phn MURRAY

An Australian Government Initiative

FOLIO LITE USER (PROVIDER) PORTAL USER GUIDE

Contents

Introduction

Folio is the centralised contract management system used by Murray PHN to store all contracts and associated deliverables in an accessible, secure and customised system.

Murray PHN requires service providers to submit reports and deliverables through the Portal.

We aim to make reporting easier for our service providers by providing access to a simple portal that will streamline how data is entered, analysed and evaluated. The Portal will enhance the business intelligence capacity of Murray PHN and its stakeholders by automating two-way reporting, including providing a more robust system to capture achievements of providers, projects and activities. Folio is an efficient and easy way to collect, analyse and evaluate the achievements of contracts, projects and activities.

This guide focuses on first-time user induction, the Folio provider portal interface and how to complete a report in Folio.

Getting started

You will be asked to nominate staff who will require access to Folio for reporting purposes. There are two levels of access:

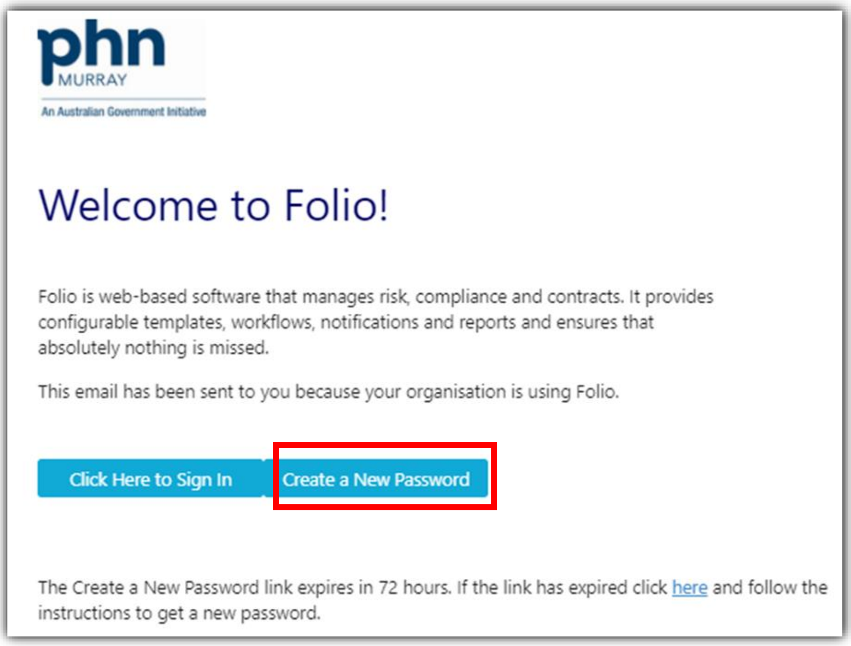
- **Lite user** – a lite user will have access to the reports that have been assigned specifically to them.
- **Team leader** – a team leader will have access to the reports that have been assigned to them, as well as all other reports that have been assigned to the organisation. This level of access will suit users who need to have oversight of other users reporting.

We will need the name and email address of each person who will report into Folio, and the level of access they will require.

Welcome

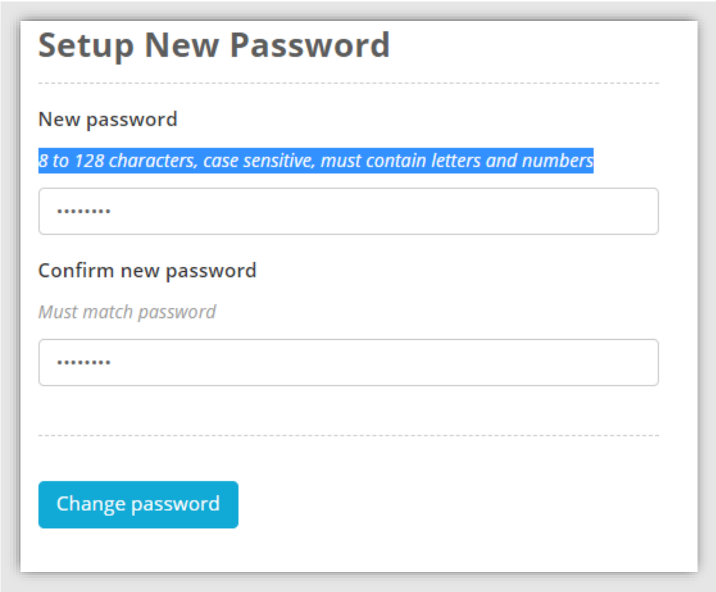
First-time users will receive a welcome email with a link to access Folio. Note that the link expires in 72 hours.

Click on "Create a New Password" in the email:



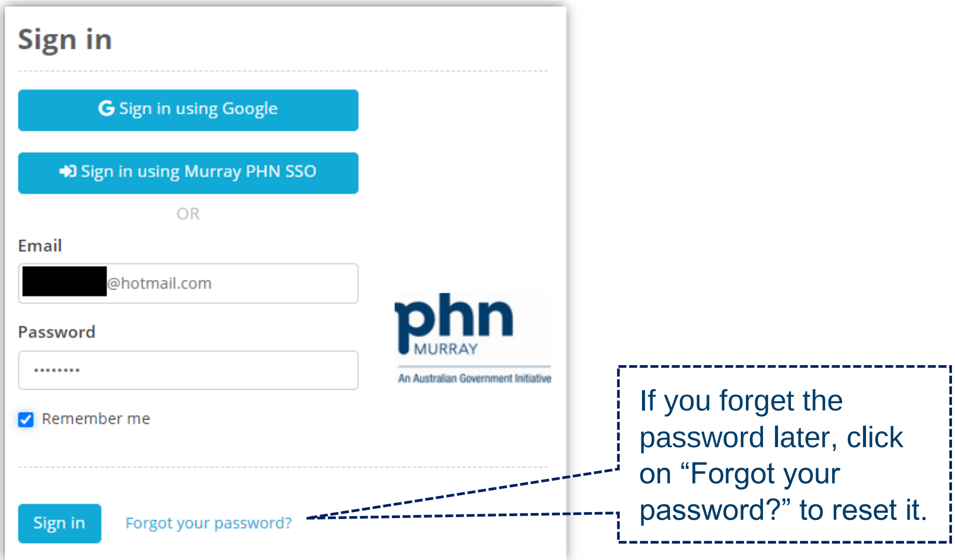
New password

You will be prompted to set up a new password. The new password can contain 8 to 128 characters (case sensitive) and must contain letters and numbers:



Click on “Change password” to save it.

