN "Test PHN", Provider Organisation "Test PO 1"

Details

View Details Edit Details Delete

|   |                                      |
|---|--------------------------------------|
| <b>Organisation Path</b><br>PHN999:NFP01  | <b>Practitioner Key</b><br>P01       |
| <b>Category</b><br>General Practitioner   | <b>Active</b><br>Active              |
| <b>Year of Birth</b><br>1975  | <b>Gender</b><br>Other               |
| <b>Aboriginal and Torres Strait Islander Status</b><br>Aboriginal but not Torres Strait Islander origin | <b>ATSI Cultural Training</b><br>Yes |
| <b>Tags</b><br>tag1   |                                      |

#### 6.5.4. Editing a Practitioner

You can view a practitioner's details through [Finding a Practitioner](#) on the Data Entry tab, by following these steps:

1. Click on the [Practitioners](#) tab.
2. Click on the practitioner's key in blue displayed within the table list.
3. From the View Practitioner Details tab, click the Edit Details tab.
4. Update the practitioner's details. Mandatory fields are marked with an \* .

*Please note: You can edit the Practitioner Key from this screen. See [Editing a Practitioner Key](#).*

Home / Data Entry / Practitioners / P01@PHN999:NFP01 / Edit Details

#### Practitioner "P01" at PHN "Test PHN", Provider Organisation "Test PO 1"

Details

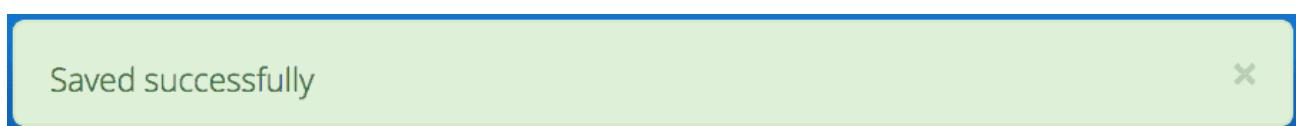
View Details    **Edit Details**

|   |   |
|---|---|
| <b>Organisation Path</b><br>PHN999:NFP01  | <b>Practitioner Key</b><br><a href="#"> Edit Key</a><br>P01 |
| <b>Category *</b><br>General Practitioner   | <b>Active *</b><br>Active                                   |
| <b>Year of Birth *</b><br>1975  | <b>Gender *</b><br>Other                                    |
| <b>Aboriginal and Torres Strait Islander Status *</b><br>Aboriginal but not Torres Strait Islander origin | <b>ATSI Cultural Training *</b><br>Yes                      |
| <b>Tags</b><br>tag1   |   |

**Save**

5. Click the blue 'Save' button. (If you decide not to save changes, you can simply navigate away from this screen)

You will receive confirmation that the practitioner's details have been added, and it will now be displaying these new details in the View Practitioner Details tab.



If you receive an error message, the data will need to be corrected before the record is saved and added to the PMHC MDS. See Validation Rules - [Practitioner](#).

#### 6.5.4.1. Editing a Practitioner Key

You can edit a practitioners's identification key through [Editing a Practitioner](#) available on the Data Entry tab, by following these steps:

1. In step five when [Editing a Practitioner](#).
2. From the Practitioner Edit Details tab, click the 'Edit Key' button.

The screenshot shows a 'Practitioner Edit Details' form on the left with fields for Organisation Path (PHN999:NFP01), Category (General Practitioner), Year of Birth (1975), and Aboriginal and Torres Strait Islander Status (Aboriginal but not Torres Strait Islander origin). On the right, a modal dialog box titled 'Edit Key' is open, containing 'Old Practitioner Key' (P01) and 'New Practitioner Key' (empty). A 'Next' button is located at the bottom of the dialog box.

3. Type in the new practitioner key and click 'Next'.
4. Double check the new key is correct and click save. If it is incorrect, click back to re-enter the key or click the 'cross' in the top right to cancel this key change request.

You will receive confirmation that the Practitioner's key has been saved, and the screen will now be displaying the updated practitioner key details in the Practitioners View Details tab.

Successfully updated practitioner's key as P01



#### 6.5.5. Adding a Practitioner

You can view a practitioner's details through [Finding a Practitioner](#) on the Data Entry tab, by following these steps:

1. Click on the [Practitioners](#) tab.
2. Click the Add New Practitioner tab.
3. Enter the practitioner's details. Mandatory fields are marked with an \* .

## Data Entry

Users with the Data Entry role can use this tab to view client files.

**Support:** For more information and assistance visit [PMHC MDS Documentation](#). (link opens in a new window)

Clients      Practitioners

View Practitioners      Add New Practitioner

Organisation Path \*

PHN999  
Test PO 1 ( PHN999:NFP01 )  
Test PO 2 ( PHN999:NFP02 )  
Test PO 3 ( PHN999:NFP03 )

Year of Birth \*

Aboriginal and Torres Strait Islander Status \*

Tags

Practitioner Key \*

ATSI Cultural Training \*

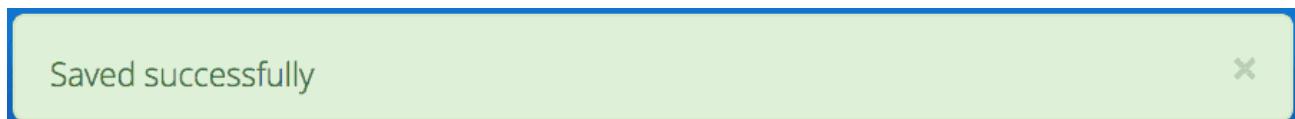
Gender \*

Active \*

**Save**

- Click the blue 'Save' button. (If you decide not to save changes, you can simply navigate away from this screen)

You will receive confirmation that the practitioner's details have been added, and it will now be displaying these new details in the View Practitioner Details tab.



If you receive an error message, the data will need to be corrected before the record is saved and added to the PMHC MDS. See Validation Rules - [Practitioner](#).

You can add a practitioners individually through the data entry interface or alternately, practitioner records can be uploaded in bulk. See [Upload](#)

### 6.5.6. Deleting a Practitioner

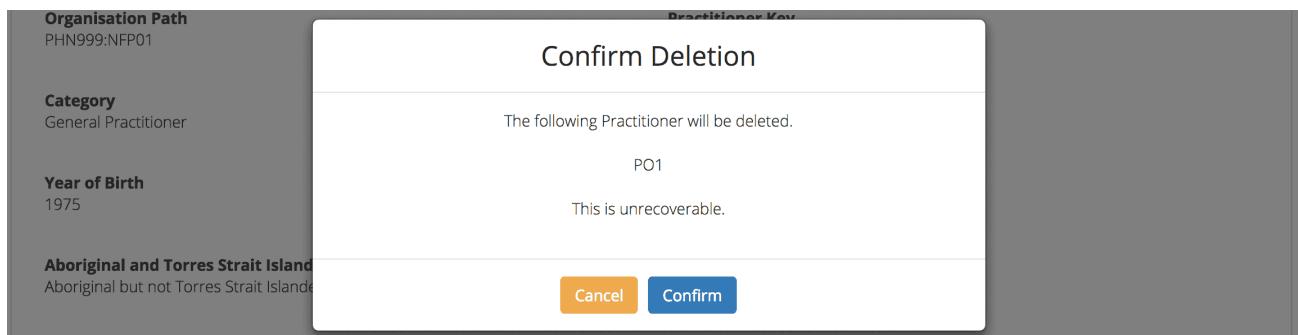
You can delete a practitioner's details through [Editing a Practitioner](#) on the Data Entry tab, by following these steps:

- Click on the [Practitioners](#) tab.
- Click on the practitioner's key in blue displayed within the table list.
- Click the red 'Delete' button.
- You will either be displayed a '[Confirm Delete](#)' screen or a '[Cannot Delete](#)' screen.

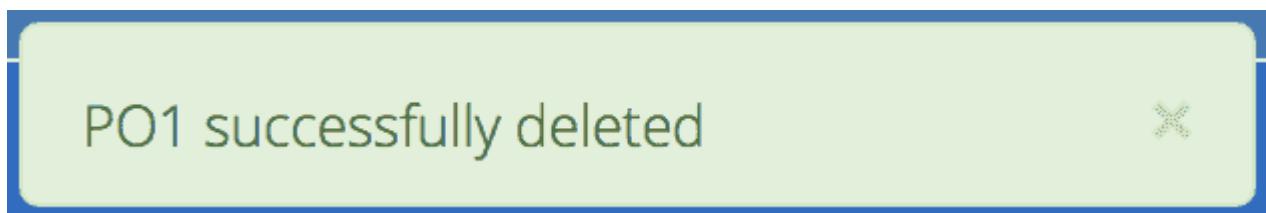
### 6.5.6.1. Confirm Delete

Please note: Once the practitioner is deleted, you will not be able to recover this practitioner data.

1. Click the blue 'Confirm' button to delete this practitioner. (or click the orange 'Cancel' button if you decide not to delete this practitioner data)



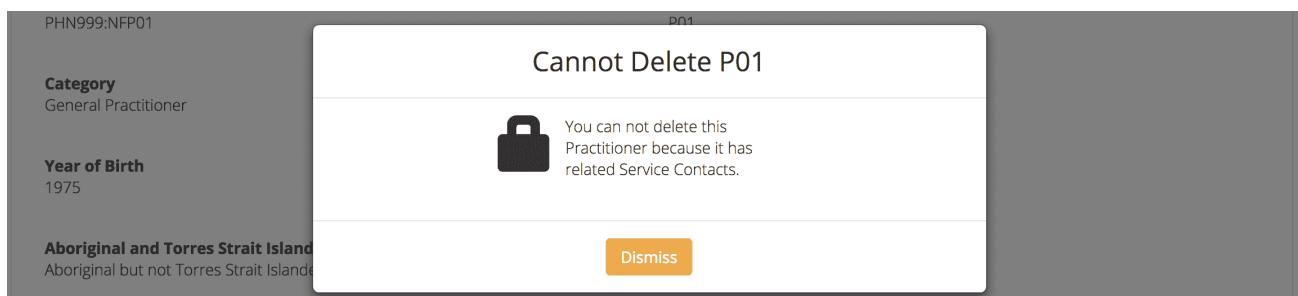
After you click 'Confirm', you will receive confirmation that the practitioner has been deleted, and you will be redirected to the [View Practitioners](#) where the practitioner will no longer be displayed.



### 6.5.6.2. Cannot Delete

If the practitioner you are trying to delete has any dependant records, you will not be able to proceed with deleting this practitioner until all the related records have been edited or deleted.

1. You can click the orange 'Dismiss' button.



See [Editing a Client's Service Contacts for an Episode](#) or [Deleting an Service Contact](#).

### 6.5.7. Inactive Practitioners

Currently a practitioner can not be deleted from the PMHC MDS if they have any dependant records.,

You can change the practitioner from 'active' to 'inactive' by editing their details. By doing this, the inactive practitioner keys will no longer be displayed in the Practitioner Key drop down list displayed on the Service Contact forms.

See [Editing a Practitioner](#).

## 7. Reports

You will only be able to see the Reports tab if you have been assigned the 'Reporting' [Users Roles](#), when logged into the PMHC MDS on <https://pmhc-mds.net>.

If you don't have access to the Reports tab and you believe you should, please contact someone in your provider organisation or provider organisation's PHN who has the 'User Management' role. If you are unsure who has the 'User Management' role please email the PMHC Helpdesk at [support@pmhc-mds.com](mailto:support@pmhc-mds.com)

After navigating to the Reports tab, you will be able to view and export various [Types of System Reports](#).

The screenshot shows the 'Reports' tab selected in the top navigation bar. The main content area displays a form for requesting reporting data. It includes fields for 'Select Report Type\*', 'Start Date\*' (17/12/2017), 'End Date\*' (17/01/2018), and a 'Client Consent' checkbox. A 'Request' button is at the bottom. The footer contains the Australian Government Department of Health logo and links to PMHC-MDS managed by Strategic Data Pty Ltd, Contact Support, and User Documentation.

Home Data Extract Reports SLK Logged in as given-user48 surname-user48 ▾

Home / Reports

## Reports

Users with the Reporting role can use this tab to request reporting data

**Support:** For more information and assistance visit [PMHC MDS Documentation](#). (link opens in a new window)

Select Report Type\*

Start Date\* 17/12/2017 End Date\* 17/01/2018

Client Consent Include only records with Client Consent

Request

Australian Government  
Department of Health

PMHC-MDS managed by Strategic Data Pty Ltd | Contact Support | User Documentation

### 7.1. How to produce a report

You can produce a system report by completing the fields in the Reports tab by following these steps:

1. Navigate to the 'Reports' tab.

## Reports

Users with the Reporting role can use this tab to request reporting data

**Support:** For more information and assistance visit [PMHC MDS Documentation](#). (link opens in a new window)

**Select Report Type\***

**Start Date\***

**End Date\***

**Client Consent**

Include only records with Client Consent

2. Select the type of report you would like to produce.
3. If you are allowed to produce reports for more than one organisation you will be asked to select an organisation name.
4. Select the name of the organisation from the drop down list.
5. Click the first calendar icon to select the start date and then the second calendar icon to select the end date.
6. If you click the 'Include only records with Client Consent' tickbox, the data for clients that have not consented to their anonymised data being provided to the Department of Health will be excluded from your report. (See [Episode - Client Consent to Anonymised Data](#))
7. Click the blue 'Request' button.
8. Your report will be displayed on screen and can be downloaded as a CSV.

Note: If you are not sure what data is displayed in a report, please click on the 'Counting Rules Explained' link.

Report E1 - High level summary of overall volumes by entity for Test PHN; 01/10/2017 - 31/12/2017

| Organisation                    | Clients | Episodes | Service Contacts | K10+ | K5 | SDQ | Practitioners |
|---------------------------------|---------|----------|------------------|------|----|-----|---------------|
| Test ATSI Provider One          | 3       | 0        | 0                | 0    | 0  | 0   | 0             |
| Test Provider Organisation 1    | 0       | 0        | 0                | 0    | 0  | 0   | 1             |
| Test Provider Organisation 2    | 1       | 0        | 0                | 0    | 0  | 0   | 0             |
| Test Provider Organisation NFP1 | 12      | 17       | 25               | 37   | 4  | 0   | 12            |
| Test Provider Organisation NFP2 | 12      | 0        | 0                | 0    | 0  | 0   | 0             |
| Total                           | 28      | 17       | 25               | 37   | 4  | 0   | 13            |

Generated on 08/01/2018 17:20:23 AEDT

[Counting Rules Explained](#)

## 7.2. Types of System Reports

The reports are grouped into five categories, each designed to serve different purposes:

- Category A: Monitoring progress of MDS implementation
- Category B: Monitoring overall service delivery
- Category C: Monitoring implementation of stepped care
- Category D: Key Performance Indicators
- Category E: Reports for data managers to monitor data supply

### 7.2.1. Category A: Monitoring progress of MDS implementation

These reports are designed to assist monitoring MDS uptake and compliance with key business rules.

The reports provide summary data on:

- Volumes ('active clients'/'active episodes'/contacts)
- Data quality in terms of compliance with key business rules

Available A category reports are:

- A1 - High level summary of overall volumes by entity
- A2 - Monthly volume trends
- A3 - Data quality report - Missing and invalid client data
- A4 - Data quality report - Missing and invalid episode data
- A5 - Data quality report - Missing and invalid service contact data
- A6 - Data quality report - Missing and invalid practitioner data
- A7 - Open episodes with no service contact activity for 90+ days
- A8 - Data quality report - Recording of outcome measures for open episodes
- A9 - Data quality report - Recording of outcome measures for completed episodes

**Note:** A subset of these reports is included in [Category E: Reports for data managers to monitor data supply](#) without any filtering for active clients or episodes to enable organisational data managers to monitor 'raw' upload and data supply to the MDS.

#### 7.2.1.1. A1 - High level summary of overall volumes by entity

This report is designed to provide a 'one page' view, with data aggregated for the specified reporting period, covering counts of clients, episodes and service contacts.

Key specifications:

- To be counted, a client must have had one or more Service Contacts in the reporting period, defined for this report's purposes as 'Active Clients'. Clients are counted uniquely regardless of number of episodes.
- Episodes to be counted if one or more Service Contacts were recorded in the period - defined for this report purpose as 'Active Episodes'.
- All Service Contacts in the period are reported except those that are flagged as 'No Show'.
- All dates refer to date of service not date of data upload or data entry.

### **7.2.1.2. A2 - Monthly volume trends**

This report is designed to show volume trends in clients, episodes and service contacts. Each data point in the table and the chart shows monthly data.

Key specifications:

- To be counted, a client must have had one or more Service Contacts in the reporting period, defined for this report purposes as 'Active Clients'. Clients are counted uniquely regardless of number of episodes.
- Episodes to be counted if one or more Service Contacts was recorded in the period – defined for this report purpose as 'Active Episodes'.
- All Service Contacts in the period are reported except those that are flagged as 'No Show'.
- All dates refer to date of service not date of upload or data entry.

