

Primary Care Reporting Portal Manual

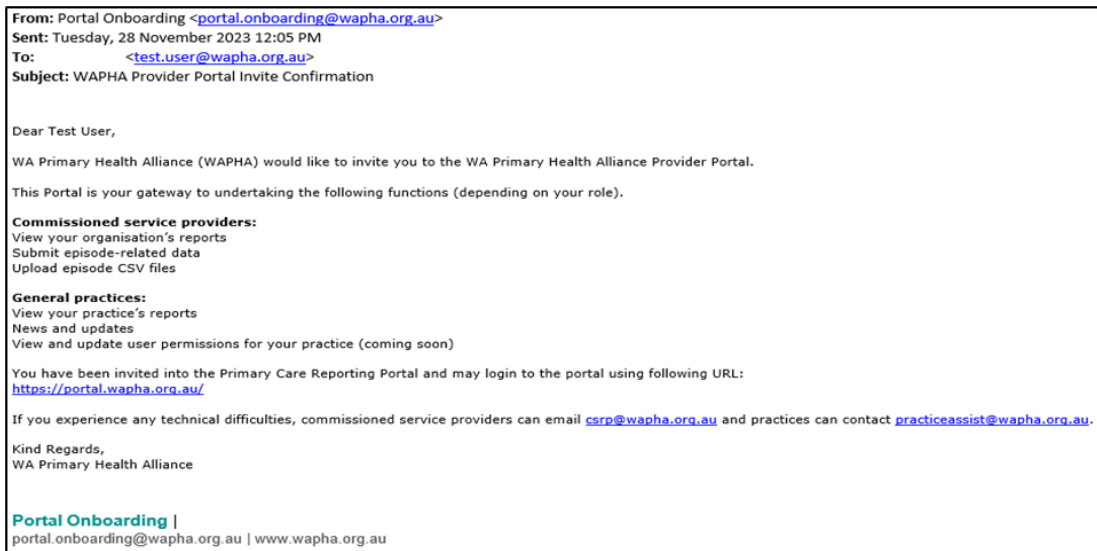
General practice support manual

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Accessing the Primary Care Reporting Portal

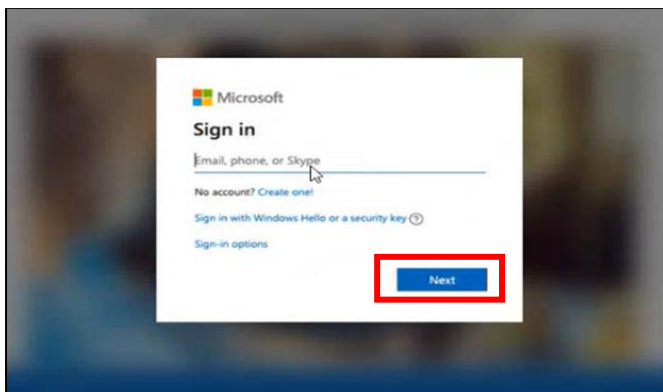
You will receive an invitation from WAPHA via portal.onboarding@wapha.org.au with the subject line: **WAPHA Provider Portal Invite Confirmation**. Click on the **URL** in the email. Or access the PCRP [here](#).



Note: Occasionally this email may be filtered out as 'junk' or 'spam', so please check your spam folder.

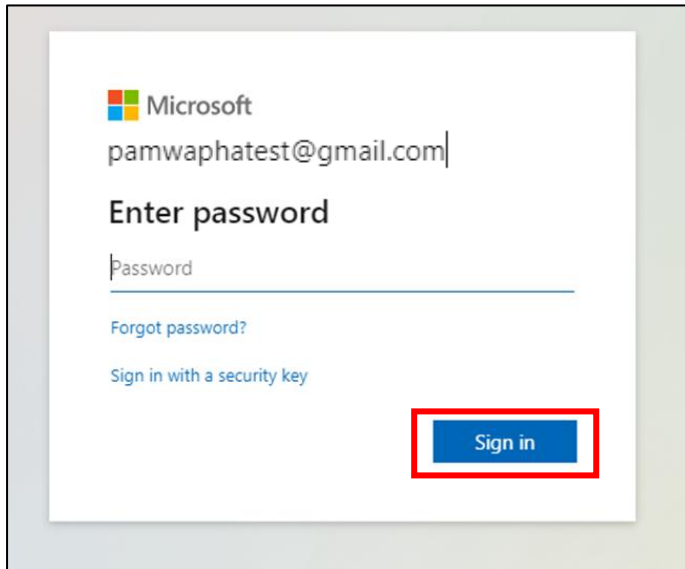
Sign In

1. Once the [Primary Care Reporting Portal](#) page opens, click **Sign In**.
2. The first time you sign in, a Microsoft Sign In window will be displayed. Enter **your email address** (as linked to your PCRP profile) and click **Next**.