Signing into Folio



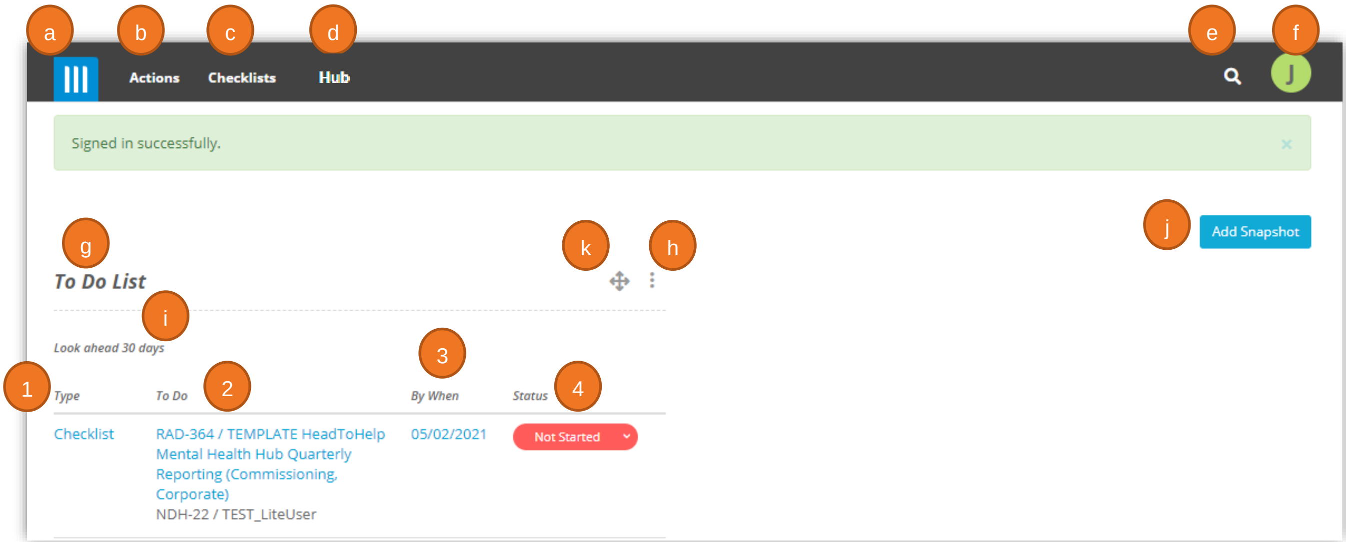
Google Chrome - Please load the Folio application in a Google Chrome internet browser.

Save URL – It is suggested that you bookmark the Folio URL in your Google Chrome browser for easy access in future: murrayphn.foliogrc.com/d/users/sign_in

Forgot password – Should you forget your password, please click “Forgot your Password” on the sign-in page shown in the last section. An auto-generated email will be sent to you, with a link to create a new password.

Dashboard (homepage)

When you have an assigned checklist, it shows in the Dashboard under “To Do List”. An example of a Dashboard with a checklist assignment is below:



a. Home button – return to the homepage at any time
b. Actions – Murray PHN is not currently using Actions
c. Checklists – view all completed and yet to be submitted checklists assigned to you
d. Hub – find a copy of this User Guide here
e. Search – click on the magnifying glass to search your checklist assignments
f. User button – adjust settings, change password, access help and sign out
g. To Do List – a list of the checklists requiring completion and reflects the reporting requirements detailed in the contract. Folio uses the terminology ‘Checklists’ for reports. A different set of reporting checklists will exist for each funded contract.
   1. Type – indicates what type of task is required (in most cases this will be a ***Checklist***)

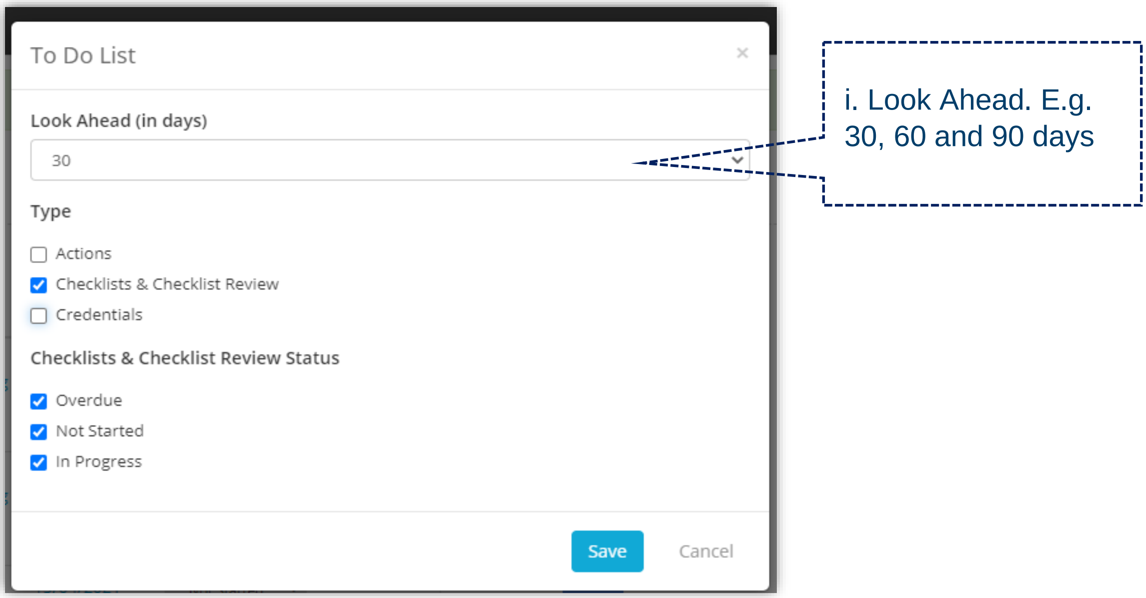
> ***Tip:*** *“Checklist” in Folio means the report included in the deliverables of a contract*

   To Do – shows the title of the checklist that is due and title of the contract. The User can hover over the name to obtain more information
   2. By When – the date that the checklist is due to be completed
   3. Status – Status of checklist including Not Started, In Progress, Completed and Overdue. You can start entering the checklist by clicking this button

h. Setting of the To Do List – click on the three dots to see the settings.

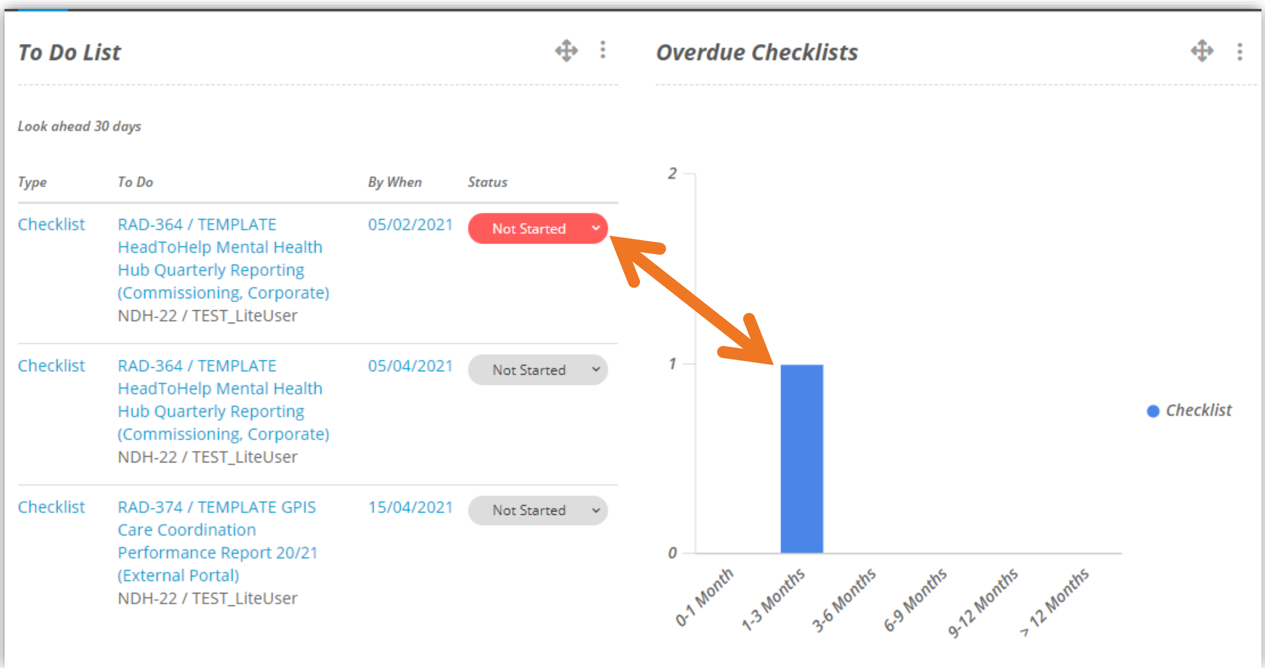
   Please ensure the following choices are selected. Checklists & Checklist Review (Actions and Credentials are not applicable), Overdue, Not Started and In Progress.