### **7.2.1.3. A3 - Data quality report - Missing and invalid client data**

The A3 reports are designed to identify Client data elements with significant amounts of missing or invalid data.

Two formats of this report are offered to users:

- [A3-1 - Data quality report - Missing and invalid client data - Summary](#)
- [A3-2 - Data quality report - Missing and invalid client data - Detail](#)

Key specifications:

- Clients to be counted uniquely regardless of number of episodes. To be counted, a client must have had one or more Service Contacts in the reporting period i.e. 'Active Clients'.
- Service Contacts flagged as 'No Show' are not included for this purpose.
- Missing/invalid data defined as: Data elements with null or invalid values, or where 'system generated' codes have been reported to denote 'not stated', 'inadequately defined' or 'missing'.

#### **7.2.1.3.1. A3-1 - Data quality report - Missing and invalid client data - Summary**

Summary format provides a simple listing of missing/invalid data rates for relevant Client data elements, aggregated across the organisation, region or nationally.

### **7.2.1.3.2. A3-2 - Data quality report - Missing and invalid client data - Detail**

Detailed format presents missing/invalid data rates at the entity level (PHN and Provider Organisation). For this version, the user selects the specific Client data element to be targeted for the report from a list of possible options.

Missing/invalid client data elements that can be selected for the A3-2 report are:

- Date of Birth
- Date of Birth Flag
- Gender
- ATSI status
- Country of Birth
- Main Language Spoken at Home
- Proficiency in Spoken English

Note: For a user with the Reporting role at a single Provider Organisation, this report is redundant as it would only ever have a single row, which is already present in the output of the A3-1 report. Therefore this report is not made available to these users.

### **7.2.1.4. A4- Data quality report - Missing and invalid episode data**

The A4 reports are designed to identify data Episode elements with significant amounts of missing or invalid data.

Two formats of this report are offered to users:

- [A4-1 - Data quality report - Missing and invalid episode data - Summary](#)
- [A4-2 - Data quality report - Missing and invalid episode data - Detail](#)

Some Episode data elements are not included in the options list as they are allowed to have a blank value (eg. Episode End Date) or there is no missing value provided in the specification and the system doesn't allow blank values to be submitted (eg. Principal Focus of Treatment Plan):

- Client Consent to Anonymised Data
- Episode End Date
- Episode Completion Status
- Episode Start Date
- Medication - Antipsychotics (N05A)
- Medication - Anxiolytics (N05B)
- Medication - Hypnotics and sedatives (N05C)
- Medication - Antidepressants (N06A)
- Medication - Psychostimulants and nootropics (N06B)

- Principal Focus of Treatment Plan

Key specifications:

- Report counts only ‘active episodes’. An Episode is defined as ‘active’ if it has one or more Service Contacts recorded in the period.
- Service Contacts flagged as ‘No Show’ are not included for this purpose.
- Missing/invalid data defined as: Episode data elements with null or invalid values, or where ‘system generated’ codes have been reported to denote ‘not stated’, ‘inadequately defined’ or ‘missing’.

#### **7.2.1.4.1. A4-1 - Data quality report - Missing and invalid episode data - Summary**

Summary format provides a simple listing of missing/invalid data rates for relevant Episode data elements, aggregated across the organisation, region or nationally.

#### **7.2.1.4.2. A4-2 - Data quality report - Missing and invalid episode data - Detail**

Detailed format presents missing/invalid Episode data rates at the entity level (PHN and Provider Organisation). For this version, the user selects the specific Episode data element to be targeted for the missing/invalid data report from a list of possible options.

Missing/invalid episode data elements that can be selected for the A4-2 report are:

- Episode Referral Date
- Referrer Profession
- Referrer Organisation Type
- Suicide Referral Flag
- GP Mental Health Treatment Plan Flag
- Homelessness flag
- Area of Usual Residence, Postcode
- Labour Force Status
- Employment Participation
- Source of Cash Income
- Health Care Card
- NDIS Participant
- Marital Status
- Principal Diagnosis
- Additional Diagnosis

Note: For a user with the Reporting role at a single Provider Organisation, this report is redundant as it would only ever have a single row, which is already present in the output of the A4-1 report. Therefore this report is not made available to these users.

### **7.2.1.5. A5 - Data quality report - Missing and invalid service contact data**

The A5 reports are designed to identify Service Contact data elements with significant amounts of missing or invalid data.

Two formats of this report are offered to users:

- [A5-1 - Data quality report - Missing and invalid service contact data - Summary](#)
- [A5-2 - Data quality report - Missing and invalid service contact data - Detail](#)

Service Contacts flagged as 'No Show' are not included in this report.

Some service contact data elements are not included in the options list as there is no missing value provided in the specification and the system doesn't allow blank values to be submitted:

- Service Contact Date
- Service Contact Final
- Service Contact Type
- Service Contact Modality
- Service Contact Duration
- Service Contact Copayment
- Service Contact Client Participation Indicator
- Service Contact No Show

#### **7.2.1.5.1. A5-1 - Data quality report - Missing and invalid service contact data - Summary**

Summary format provides a simple listing of missing/invalid data rates for relevant Service Contact data elements, aggregated across the organisation, region or nationally.

#### **7.2.1.5.2. A5-2 - Data quality report - Missing and invalid service contact data - Detail**

Detailed format presents missing/invalid Service Contact data rates at the entity level (PHN and Provider Organisation). For this version, the user selects the Service Contact data to be targeted for the missing/invalid data report from a list of possible options.

Missing/invalid episode data elements that can be selected for the A5-2 report are:

- Service Contact Interpreter Used
- Service Contact Postcode
- Service Contact Participants
- Service Contact Venue

Note: For a user with the Reporting role at a single Provider Organisation, this report is redundant as it would only ever have a single row, which is already present in the output of the A5-1 report. Therefore this report is not made available to these users.

### **7.2.1.6. A6 - Data quality report - Missing and invalid practitioner data**

The A6 reports are designed to identify Practitioner data elements with significant amounts of missing data.

Two formats of this report are offered to users:

- [A6-1 - Data quality report - Missing and invalid practitioner data - Summary](#)
- [A6-2 - Data quality report - Missing and invalid practitioner data - Detail](#)

Key specifications:

- Report is confined only to 'active practitioners'. A Practitioner is defined as 'active' if it they have recorded one or more Service Contacts in the period.
- Service Contacts flagged as 'No Show' are not included for this purpose.

#### **7.2.1.6.1. A6-1 - Data quality report - Missing and invalid practitioner data - Summary**

Summary format provides a simple listing of missing/invalid data rates for relevant data elements, aggregated across the organisation, region or nationally.

#### **7.2.1.6.2. A6-2 - Data quality report - Missing and invalid practitioner data - Detail**

Detailed format presents missing/invalid data rates at the entity level (PHN and Provider Organisation). For this version, the user selects the Practitioner data to be targeted for the missing/invalid data report from a list of options.

Missing/invalid episode data elements that can be selected for the A6-2 report are:

- Practitioner Category
- ATSI Cultural Training Flag
- Practitioner Year of Birth
- Gender
- Aboriginal and Torres Strait Islander Status

Note: For a user with the Reporting role at a single Provider Organisation, this report is redundant as it would only ever have a single row, which is already present in the output of the A6-1 report. Therefore this report is not made available to these users.

### **7.2.1.7. A7 - Open episodes with no service contact activity for 90+ days**

The A7 report is designed to allow monitoring of adherence to the requirement to close episodes where there are no further services scheduled for the client.

Setting of the 90 day threshold does not imply a strict business rule to close episodes where no contact has occurred for this period, but rather to identify episodes that may warrant review.

Key specifications:

- Open Episodes defined as those without an End Date or an End Date after the end date of the report.
- Service Contacts flagged as 'No Show' are not included for this purpose.

Note that if the period between start and end date specified in this report is less than 90 days the number of episodes with no service contact activity for 90+ days will always be zero.

### **7.2.1.8. A8 - Data quality report - Recording of outcome measures for open episodes**

The A8 report is designed to show the percentage of open (not yet completed) episodes that have an outcome measure recorded at the Episode Start collection occasion. Its purpose is to allow monitoring of adherence to the minimum requirements for outcome recording - i.e. measures to be recorded at Episode Start and Episode End.

Report A9 examines a related aspect - the extent to which Completed Episodes have both Episode Start and Episode End measures.

Key specifications:

- Open Episodes are defined as those without an End Date or an End Date after the end date of the report. less than or equal to the report end date.
- For this report, Episodes must also have an Episode Start Date equal to or greater than the report start date.
- Only Episodes with one or more Service Contacts in the reporting period are included in the analysis (referred to as 'active episodes').
- Service Contacts flagged as 'No Show' are not included for this purpose.
- Measures that have a total score of '99' are invalid and counted as 'no measure'.

### **7.2.1.9. A9 - Data quality report - Recording of outcome measures for completed episodes**

The A9 report is designed to show the percentage of completed episodes that have outcome measures recorded. Its purpose is to allow monitoring of adherence to the minimum requirements for outcome recording - i.e. measures to be recorded at Episode Start and Episode End.

Key specifications:

- Completed Episodes are defined as those Episodes with an Episode End Date less than or equal to the report end date.
- For this report, Episodes must also have an Episode Start Date equal to or greater than the report start date.
- Only Episodes with one or more Service Contacts in the reporting period are included in the analysis (referred to as 'active episodes').
- Service Contacts flagged as 'No Show' are not included for this purpose.
- Measures that have a total score of '99' are invalid and counted as 'no measure'.

### **7.2.2. Category B: Monitoring overall service delivery**

These reports are designed to present a range of data in the form of summary tables. Their purpose is to allow the user to monitor overall service delivery based on counts of clients, episodes, and service contacts, stratified in various ways that depend on the data being sourced.

There are five reports in this series, each covering a specific data category (Clients, Episode, Service Contacts, Provider Organisations, and Practitioners).

Available B category reports are:

- [B1 - Activity report - Client characteristics](#)
- [B2 - Activity report - Episode characteristics](#)
- [B3 - Activity report - Service Contact characteristics](#)
- [B4 - Activity report - Provider Organisation characteristics](#)
- [B5 - Activity report - Practitioner characteristics](#)

#### **7.2.2.1. B1 - Activity report - Client characteristics**

The B1 report is designed to allow selection of a Client stratification variable of interest, with a menu of options covering all core Client data fields.

Key specifications:

- Client to be counted uniquely regardless of number of episodes. To be counted, a client must have had one or more Service Contacts in the reporting period.
- Counts of Episodes to be based only on 'active' Episodes, defined as those that had one or more Service Contacts recorded in the period.
- Service Contacts flagged as 'No Show' are not included for this purpose.

#### **7.2.2.2. B2 - Activity report - Episode characteristics**

The B2 report is designed to allow selection of an Episode stratification variable of interest, with a menu of options covering all core Episode data fields.

Key specifications:

- An Episode is defined as 'active' and in-scope for inclusion in this report if it had one or more Service Contacts recorded in the period. No distinction is made between Open and Completed Episodes.
- Service Contacts flagged as 'No Show' are not included for this purpose.

#### **7.2.2.3. B3 - Activity report - Service Contact characteristics**

The B3 report is designed to allow selection of a Service Contact stratification variable of interest, with a menu of options covering all core Service Contact fields.

Key specifications:

- Reporting by 'Service Contact No Show' element counts all service contacts by whether they are flagged as 'No Show'.
- Otherwise, Service Contacts flagged as 'No Show' are not included in this report.

#### **7.2.2.4. B4 - Activity report - Provider Organisation characteristics**

The B4 report is designed to allow selection of a Provider Organisation stratification variable of interest, with a menu of options covering all core Provider Organisation data fields.

Key specifications:

- A Provider Organisation is defined as 'active' if it has recorded and in-scope for this report if there is one or more Service Contacts recorded for the Provider Organisation in the period.
- Service Contacts flagged as 'No Show' are not included for this purpose.

#### **7.2.2.5. B5 - Activity report - Practitioner characteristics**

The B5 report is designed to allow selection of a Practitioner stratification variable of interest, with a menu of options covering all core Practitioner data fields.

Key specifications:

- A Practitioner is defined as 'active' and in-scope for this report if they have recorded one or more Service Contacts in the period.
- Service Contacts flagged as 'No Show' are not included for this purpose.

### **7.2.3. Category C: Monitoring implementation of stepped care**

This group of reports is based on composite data, built from cross-tabulation of data drawn from multiple levels of the PMHC data model – Clients, Episodes, Service Contacts, Practitioners.

Their purpose is to allow the user to monitor selected aspects of the implementation of the stepped care model.

The stepped care reports represent work in progress and will be subject to ongoing improvement with PHN feedback on their utility.

Available C category reports are:

- [C1 - Stepped care report - Episode type by Client characteristics](#)
- [C2 - Stepped care report – Episode Type by Service Contacts Type](#)

#### **7.2.3.1. C1 - Stepped care report - Episode type by Client characteristics**

Purpose: To provide summary information on the characteristics of clients who receive different types of services, grouped by 'episode type'.

Client data fields to be selected by user from a list of options.

Key specifications:

- Only 'active episodes' are reported. An Episode is defined as 'active' and in scope for inclusion in this report if it had one or more Service Contacts recorded in the period. No distinction is made between Open and Completed Episodes.
- Service Contacts flagged as 'No Show' are not included for this purpose.
- Counts shown in the report refer to Episodes, and are displayed as numbers or percent column based on user selection.

Client data elements that can be selected for the C1 report are:

- Client age group based on Date of Birth, grouped to the following categories:
  - 0-11, 12-17, 18-24, 25-64, 65+
  - Each client assigned to only age group based on age at a fixed date (e.g., beginning of year)
- Indigenous status
- Area of Usual Residence
  - Grouped by Remoteness Classification (Major Cities, Outer Regional, Inner Regional, Remote, Very Remote)
- Principal diagnosis - High level grouping
  - Anxiety disorders
  - Affective (Mood) disorders
  - Substance use disorders
  - Psychotic disorder
  - Disorders with onset usually occurring in childhood and adolescence not listed elsewhere
  - Other mental disorder

- No formal mental disorder but subsyndromal problem
- Gender
- Country of Birth – grouped to high level categories

### **7.2.3.2. C2 - Stepped care report – Episode Type by Service Contacts Type**

Purpose: To provide summary information on the types of service contacts delivered within each of the episode types.

Key specifications:

- Only ‘active episodes’ are reported. An Episode is defined as ‘active’ and in scope for inclusion in this report if it had one or more Service Contacts recorded in the period. No distinction is made between Open and Completed Episodes.
- Service Contacts flagged as ‘No Show’ are not included for this purpose.
- Counts shown in the report refer to Episodes, and are displayed as numbers or percent rows based on user selection.

### **7.2.3.3. C3 - Stepped care report – Episode Type by Service Contact Intensity**

Purpose: To provide summary information on the volumes of service delivered within each of the episode types.

Key specifications:

- Only ‘active episodes’ are reported. An Episode is defined as ‘active’ and in scope for inclusion in this report if it had one or more Service Contacts recorded in the period. No distinction is made between Open and Completed Episodes.
- Service Contacts flagged as ‘No Show’ are not included for this purpose.
- Counts shown in the report refer to Episodes, and are displayed as numbers or percent rows based on user selection.
- Total Clients is a unique count of clients, not the sum of the individual rows. Clients may be counted in more than one row.

### **7.2.4. Category D: Key Performance Indicators**

A set of 13 key performance indicators was introduced in July 2016, designed to monitor the progress of mental health reforms being led by Primary Health Networks (PHNs). The indicators covered activities related to the delivery of services in six priority areas set by government, along with two overarching program management indicators covering integrated service planning and delivery, and implementation of stepped care models of care.

All 13 indicators were subsequently incorporated in schedules for mental health program funding, requiring PHNs to report on performance annually. Data sources for the majority of indicators (11) are derived in full or part from the Primary Mental Health Care Minimum Data Set (PMHC MDS).

The mental health KPIs were introduced prior to the implementation of the current PHN Performance and Quality Framework (September 2018) and need to be positioned within that policy framework. One additional indicator was added to the mental health KPIs as a result of the new framework, bringing the total to 14.