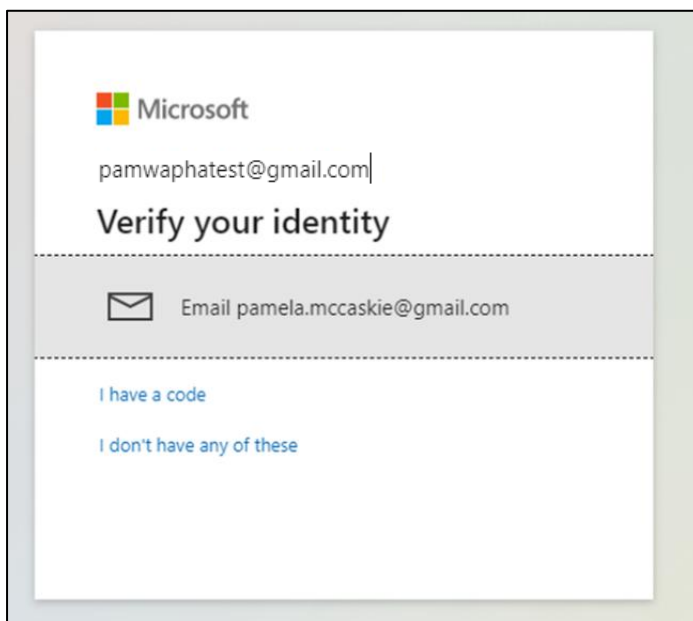
Note: If your email account is NOT associated with a Microsoft account, proceed to [Verify your Identity](#).

3. If your account is associated with a Microsoft Account, enter your Microsoft password, and click **Sign in**.



Verify your Identity

1. Click on the **grey bar** with the email address for your practice, which will prompt the Microsoft authenticator to send you a security code. (You may be prompted to download [Microsoft Authenticator](#)). This may be via a **security code emailed** to you or via a **text message**.
2. Verify your identity following the prompts you receive.

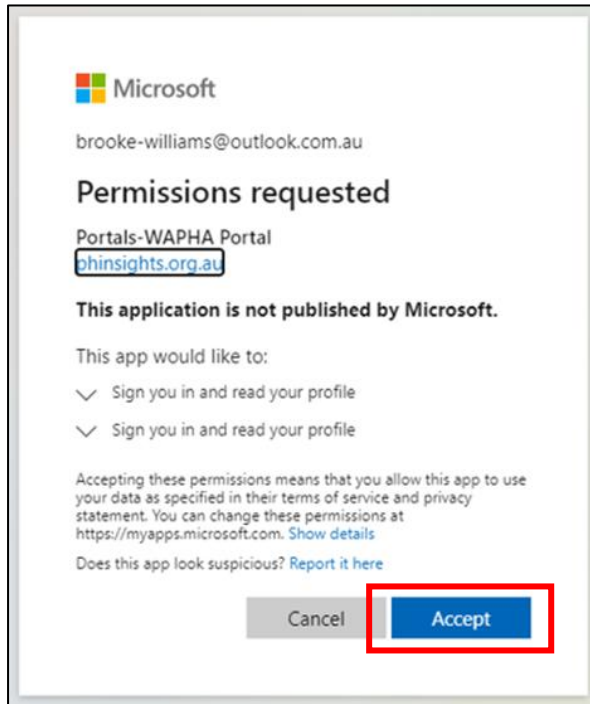


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Accept Permissions

Accept the permissions requested, when prompted.



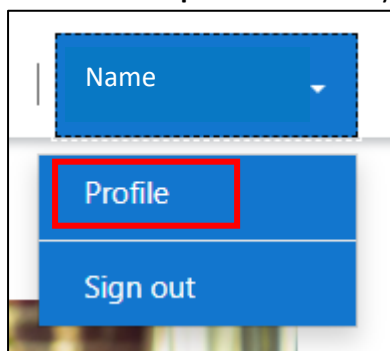
Microsoft Authenticator

You may be prompted to install the [Microsoft Authenticator App](#) on your smart phone to verify your access to the portal.