i. Look Ahead (in days)

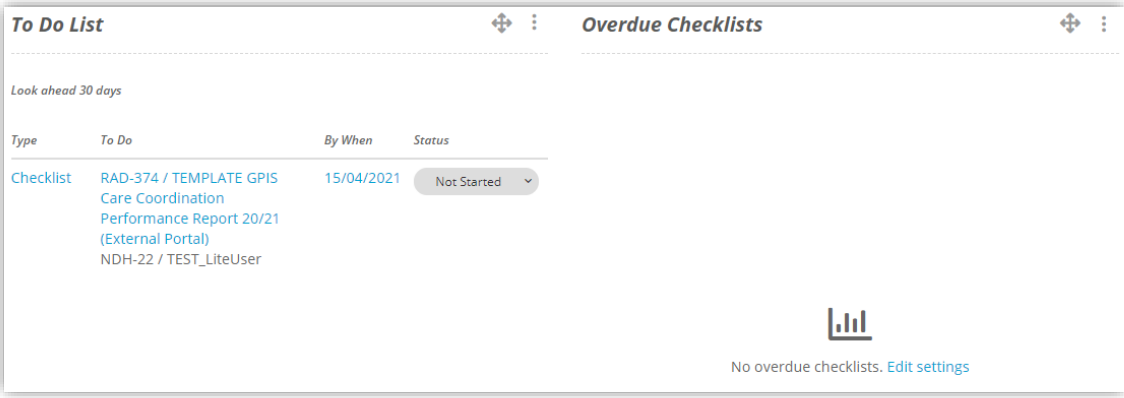


j. Add Snapshot – you can view a snapshot of any checklists that are overdue by clicking the Add Snapshot button:

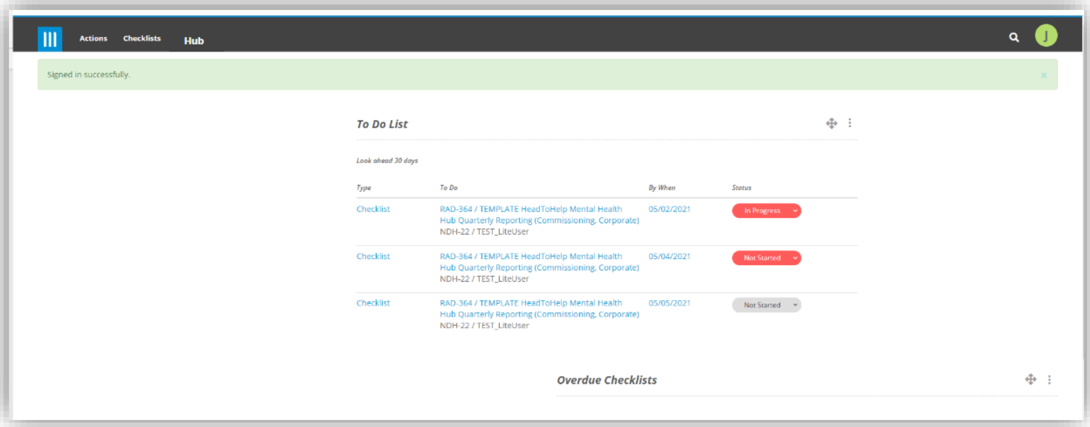
When you have overdue Checklists to be completed, they will appear in the snapshot:



If there is no overdue Checklists, it is blank:



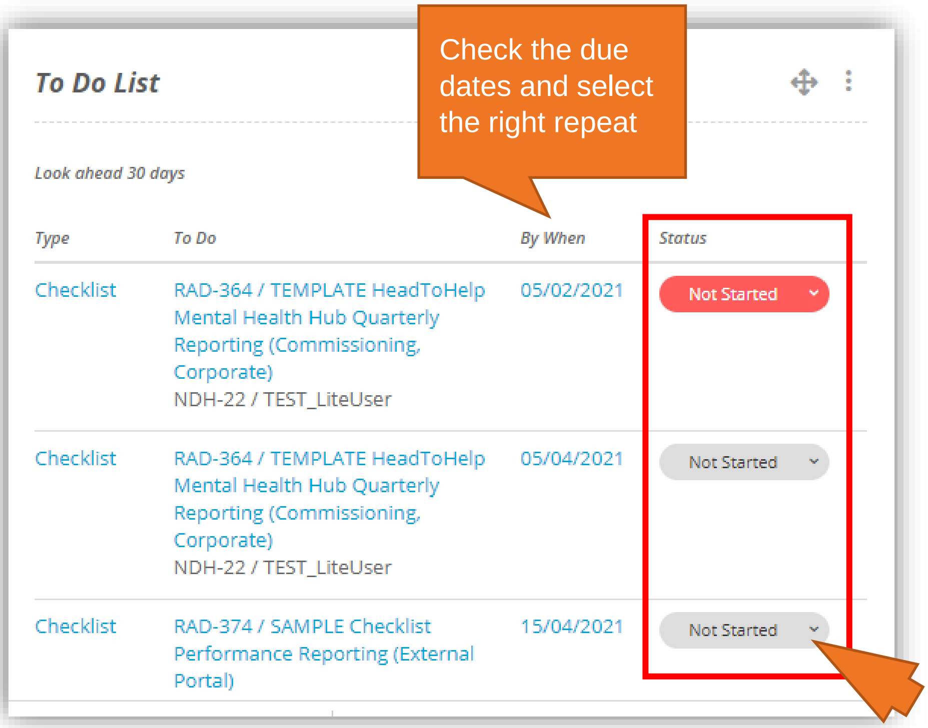
k. Move button – click and hold this button to move the To Do List to a new location on the homepage:



Completing a Checklist

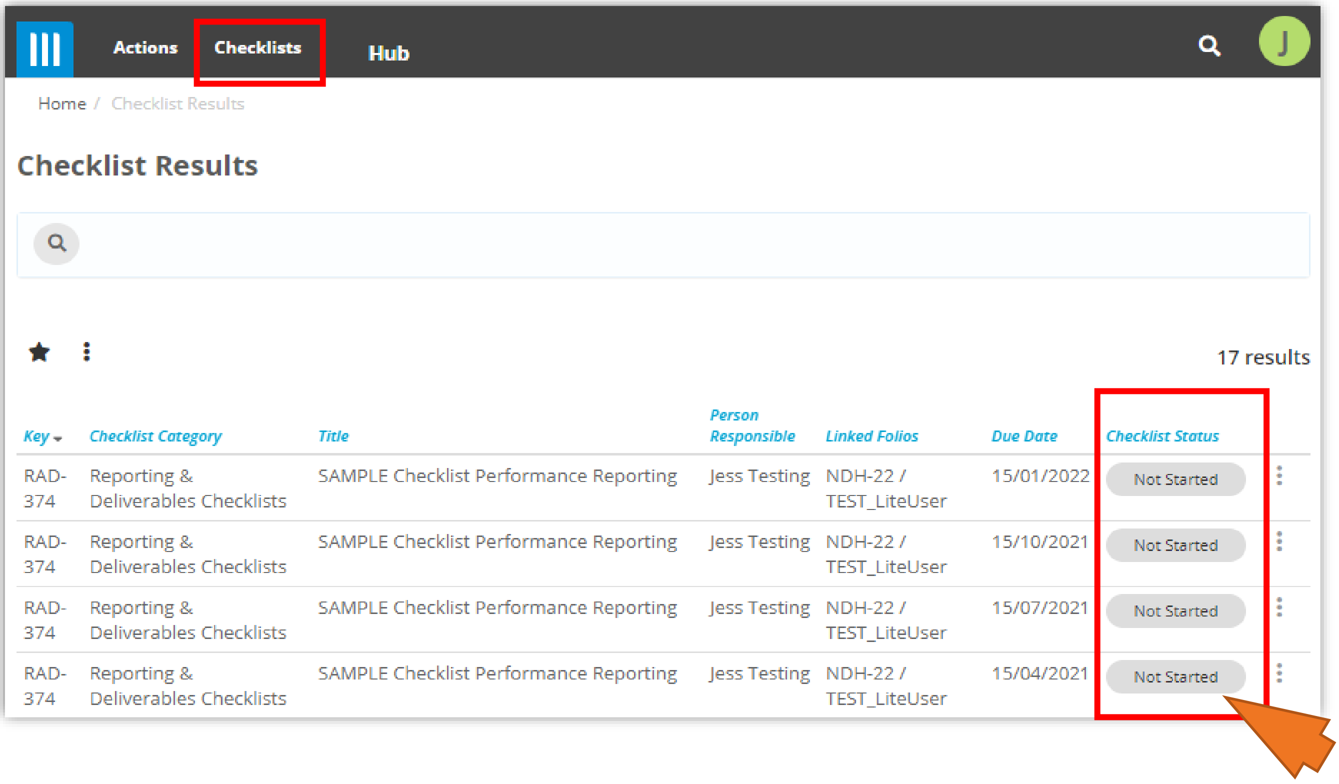
Find the Checklist

From the ***To Do List*** identify the checklist (Please check the due date in the "By When" column to ensure that you are completing the correct checklist for the reporting period). Then click on the ***Status*** button.



Tip: *Folio issues reminder emails to the users who are responsible for completing the checklist two weeks before the checklist is due as well as on the day it is due. Users can use the link in the reminder emails to access the checklist also. Below is an example of the email.*

__Tip:__ Checklists to be completed can also be accessed by the __Checklist__ tab on the Dashboard and by then selecting the __Not Started__ button