9 of the 14 KPI reports will ultimately be available via the PMHC MDS. 7 are currently available:

- [Acc-1 - Access to Low Intensity Services](#)
- [Acc-2 - Access to Psychological Services](#)
- [Acc-3 - Access to Clinical Care Coordination](#)
- [App-1 - Youth receiving youth-specific services](#)
- [App-2 - Indigenous Population receiving culturally appropriate services](#)
- [App-3 - Suicide Risk Followup](#)
- Out-1 - Clinical outcomes - Low intensity psychological interventions
- Out-2 - Clinical outcome - Psychological therapies delivered by mental health professionals
- [Out-3 - Completion rates for clinical outcome measures](#)

**Note:** Out-1 and Out-2 reports are still to be implemented.

The following reports are not available via the PMHC MDS as they require information that is not derived from the PMHC MDS:

- Eff-1 - Average cost of PHN-commissioned low intensity psychological intervention services
- Eff-2 - Average cost of PHN-commissioned psychological therapies delivered by mental health professionals
- Eff-3 - Average cost of PHN-commissioned clinical care coordination for people with severe and complex mental illness
- Prog-1 - Proportion of PHN annual flexible funding allocated to low intensity services, psychological therapies and services for people with severe and complex mental illness
- Prog-2 - Formalised partnerships with other regional service providers to support integrated regional planning and service delivery

#### **7.2.4.1. Acc-1 - Access to Low Intensity Services**

Purpose: Measure the proportion of regional population receiving PHN-commissioned low intensity psychological interventions

Key specifications:

- Only 'active clients' are reported. A Client is defined as 'active' and in scope for inclusion in this report if they had one or more Service Contacts recorded in the period.
- Service Contacts flagged as 'No Show' are not included for this purpose.
- Population is calculated from Estimated Regional Population figures.
- KPI is measured in clients per 100,000 population.

#### **7.2.4.2. Acc-2 - Access to Psychological Services**

Purpose: Measure the proportion of regional population receiving PHN-commissioned psychological therapies delivered by mental health professionals.

Key specifications:

- Only 'active clients' are reported. A Client is defined as 'active' and in scope for inclusion in this report if they had one or more Service Contacts recorded in the period.
- Service Contacts flagged as 'No Show' are not included for this purpose.
- Population is calculated from Estimated Regional Population figures.
- KPI is measured in clients per 100,000 population.

#### **7.2.4.3. Acc-3 - Access to Clinical Care Coordination**

Purpose: Measure the proportion of regional population receiving PHN-commissioned clinical care coordination for people with severe and complex mental illness.

Key specifications:

- Only 'active clients' are reported. A Client is defined as 'active' and in scope for inclusion in this report if they had one or more Service Contacts recorded in the period.
- Service Contacts flagged as 'No Show' are not included for this purpose.
- Population is calculated from Estimated Regional Population figures.
- KPI is measured in clients per 100,000 population.

#### **7.2.4.4. App-1 - Youth receiving youth-specific services**

Purpose: Measure the proportion of regional youth population receiving youth-specific mental health services.

Key specifications:

- Only 'active clients' are reported. A Client is defined as 'active' and in scope for inclusion in this report if they had one or more Service Contacts recorded in the period.
- Service Contacts flagged as 'No Show' are not included for this purpose.
- Population is calculated from Estimated Regional Population figures for people aged 12-24.
- KPI is measured in clients per 100,000 population.

#### **7.2.4.5. App-2 - Indigenous Population receiving culturally appropriate services**

Purpose: Measure the proportion of PHN-commissioned mental health services delivered to the regional Indigenous population where the services were culturally appropriate.

Key specifications:

- Service contacts are in scope for inclusion in this report if they occurred within the reporting period and are not flagged as 'No Show'.
- KPI is measured as the percentage of service contacts which are culturally appropriate
- A culturally appropriate service is defined as one that is delivered by a service provider that is recorded as of ATSI origin, or employed by an Aboriginal Community Controlled Health Service or has indicated that they have completed a recognised training programme in the delivery of culturally safe services to ATSI peoples.

#### **7.2.4.6. App-3 - Suicide Risk Followup**

Purpose: Measure the proportion of people referred to PHN-commissioned services due to a recent suicide attempt or because they are at risk of suicide, who are followed up within 7 days of referral.

Key specifications:

- Only episodes with a referral date within the reporting period are included.
- Service contacts which are flagged as 'No Show' are not included.
- Service contacts where the Client Participation Indicator flag is 'No' are not included.
- '% Episodes with Suicide Risk Flag %' counts the proportion of all episodes which are flagged as a suicide risk.
- Other than in the '% Episodes with Suicide Risk Flag' column, only episodes flagged as suicide risk are counted.
- Episodes where the first service contact occurred within 7 days are tabulated as '7 days or less'
- Episodes where no service contact occurred are tabulated as 'No Service Contact Occurred'.
- KPI is measured as percentage of episodes flagged as a suicide risk which have a service contact within 7 days.

#### **7.2.4.7. Out-3 - Completion rates for clinical outcome measures**

Purpose: Measure completion rates for clinical outcome measures.

Key specifications:

- Completed Episodes are defined as those Episodes with an Episode End Date less than or equal to the report end date.
- For this report, Episodes must also have an Episode Start Date equal to or greater than the report start date.
- Only Episodes with one or more Service Contacts in the reporting period are included in the analysis (referred to as 'active episodes').
- Service Contacts flagged as 'No Show' are not included for this purpose.
- To be counted at 'Matched', both an initial and final measure of matching type must be recorded, each with a valid total score (not '99'). This rule is a little tighter than that used in the A9 report, so figures in the two reports may vary

Matching measure types:

| Initial   | Final     |
|-----------|-----------|
| K5        | K5        |
| K10+      | K10+      |
| SDQ PC101 | SDQ PC201 |
| SDQ PY101 | SDQ PY201 |
| SDQ YR101 | SDQ YR201 |

### 7.2.5. Category E: Reports for data managers to monitor data supply

These reports are designed to assist in monitoring the amount and type of data that has been input into the MDS.

They are based on a subset of Category A reports but differ in two important ways:

- The reports are based on 'raw data', not filtered or trimmed by any data quality censoring. Comparable Category A reports restrict the reported data by specific edit criteria (e.g., Category A reports are only based on 'active clients', 'active episodes' and 'active providers').
- All dates refer to date of upload. Comparable Category A reports are based on date of service.

Category E reports are specifically designed to enable PHN and Provider Organisation data managers to monitor upload and data supply to the MDS.

The reports provide summary data on:

- Raw volumes (clients/episodes/service contacts/collection occasions/practitioners) over time periods
- Raw volumes per day (clients/episodes/service contacts/collection occasions/practitioners)

#### 7.2.5.1. E1 - High level summary of overall volumes by entity

This report is designed to provide a 'one page' view, with data aggregated for the specified reporting period, covering counts of clients, episodes, service contacts, collection occasions and practitioners, without any filtering for business rules.

Key specifications:

- All records to be counted with no filtering.
- All dates refer to date of modification, not date of service.

#### 7.2.5.2. E2 - Volume trends

This report is designed to show volume trends in clients, episodes, service contacts, collection occasions and practitioners.

Key specifications:

- All records to be counted with no filtering.
- All dates refer to date of insertion, not date of service.
- Results are cumulative.

#### **7.2.5.3. E3 - Activity per day**

This report will show a summary of the number of clients, episodes, service contacts, collections occasions and practitioners added or modified each day. Its purpose is to give entities information about when and how much data was added or modified.

Key specifications:

- All records to be counted with no filtering.
- All dates refer to date of modification, not date of service.

## 8. Data Extract

You will only be able to see the Data Extract tab if you have been assigned the ‘Reporting’ [Users Roles](#), when logged into the PMHC MDS on <https://pmhc-mds.net>.

If you don’t have access to the Data Extract tab and you believe you should, please contact someone in your provider organisation or provider organisation’s PHN who has the ‘User Management’ role. If you are unsure who has the ‘User Management’ role please email the PMHC Helpdesk at [support@pmhc-mds.com](mailto:support@pmhc-mds.com)

After navigating to the Data Extraction tab, you will be presented with a form to request and download a data extract.

The screenshot shows the 'Data Extract' tab selected in the top navigation bar. The main content area is titled 'Data Extract' and contains the following fields:

- Select Organisation\***: A dropdown menu.
- Start Date\***: A date input field set to 17/01/2018, with a calendar icon to its right.
- End Date\***: A date input field set to 17/01/2018, with a calendar icon to its right.
- Include data without associated dates.**
- Select File Type\***: A dropdown menu set to .xlsx.

At the bottom left is a blue 'Request' button, and at the bottom right is a link to 'Associated Date Rules Explained'.

The footer of the page includes the Australian Government Department of Health logo, and links to 'PMHC-MDS managed by Strategic Data Pty Ltd | Contact Support | User Documentation'.

### 8.1. How to download an organisation's data

You can extract a PHN’s or provider organisation’s PMHC MDS data by completing the Download Data fields in the Data Extraction tab, by following these steps:

1. Navigate to the ‘Data Extract’ tab.
2. If you are allowed to download data from more than one organisation you will be asked to select an organisation name.
3. Select the name of the organisation from the drop down list.
4. Click the first calendar icon to select the start date and then the second calendar icon to select the end date.
5. Click the ‘Include data without associated dates’ checkbox, if required.

**Please note:** As the query is date based the following data will not by default be included in the extract:

- The start date of an episode is derived from the date of the first service contact. Therefore, if an episode doesn't have any associated service contacts, there will be no start date for the episode and they will not by default be included in the data extract.
- Clients that don't have any associated episodes, or who are associated with an episode with no service contacts also will not by default be included in the data extract.
- Practitioners who are not associated with a service contact will not by default be included in the data extract.

If you would like to include these episodes, clients and practitioners check the the 'Include data without associated dates' checkbox.

6. Select the File Type you'd like this data downloaded in.

Home / Data Extract

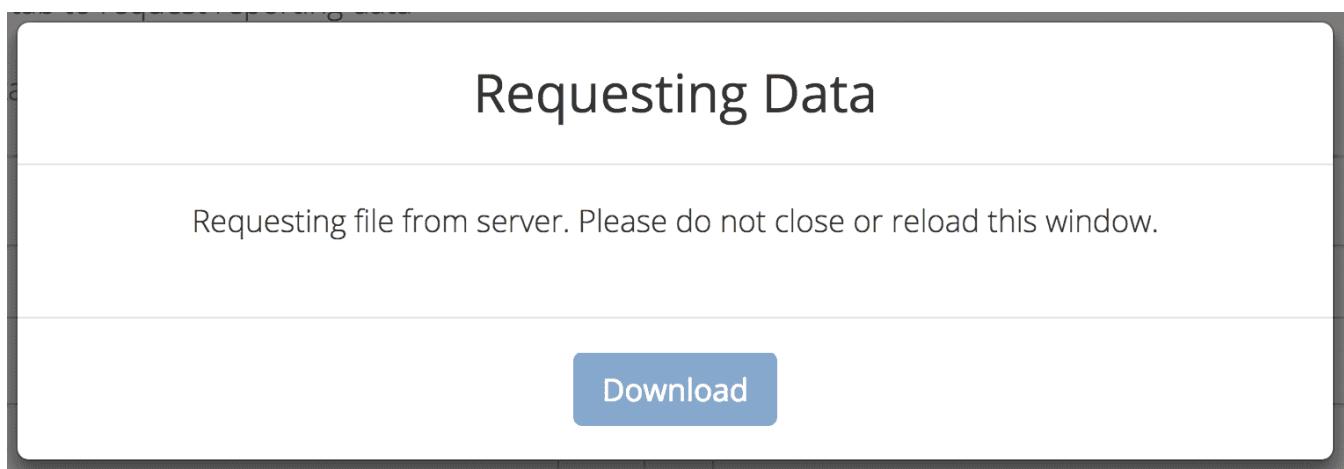
## Data Extract

Users with the Reporting role can use this tab to request reporting data

**Support:** For more information and assistance visit [PMHC MDS Documentation](#). (link opens in a new window)

|   |                                 |
|---|---------------------------------|
| <b>Select Organisation*</b>                                     | Test PHN ( PHN999 )             |
| <b>Start Date*</b>  | 08/01/2018                      |
| <b>End Date*</b>  | 08/01/2018                      |
| <input type="checkbox"/> Include data without associated dates. |                                 |
| <b>Select File Type*</b>  |                                 |
| .xlsx   |                                 |
| <b>Request</b>  | Associated Date Rules Explained |

7. Click the blue 'Request' button.
8. A dialogue box will be displayed, showing that the file is being requested from the server.



9. When the file is ready, a 'File ready for download' message will be displayed.

# Requesting Data

File ready for download.

[Download](#)

[Close](#)

10. Click the blue 'Download' button.
11. Your data extract will be downloaded to your computer.

## 8.2. Dates explained for Data Extract

The Data Extract dates are based on the Client's Service Contact dates.

**Please note:** As the query is date based the following data will not by default be included in the extract:

- The start date of an episode is derived from the date of the first service contact. Therefore, if an episode doesn't have any associated service contacts, there will be no start date for the episode and they will not by default be included in the data extract.
- Clients that don't have any associated episodes, or who are associated with an episode with no service contacts also will not by default be included in the data extract.
- Practitioners who are not associated with a service contact will not by default be included in the data extract.

If you would like to include these episodes, clients and practitioners check the the 'Include data without associated dates' checkbox.

See [How to download an organisation's data](#).

## 9. SLK

We have provided a stand-alone generator that can be used without logging into the PMHC MDS on <https://pmhc-mds.net>. This allows users to generate a client's Statistical Linkage Key (SLK) to enter into upload files.

The screenshot shows the PMHC-MDS website with a blue header featuring the Australian Government Department of Health logo. The main title is "Primary Mental Health Care Minimum Data Set". Below the header, there are navigation links for "Home" and "SLK", and a "Sign in" button. The "SLK" link is highlighted. The page content is titled "Statistical Linkage Key Generator". On the left, there is a sidebar with a "SLK" tab and a "Generate SLK" button. The main form area contains fields for "Given Name" (with a placeholder "Given Name"), "Family Name" (with a placeholder "Family Name"), "Date of Birth \*" (with a placeholder date field), and "Gender" (with a dropdown menu showing "Not stated/Inadequately described"). At the bottom of the form is a blue "Generate Key" button. The footer of the page includes the Department of Health logo and links for "PMHC-MDS managed by Strategic Data Pty Ltd | Contact Support | User Documentation".

In order to generate an SLK:

1. Navigate to the 'SLK' tab. This will open up the SLK generator.
2. Enter the following client details: Given Name, Surname, Date of Birth and Gender.
3. Click on the blue 'Generate Key' button.

## Statistical Linkage Key Generator

SLK

Generate SLK

**Given Name**  
Firstname

**Date of Birth \***  
01/01/1901

**Family Name**  
Surname

**Gender**  
Other

**Generate Key**

Your statistical linkage key

**SLK**  
URAIR010119013 **Copy to clipboard**

**Generated Hash**  
7AZFQB02PQAZGXJ1Z89SNZ6306WDF0XC **Copy to clipboard**

The client's 'SLK Key' and 'Generated Hash' key will now be displayed.

4. Click 'Copy to clipboard' next to either of these items.
5. Paste this information into your data file.

*Please note: you can only copy one SLK at a time to the clipboard.*

## **10. Frequently Asked Questions**

### **10.1. Concepts and Processes Frequently Asked Questions**

#### **10.1.1. Questions about the scope of the MDS**

PHNs raised a number of questions regarding the scope of the MDS and whether specific areas of commissioned activity were intended to be covered. The [Overview paper](#) covers the scope issue (page 4), an extract of which is copied below:

**"The new arrangements are designed to capture data on PHN-commissioned mental health services delivered to individual clients, including group-based delivery to individual clients ...**

**The scope of coverage will not extend to services targeted at communities**, such as the community capacity building activities previously funded under projects sourced from National Suicide Prevention Program funding. Collection and reporting of activities of this type requires a different approach to 'counting' and identification of the 'client'. PHNs commissioning activities of this type will have flexibility to establish local data reporting arrangements that suit requirements."

PHNs raised a number of questions to further clarify the scope of the PMHC MDS, summarised below.

#### **10.1.1.1. Coverage of community-based suicide prevention activities**

**10.1.1.1. Activities such as mental health and suicide awareness training and whole of community health promotion programs (non-clinical services) (e.g., Farm-Link). targeted at groups or whole communities, are not a good fit for the PHMC MDS They are currently reported to the National Suicide Prevention Program) MDS which finishes on the 30th June 2016. What is the mechanism for the future?**

PHN-commissioned services of this type are outside the scope of the PMHC MDS.

Regional whole-of-community suicide prevention activities previously funded directly by the Department and now transferred to PHNs (e.g., Farm-Link) have previously reported to the National Suicide Prevention Program MDS managed by Australian Healthcare Associates under contract to the Department. The Department is currently exploring options to continue this collection and will advise PHNs accordingly, with a view to ensuring continuity of reporting of community-based suicide prevention activities.

Suicide prevention oriented services provided to individuals are in scope for collection and reporting to the PMHC MDS.