As the Microsoft Authenticator set up is dependent on how your practice's IT systems are configured, please contact your IT provider or refer to the Microsoft troubleshooting [here](#).

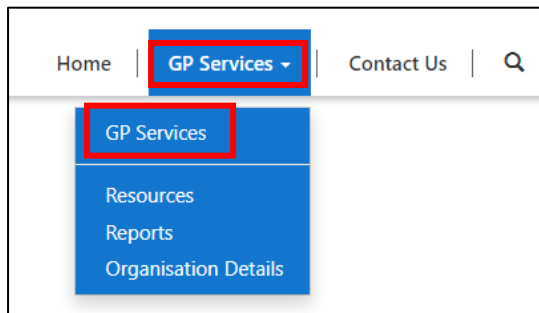
Updating your Profile

You can access your profile, by clicking on the drop-down arrow near your name and selecting **Profile**. Click **Update** to save any changes.



General Practice Services

From the PCRP landing page, you can access **GP Services**, by clicking the arrow next to 'GP Services' on the navigation bar and selecting 'GP Services'.



The General Practice Services home page provides three short cut buttons, **Reports**, **Resources**, and **News Feed**

General Practice Services

Welcome to the new Primary Care Reporting Portal

Developed by WA Primary Health Alliance designed from a digital transformation perspective to manage and provide timely, safe, secure and reliable access to your practices information.

Reports

Resources

News Feed



News Feed

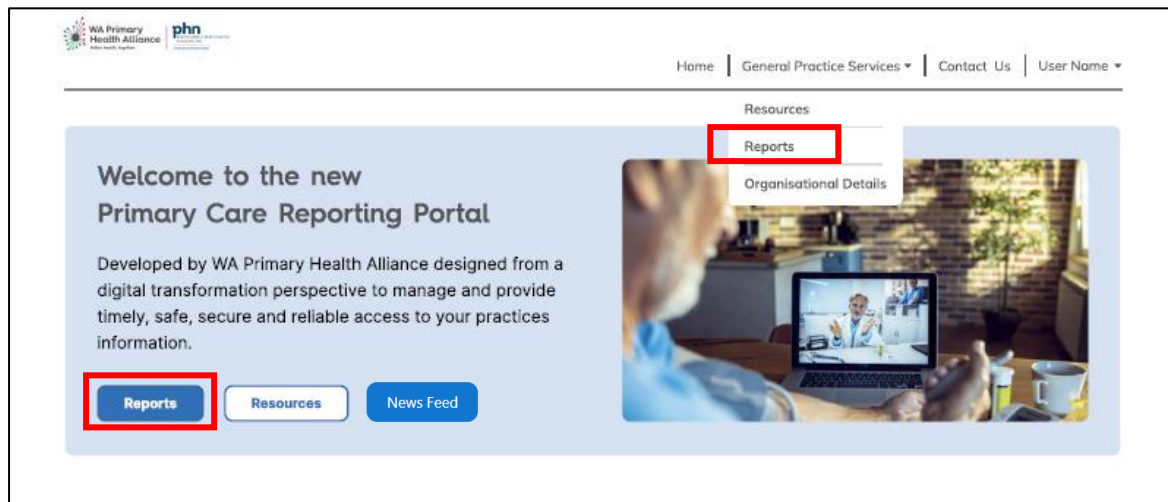
Stay informed with the latest updates and alerts that are relevant to general practices by viewing the **News Feed**.