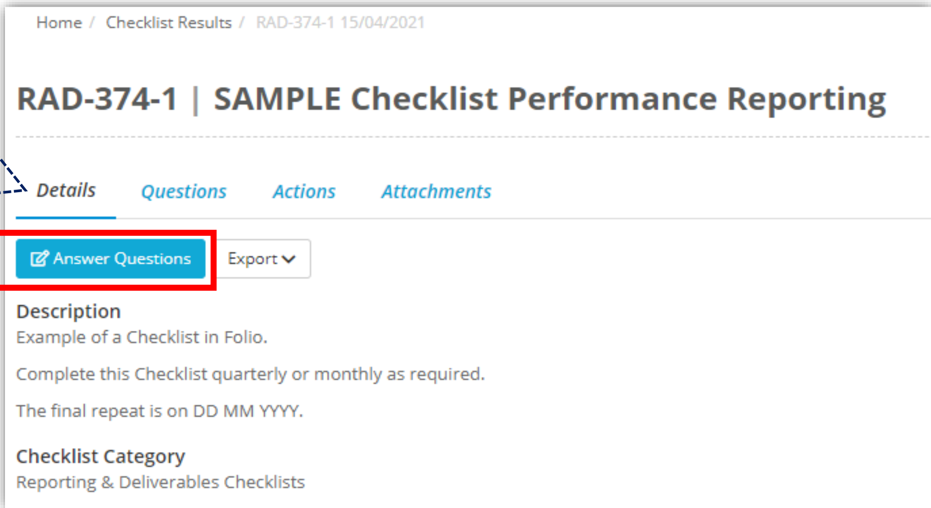


Answer the questions

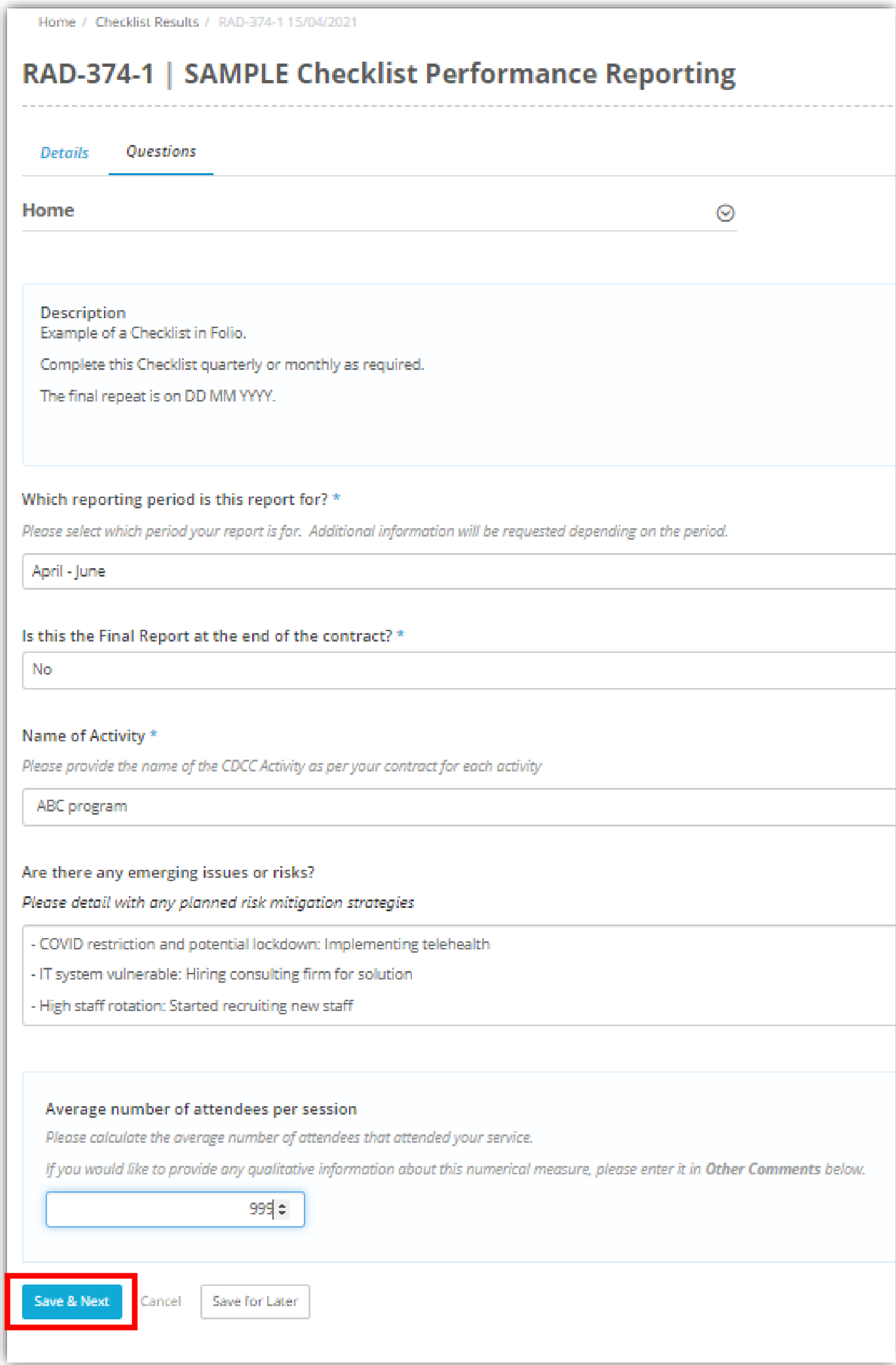
Answer questions button

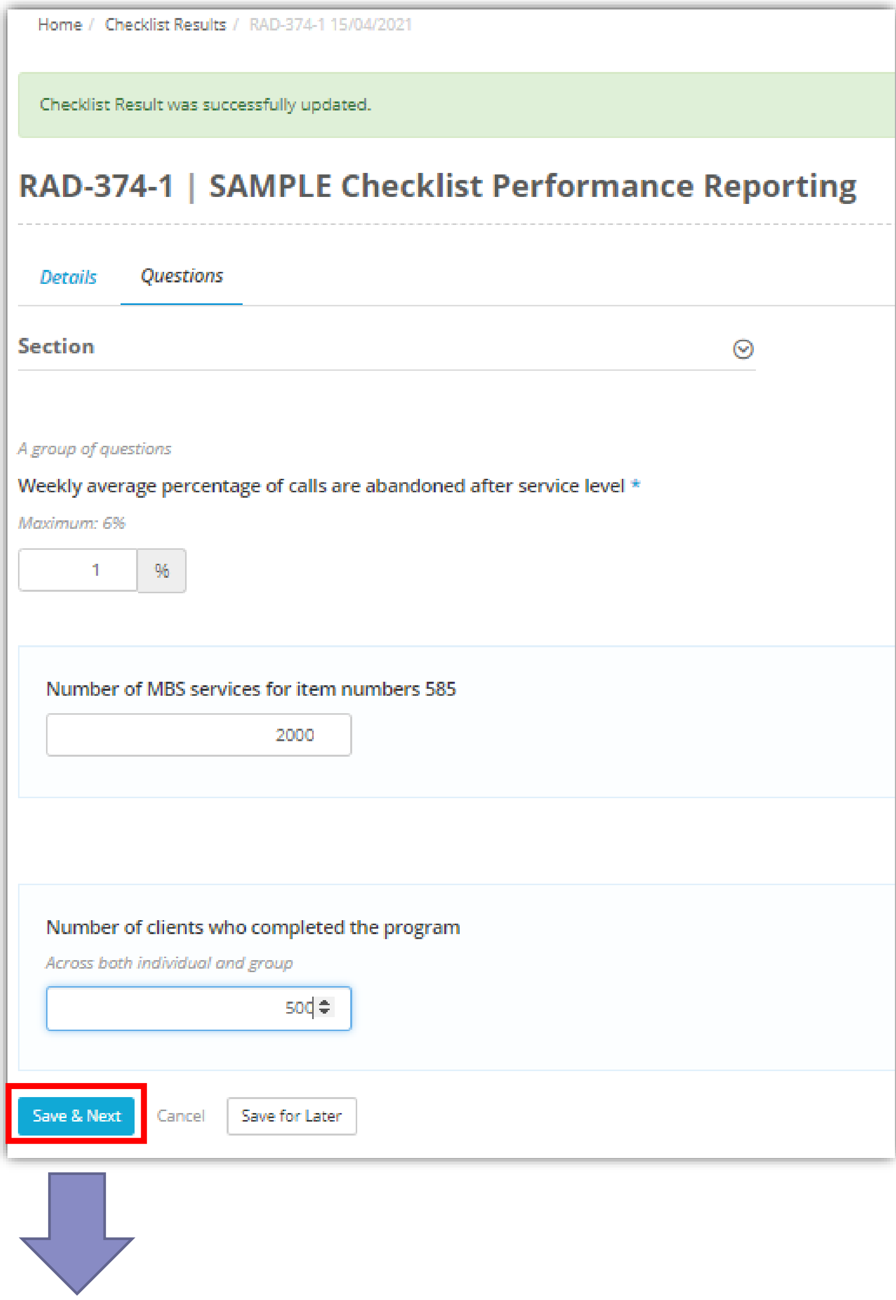
Any of above options will take you straight to the checklist that is required to be completed. An example is below. Click on ***Answer Questions*** button to start:

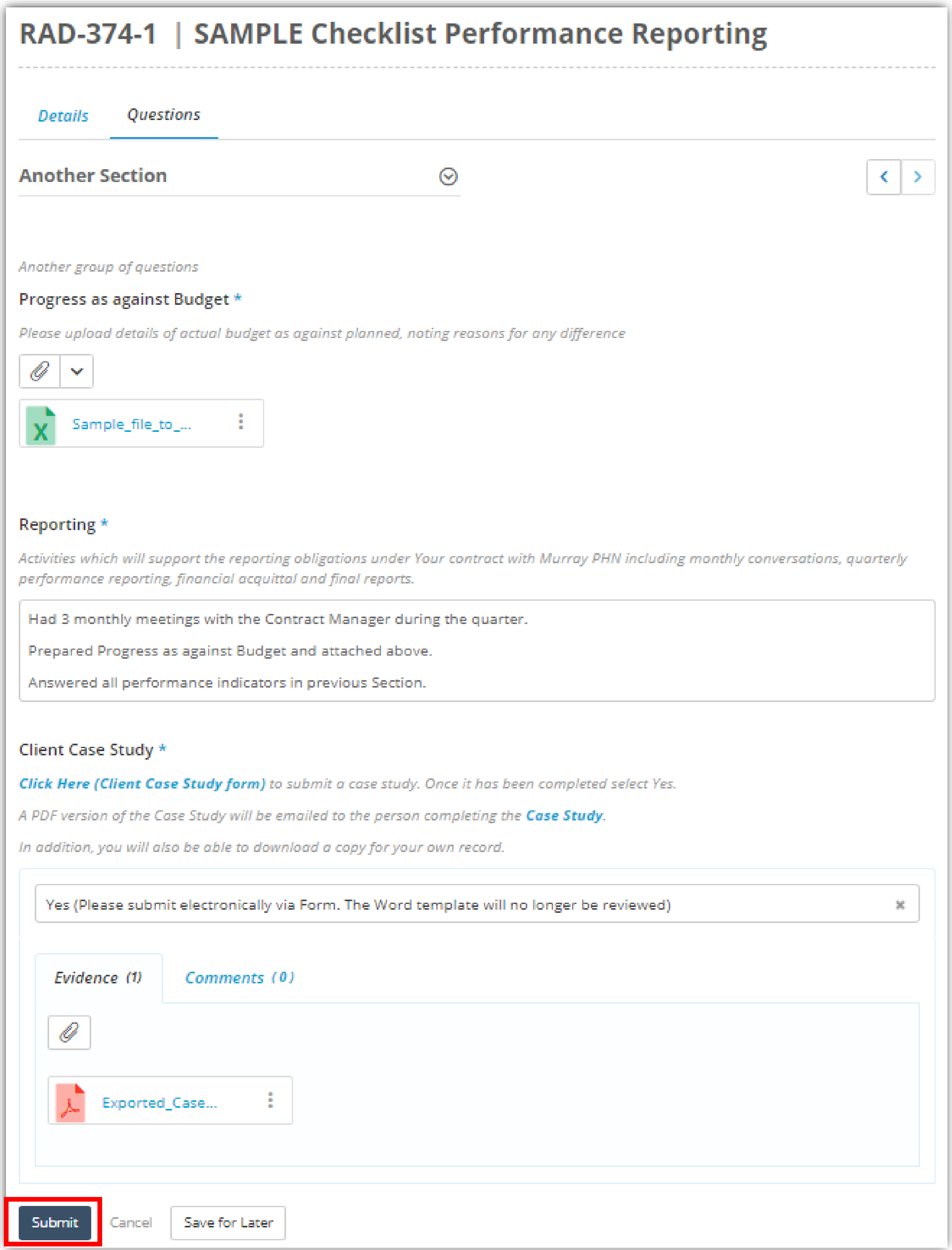
The Details page on each checklist will have a brief summary of the aims of the activity and may also contain instructions for completing the report.