### **10.1.1.2. Coverage of digital health services**

**10.1.1.2.1. Are the PHNs expected to collect and upload all of the data outlined under the 6 Mental Health Priority Areas? If so it will be difficult to collect this data for referrals made to e-mental health sites such as mood gym, mind spot etc. There are also challenges around self-help groups.**

As indicated, scope of coverage is all PHN-commissioned mental health services delivered to individual clients, regardless of mode of service delivery.

Digital health services present particular challenges that need to be unbundled to resolve a way forward. Where PHNs refer the consumer to self-help, clinician unmoderated assistance (e.g., Mood Gym), this is not a PHN-commissioned service as such and falls outside of the scope of collection. Similarly, referral to a nationally funded clinician-moderated service such as Mindspot is not a PHN-commissioned services and falls outside of scope, bypassing the need for data collection.

However, there are acknowledged issues where a PHN enters a funding agreement with a digital health provider to provide individually tailored, clinician-moderated services to specific populations within their regions. Such services clearly fall within scope. The Department is considering the options to capture the required data. These include setting up arrangements for digital providers to collect and submit data on behalf of PHNs.

### **10.1.1.3. Coverage of whole of region services regardless of who funds**

**10.1.1.3.1. Are we only reporting on services and processes that we are commissioning and undertaking or the region as a whole?**

The PMHC MDS is designed to cover only those services commissioned by PHNs.

### **10.1.1.4. Appropriateness of occasions of service as a counting measure**

**10.1.1.4.1. This unit of counting is not appropriate for the full range of services that might be commissioned by PHNs, for example, whole of community-oriented prevention activities**

This is agreed. The scope of the PMHC MDS does not cover every activity that a PHN may commission.

Where activities are outside the scope of the PMHC MDS, PHNS are expected to set up their own arrangements to collect data suitable for reporting purposes. See also the response above regarding [Coverage of community-based suicide prevention activities](#).

### **10.1.1.5. Exclusion of 'non clinical' time**

**10.1.1.5.1. The MDS only captures actual clinical time. Administrative tasks such as arranging for case conferences, updating electronic health information records, undertaking program contractual management tasks, travelling to service provision venue amongst others, are currently not being captured.**

The focus of the PMHC MDS collection is on clinical service delivery to individual clients. It is acknowledged that clinician have to undertake other activities to maintain their clinical work and time spent on these can be significant. However, any broadening of scope to include as mandatory other activities would create an unacceptable data reporting burden on clinical service providers, all of whom are practitioners independent of the PHN.

It should be noted however that the PMHC MDS differs from the previous ATAPS collection in allowing a range of services delivered 'on behalf' of the client to be recorded. Section 4.4 of the [Overview paper](#) ('Determining what activities are in scope for reporting as service contacts') provides the relevant details.

### **10.1.1.6. Are headspace services covered by the requirements?**

#### **10.1.1.6.1. Are services funded through headspace expected to collect the PHMC MDS?**

First-stage development of the MDS will not include existing youth-specific services (headspace, Early Psychosis Youth Services) that currently collect and report a standardised dataset to headspace National Office. Pending the future of these arrangements, and access to data by PHNs, the PHMC MDS can be expanded at a future stage to allow incorporation of headspace and Early Psychosis Youth Services should this be required.

### **10.1.1.7. Are EPYS centres covered?**

#### **10.1.1.7.1. Are services funded as Early Psychosis Centres expected to collect the PHMC MDS?**

First-stage development of the MDS will not include existing youth-specific services (headspace, Early Psychosis Youth Services) that currently collect and report a standardised dataset to headspace National Office. Pending the future of these arrangements, and access to data by PHNs, the PHMC MDS can be expanded at a future stage to allow incorporation of headspace and Early Psychosis Youth Services should this be required.

### **10.1.1.8. Coverage of Mental Health Nursing services**

#### **10.1.1.8.1. Are services previously delivered under MHNIP expected to collect the PHMC MDS?**

From July 2016, funding has been provided to PHNs through a flexible funding pool to enable commissioning of a wide range of primary mental healthcare and suicide prevention services at regional levels. As such the MHNIP and other programs that have transitioned into the flexible funding pool, and their associated guidelines, are no longer applicable.

All 31 PHNs are required to collect and enter/upload data into the PMHC MDS. The PMHC MDS has been developed to capture the broader range of mental health services now being commissioned by PHNs, including services previously delivered under MHNIP. However, principal responsibility for establishing regional arrangements for data collection and reporting rests with PHNs.

### **10.1.2. Questions about Specific Data Items and Definitions**

#### **10.1.2.1. Provider Organisation**

##### **10.1.2.1.1. Provider organisation – solo practitioners: If the organisation is a sole trader private practitioner, does the organisation name become the providers name?**

The sole practitioner should use the trading name against which they have registered their ABN.

##### **10.1.2.1.2. Provider Organisation ABN: Why is this needed?**

Understanding the characteristics and number of Provider Organisations is important for both regional and national planning purposes, and requires an approach that uniquely identifies organisations. While Provider Organisation identifiers are set up by PHNs, these are only unique at the regional level. They therefore do not allow a national picture of the number and type of organisations engaged in the delivery of primary mental health care.

The ABN provides a simple and nationally unique organisation identifier. Organisation ABNs are also public domain information, being available via the Australian Business Register website.

...

#### **10.1.2.2. Practitioner**

##### **10.1.2.2.1. Practitioner category: Should there be separate categories for accredited mental health social workers and occupational therapists in mental health?**

The coding options allows for separate identification of social workers and occupational therapists. PHNs are free to add additional details to their local collection on the proviso that any additions are capable of being mapped to the national MDS categories.

##### **10.1.2.2.2. Principal Focus of Treatment Plan – Psychological Therapy: Is the Department going to provide a firm definition of a mental health professional under the new specifications – noting the intent of increased flexibility to provide a workforce of mixed and flexible professional background?**

The concept of 'mental health professionals' has a specific meaning defined in the various guidance documentation prepared to support PHNs in implementation of reforms. It refers to service providers who meet the requirements for registration, credentialing or recognition as a qualified mental health professional and includes:

- Psychiatrists

- Registered Psychologists
- Clinical Psychologists
- Mental Health Nurses
- Occupational Therapists
- Social Workers
- Aboriginal and Torres Strait Islander health workers.

...

### **10.1.2.3. Client**

#### **10.1.2.3.1. Gender: Should there be consistency in how Practitioner and Client gender are collected?**

Yes. The data coding options are the same for both items and based on the new standards recently released by Australian Government Guidelines on the Recognition of Sex and Gender.

#### **10.1.2.3.2. Statistical Linkage Keys (SLK) - will these be generated in a similar manner to the ATAPS MDS?**

Yes.

Details on how the SLKs are created, are currently available on the [PMHC MDS Specifications - SLK](#). An SLK Generator has been developed on the [PMHC MDS - SLK tab](#).

See [SLK](#) for details how to use this feature.

...

### **10.1.2.4. Episode**

#### **10.1.2.4.1. Diagnosis: Is this required across all service delivery areas, including low intensity services?**

Yes. While low intensity workers will not be qualified to assign a clinical diagnosis, it is expected that they will be working under the supervision of a clinically qualified mental health professional.

#### **10.1.2.4.2. Diagnosis - DSM-IV: Why isn't DSM-V used as the standard given that that is the most current classification system?**

The DSM-IV is the diagnostic classification currently used by the majority of Australian mental health clinicians. Any move to DSM-V would require confidence that most clinicians providing services through PHN commissioning arrangements have had training in, and moved across to, the new system. The Department does not believe that this is the case. Pending uptake of DSM-V, there is scope to change to the new classification in future versions of the PMHC MDS.

Additionally, as the diagnostic codes included in the PMHC MDS represent an abbreviated 'pick list', the decision to use either DSM-IV or DSM-V will not have material impact given the substantial common ground between the two classifications.

**10.1.2.4.3. Episode - Completion Status: If the client is referred elsewhere (i.e. not suitable for this service) would this be recorded as "Episode closed administratively-other reason" or should there be an additional code to capture this information?**

Under the new PMHC MDS, an episode does not formally commence until the client receives their first Service Contact. For referrals that do not lead to a Service Contact, and where the person is referred elsewhere, there is no need to open an Episode. However, based on previous experience with the ATAPS system, the Department understands that many PHNs are likely to want to do this as a means to track referrals that do not lead to Service Contacts, or to begin entering data prior to the first Service Contact. Therefore, there will be scope in the system to set up an Episode even if it does not lead to a Service Contact. Standard reports to be developed will build in capacity to monitor these and ensure that they are not counted in service delivery indicators. Where a referral is followed by an initial Service Contact, and the person is referred elsewhere due to being assessed as not suitable, or requires an alternative service, a new code for Episode- Completion Status has been added ('Episode closed administratively - client referred elsewhere').

**10.1.2.4.4. GP mental health treatment plan: Can we include an item to capture whether the client has GP mental health treatment plan? Would be very useful from a planning and commissioning perspective.**

The Department agrees that this is a useful item for both PHN and national purposes. It has been added to the final Version 1 specifications and is to be reported at the level of Episodes of Care.

**10.1.2.4.5. Source of Cash Income, Income range: What is the rationale for these items? They are not relevant to PHNs and providers may not be comfortable in asking the questions.**

Both items were intended to address key indicators of socioeconomic disadvantage of the consumers using PHN-commissioned services. The intent is to replace the previous 'low income' data item of the previous ATAPS/MHSRRA dataset which was poorly defined and of doubtful reliability.

Based on discussions we believe the intent of these data items is understood by most PHNs.

'Source of cash income' is a standard Meteor item that importantly, identifies whether the consumer is receiving government income support through a Disability Support Pension or other means. It is used in a number of data collections covering Australia Government funded human services.

Income range was intended as a supplementary measure to identify low income consumers. The Department has considered the feedback and agrees this data item is not the appropriate approach. It has been replaced by an alternative item - 'Health Care Card holder'.

The Department considers it essential for the data collection to have a reliable approach to identifying consumers who are economically challenged.

**10.1.2.4.6. One episode of care at a time: We have clients who are receiving treatment at multiple programs and require multiple episodes with different 'Principal Focus of Treatment Plan'. The PMHC MDS only allows one episode at a time for each client, defined at the level of the provider organisation. What do we do?**

The 'one episode at a time per organisation' rule is fundamental to the concepts underpinning the MDS. This rule has important implications, and is based on the long standing principle that, in bringing together all the various services used by an individual during their healthcare for a particular illness, the episode of care should be bundled to the highest level possible. This allows for a more accurate approach to understanding costs and outcomes at the patient level. A single episode of care may entail multiple service types, and service events which in some systems are bundled together under the concept of 'service episodes'. This situation is common in mental health care; for example where a consumer is simultaneously under the care of a community mental health team and a separate day program. Typically, the patient is registered at both centres and contacts are separately recorded by each service or team. But it's important to not confuse such 'service episodes', which are based on service characteristics, with the episode of care concept, which is patient based.

So the short response to the query is that no, the 'one episode of care at a time per organisation rule' should not be breached. The fact that the person is receiving multiple service types during the course of their episode is not a reason to break their care down into multiple episodes. Doing so would have consequences of subjecting the person to two sets of data collection and outcome measures (noting outcomes are needed for each episode).

It is essential the following aspects of the way episode types (as denoted by the Principal Focus of Treatment Plan) are conceptualised:

1. A single episode may include heterogeneous services, as outlined above.
2. The mix of services provided during a single episode is captured by the Service Type data item - collected at each Service Contact.
3. Classifying the episode type by Principal Focus of Treatment Plan requires a judgement to be made about the main focus of the services to be delivered to the client for the current episode of care following initial assessment. It is important to note that can be modified at a later stage if the initial judgement made proved to be incorrect.
4. Episodes are not defined by the source of funding.

Further detail on the concepts underpinning the PMHC MDS are outlined in the Overview paper at  
<https://www.pmhc-mds.com/doc/pmhcmds-overview.pdf>

Several PHN organisations have also queried whether a new and separate episode can be opened when a client is shifted to a significantly different type of care from that originally envisaged. The PMHC does not require this, but also the PMHC does not prevent it. It's a clinical decision that can be made - i.e. a new episode can be opened (after the previous one is closed) when there is a significant shift in the type of care provided e.g., the client begins with a Low Intensity episode, because it was envisaged that the episode would be relatively brief/inexpensive, but in the course of treatment it became clear that the client had complex mental health issues that would warrant

higher intensity services and over a more prolonged period. In such instances, the original episode can be closed, and a new one opened. However, the department does not believe this to be the best alternative as it artificially segments a continuous course of treatment into multiple episodes.

One innovation suggested by some PHNs is to establish a mechanism in the MDS collection to identify where an episode is closed to allow the person to be stepped up, or down, to a lower level of care. Specifically, the suggestion has been made that a new coding option should be added to the Episode Completion Status field to identify episodes that end due to a change in the type of care. The department will consider this as part of any changes made to the MDS in the future.

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#### **10.1.2.5. Service Contact**

##### **10.1.2.5.1. Service contact - Definition: Does the definition extend to the writing of reports to assist the client in accessing appropriate services etc (although this may not involve 2 people)?**

No. See response to [Exclusion of 'non clinical' time](#).

As stated in the [Overview paper](#), Service contacts are defined as “the provision of a service by a PHN commissioned mental health service provider for a client where the nature of the service would normally warrant a dated entry in the clinical record of the client and:

- must involve at least two persons, one of whom must be a mental health service provider, and
- can be either with the client or with a third party, such as a carer or family member, and/or other professional or mental health worker, or another service provider.

##### **10.1.2.5.2. Service Contact - Duration: It is unclear if the expectation is to calculate all occasions of contact for an individual consumer over an entire 24-hour day or every individual contact recorded separately. A 24-hour or full work day summation of time would be useful.**

In general, it is expected that each Service Contact is reported separately. However, PHNs have discretion on how to handle multiple contacts on a single day. The approach taken will depend on how PHNs commission and remunerate service providers. We have assumed that most services will be paid on a service contacts-as-delivered basis, and thus PHNS will want to track these. But where PHNs opt to remunerate at whole-of-episode of care basis, aggregating Service Contact-Duration to whole days may be a more efficient approach.

##### **10.1.2.5.3. Service Contact – No Show: When item “Service Contact - No Show” is selected as “Yes”, it would be useful to capture how that time of appointment was used.**

The creation of the ‘No Show’ item represents a carry-over from the previous ATAPS collection, and was created at the request of the former Medicare Locals to monitor the extent to which this was impacting. As it does not represent a service contact as such, the Department does not believe it to be reasonable to require practitioners to report on how they used the ‘no show’ time.

**10.1.2.5.4. Service Contact – Type:** This item includes limited options of the actual service function delivered e.g., more detailed information - CBT, ACT, DBT, mindfulness etc. These are all grouped under the category of structured psychological

The approach taken in the PMHC MDS is to use a higher level grouping of interventions provided at each contact, designed to provide a simpler set of options for the practitioner to select from. More detailed lists of intervention types, where the provider is required to select from a long list of options, creates 'selection burden' on the provider and has proved of doubtful reliability. The former ATAPS system used a more detailed reporting on interventions, with practitioners reporting on the types of psychological interventions used, but this has not proved to be useful for regional or national purposes.

**10.1.2.5.5. Service Contact – Type: Is it possible to obtain further examples of "structured psychological interventions" and "other psychological interventions"? e.g., where would narrative therapy fit?**

The rationale for this item is explained in the [Overview paper](#), along with definitions of the following major categories:

- Assessment
- Structured psychological intervention
- Other psychological intervention
- Clinical care coordination/liaison
- Clinical nursing services
- Child or youth specific assistance NEC
- Suicide prevention specific assistance NEC
- Cultural specific assistance NEC

Exhaustive inclusion lists are not provided, but structured psychological interventions are indicated to include, but not be limited to:

- Psycho-education (including motivational interviewing)
- Cognitive-behavioural therapies
- Relaxation strategies
- Skills training
- Interpersonal therapy

Narrative therapy would best fit in the category 'Other Psychological interventions', defined as those psychological interventions that do meet criteria for structured psychological intervention.

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## **10.1.3. Questions about Standard Outcome Measures**

### **10.1.3.1. Consumer experience measures**

#### **10.1.3.1.1. Why isn't a measure of consumer experience of services added to the PMHC MDS? This is needed to capture a person centred approach to commissioned services. Is the Department planning on developing a standard measure for use by PHNs?**

The Department has previously acknowledged the importance of capturing consumer experience of service delivery as an essential measure of service quality. Considerable work has been funded by the Department since 2010 to develop the 'Your Experience of Services' (YES) consumer survey instrument that is currently being rolled out in several state and territory mental health services and non-government agencies. However, this instrument will need modification to enable a better fit to primary mental health care services and the Department will give this consideration. It is agreed that a nationally consistent tool is highly desirable.

An important caveat is that, assuming a national tool is developed, any collection would sit outside a routine minimum data set collection. Consumer experience measures are usually offered to consumers on a voluntary, opt-in basis and are completed anonymously in way that is not linked to MDS data. They are also usually collected on a periodic basis (e.g., annually) rather than as a routine requirement of service delivery, unlike standard outcome measures.