News Feed

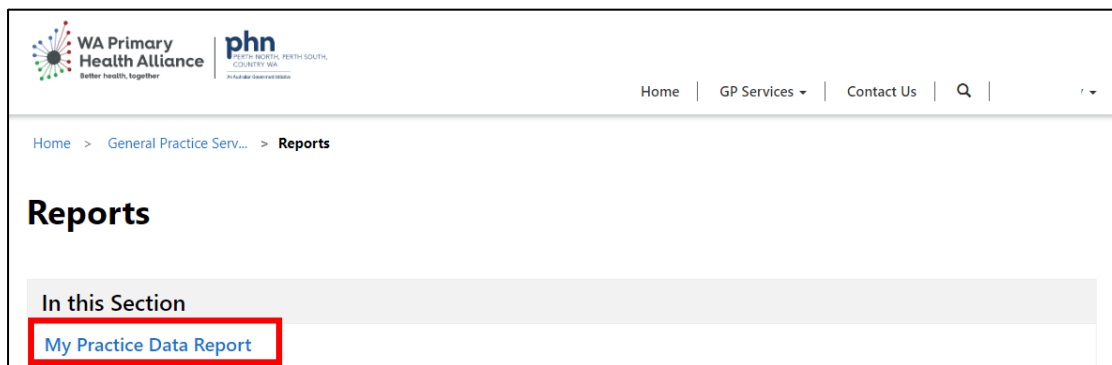
Search by any column <input type="text"/>	
Title ↑	Details of Item
Welcome to the WAPHA Primary Care Reporting Portal	Welcome to the WAPHA Primary Care Reporting Portal, the portal is a safe and secure way for practices to access real-time reports of practice information. The reports are designed to be intuitive and easy to use but if you would like any assistance please reach out to your Primary Care Navigator or Practice Assist practiceassist@wapha.org.au. This newsfeed will keep you up to date with the latest news, issues and information on the Primary Sense tool and other information specific to general practice.

Reports

To access reports, you can select the short cut button from General Practice Services landing page or alternatively access by clicking the arrow next to **'GP Services'** on the navigation bar and selecting **'Reports'**.



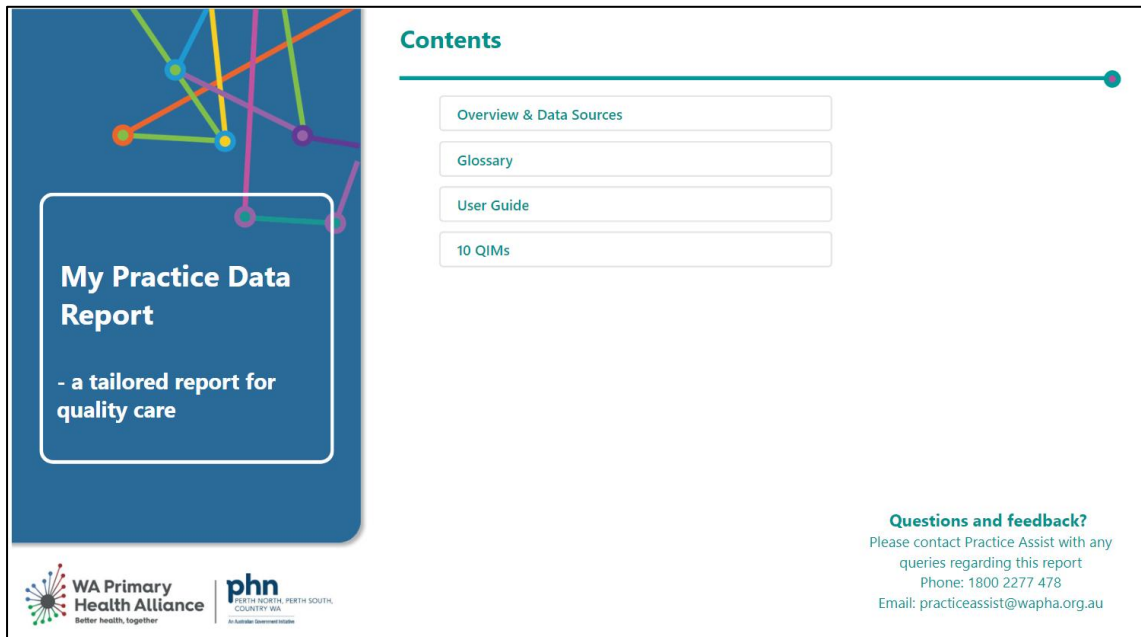
The page will load and display a list of the reports available to you. Select **'My Practice Data Report'**.



To access the reports, you will need to Authenticate with **Power BI** which is the Microsoft tool WAPHA uses to create and share the reports. Click **Sign In** when prompted and select the email account for the practice.



A contents page of the **My Practice Data Report** will be displayed. For further instructions on how to use the report, please refer to the [My Practice Data Report User Guide](#).