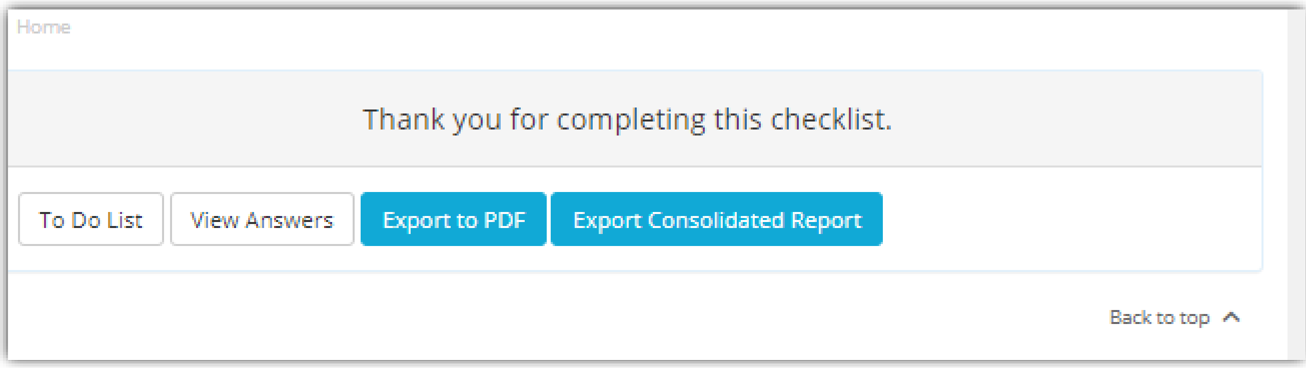


Note: the questions in this example are all sample questions




Home / Checklist Results / RAD-374-1 15/04/2021
Checklist Result was successfully updated.
RAD-374-1 | SAMPLE Checklist Performance Reporting
Details
Questions
Section
A group of questions
Weekly average percentage of calls are abandoned after service level *
Maximum: 6%
1
%
Number of MBS services for item numbers 585
2000
Number of clients who completed the program
Across both individual and group
500
Save & Next
Cancel
Save for Later


RAD-374-1 | SAMPLE Checklist Performance Reporting
Details
Questions
Another Section
Another group of questions
Progress as against Budget *
Please upload details of actual budget as against planned, noting reasons for any difference
Sample_file_to_...
Reporting *
Activities which will support the reporting obligations under Your contract with Murray PHN including monthly conversations, quarterly performance reporting, financial acquittal and final reports.
Had 3 monthly meetings with the Contract Manager during the quarter.
Prepared Progress as against Budget and attached above.
Answered all performance indicators in previous Section.
Client Case Study *
Click Here (Client Case Study form) to submit a case study. Once it has been completed select Yes.
A PDF version of the Case Study will be emailed to the person completing the Case Study.
In addition, you will also be able to download a copy for your own record.
Yes (Please submit electronically via Form. The Word template will no longer be reviewed)
Evidence (1)
Comments (0)
Exported_Case...
Submit
Cancel
Save for Later



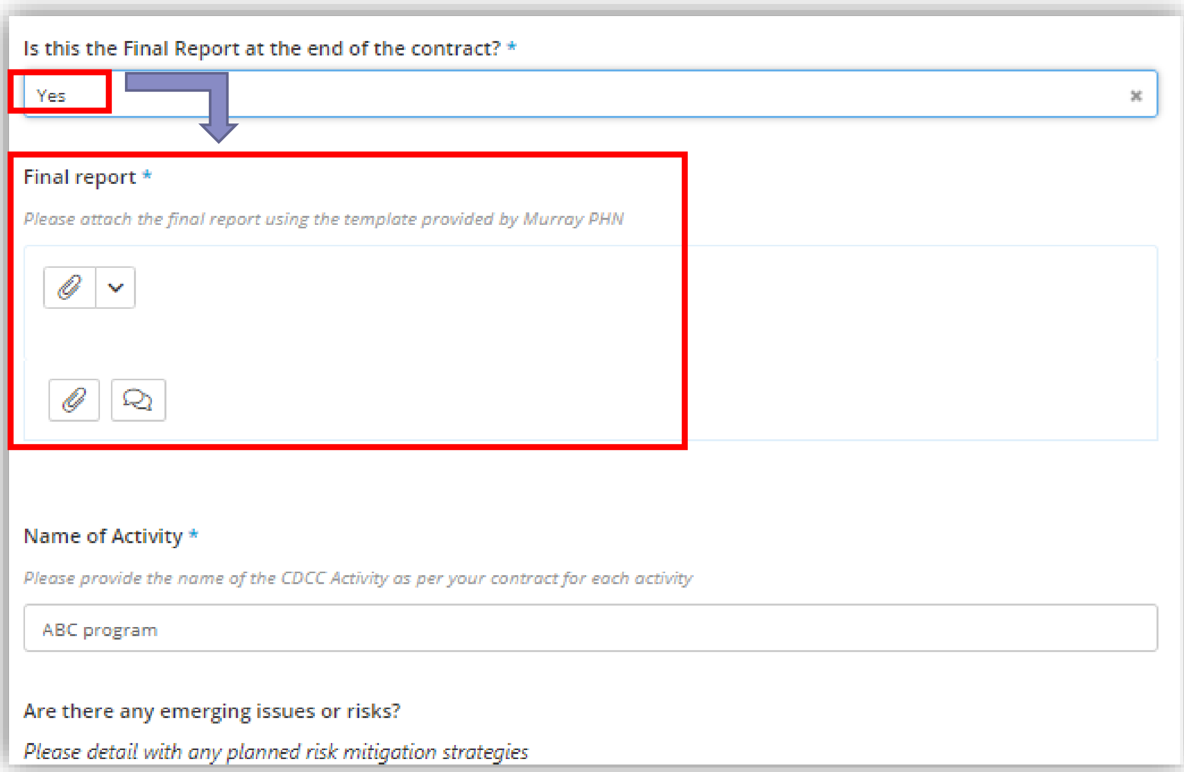
This is the screen that appears after you successfully submit the Checklist.