Further work on this will be considered as a component of establishing a quality framework for primary mental health care services.

### **10.1.3.2. Alternative outcome measures – for severe mental illness**

#### **10.1.3.2.1. The K10 has been selected as the outcome tool across all populations. Is there scope to include an alternative measure for those with severe mental illness?**

The issues entailed in the specification of mandatory outcome measures are covered in section 4.7 of the [Overview paper](#). Key selection criteria include that the core measures should be meaningful and applicable across all client groups, be capable of being used by all service providers, and reflect the client's perspective – that is, be based on self-report. The K10 is regarded as meeting all these essential elements. An important note is that the K10 is the mandatory measure used by four state and territory jurisdictions' specialised mental health services which predominantly focus on consumers with severe mental illness. Nationally, the K10+ is the consumer self-report outcome measure that has the highest level of consumer uptake across state and territory mental health services.

Each PHN has the capacity to add additional outcome measures to their own regional data collection systems to meet local requirements but these are not necessary for reporting the national data PMHC minimum data set.

### **10.1.3.3. Alternative measures – additional measures set by PHNS**

#### **10.1.3.3.1. Can the measures be extended to include the Depression, Anxiety Stress Scale (DASS) and Modified Scale Suicide Ideation (MSSI)?**

As per [Capturing additional data](#), each PHN has the capacity to add additional outcome measures to their own regional data collection systems to meet local requirements but these are not necessary for reporting the national data PMHC minimum data set.

### **10.1.3.4. Mandatory measures – applicable to all priority areas?**

#### **10.1.3.4.1. Is the K10 and SDQ for children going to be required across all priority areas?**

Yes – noting that the K5 is included as an alternative to the K10 for use with Aboriginal and Torres Strait Islander clients.

### **10.1.3.5. Use of collection reported by Referrer**

#### **10.1.3.5.1. Does the collection occasion date (for the first outcome measure) need to correspond to the first service contact date? It is possible that the referrer may have already completed this measure with the client at time of referral.**

The first Collection Occasion for the outcome measure should correspond as closely as possible to the Episode Start date. If the measure has been collected and reported by the Referrer shortly before this date, it is acceptable for those scores to be used even though it will predate the Episode Start date.

### **10.1.3.6. K5 for Aboriginal and Torres Strait Islander population**

#### **10.1.3.6.1. The definitions document details the K10+, K5 and SDQ as the possible measures but the PMHC MDS overview document only mentions the K10+ for adults and the SDQ for children and young people. Is the K5 recommended for an Aboriginal and Torres Strait Islander population?**

The K5 is included as an alternative to the K10 for use with Aboriginal and Torres Strait Islander clients. A version of the instrument will be made available on the PMHC MDS website. The overview document will be amended accordingly to include the K5.

### **10.1.3.7. SDQ for 2-4 year olds**

#### **10.1.3.7.1. We collect data for younger children using the SDQ 2-4 year olds. Please clarify whether we should continue this, given that the SDQ is listed as covering only 4- 11 year olds.**

There are no mandated measures for children less than 4 years of age simply because there is not yet a nationally agreed standard for this age group. Work is under way to redesign the HoNOSCA but that is not yet complete. PHNs do however have the flexibility to add additional measures to meet local requirements but these are not included in the PMH MDS.

### **10.1.3.8. Multiple collection occasions**

**10.1.3.8.1. It is essential that the PMHC MDS have capacity for numerous outcome measure scores to be recorded against a single episode.**

The new arrangements will allow this. Collection Occasions between Episode Start and Episode End are termed ‘Review’. There is no limit in the number of Review Collection Occasions.

### **10.1.3.9. Outcome measure date**

**10.1.3.9.1. To gather meaningful clinical outcome data, the PMHC MDS needs to allow a date to be added against each measure administered.**

The data item Collection Occasion Date is included in the PMHC MDS to achieve this.

### **10.1.3.10. Low intensity workers**

**10.1.3.10.1. Use of clinical outcome measure for low intensity interventions is questionable given non-mental health professionals will deliver this service.**

The mandated measures are based on consumer self-report rather than clinician-completed. They can be offered and collected by low intensity workers.

### **10.1.3.11. Reporting individual item scores versus subscale totals and total score**

**10.1.3.11.1. The ATAPS system only required totals and subscale scores to be reported but the PMHC MDS requires all individual scores to be reported. This may not be practical for many service providers because it adds a significant reporting burden.**

The PMHC MDS requires individual item scores because these provide a stronger basis for understanding outcomes, and avoid the necessity for providers having to calculate subscale scores (on the SDQ). However, it is acknowledged that this may not be possible in the short term for all providers. Therefore, as a transitional step, reporting overall scores/subscales is allowed. This means:

- For the K10+, providers can either report all 14 item scores or report the K10 total score as well as item scores for the 4 extra items in the K10+.
- For the K5, providers can either report all 5 item scores or report the K5 total score.
- For the SDQ, providers can either report all 42 item scores or report the SDQ subscale scores.

The Department will advise PHNs of when this transitional arrangement will be ceased and individual item scores required for all measures.

Additionally, the Department is giving consideration to developing a web-based reporting arrangement that would allow the client to complete and submit the outcomes data, bypassing the need for practitioners to undertake collection and reporting.

### **10.1.3.12. Statistical significance**

#### **10.1.3.12.1. Please specify whether measured changes should be statistically significant.**

No, the data required for the immediate future by the PMHC MDS are individual item scores, or as noted above, subscale scores and totals. These will be used to derive a range of change indicators.

### **10.1.3.13. MHNIP outcome measures**

#### **10.1.3.13.1. The PHMC MDS requires the K10+, K5 or SDQ to be captured, however for MHNIP the DoH 2015-16 guidelines requires providers to capture the HoNOS. Can we record HoNOS through PMHC MDS?**

The PMHC MDS is designed to monitor and evaluate regional service delivery against key mental health performance indicators. The PMHC MDS does not confine PHNs to the data specified. Rather, it sets the minimum and common ground for what data are to be collected and reported for mental health services commissioned by PHNs. It is anticipated that many PHNs will seek to collect an enhanced set of data to meet local needs, however this data will not be submitted to the MDS. Therefore, a PHN can of course continue to collect additional outcome measures such as the HoNOS in relation to specific service/episode types but this is at their discretion and will not form part of the MDS at this time.

### **10.1.4. Questions about privacy protections and patient consent**

#### **10.1.4.1. Privacy and patient consent**

The Commonwealth Privacy Act 1988 and associated Australian Privacy Principles (APPs) in Schedule 1 of that Act set the overarching requirements for the collection and use of all personal information by organisations and entities involved in the Primary Mental Health Care Minimum Data Set (PMHC MDS). A key feature to the operation of the PMHC MDS is based on obtaining client consent to the collection, use and disclosure of their personal information.

Specific responses to two issues commonly raised are provided below.

##### **10.1.4.1.1. (a) Can PHNs collect the required MDS data?**

Under Australian Privacy Principle (APP) 3, an organisation can collect health information where it is reasonably necessary for its functions or activities, and the individual concerned consents to the collection, or another exception applies.

As commissioners and regional planners, PHNs require a range of data to remunerate service providers as well as monitor overall regional service provision and plan future service improvements. These are all core functions of PHNs and require that PHNs collect and analyse data on what services are delivered, to what clients, at what costs and with what outcomes. Without data, PHNs cannot undertake these functions.

Additionally, most PHNs have set up centralised referral coordination points to which the GP or other referrer forwards client and referral details. This centralised function allows referrals to be processed and services selected to match the client's needs as well as giving the PHN an efficient method for managing demand.

Client consent is critical to the process. While APP 3 includes provision for health information to be collected without consent under the 'health management activities exception', the conditions for this are limited and may not be applicable (see <https://www.oaic.gov.au/engage-with-us/consultations/healthprivacy-guidance/business-resource-collecting-using-and-disclosing-health-information-for-healthmanagement-activities>). Under the previous ATAPS/MHSRRA programs, PHNs set up appropriate consent processes for clients to agree to information being provided to the PHN. For most PHNs, specific forms are available on their websites for use by referrers or health practitioners, including versions that can be downloaded and integrated into GP clinical software, enabling secure electronic transmission to referral triage teams.

Most forms currently available on PHN websites relate only to the former ATAPS program and do not reflect the wider range of services to be delivered from mental health flexible funding. It is therefore recommended that PHNs review and update as required their consent processes to reflect the wider range of services that they are now responsible for commissioning.

#### **10.1.4.1.2. (b) Can PHNs supply the data to the Department of Health?**

Provision of information to the Department is necessary for government to undertake its role in funding, monitoring and planning future national service delivery.

Supply of PMHC MDS data by PHNs to the Department of Health is governed by APP 6 which regulates how an organisation may use and disclose the health information that it collects. Under APP 6, if an organisation collects health information for a particular or 'primary purpose', it generally cannot use or disclose that information for a 'secondary purpose' unless an exception applies. A specific exception under APP6 allows personal information to be used or disclosed for a 'secondary purpose' where there is client consent.

A new item has been added to PMHC MDS to confirm that client consent for data supply to the Department has been obtained. Any records attached to clients for whom the consent flag is not checked as 'yes' will not be passed to the Department.

PHNs should therefore ensure that the consent processes they establish include client consent to the provision of data to the Australian Government Department of Health.

The Department has prepared a set of standard words that can be used, or adapted as necessary, in any locally developed forms. These are available on the resources section of the PMHC MDS website (<https://www.pmhcmds.com/resources/>).

## **10.1.5. Questions about Unique Identifiers and 'Keys'**

PHNs raised a number of queries about the assignment of unique keys. Client Keys must be unique and persistent for an individual across the entire PHN. It is the responsibility of the PHN to derive a format for these fields to be used across their commissioned organisations. Practitioner, Episode, Service Contact and Outcome Collection Occasion Keys will be managed by provider organisations and will be unique at the level of the provider organisation.

An important requirement to note is that Keys (or identifiers) are strings that can have a minimum length of 2 characters and a maximum length of 50 characters. Once assigned keys cannot be changed. The purpose of keys on each of the records is to provide a unique and persistent identifier in order to allow addition, update and deletion of each individual record. Responses to specific questions are provided below.

### **10.1.5.1. Client keys**

#### **10.1.5.1.1. Does the Department have any recommendations for assignment of the Client Key? Can the Department provide any further information regarding the process for allocation of region wide unique client identifiers?**

Client Keys must be unique and persistent for an individual across the entire PHN. It is the responsibility of the PHN to derive a format for these fields to be used across their commissioned organisations.

Some PHNs have or are already implementing centralised client identifier ('key') allocation in order to facilitate services between their contracted provider organisations. For those PHNs without this capability a master client index will be created during [Stage Two](#) of the PMHC MDS implementation. The master client index will facilitate management of the client keys within the PHN independent of the provider organisation.

In the interim it is recommended that at the very least PHNs ensure that Client Keys issued by provider organisations do not overlap.

### **10.1.5.2. Episode keys**

#### **10.1.5.2.1. Could the Department provide further information about the purpose and creation of episode Keys?**

The purpose of keys on each of the records is to provide a unique and persistent identifier in order to allow addition, update and deletion of each individual record without reference to items on that record which might need to change. e.g. correcting a patient key or date. This also applies to the other record types such as client and service contact.

### **10.1.5.3. Manual data entry via MDS interface**

#### **10.1.5.3.1. Do we need to create 'keys' if we intend to enter data directly into the MDS?**

Stage One of the PMHC MDS will only allow upload, not direct data entry. Upload files will either be produced automatically from client systems or by hand via Excel spreadsheet. Therefore, all organisations uploading data to the PMHC MDS will need to provide keys for each record. Where data is being exported from client systems, these keys can be auto generated, provided that a key does not change once it is assigned to an item.

### **10.1.5.4. Practitioner identifiers**

#### **10.1.5.4.1. There is currently a jumble of systems for coding service providers, making it difficult to report against the 'delivered by whom' part of the complex multi-part question posed. How will this be improved?**

The new MDS specifications include separate unique keys for Provider Organisation and Practitioner which are intended to resolve this problem

## **10.1.6. Questions about PHN access to the Data Warehouse**

### **10.1.6.1. Data Warehouse**

#### **10.1.6.1.1. Data entered into PMHC data set will be stored in a national data warehouse. Will all of the information be accessible by PHN's for benchmarking and service development/collaborative purposes?**

PHNs will have access to all de-identified data pertaining to their services but will not have access to the information of other PHNs.

Benchmarking and service development reports will be developed in a subsequent development stage with input from appropriate stakeholders.

## **10.1.7. Questions about Implementation and Support**

### **10.1.7.1. Support to developers**

#### **10.1.7.1.1. Will the Department be providing further support to system developers to ensure that they are able to develop their clinical systems in line with the revised MDS specification?**

System developers will have access to the following resources:

- API documentation online
- Test accounts on both staging and production systems
- Offline data validation for ease of testing extracted datasets
- Access to help desk via e-mail. Telephone support will be provided where the issue can't be resolved via email
- Developer announcement mailing list to notify developers of pending changes and issues

### **10.1.7.2. Staging:**

#### **10.1.7.2.1. We would seek assurance from the Department that there is sufficient lead time for system developers to refine systems in line with these new requirements.**

The Department is aware that developers will need sufficient lead time to make the required system changes and/or additions.

PMHC MDS upload functionality will be separate from the existing ATAPS/MHSRRA MDS. During this initial stage the existing ATAPS/MHSRRA MDS will be kept operational so that ATAPS/MHSRRA organisations can continue to provide data through that system until they are either ready to export data to the new upload interface or until the new data entry interface is available after a later stage of development. Once all ATAPS/MHSRRA organisations are submitting data to the PMHC MDS, the ATAPS/MHSRRA MDS will be shut down. This date has not yet been specified.

Data for services other than ATAPS/MHSRRA will have to be submitted via the PMHC MDS interface.

Organisations should only submit data via one interface, not both.

Data submitted via the existing ATAPS/MHSRRA MDS will be converted and merged with data submitted via the PMHC MDS in order to produce departmental reports.

#### **10.1.7.2.2. Is year one a baseline data gathering year as opposed to there being any expectation to manage providers against levels of activity not fully understood due to the extended MDS requirements?**

The Department is aware that 2016-17 is a transitional year and will not provide sufficiently comprehensive data to serve as a baseline for monitoring future activity. 2017-18 is expected to serve as the baseline year for comprehensive data collection.

### **10.1.7.3. Support to PHNs to engage providers**

#### **10.1.7.3.1. Can the Department offer assistance to PHNs in terms of creation of a spreadsheet suitable for storing and uploading collected data**

Yes – Excel data entry templates for submission are provided on the PMHC MDS website. Visit Upload Specifications [File format](#).

#### **10.1.7.3.2. Will there be further clarification on how PHNs will be expected to report on provider performance to allow engagement on how best to undertake the change process?**

See responses to [Questions about Standard Reports](#).

**10.1.7.3.3. PHNs would desirably see the actual mechanics of the MDS hands-on prior to wider release. Successful roll-out will depend on how well PHNs are able to communicate and support providers. We suggest the department conducts PHN specific webinars and training for key nominated staff**

Online support documentation is currently being created around the data specification and online portal. In addition, the Department is currently in negotiations with external providers to supply ongoing support and training for the system. Further details of these arrangements will be made available subsequent to the finalisation of these arrangements.

#### **10.1.7.4. Data capture via the web-based portal**

**10.1.7.4.1. With the data being submitted via the web based portal – does the web based portal also allow PHN's to use this as their data capture tool as well?**

During the initial stage of implementing the PMHC MDS, PHNs and their service providers will be able to either export data from their client systems and upload to the PMHC MDS or manually create spreadsheets that can then be uploaded. Data may be uploaded in either Excel or CSV format.

During phase 2 a full data entry capacity will be added. This is expected to be ready for the 2017-18 financial year.

### **10.1.8. Questions about Standard Reports**

#### **10.1.8.1. Provider Organisations and Practitioners**

**10.1.8.1.1. The documentation indicates standard reports will be designed to meet PHN and departmental requirements. Will a Provider organisation or Practitioner be able to receive reports for their respective service provision?**

The Department will be planning a range of standard reports and will consult with PHNs about their requirements. Standard Reports are expected to be developed for [Stage Two](#).

#### **10.1.8.2. Benchmarking reports**

**10.1.8.2.1. Are the PHNs going to receive reports on collated data and benchmarked against other PHNs for QI purposes?**

The Department will be planning a range of standard reports and will consult with PHNs about their requirements. Standard Reports are expected to be developed for [Stage Two](#).