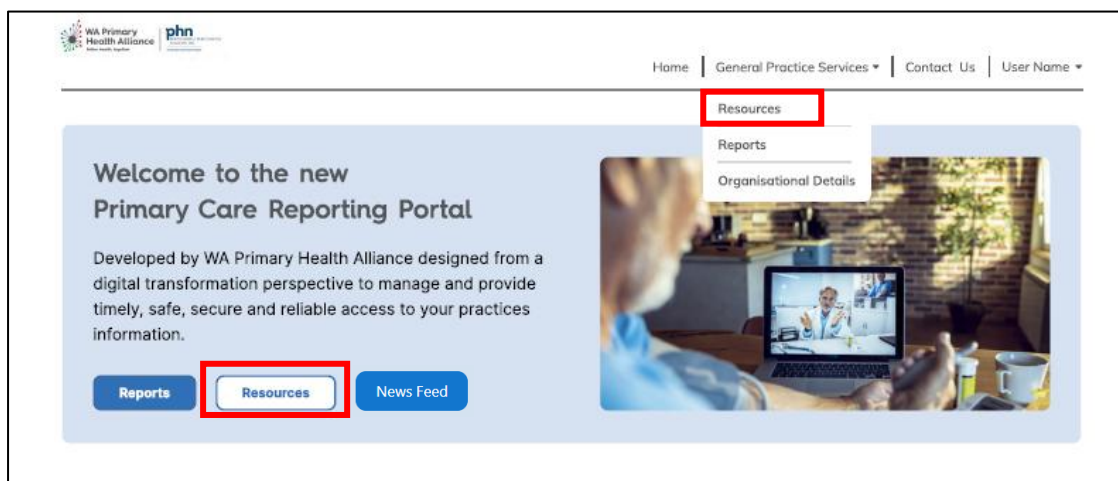


Hint: To zoom in or out within Power BI, hold 'Ctrl' and either scroll up or down with your mouse or use the + or - on your keyboard.

Resources

Resources have been developed to support general practice staff in utilising the Primary Care Reporting Portal to its full potential.

To access the resources, you can select the short cut button from General Practice Services landing page or alternatively access by clicking the arrow next to 'GP Services' on the navigation bar and selecting 'Resources'.



Organisational Details

To access organisational details, you can click the arrow next to 'GP Services' on the navigation bar and select 'Organisational Details'.

Organisation Details

On this page, you will find the organisations that you have permission to access.

Organisations

search organisation <input type="button" value="Q"/>	
Organisation Name ↑	Org Type ↑
WA Primary Health Alliance	CSP

Note: You will only be able to search and view the details of the organisation that you are associated with. If you belong to a group of practices and have permission, you will also be able to search and view these.

Self Service Administration

Nominated Administrators for a practice are responsible for the onboarding and maintenance of all users for the practice, who will have access to the data summary reports from WAPHA. There must always be at least **one** nominated administrator in place. It is recommended that **two** nominated administrators are in place.

This is completed by clicking the arrow next to 'Self Service Administration' on the navigation bar and selecting 'Self Service Administration'. This will display 5 buttons for actions you can complete.

[Home](#) | [GP Services](#) | [Contact Us](#) | [Self Service Administration](#)

Self Service Administration

WAPHA follows current best practices in security standards, requiring regular review of who can access the Primary Care Reporting Portal (PCRP). As such, as a general practice provider it is your responsibility to ensure that all organisation user details and access are up to date. If a user's details or access to the PCRP require access improves the safety of your data by preventing unauthorised updates.

Please review your PCRP users and document any changes and/or removal of any users who no longer work for your practice. The nominated administrator for the organisation, who will have access to the data summary reports from WAPHA. Two nominated administrators are available per organisation in the PCRP and it is encouraged that a new administrator is identified and set up in the PCRP prior to a current administrator leaving the practice. The nominated administrator will be responsible for ensuring all organisational user details are correct and up to date.

Add User

Remove Access

Update Profile

Add Organisation

Practice Permissions

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Add a New User

To add a new user to the PCRP, select the **Add User** short cut button on the Self Service Administration page or by selecting '**Add a New User**' from the '**Self Service Administration**' drop down menu.

Complete the details as requested for the new user that you would like to add to the PCRP and click '**Add**'.

Add a New User

WAPHA follows current best practices in security standards, requiring regular review of who can access the Primary Care Reporting Portal (PCRP). Please review your PCRP users and document any changes and/or removal of any users who no longer require access via this form.

As a nominated administrator it is your responsibility to nominate someone else prior to leaving the organisation yourself. Access to your practices information through the PCRP should be limited to those staff who will use this information within their role. This includes, but not limited to, general practitioners, primary care nurses, and administration staff.