Question types you may see

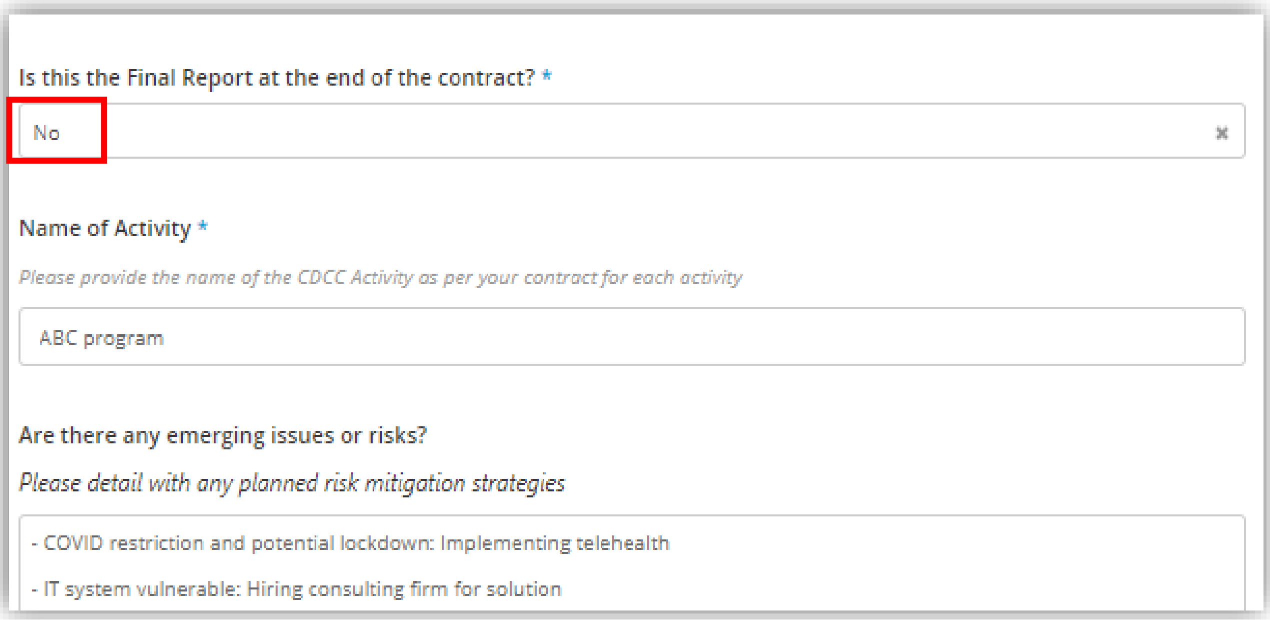
Depending on the type of contract the report relates to, there will be a number of different questions to complete – the fields may be text-based fields, date fields, numeric fields, single select fields or may require you to attach a document or complete a case study.

Some questions are mandatory, and the checklist will be unable to be submitted until a response has been entered. Mandatory questions are indicated by a blue asterisk at the end of the question.

Other questions may only require a response at specific times, and these will be displayed when the relevant reporting period is selected from the drop-down list. For example, case studies and financial acquittals may only be required for some reports and therefore will only be visible for those reporting periods (Note: refer to detailed instructions for Uploading Attachments and Completing a Case Study later in this guide); and a final report (if applicable) is only required in the last repeat of the Checklist (example below).