## **10.1.9. Miscellaneous Questions**

### **10.1.9.1. Clients/consumer terminology**

**10.1.9.1.1. The terms 'patient', 'client' and 'consumer' are used interchangeably in the documentation. Consultation indicates a preference for the term "consumer".**

The Department acknowledges the importance of language in describing those who use mental health services and that 'consumer' is the current preferred term in the sector. However, for the purpose of specifying the PMHC MDS, the term 'client' is used in the technical specifications. This does not imply that the term 'consumer' should not be used in PHN communications with stakeholders.

### **10.1.9.2. Provisional Psychologists**

#### **10.1.9.2.1. Can provisional psychologists provide services under supervision in priority area 3?**

Provisional Psychologists fall within the broader Practitioner category of 'low intensity workers'. These are defined as "individuals with appropriate competencies but who do not meet the requirements for registration, credentialing or recognition as a mental health professional". The deployment of low intensity workers is at the discretion of PHNs, but of course depends on suitable clinical supervisory arrangements being in place.

### **10.1.9.3. Referrer postcode**

#### **10.1.9.3.1. It would also be useful to collect the postcode of the referrer to understand referral patterns across and within regions.**

Referrer postcode is not regarded as essential for the national data and thus not included in the PMHC MDS. However, PHNs have the discretion to add this as additional information collected at regional level.

### **10.1.9.4. Multiple episodes**

**10.1.9.4.1. When patients receive services under multiple funding areas is the data recorded against a separate episode of care for each service? For eg: a young person is receiving care through a headspace site (priority area 2) yet has an acute episode and requires services for a follow up around a suicide attempt- (Priority area 5) is the MDS data uploaded against both priority areas?**

The business rules for Episodes are stated in the MDS specifications. Episodes are defined at the level of the Provider Organisation, not the funding source. A client can only have one episode at a time **for any given Provider Organisation**. Of course, if two Provider Organisations are delivering services simultaneously, one episode would be created by each Provider Organisation.

Each Episode is classified according to a single 'Principal Focus of Treatment Plan'. This may be changed in the course of an episode if the original code entered changes during the course of treatment.

## **10.1.9.5. Data collection responsibility**

### **10.1.9.5.1. Does the referrer or clinical provider collect the sociodemographic and clinical data? If the former, this may not be acceptable to GPs**

While referrers will continue to provide some information as part of the referral process, it is the responsibility of the Practitioner and Provider Organisation to ensure the integrity of data submitted to the PMHC MDS. Most of the data required would normally be collected as part of the assessment process by the Practitioner. GPs are not expected to provide the full set of sociodemographic data.

## **10.2. System Frequently Asked Questions**

### **10.2.1. Accessing the PMHC Minimum Data Set**

#### **10.2.1.1. What internet browser should I use?**

You can access the PMHC MDS using the following browsers:

- Chrome (version 30+)
- Firefox (version 38+)
- Internet Explorer 11
- Safari 8 +

#### **10.2.1.2. How do I get started using the MDS?**

Each individual staff member should be set up with their own unique login access. Generic login accounts are not encouraged to be set up and used within the PMHC MDS, and usernames/passwords should not be shared with other individuals. This process ensures that when a staff member leaves, their access can be easily disabled and it doesn't affect other users or the security of the organisation's data. A user's account, should not be passed from one staff member to the next.

Refer to [How do I obtain access to the PMHC MDS?](#) for information on getting an account on the MDS.

The PMHC website is available at <https://pmhc-mds.com/>. Here you will find documentation on using the MDS.

The MDS is accessed on the web at the following address: <https://pmhc-mds.net/>

#### **10.2.1.3. How do I obtain access to the PMHC MDS?**

Access to the PMHC MDS is based around roles. Each role allows a user to perform specific tasks. A user can have more than one role. Each role is granted for a user against an organisation. An organisation can either be a Primary Health Network (PHN) or a Provider Organisation. If a user is granted a role for a PHN they will also have this role for any Provider Organisations of that PHN. A user can be invited to have a role at more than one organisations.

See [Users Roles](#) for a summary of each of the roles that currently exist within the PMHC MDS.

User accounts can be created by a user at your PHN or Provider Organisation who has the User Management role. If unsure who this is, please contact [support@pmhc-mds.com](mailto:support@pmhc-mds.com) to find out who has this access.

Alternatively, if you cannot contact any users who have the User Management role access can be gained by producing a [letter of authority](#).

#### **10.2.1.4. What is required for the Letter of Authority?**

The protocol for setting up a new account to access the MDS requires a written letter of authority. A [letter of authority](#) is a request made on your Primary Health Network or Provider Organisation's letterhead which must be signed by an authority at the Primary Health Network or Provider Organisation who holds a position that is higher than the person for whom the account is being created (i.e., the person's manager or the CEO).

This letter must contain the following details (for the person for whom the MDS access is being requested):

1. Name.
2. Email address.
3. Contact telephone number.
4. Mobile phone number.
5. The exact Primary Health Network or Provider Organisation's name in the MDS you are seeking to access.
6. The roles required for the user. The user can have any combination of these roles. (See [Users Roles](#) for a summary of each of the roles that currently exist within the PMHC MDS.)

This letter must be faxed or scanned then emailed to:

- Strategic Data Fax: (03) 9340 9090
- PMHC Helpdesk Email: [support@pmhc-mds.com](mailto:support@pmhc-mds.com)

The same protocol applies if an MDS user no longer requires MDS access and needs to hand over their MDS access to another person. However, in this case it is advised that the new MDS user has a new username and password issued to protect the privacy and security of the organisation's data.

This process will also apply where a user is requesting a password re-set. However, the auto [password recovery](#) process available to you via the MDS login screen is the preferred method of password retrieval.

This process will also apply where a user is requesting an update to their details. However, the [Updating your details](#) process available to you via the MDS login screen is the preferred method for a user to update their own details.

#### **10.2.1.5. What can a user see in the MDS?**

What you see once you login will depend upon what roles you have been assigned.

Refer to [Users Roles](#) for more information.

#### **10.2.1.6. I do not have a work mobile. What do I do?**

A user can use their personal mobile. Users' mobile phone numbers are not listed or able to be viewed by other users within the PMHC MDS.

The mobile is only used by the PMHC MDS profile management system to deliver the verification code via SMS. This is used to activate their profile, reset their password or if a password is forgotten or expires.

Refer to [How can I recover my password or username?](#)

#### **10.2.1.7. Can I invite different users by using the same mobile?**

It is not advised for multiple PMHC users to share using the same mobile number.

Refer to [I do not have a work mobile, letter of authority](#) and [How can I recover my password or username?](#)

#### **10.2.1.8. Can I pass on my username and password to my organisation's IT person or evaluator if they are entering data?**

No, each user should be issued with their own username and password.

Refer to [How do I obtain access to the PMHC MDS?](#)

#### **10.2.1.9. Can I add an existing user to another PHN or Provider Organisation?**

Yes, a user can have role/s at more than one organisation.

By ensuring you enter the same email and mobile number when completing the invitation steps in [Adding an existing user](#), the system will automatically pick up if a user already exists in the PMHC MDS and will grant them access to the additional organisation.

#### **10.2.1.10. Why did I get this message when inviting a user - '500 Internal Server Error: Inviting user failed: An outstanding PMHC MDS invite exists'?**

This user has previously been invited and has not yet completed the required steps for [Accepting an invitation to become a PMHC MDS User](#). An invitation will be valid for 7 days and you can not resend an invitation within this time whilst a token is still valid.

Why are you trying to re-invite this user? For further assistance refer to:

- [What should I do if a user didn't receive the email invitation?](#)
- [What should I do if a user didn't receive the invitation SMS token?](#)

- [What should I do if a user deleted the email invitation or the SMS token?](#)
- How can I change the users roles? When the user has accepted the invitation you will be sent an email and after this you can then [Editing a user's roles](#).

#### **10.2.1.11. What should I do if a user didn't receive the email invitation?**

You will not be able to re-invite this user using the same email within 7 days, as an [outstanding PMHC MDS invite exists](#).

Firstly confirm that you have their correct email address. Ask the user to double check their junk mail folder and search for an email sent from [noreply@strategicdata.com.au](mailto:noreply@strategicdata.com.au). Otherwise, please contact the Helpdesk on [support@pmhc-mds.com](mailto:support@pmhc-mds.com).

If an incorrect email was entered, you will be able to re-invite the user using the correct email.

#### **10.2.1.12. What should I do if a user didn't receive the invitation SMS token?**

You will not be able to re-invite this user within 7 days, as an [outstanding PMHC MDS invite exists](#).

Firstly confirm that you have their correct mobile phone number. If an incorrect number was entered, please contact the Helpdesk on [support@pmhc-mds.com](mailto:support@pmhc-mds.com) as we can reissue it to the preferred number. When contacting please inform the Helpdesk of both the incorrect number, along with the correct number where possible.

See [What should I do if a user deleted the email invitation or the SMS token?](#)

#### **10.2.1.13. What should I do if a user deleted the email invitation or the SMS token?**

You will not be able to re-invite this user within 7 days, as an [outstanding PMHC MDS invite exists](#).

If a user deleted the email invitation or the SMS token please contact the Helpdesk on [support@pmhc-mds.com](mailto:support@pmhc-mds.com) as we can reissue it.

#### **10.2.1.14. Can GPs or Mental Health Providers (MHPs) access the MDS to upload data themselves?**

Yes, GPs and MHPs can access the MDS to upload their data directly into the system. However, it is not possible to limit their data access to the select data fields that they would normally manage. For example, MHPs would normally only need to enter or edit their own client information and the episodes and service contacts associated with these clients.

However, it is not possible to restrict their access only to their own clients' data. They will be able to modify data for clients across their entire provider organisation. Therefore, MHPs who access the MDS could potentially change data for a client that is not their own.

Refer to [Users Roles](#).

#### **10.2.1.15. I'm a third-party software developer developing software to assist with uploading data to the MDS. Can I have an account to test my data uploads?**

Yes, we can supply you with an account that has access to a test Primary Health Network. In order to set up the test Primary Health Network account we need to follow a similar procedure to setting up a proper Primary Health Network account, by producing a [letter of authority](#).

On company letterhead, this letter must be signed by an authority at your company who holds a position that is higher than the person for whom the account is being created (i.e., the person's manager or the CEO).

This letter must contain the following details (for the person for whom the MDS access is being requested):

1. The name of the person the account is for
2. The email address of the person
3. Contact telephone number
4. Mobile phone number
5. Request access to the 'Test [Your Company Name]' Organisation

This letter must be faxed or scanned then emailed to:

- Strategic Data Fax: (03) 9340 9090
- PMHC Helpdesk Email: [support@pmhc-mds.com](mailto:support@pmhc-mds.com)

Base your letter on the details listed in [What is required for the Letter of Authority?](#)

#### **10.2.1.16. Can I have an account to test adding data and for training new staff?**

Yes, there is a Developers PMHC MDS website available for testing and training purposes for PHNs, Provider Organisations and third-party developers.

To set up an account on <https://developers.pmhc-mds.net/> please provide us with a 'Letter of Authority' on your organisation's letterhead, similar to the one outlined for third-party software developers.

See: [I'm a third-party software developer developing software to assist with uploading data to the MDS. Can I have an account to test my data uploads?](#).

#### **10.2.1.17. I forgot my password. What do I do?**

See [Forgotten or Expired Password](#).

### **10.2.1.18. How can I update my user details?**

If your email address or mobile number has changed, it is important that you update your account. See [Updating your details](#).

If you can't access your profile, contact the PMHC Helpdesk so that your records can be updated. When contacting the PMHC Helpdesk you will be asked to arrange for a [letter of authority](#) stating the change(s)

Refer to [What is required for the Letter of Authority?](#)

### **10.2.1.19. How can I recover my password or username?**

The system offers an automated password/username recovery feature. The system will email the registered email address on your account and send an SMS to the registered mobile phone on your account.

See [Forgotten or Expired Password](#) for instructions on resetting your password.

It is important to keep your email address and mobile phone current so that you can make use of this facility. If you can no longer access the PMHC MDS please email the PMHC MDS Helpdesk at [support@pmhc-mds.com](mailto:support@pmhc-mds.com) to update your email address/mobile phone.

Please note, when contacting the PMHC Helpdesk you will be asked to arrange for a [letter of authority](#) stating the change(s) required. Refer to [What is required for the Letter of Authority?](#)

## **10.2.2. Entering data in the PMHC Minimum Data Set**

### **10.2.2.1. What is the best way to manage the client key?**

The Client Key needs to be stable for each individual within the Provider Organisation.

Initially the PHN may decide to play a role in coordinating assignment and management of these keys for Provider Organisations, prior to the PMHC MDS implementation a Master Client Index during [Stage Two](#) of development.

See data specifications for [Identifier management](#).

### **10.2.2.2. Can you suggest a best practice approach to managing client keys?**

We understand that PHNs and Provider Organisations will approach [Identifier management](#) in various different ways to best suit their practice. PHNs may decide to manage client keys until the Master Client Index is developed and released in [Stage Two](#). In the interim, we suggest speaking with your PHN or another Provider Organisation in your network to understand their approach to managing their client keys.

Refer to the Department's response to [Questions about Unique Identifiers and 'Keys'](#).

### **10.2.2.3. Why can't we use the SLK as the client key?**

The Client Key is required to be a unique client identifier. The SLK isn't a unique key and therefore not suitable to be used as the Client Key.

Refer to data specifications for [Identifier management](#).

### **10.2.2.4. How will the Master Client Index work?**

The previous PMHC MDS specification requires a Client Key that is unique and stable at the PHN regional level, not at the Provider Organisation level. The purpose of the Master Client Index is to help PHNs and their Provider Organisations manage client information across the PHN region. This requirement has proven problematic for PHNs and is being worked through by the PMHC MDS Working Group.

To determine what issues exist with managing the client key and possible solutions, nine PHNs worked with Strategic Data to describe their models for triaging patients, the information systems being used by PHNs and Provider Organisations, the ease of updating information systems and resources available for manual reconciliation of clients.

As a result of this work, a Master Client Index is not possible at this time, and as such, will not be a requirement for full compliance from 1 July 2017.

See [Master Client Index](#).

### **10.2.2.5. How often should I enter data into the MDS?**

Refer to [Reporting timeliness](#).

### **10.2.2.6. Can I enter fictitious data as a part of testing?**

The MDS is live and data uploads will be recorded. Real PMHC data can be trialled by uploading in test mode, whereas fictitious data should be trialled with a 'Test Organisation' on [developers.pmhc-mds.net](https://developers.pmhc-mds.net).

See [PMHC Developers Announcement](#).

### **10.2.2.7. How do I find or create a Client's Statistical Linkage Key (SLK)?**

If you don't have an internal system that can provide you with the client's SLK, an SLK generator is available within the client data entry forms. Refer to the online User Guide [Adding a New Client](#).

There is also a manual Statistical Linkage Key Generator available on the PMHC MDS website, under the SLK tab - <https://pmhc-mds.net/#/slk>. See [SLK](#).

### **10.2.2.8. How do I find what the Episode Key, Service Contact Key and Outcome Collection Occasion Key is?**

The [Episode Key](#), [Service Contact Key](#), and [Outcome Collection Occasion Key](#) are the system [unique identification keys](#) that will need to be manually created and managed by your Provider Organisation.

Each record needs to be assigned a stable unique key within the Provider Organisation, in order to facilitate adding/updating/deleting each item when entering data.

See data specifications for [Identifier management](#).

### **10.2.2.9. How do I find what my Practitioner Key is?**

The Practitioner Key is one of the system [unique identification keys](#) that will need to be manually created and managed by your Provider Organisation.

Data Entry users can add a Practitioner once they know their key. Refer to the online User Guide [Adding a Practitioner](#).

### **10.2.2.10. How can I edit a record's identifying key?**

Each record needs to be assigned a stable unique key within the Provider Organisation, in order to facilitate adding/updating/deleting each item when entering data.

You can edit a record's identifying key you have entered within the data entry interface. There is an edit key button available when editing a records details.

See:

- [Editing a Practitioner Key](#)
- [Editing a Client Key](#)
- [Editing a Episode Key](#)
- [Editing a Service Contact Key](#)
- [Editing a Collection Occasion Key](#)

### **10.2.2.11. How do I enter a referral?**

A referral can be entered as an [Episode](#).

An Episode does not need to be concluded if the client requires as a new referral. If the treatment continues with a client, the service contacts can continue to be recorded to the original Episode until treatment is formally concluded either clinically or administratively.

Refer to the online User Guide [Episodes](#).

### **10.2.2.12. How do I enter a K10+, or K5?**

These measures tools, K10+ and K5, are entered as an [Outcome Collection Occasion](#).

Refer to the online User Guide [Outcome Collection Occasions](#).

### **10.2.2.13. How do I enter a SDQ measure?**

The SDQ development for the Data Entry Interface is on hold, as the Department is currently in licensing negotiation with the SDQ developers to be able to add the complete SDQ online form to the PMHC MDS. Refer to [Data Entry Interface Development](#).