All fields are required, unless indicated as (optional)

First Name *

Last Name *

Email Address *

Phone

Position Title/Role

Add

A message will display if the user has been added successfully or if the user already exists. The user should also receive an email stating that they have been added to the PCRP.

Change Practice User Permissions

Once a new user is added to the PCRP, you need to ensure that they are connected to the organisation or practice as appropriate. To do this, select the short cut button **'Practice Permissions'** on the Self Service Administration page or by selecting **'Change Practice User Permissions'** from the **'Self Service Administration'** drop down menu.

The screenshot shows the 'Self Service Administration' page. At the top, there are logos for WA Primary Health Alliance and phn. Below the logos is a navigation bar with links: Home, GP Services, Contact Us, and Self Service Administration. The 'Self Service Administration' dropdown menu is open, showing options: 'Self Service Administration', 'Add a New User', 'Remove Access of a User', 'Add a New Organisation', and 'Change Practice User Permissions' (highlighted with a red box). Below the menu, there are three main sections: 'Add User' (with a plus icon), 'Remove Access' (with a minus icon), and 'Update Profile' (with a pencil icon). Below these are 'Add Organisation' (with a building icon) and 'Practice Permissions' (with a person and gear icon, highlighted with a red box).

A list of linked Practices will be displayed that you have access to as a nominated administrator. Select the appropriate one that you want to link a user to.

A list of nominated administrators and Users will be displayed that are already linked to the practice.

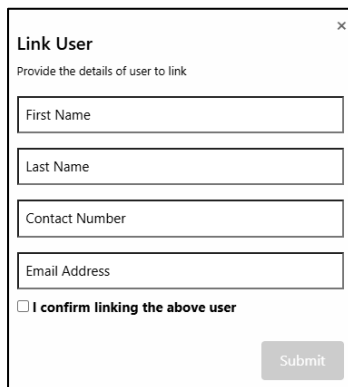
The screenshot shows the 'Test Organisation 1' page. It includes contact information: phone number 04212121221 and email testorg1@test.com. Below this is the 'Nominated Admin/s' section, which has a 'Link Admin' button and a table with columns: Name, Contact Email (Name), and Contact Phone Number (Name). The table has two empty rows. Below the 'Nominated Admin/s' section is the 'Users' section, which has a 'Link User' button and a table with columns: Name (with an upward arrow), Contact Email (Name), and Contact Phone Number (Name). The table has six empty rows.

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Link User

Select '**Link User**' and enter the email address of the user you wish to link to the practice and click '**Submit**'. A message should be displayed stating if successful or if there is an issue. The user should receive an email stating that they have been linked to the practice.



The 'Link User' form is a modal window with a title bar containing a close button. Below the title, it says 'Provide the details of user to link'. There are four text input fields: 'First Name', 'Last Name', 'Contact Number', and 'Email Address'. Below these fields is a checkbox labeled 'I confirm linking the above user'. At the bottom right is a 'Submit' button.

Link Admin

Once a user is linked to the practice, you can link them as a nominated administrator if you would like them to share the responsibility for the onboarding and maintenance of all users for the practice.

Note: *There must always be at least **one** nominated administrator in place. It is recommended that **two** nominated administrators are in place.*

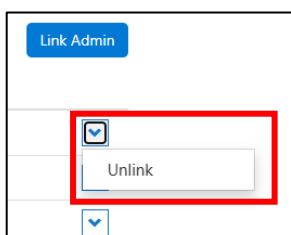
To complete this, select '**Link Admin**' and enter the details of the user you wish to link as a new administrator for the practice. A message should be displayed stating if successful or if there is an issue. The user should receive an email stating that they have been added as an administrator for the practice.

The request to link a nominated administrator to the practice will be sent to Practice Assist who will approve or decline the request as appropriate. The team may be in contact if required to confirm details.

Note: *Response time from Practice Assist is within 24hrs Monday to Friday and if further contact is needed, response time can vary.*

Unlink Admin

To unlink a nominated administrator from a practice, select the arrow next to their details and click '**Unlink**'. The user will now only have user access rights to the practice (i.e. report view only).



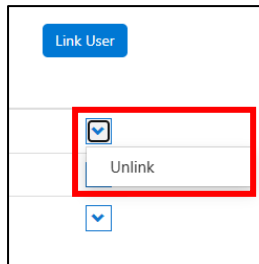
The 'Unlink Admin' form is a modal window with a title bar containing a close button. Below the title, there is a blue button labeled 'Link Admin'. Below this, there is a table with a red box highlighting the 'Unlink' button. Below the table is a dropdown arrow.

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Unlink User

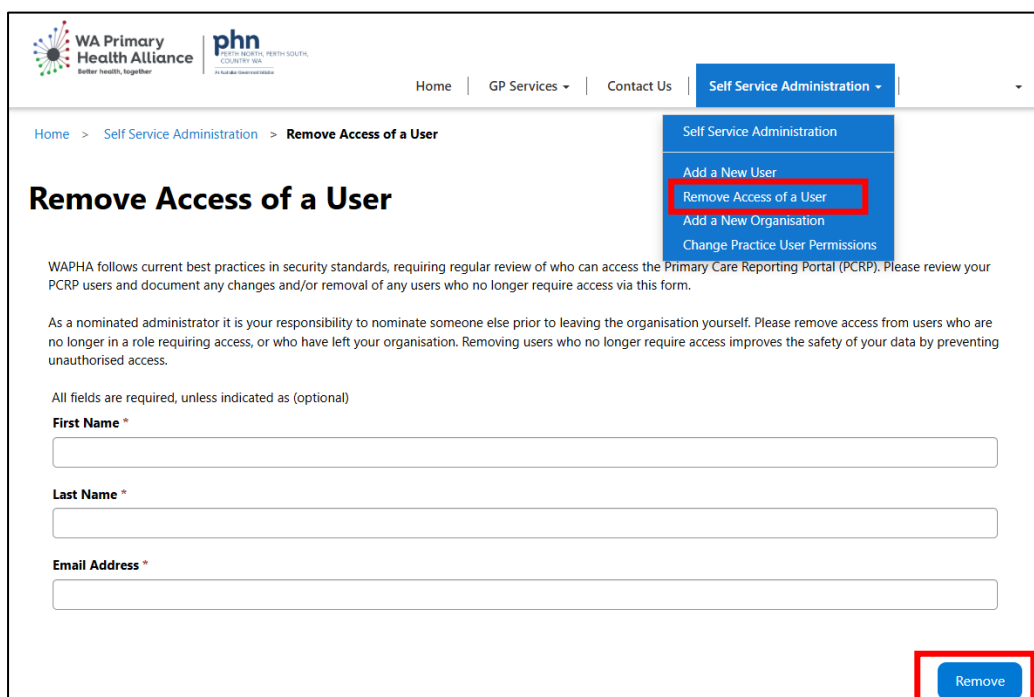
To unlink a user from a practice, select the arrow next to their details and click '**Unlink**'. The user should receive an email stating that they have been unlinked from the practice.



Remove Access of a user

To remove all practices linked to a PCRP user, select the short cut button on the Self Service Administration page or by selecting '**Remove Access of a User**' from the '**Self Service Administration**' drop down menu. **Note:** This will remove access to all practices this user has access to in PCRP. To just unlink from a specific practice, follow the instructions above to unlink a user.