The SDQ paper version is still able to be used and once the development is released can be entered through the Data Entry Interface.

In the interim, however you can currently add the SDQ subscales through the Data Entry Interface - See [Adding a Client's Outcome Collection Occasions data](#).

### **10.2.2.14. How can I delete a record I incorrectly entered?**

You can delete a record you have entered within the data entry interface. There is a delete button available when viewing a records details.

However, if the record you are trying to delete has any dependant records, you will not be able to proceed with deleting the parent record until all the related dependant records have been edited or deleted.

See:

- [Deleting a Practitioner](#)
- [Deleting a Client](#)
- [Deleting an Episode](#)
- [Deleting an Service Contact](#)
- [Deleting an Outcome Collection Occasion](#)

### **10.2.2.15. Can I go back and enter information if I don't have it at the time?**

Yes, the MDS allows you to go back and enter information at a later date.

When data in the upload has the same identification key as recorded in the MDS, (eg Client, Practitioner, Episode, Service Contact, and Outcome Collection Keys) the data will automatically be updated for these files. The number of files present, created, and updated, are summarised on the successful upload notification email.

Refer to upload specification [File format](#).

#### **10.2.2.16. Do I enter a Service Contact when a client doesn't show up for the session?**

Yes. A Service Contact record has a 'No Show' field and selecting the value 'Yes' indicates that the intended participant(s) failed to attend the appointment.

Some of the other Service Contact fields have a 'no show' option available to be selected. For any other Service Contact fields, please enter the response that would have been entered if the participant had attended the session.

You can decide to enter as much information as possible within a no show form, as long as it meet the 'No Show' validation guidelines for a service contact.

Refer to [Service Contact](#).

#### **10.2.2.17. If the client is referred elsewhere (e.g. not suitable for this service) should this be recorded?**

This decision depends upon your local guidelines.

Under the new PMHC MDS, an episode does not formally commence until the client receives their first Service Contact. For referrals that do not lead to a Service Contact, and where the person is referred elsewhere, there is no need to open an Episode.

However the Department understands that many PHNs are likely to want to do this as a means to track referrals that do not lead to Service Contacts, or to begin entering data prior to the first Service Contact. Therefore, there is scope in the system to set up an Episode even it does not lead to a Service Contact. Standard reports to be developed will build in capacity to monitor these and ensure that they are not counted in service delivery indicators.

Where a referral is followed by an initial Service Contact, and the person is referred elsewhere due to being assessed as not suitable, or requires an alternative service, a new code for Episode- Completion Status has been added ('Episode closed administratively - client referred elsewhere').

#### **10.2.2.18. Why is an episode showing as uncommenced?**

The episode definition states that 'Episodes commence at the point of first contact. The episode start date will be derived from the first service contact date.'

When an episode does not have any service contacts added yet, it does not have a start date and the system will report it as 'Uncommenced'.

Refer to [Episode](#).

### **10.2.2.19. How can I close an episode?**

To close an episode, you can edit a Client's Episode details and enter an 'Episode - End Date' and update the 'Episode - Completion Status' value.

Refer to [Editing a Client's Episode data](#).

### **10.2.2.20. What do I do if the GP / mental health provider has not given an answer to one or more questions in the minimum dataset?**

Provider Organisations should make every effort to ensure that the data entered into the MDS is as complete as possible. However, most data items specify a 'Missing' response. Where information is unavailable, please use this response item. The aim is to minimise missing data as much as possible.

Refer to [Record formats](#) for more information. By clicking on the field name this will take you to the field definition which outlines the associated notes that provide guidance on which response to use.

### **10.2.2.21. What are the options where the information collected does not fit into the available fields?**

Each data item has associated notes that provide guidance on which response to use. By clicking on the [Record formats](#) field name this will take you to the field definition which outlines the associated notes.

Refer to [Record formats](#).

### **10.2.2.22. The PHMC MDS specifications seems limited. Can we capture and record additional data?**

PHNs can choose to capture and record additional data outside the PMHC MDS.

See [Can the PMHC MDS capture and record additional data?](#).

### **10.2.2.23. Where do I enter MHNIPS data collection?**

The Department of Health is expecting all commissioned Mental Health Nursing services data from July 2016 to be entered into the PMHC MDS.

Refer to the Department's response to [Are services previously delivered under MHNIP expected to collect the PHMC MDS?](#).

### **10.2.2.24. I have an error message but no idea what it means or how to fix it. What should I do?**

Refer to [Record formats](#) for more information. By clicking on the field name this will take you to the field definition which outlines the associated notes that provide guidance on which response to use. It will also inform you if there are any interrelated field requirements that can cause data errors.

If still unsure, please email the PMHC Helpdesk on [support@pmhc-mds.com](mailto:support@pmhc-mds.com) and provide a description of where the error occurred, a screenshot if possible, and the error log number. The error log number is displayed at the end of the error message, eg [BVDS105Q], and is very important for the Helpdesk to quickly identifying the error and to provide you with a clear response on how to rectify the data issue.

### **10.2.3. Uploading data**

#### **10.2.3.1. How do I obtain a template to upload my data to the MDS?**

Upload templates are available from [Upload specification](#).

#### **10.2.3.2. What do I do if I have collected the data in Excel or Access?**

Visit the online MDS documentation regarding uploads were a detailed User Guide for data uploads is available.

See [Upload specification](#).

#### **10.2.3.3. Should an upload file only contain new or changed data or should it contain all cumulative data from the start of service delivery?**

All data should be uploaded for the first upload, but subsequently only new or changed data should be uploaded. However, parent records of new or changed data also need to be uploaded in order to keep the file internally consistent.

An example of what this means is that if a service contact record is added or changed, there must be a corresponding episode record in the episode file and a client record in the clients file, even if the episode and client data hasn't changed. Also, as service contacts refer to practitioners, there must also be a practitioner record in the practitioner file.

#### **10.2.3.4. How can I edit a record I have previously uploaded?**

There is a unique identifying key associated with every record in the PMHC MDS. When you upload a record with the same unique identifying key with updated data, then the MDS will recognise this record's key and update the data already recorded in the system.

When an upload is completed successfully, you will see a summary of the updated records shown in the 'Upload Change Summary' table displayed in the View Upload Details for complete uploads. See [Complete uploads](#).

#### **10.2.3.5. How can I delete a record I have previously uploaded?**

You can delete records via upload.

Please refer to [Deleting records](#).

#### **10.2.3.6. How can I review why the status of my upload file shows error?**

If the status of your file shows error, you can view the returned errors through [Viewing Previous Uploads](#).

Refer to [Error messages](#).

#### **10.2.3.7. How can I view my uploaded data?**

When an upload is completed successfully, you will see a summary of the updated records shown in the ‘Upload Change Summary’ table. See [Complete uploads](#).

If you have the Reporting role, you can produce system reports or extract recorded data. See [Reports](#).

#### **10.2.3.8. How do I upload the individual CSV files?**

The CSV files must be compressed into a single file by zipping before upload. The filename of the zip file doesn’t matter as long as it has the file extension .zip All the required CSV files must be included for each upload, even if the file contains no data. If choosing to include any optional CSV files, these must be included with the required files in the single upload zip file.

See [Upload specification](#).

#### **10.2.3.9. How do I fix upload file errors?**

Refer to [Correcting upload errors](#).

#### **10.2.3.10. How do I fix data errors in an upload?**

Refer to [Record formats](#) related to column name for each error. By clicking on the field name this will take you to the field definition which outlines the associated notes that provide guidance on which response to use.

If still unsure, please email the PMHC Helpdesk on [support@pmhc-mds.com](mailto:support@pmhc-mds.com) and provide a copy of the error email, and/or a screenshot if possible. The error email is very important for the Helpdesk to quickly identifying the error and to provide you with a clear response on how to rectify the data issue.

#### **10.2.3.11. Has my data uploaded if my file has an error status?**

No. Only ‘Complete’ uploads that are not in test mode, are recorded in the PMHC MDS.

See [Viewing Previous Uploads](#).

#### **10.2.3.12. Will valid data be accepted if there are errors in the file?**

For example, if we upload 200 lines of service contacts, and there are validation errors in 10 lines - will 190 lines be accepted?

No. All files and records in an upload have to validate before any data is accepted.

#### **10.2.3.13. If validation rules change how will you treat legacy data?**

When implementing new validation rules or changing existing rules, where possible we prefer to enforce the new rules as of a certain date.

For example, if a data field that is now optional where to be made mandatory, we would specify that it was mandatory as of a particular date. For any data previous to that date the field could still be optional, but for any data after that date the field would be mandatory.

#### **10.2.3.14. I am receiving an upload error that has a code that is not in my records. What should I do now?**

We have implemented an upload error log that reports when an error is not providing the relevant details. The error log code will be reported to the user after the error message, for example [ABC123ZY]

The [AW97AZRX] error code refers to our internal error log. With this error code, we will be able to quickly source you the relevant key details for this record. And this error log is also reviewed by our developers to diagnose and fix the specific error to ensure that the system reports the relevant details/keys for future uploads.

If you receive this types of errors message, please email the PMHC Helpdesk on [support@pmhc-mds.com](mailto:support@pmhc-mds.com) and provide a copy of the entire error message along with the error code.

#### **10.2.3.15. I am receiving an unknown error in my records. How can I fix this?**

If you receive an 'unknown error' message, please email the PMHC Helpdesk on [support@pmhc-mds.com](mailto:support@pmhc-mds.com) and provide a copy of the error email, and/or a screenshot if possible. The error email is very important for the Helpdesk to quickly identifying the error and to provide you with a clear response on how to rectify the data issue.

#### **10.2.3.16. Why am I receiving an error saying I don't have permission to upload organisation data?**

If you receive an error message stating 'Upload file contains organisations data, but user doesn't have Organisation Management role' you do not have permission to upload organisation data. (The Organisation Management role is only available for PHN users - see [Users Roles](#))

The 'Organisations' data is optional and does not need to be included in an upload file. Please delete the 'Organisations' worksheet/file from your upload.

### **10.2.3.17. Why am I receiving an error saying 'Could not find worksheet [Name]'?**

This error occurs when you are uploading an Excel spreadsheet. The worksheet names need to exactly match the name in the 'Excel worksheet name' column of the 'Summary of files to upload' table at [Files or worksheets to upload](#). If all the required worksheets are not present you will receive the error above.

### **10.2.3.18. Why am I receiving an error saying 'Invalid version line in worksheet [Name]'?**

The top line of the worksheet must include the following columns:

|         |     |
|---------|-----|
| Version | 1.0 |
|---------|-----|

### **10.2.3.19. Why am I receiving an error saying 'Column [Name] is not valid'?**

Each item is a column in the file/worksheet. The 'Field Name' should be used for the column headings. These values can be found at [File format](#), or listed on the provided example file at [Files or worksheets to upload](#). If the Column [Name] doesn't match identically you will receive the error above.

### **10.2.3.20. Why am I receiving an error saying 'Organisation\_path is not valid on row ....'?**

The organisation path provided does not map to a valid organisation. The format should be a combination of your PHN key and the provider organisation key, separated with a colon. Example PHN\_key:POrg\_key. If the organisation path doesn't match identically you will receive the error above.

### **10.2.3.21. Why am I receiving an error saying 'Invalid version number on row 1'?**

You need to record a valid version number on row 1, in column 2. Column one will include the word Version, Column two should include a number. We are currently only accepting Version 1, or Version 1.X eg 1.0 or 1.1 . If the version number doesn't match identically you will receive the error above.

### **10.2.3.22. Why am I receiving an error saying 'Column [Name] is required on row ...'?**

There is a required field that has not been entered. If not supplied, insert the default 'Missing' or 'Not recorded' value. These values can be found at [Record formats](#). If the Column [Name] is blank in a mandatory field you will receive the error above.

### **10.2.3.23. Why am I receiving an error saying 'Invalid file ...'?**

The system is having trouble identifying your upload file. Please provide a copy of your upload file to [support@pmhc-mds.com](mailto:support@pmhc-mds.com).

### **10.2.3.24. Why am I receiving an error saying 'Could not parse worksheet [Name]: Bad request at ...'?**

Something has gone wrong with the upload. Please contact [support@pmhc-mds.com](mailto:support@pmhc-mds.com).

## **10.2.4. Capturing additional data**

### **10.2.4.1. It seems that the data being collected is quite limited, would it not be useful to collect more detailed information?**

The development of the minimum dataset balanced the ideal against what was realistic, given that any additional data item places extra burden on those collecting and entering data.

Organisations may collect extra information for their own analysis however this information does not need to be submitted to the PMHC MDS.

Refer to [What are the options where the information collected does not fit into the available fields?](#)

### **10.2.4.2. The information collected does not fit into the available fields. Can we add another option?**

The development of the minimum dataset balanced the ideal against what was realistic, given that any additional data item places extra burden on those collecting and entering data.

See [What are the options where the information collected does not fit into the available fields?](#) and [Can the PMHC MDS capture and record additional data?](#)

### **10.2.4.3. Can the PMHC MDS capture and record additional data?**

The PMHC MDS is designed to monitor and evaluate regional service delivery against key mental health performance indicators and can not capture and record additional data outside the [Data model](#).

The PMHC MDS does not confine PHNs to the data specified. Rather, it sets the minimum and common ground for what data are to be collected and reported for mental health services commissioned by PHNs.

It is anticipated that many PHNs will seek to collect and manage an enhanced set of data to meet local needs, however this data will not be submitted to the MDS.

Refer to [It seems that the data being collected is quite limited, would it not be useful to collect more detailed information?](#)

## **10.2.5. Checking data**

### **10.2.5.1. Who should be checking data?**

Each individual organisation is responsible for checking their data in the MDS to confirm its accuracy and completion. It is advisable that this review is undertaken regularly to ensure data integrity and avoid widespread errors.

### **10.2.5.2. How can I run a report?**

If you can see the reports tab you will be able to run a report.

Refer to [Reports](#).

### **10.2.5.3. How can I view the rules of a report?**

Each report has its own rules. If you are not sure what data is displayed in a report, please click on the 'Counting Rules Explained' link displayed after running a report.

Refer to [How to produce a report](#).

### **10.2.5.4. What are the types of system reports?**

The reports are grouped into different categories, each designed to serve different purposes.

Refer to [Types of System Reports](#)

### **10.2.5.5. How can I view all data?**

To access your data in full, you can download your data.

Refer to [Data Extract](#).

## **10.2.6. Storing data relating to the minimum dataset system**

### **10.2.6.1. After entering data in the MDS how long should I store my hardcopy and/or electronic files?**

There is no set time limit; however, it is recommended that you archive this data and keep it secure for at least two years. As with all electronic data (including MDS) there is a risk of corruption - whether it is due to a system bug or human error. The MDS stores the original upload files as well as the data that has been imported into the database, however it is always good to keep the original data as a backup to either check details against or re-enter, if needed.

## **10.2.7. Development of the PMHC Minimum Data Set**

### **10.2.7.1. Stage Two**

#### **10.2.7.1.1. When is Stage Two of development going to be implemented?**

Stage Two development has been split into several components as outlined below:

- [Data Entry Interface](#)

- [Reporting](#)

Regularly check the announcements on the [PMHC MDS home page](#) to keep informed of development releases.

#### **10.2.7.1.2. Data Entry Interface**

In order to get Data Entry functionality to PHNs as soon as possible, the development of this feature was split into several components.

The remaining features will be rolled out iteratively over the following months, and will be:

- SDQ Data Entry Interface (Currently development is on hold until the Department finalises licensing requirements)
- Develop pre-filled fields for interrelated field specifications
- Ability to merge duplicate client records
- An Online K5, K10+, and SDQ Outcome Measures Self-Service Interface

Regularly check the announcements on the [PMHC MDS home page](#) to keep informed.

#### **10.2.7.1.3. Reporting**

The following reports will be rolled out iteratively over the following weeks:

- Category D reports: Key Performance Indicators

The Department will consider local reporting requirements in the next phase of reviewing current reporting functionality.

The [Types of System Reports](#) that are currently available are:  
\* Category A: Monitoring progress of MDS implementation  
\* Category B: Monitoring overall service delivery  
\* Category C: Monitoring implementation of stepped care  
\* Category E: Reports for data managers to monitor data supply

Regularly check the announcements on the [PMHC MDS home page](#) to keep informed on development updates.

#### **10.2.7.1.4. Master Client Index**

Current development for the Master Client Index is on hold.

Refer to the recent Department announcement on the [INFORMATION and ACTION: PHN CEO - Primary Mental Health Care Minimum Data Set Update | June 21, 2017](#).

### **10.2.8. PMHC mailing list**

### **10.2.8.1. How can I be advised of any changes to the MDS?**

When changes are made to the MDS we alert all users via an email list. MDS users are automatically added to this list, however sometimes other Primary Health Network or Provider Organisation staff who do not have accounts wish to be informed of updates.