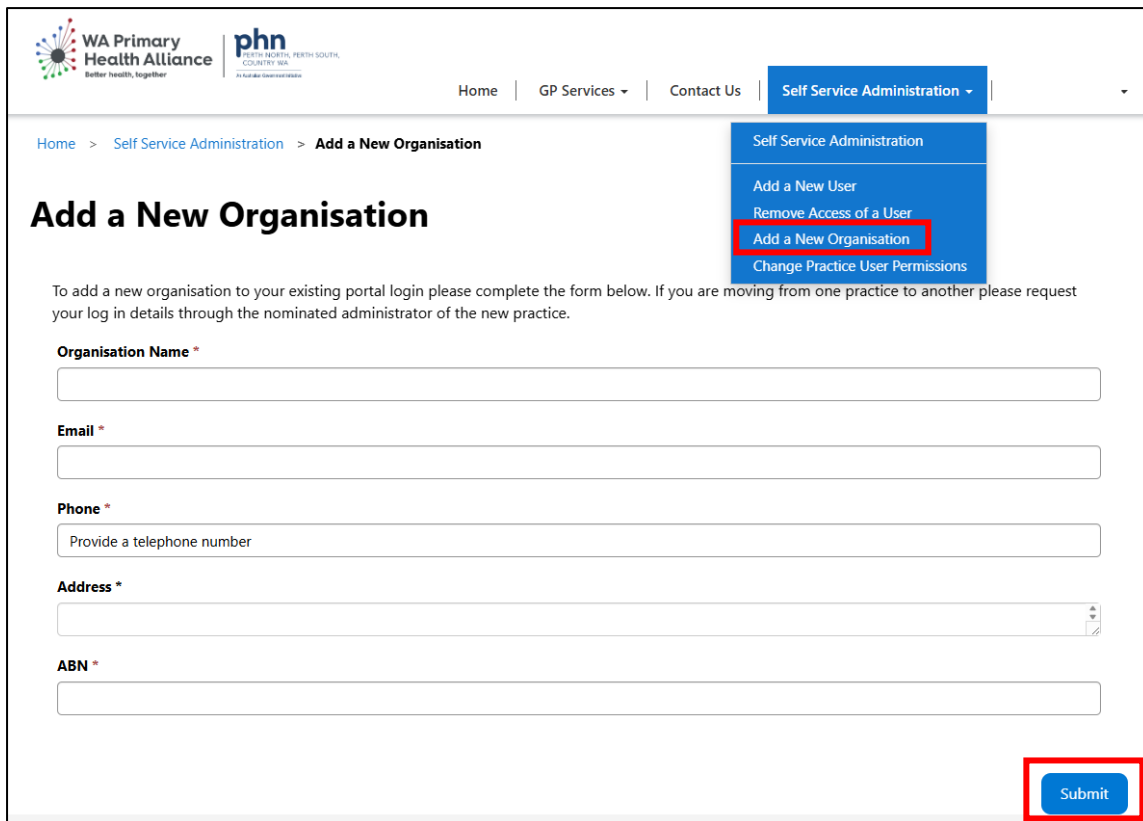
Complete the details as requested for the user that you would like to remove all linked connections and click '**Remove**'. A pop-up window should appear asking "Are you sure you want to remove access of this user", click yes in which a message should display stating that the user access has been removed. If you receive the message 'Invalid information – No active linked practice found for the user' that means that no connections are currently in place for the user therefore no action is required.

A screenshot of a web application interface. At the top, there is a navigation bar with the WA Primary Health Alliance and phn logos, and links for Home, GP Services, Contact Us, and Self Service Administration. Below the navigation bar, there is a breadcrumb trail: Home > Self Service Administration > Remove Access of a User. The main heading is 'Remove Access of a User'. Below the heading, there is a paragraph of text explaining the purpose of the form. Then, there is a form with three input fields: 'First Name *', 'Last Name *', and 'Email Address *'. At the bottom right of the form, there is a blue button labeled 'Remove' which is highlighted with a red rectangular box. On the right side of the form, there is a dropdown menu for 'Self Service Administration' with a list of options: 'Add a New User', 'Remove Access of a User' (highlighted with a red rectangular box), 'Add a New Organisation', and 'Change Practice User Permissions'.

Add a New Organisation

To add a new organisation or practice to your existing PCRP user, select the short cut button on the Self Service Administration page or by selecting '**Add a New Organisation**' from the '**Self Service Administration**' drop down menu.

Complete the details as requested and click '**Submit**'.



The screenshot shows the 'Add a New Organisation' page. At the top, there are logos for WA Primary Health Alliance and phn. A navigation bar includes links for Home, GP Services, Contact Us, and Self Service Administration. A dropdown menu for 'Self Service Administration' is open, showing options: 'Add a New User', 'Remove Access of a User', 'Add a New Organisation' (highlighted with a red box), and 'Change Practice User Permissions'. The main heading is 'Add a New Organisation'. Below it, a note states: 'To add a new organisation to your existing portal login please complete the form below. If you are moving from one practice to another please request your log in details through the nominated administrator of the new practice.' The form contains five fields: 'Organisation Name *', 'Email *', 'Phone *' (with a placeholder 'Provide a telephone number'), 'Address *', and 'ABN *'. A 'Submit' button is located at the bottom right, enclosed in a red box.

The request to add a new organisation will be sent to Practice Assist who will approve or decline the request as appropriate. The team may be in contact if required to confirm details.

Note: Response time from Practice Assist is within 24hrs Monday to Friday and if further contact is needed, response time can vary.

Support

For further support with the Primary Care Reporting Portal please contact Practice Assist via 08 6278 7900 or practiceassist@wapha.org.au.