If you would like to be added to the mailing list please email [support@pmhc-mds.com](mailto:support@pmhc-mds.com).

### **10.2.8.2. I have an MDS account but don't receive update emails.**

Please check that we have your correct email address. Refer to [Updating your details](#)

Mailing list emails will be sent from [support@pmhc-mds.com](mailto:support@pmhc-mds.com). Please make sure this is not being caught in any spam filters.

### **10.2.8.3. I no longer wish to receive PMHC update emails. How can I be removed from the list?**

Please email [support@pmhc-mds.com](mailto:support@pmhc-mds.com) and ask to be removed from the mailing list.

### **10.2.8.4. I am a third-party software developer developing code to assist with uploading data to the MDS. Can I be informed of updates to the MDS?**

Yes, we have a mailing list specifically for third-party developers.

Please email [support@pmhc-mds.com](mailto:support@pmhc-mds.com) and ask to be added to the developers mailing list. Please provide us with a generic address that will survive staffing changes.

## **10.2.9. Getting Help**

A dedicated **Helpdesk** is available to support Primary Health Networks and Provider Organisations implementing PMHC in relation to the minimum dataset system. All enquiries should be directed to: [support@pmhc-mds.com](mailto:support@pmhc-mds.com).

## **10.3. Frequently Asked Questions Change log**

### **10.3.1. 14/3/2019**

#### **10.3.1.1. System - Uploading data**

- Added the question [Why am I receiving an error saying I don't have permission to upload organisation data?](#)
- Updated the question [How do I fix upload file errors?](#)
- Moved error messages from the Upload User Guide to [Uploading Data FAQs](#)

#### **10.3.1.2. System - Checking Data FAQs**

- Added the question [How can I run a report?](#)

- Added the question [How can I view the rules of a report?](#)
- Added the question [What are the types of system reports?](#)

### **10.3.1.3. System - Development FAQs**

- Updated the section [Development of the PMHC Minimum Data Set](#)

## **10.3.2. 11/9/2018**

### **10.3.2.1. System - Access FAQs**

- Updated the question to [How do I get started using the MDS?](#)

### **10.3.2.2. System - Development FAQs**

- Updated the section [Development of the PMHC Minimum Data Set](#)

## **10.3.3. 23/7/2018**

### **10.3.3.1. System - Development FAQs**

- Updated the question to [Reporting - Development of the PMHC Minimum Data Set](#)

## **10.3.4. 13/3/2018**

### **10.3.4.1. Concepts Processes - Specific Data Items and Definitions**

- Added the question [One episode of care at a time: We have clients who are receiving treatment at multiple programs and require multiple episodes with different 'Principal Focus of Treatment Plan'. The PMHC MDS only allows one episode at a time for each client, defined at the level of the provider organisation. What do we do?](#)

### **10.3.4.2. System - Development FAQs**

- Updated the question to [Reporting](#)

## **10.3.5. 19/1/2018**

### **10.3.5.1. Concepts Processes - Outcome Measures FAQs**

- Fixed a spelling error in K5 for Aboriginal and Torres Strait Islander population

**10.3.6. 22/12/2017**

#### **10.3.6.1. System - Development FAQs**

- Updated the question to [Reporting](#)

**10.3.7. 08/12/2017**

#### **10.3.7.1. System - Data Entry FAQs**

- Added the question [How can I close an episode?](#)
- Updated the question [How do I enter a referral?](#)

**10.3.8. 20/11/2017**

#### **10.3.8.1. System - Data Entry FAQs**

- Updated the question [How can I delete a record I incorrectly entered?](#)
- Updated the question [How can I edit a record's identifying key?](#)
- Updated the question [How do I enter a SDQ measure?](#)

#### **10.3.8.2. System - Upload FAQs**

- Updated the question [How can I delete a record I have previously uploaded?](#)

#### **10.3.8.3. System - Development FAQs**

- Updated the question to [Data Entry Interface](#)

**10.3.9. 03/10/2017**

#### **10.3.9.1. System - Data Entry FAQs**

- Updated the question [Do I enter a Service Contact when a client doesn't show up for the session?](#)
- Updated the question [How do I enter a K10+, or K5?](#)
- Added the question [How do I enter a SDQ measure?](#)

#### **10.3.9.2. System - Uploading data FAQs**

- Added the question [I am receiving an upload error that has a code that is not in my records. What should I do now?](#)
- Added the question [I am receiving an unknown error in my records. How can I fix this?](#)

## **10.3.10. 12/9/2017**

### **10.3.10.1. System - Uploading data FAQs**

- Added the section [Should an upload file only contain new or changed data or should it contain all cumulative data from the start of service delivery?](#)
- Removed the section 'Should an upload file include all service contacts and measures for an episode every time?'
- Removed the section 'Do I need to include all service contacts and measures for an episode in an file?'
- Added the section [Will valid data be accepted if there are errors in the file?](#)

## **10.3.11. 30/8/2017**

### **10.3.11.1. System - Data Entry FAQs**

- Updated the question [What is the best way to manage the client key?](#)
- Updated the question [Can you suggest a best practice approach to managing client keys?](#)
- Updated the question [How will the Master Client Index work?](#)
- Added the question [How do I find or create a Client's Statistical Linkage Key \(SLK\)?](#)
- Added the question [How do I enter a referral?](#)
- Added the question [How do I enter a K10+, or K5?](#)
- Added the question [Do I enter a Service Contact when a client doesn't show up for the session?](#)
- Added the question [If the client is referred elsewhere \(e.g. not suitable for this service\) should this be recorded?](#)
- Added the question [I have an error message but no idea what it means or how to fix it. What should I do?](#)
- Added the question [How do I find what my Practitioner Key is?](#)
- Added the question [How do I find what the Episode Key, Service Contact Key and Outcome Collection Occasion Key is?](#)
- Added the question [How can I delete a record I incorrectly entered?](#)
- Added the question [How can I edit a record's identifying key?](#)

### **10.3.11.2. System - Development FAQs**

- Updated the section [Development of the PMHC Minimum Data Set](#)

### **10.3.11.3. System - Upload FAQs**

- Added the question 'Do I need to include all service contacts and measures for an episode in an file?'
- Added the question [How can I edit a record I have previously uploaded?](#)
- Added the question [How can I view my uploaded data?](#)
- Added the question [How can I delete a record I have previously uploaded?](#)
- Added the question [How do I upload the individual CSV files?](#)
- Added the question [How do I fix upload file errors?](#)
- Added the question [How do I fix data errors in an upload?](#)

- Added the question [Has my data uploaded if my file has an error status?](#)

## **10.3.12. 28/7/2017**

### **10.3.12.1. System - Development FAQs**

- Updated the section [Development of the PMHC Minimum Data Set](#)

## **10.3.13. 26/6/2017**

### **10.3.13.1. System - Development FAQs**

- Updated the section [Development of the PMHC Minimum Data Set](#)
- Removed the question *What features will be included in Stage Two development?*
- Added the section [Reporting](#)

## **10.3.14. 21/6/2017**

### **10.3.14.1. System - Development FAQs**

- Updated the question to [Data Entry Interface](#)

## **10.3.15. 6/7/2017**

### **10.3.15.1. System - Data Entry FAQs**

- Added the question to [Why is an episode showing as uncommenced?](#)

### **10.3.15.2. System - Development FAQs**

- Added the question to [Data Entry Interface](#)
- Added the question to [Master Client Index](#)

### **10.3.15.3. System - Upload FAQs**

- Added the question to [How can I review why the status of my upload file shows error?](#)

## **10.3.16. 1/5/2017**

### **10.3.16.1. System - Data Entry FAQs**

- Refined the answer to [Can I go back and enter information if I don't have it at the time?](#)

### **10.3.16.2. System - Development FAQs**

- Refined the answer to [When is Stage Two of development going to be implemented?](#)

## **10.3.17. 10/3/2017**

### **10.3.17.1. Concepts Processes - Outcome Measures FAQs**

- Refined the answer to [MHNIP outcome measures](#)

### **10.3.17.2. Concepts Processes - Scope FAQs**

- Added the question [Are services previously delivered under MHNIP expected to collect the PHMC MDS?](#)

### **10.3.17.3. System - Access FAQs**

- Added the question [I do not have a work mobile. What do I do?](#)
- Added the question [Are services previously delivered under MHNIP expected to collect the PHMC MDS?](#)
- Added the question [Can I invite different users by using the same mobile?](#)
- Refined the answer to [What can a user see in the MDS?](#)
- Added the question [What should I do if a user didn't receive the email invitation?](#)
- Added the question [Can I add an existing user to another PHN or Provider Organisation?](#)
- Added the question [Why did I get this message when inviting a user - '500 Internal Server Error: Inviting user failed: An outstanding PMHC MDS invite exists'?](#)
- Added the question [What should I do if a user didn't receive the email invitation?](#)
- Added the question [What should I do if a user didn't receive the invitation SMS token?](#)
- Added the question [What should I do if a user deleted the email invitation or the SMS token?](#)
- Refined the question [I'm a third-party software developer developing software to assist with uploading data to the MDS. Can I have an account to test my data uploads?](#)

### **10.3.17.4. System - Data Entry FAQs**

- Added the question [Can I enter fictitious data as a part of testing?](#)
- Added the question [Where do I enter MHNIPS data collection?](#)
- Added the question [Can the PMHC MDS capture and record additional data?](#)
- Added the question [Why can't we use the SLK as the client key?](#)

### **10.3.17.5. System - Development FAQs**

- Added the question [When is Stage Two of development going to be implemented?](#)
- Added the question [What features will be included in Stage Two development?](#)

### **10.3.17.6. System - Uploading FAQs**

- Added the question [How can I view my uploaded data?](#)

### **10.3.18. 8/2/2017**

- Made the 'Department response to issues raised by PHNs' document the [Concepts and Processes Frequently Asked Questions](#) subsection in the online Frequently Asked Questions
- Moved the current Frequently Asked Questions section into the [System Frequently Asked Questions](#) subsection in the online Frequently Asked Questions

## 11. User Guide Change log

### 11.1. 14/3/2019

- Edited [Inactivate a Provider Organisation](#)
- Added [Viewing an inactive Provider Organisation](#)
- Updated screenshots for [Organisations](#)
- Updated screenshots for [Service Contacts](#)
- Added reports C3 to [Category C: Monitoring implementation of stepped care](#)
- Added [Correcting upload errors](#)
- Moved example upload error messages to [Uploading Data FAQs](#)

### 11.2. 19/11/2018

- Added [Password Expiry Notifications](#)
- Moved [Forgotten or Expired Password](#) from under [Home](#) to under [Passwords](#)
- Edited [Inactivate a Provider Organisation](#)
- Added [Deleting an invitation](#)
- Edited [Editing a user's roles](#)
- Updated screenshots for [Upload](#)
- Edited [A9 - Data quality report - Recording of outcome measures for completed episodes](#)
- Edited [A8 - Data quality report - Recording of outcome measures for open episodes](#)

### 11.3. 11/9/2018

- Added reports C1-C2 to [Category C: Monitoring implementation of stepped care](#)

### 11.4. 23/7/2018

- Added reports A7-A9 to [Category A: Monitoring progress of MDS implementation](#)
- Added reports B1-B5 to [Category B: Monitoring overall service delivery](#)

### 11.5. 13/3/2018

- Added reports A3-A6 to [Category A: Monitoring progress of MDS implementation](#)
- Added [Closing a Client's Episode](#)

### 11.6. 19/1/2018

- Updated screenshots for [Home](#)
- Updated screenshots for [Data Entry](#)
- Updated screenshots for [Data Extract](#)
- Updated screenshots for [Organisations](#)
- Updated screenshots for [Reports](#)

- Updated screenshots for [Upload](#)
- Updated screenshots for [Users](#)
- Updated the question to [Reporting](#)
- Edited the Reporting [Users Roles](#)
- Edited [Passwords](#) to state the password email will be received from [noreply@strategicdata.com.au](mailto:noreply@strategicdata.com.au)

## 11.7. 22/12/2017

- Edited [Reports](#) documentation
- Edited [Data Extract](#)
- Moved [Data Extract](#) out from under [Reports](#)
- Edited the Reporting [Users Roles](#)

## 11.8. 08/12/2017

- Added [Dates explained for Data Extract](#)

## 11.9. 20/11/2017

- Edited [Editing a Practitioner](#)
- Added [Editing a Practitioner Key](#)
- Edited [Editing a Client](#)
- Added [Editing a Client Key](#)
- Edited [Editing a Client's Episode data](#)
- Added [Editing a Episode Key](#)
- Edited [Editing a Client's Service Contacts for an Episode](#)
- Added [Editing a Service Contact Key](#)
- Edited [Editing a Client's Outcome Collection Occasions for an Episode](#)
- Added [Editing a Collection Occasion Key](#)
- Edited [Adding a Client's Outcome Collection Occasions data](#)

## 11.10. 25/10/2017

- Edited [Deleting a Practitioner](#)
- Edited [Deleting a Client](#)
- Edited [Deleting an Episode](#)
- Edited [Deleting an Service Contact](#)
- Edited [Deleting an Outcome Collection Occasion](#)
- Added [Inactive Practitioners](#)

## 11.11. 23/10/2017

- Edited [Editing a Client](#)

## **11.12. 03/10/2017**

- Edited [Finding a user](#)
- Edited [Adding a new user](#)

## **11.13. 25/9/2017**

- Edited [Viewing a user's roles](#)
- Edited [Editing a user's roles](#)

## **11.14. 25/8/2017**

- Edited [Adding a New Client](#)
- Edited [Editing a Client](#)
- Updated screenshots for [Data Entry](#)

## **11.15. 28/7/2017**

- Removed *Reporting* documentation
- Added [Reports](#) documentation
- Moved [Data Extract](#) under [Reports](#)

## **11.16. 20/7/2017**

- Added [Adding a Client's Outcome Collection Occasions data](#)
- Added [Editing a Client's Outcome Collection Occasions for an Episode](#)
- Added [Deleting an Outcome Collection Occasion](#)

## **11.17. 11/7/2017**

- Edited [Finding a Practitioner](#)
- Edited [Viewing a Practitioner](#)
- Edited [Adding a Practitioner](#)
- Edited [Editing a Practitioner](#)
- Edited [Deleting a Practitioner](#)
- Updated screenshots for [Data Entry](#)

## **11.18. 30/6/2017**

- Added [Adding a New Client](#)
- Added [Editing a Client](#)
- Added [Deleting a Client](#)
- Added [Adding a Client's Episode data](#)
- Added [Editing a Client's Episode data](#)
- Added [Deleting an Episode](#)

- Added [Adding a Client's Service Contact data](#)
- Added [Editing a Client's Service Contacts for an Episode](#)
- Added [Deleting an Service Contact](#)
- Updated screenshots for [Data Entry](#)

## **11.19. 14/6/2017**

- Added [Adding a Practitioner](#)
- Added [Editing a Practitioner](#)
- Added [Deleting a Practitioner](#)
- Moved [Finding a Practitioner](#) under Data Entry tab
- Moved [Viewing a Practitioner](#) under Data Entry tab
- Moved [Viewing all Organisational Users](#) under Users tab
- Moved [Assigning Extra Roles to an Organisational User](#) under Users tab

## **11.20. 26/5/2017**

- Updated screenshots for [Data Entry](#) documentation
- Updated screenshots for [Adding a new user](#)
- Updated screenshots for [Editing a user's roles](#)
- Updated screenshots for [Viewing Upload Details](#)
- Updated screenshots for [Error messages](#)
- Added [Complete uploads](#)

## **11.21. 18/5/2017**

- Added [Data Entry](#) documentation
- Added [Viewing a Practitioner](#)
- Added to the [Users Roles](#) section
- Moved [Accepting an invitation to become a PMHC MDS User](#) under Home tab
- Updated screenshots for [Adding a new user](#)
- Updated screenshots for [Editing a user's roles](#)

## **11.22. 15/3/2017**

- Updated the references of suborganisations to provider organisation

## **11.23. 10/3/2017**

- Added [Adding an existing user](#) documentation
- Updated screenshots for [Accepting an invitation to become a PMHC MDS User](#) to include the Reporting role
- Updated screenshots for [Viewing a user's roles](#) to show roles at an organisation
- Added screenshots for [Logging In](#) to show the pop up count down feature
- Added screenshots for [Uploading a file](#) to include the organisation drop down

## **11.24. 24/2/2017**

- Added [Data Extract](#) documentation
- Added [Reporting](#) documentation
- Added Reporting role information to the [Users Roles](#) section
- Updated screenshots for [Adding a new user](#) to include the Reporting role
- Updated screenshots for [Editing a user's roles](#) to include the Reporting role

## **11.25. 8/2/2017**

- Reorganised the documentation to separate User Guide and Frequently Asked Questions
- Updated user guide for user interface changes that created sub tabs