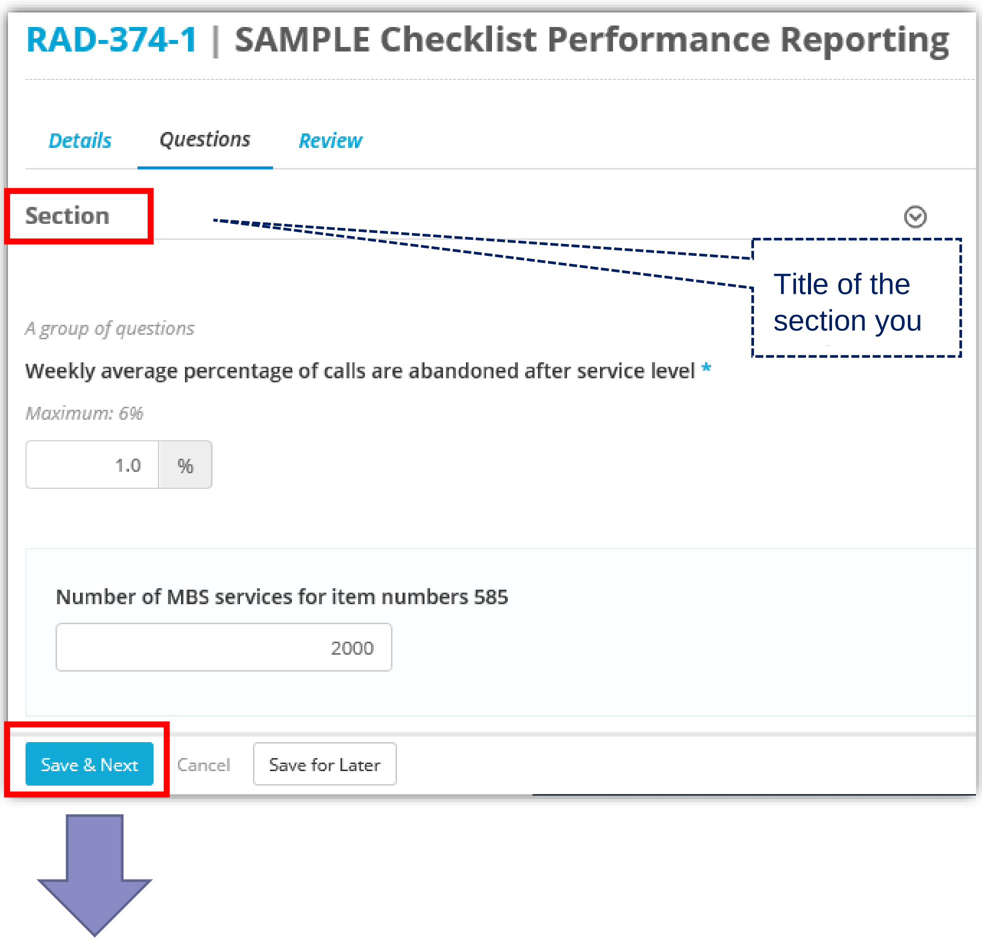


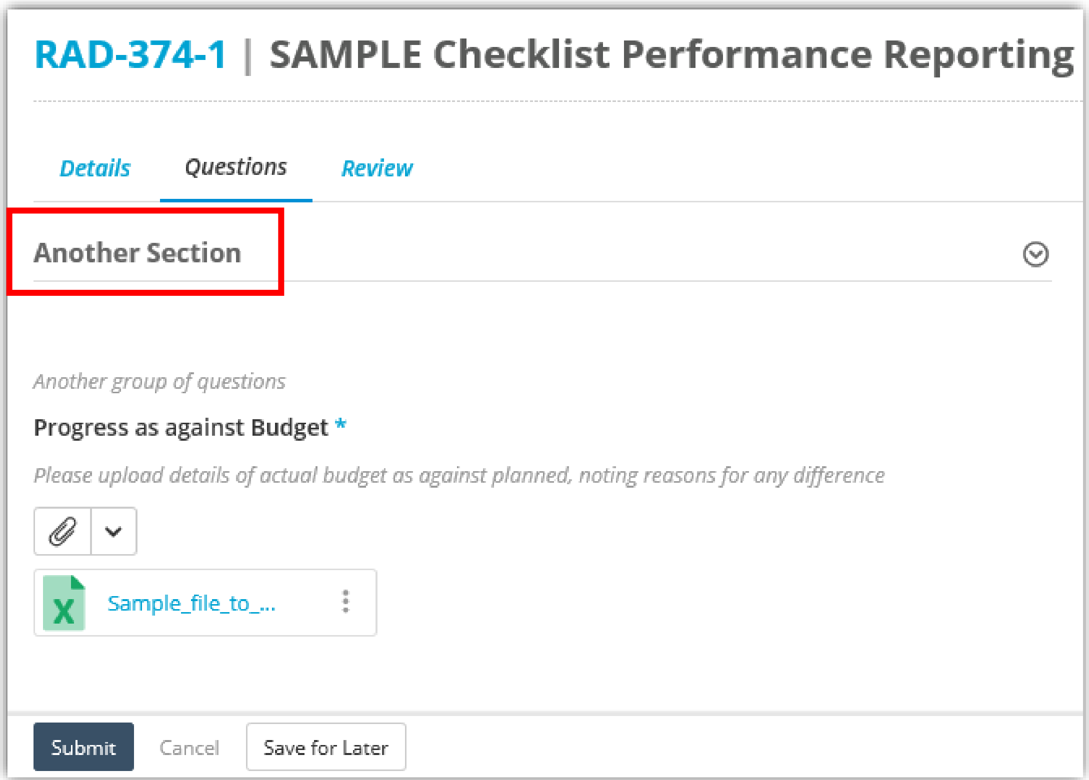
In this example, only when the question “Is this the Final Report at the end of the contract?” is answered with “Yes”, the question “Final Report” appears. If “No” is selected, “Final Report” question disappears:



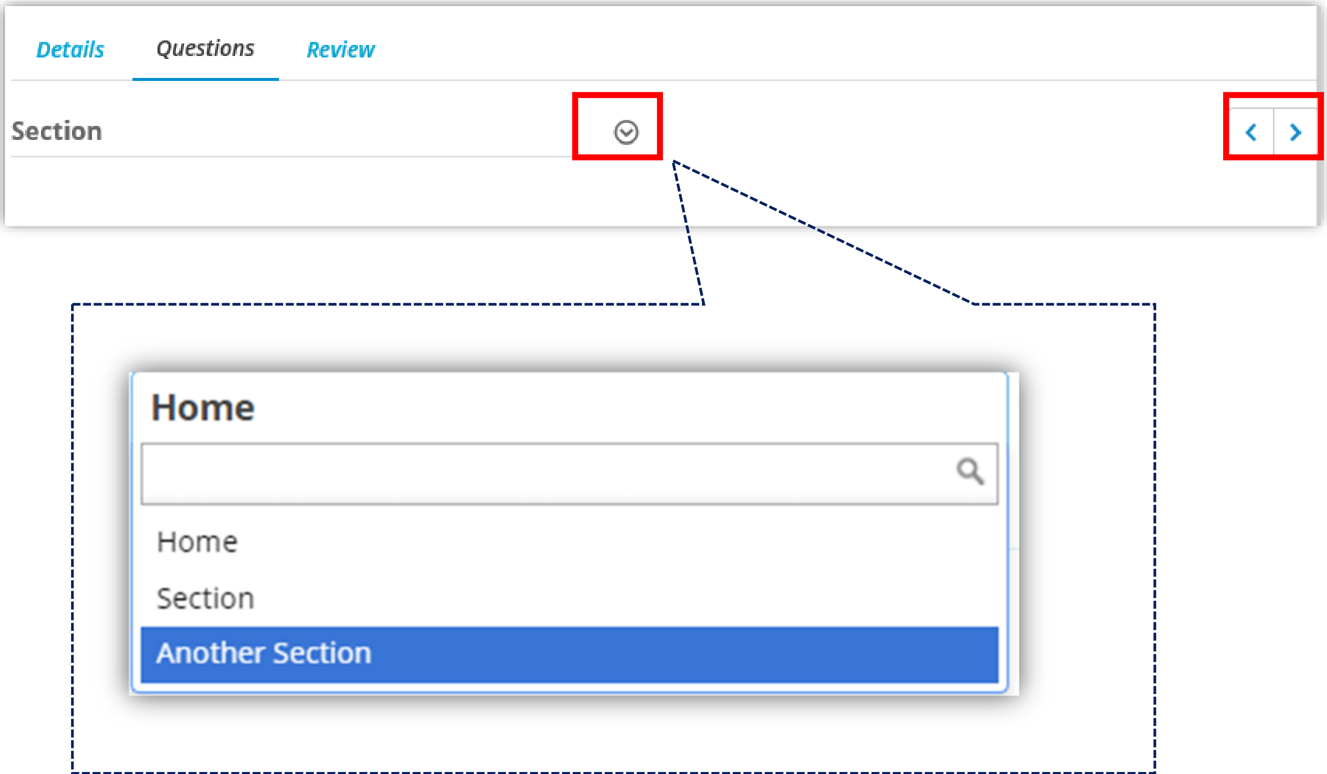
Sections - grouping of the questions

The questions may be grouped into ***sections***. You can move through the checklist sections using the ***Save & Next*** button:



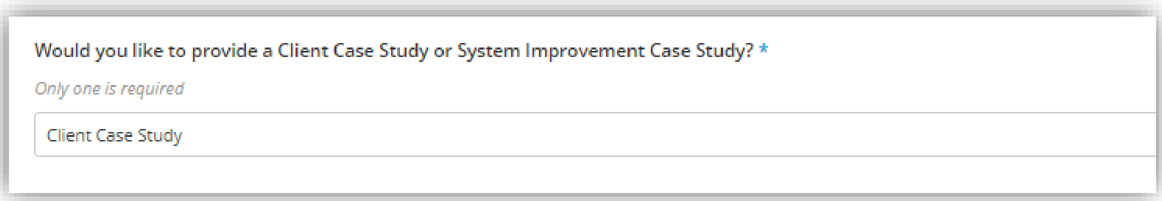


To review questions (which have been saved) in previous/other sections use drop-down menu or use direction arrows:



Completing a Case Study

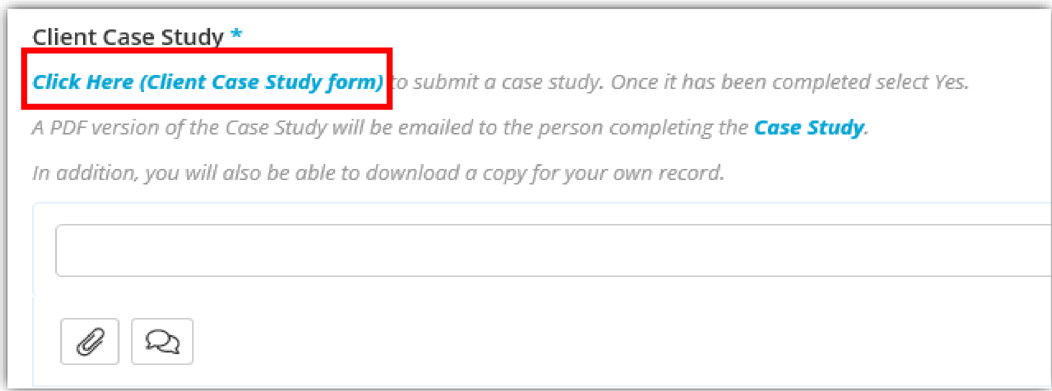
If a Case Study is required, the following question may be displayed.



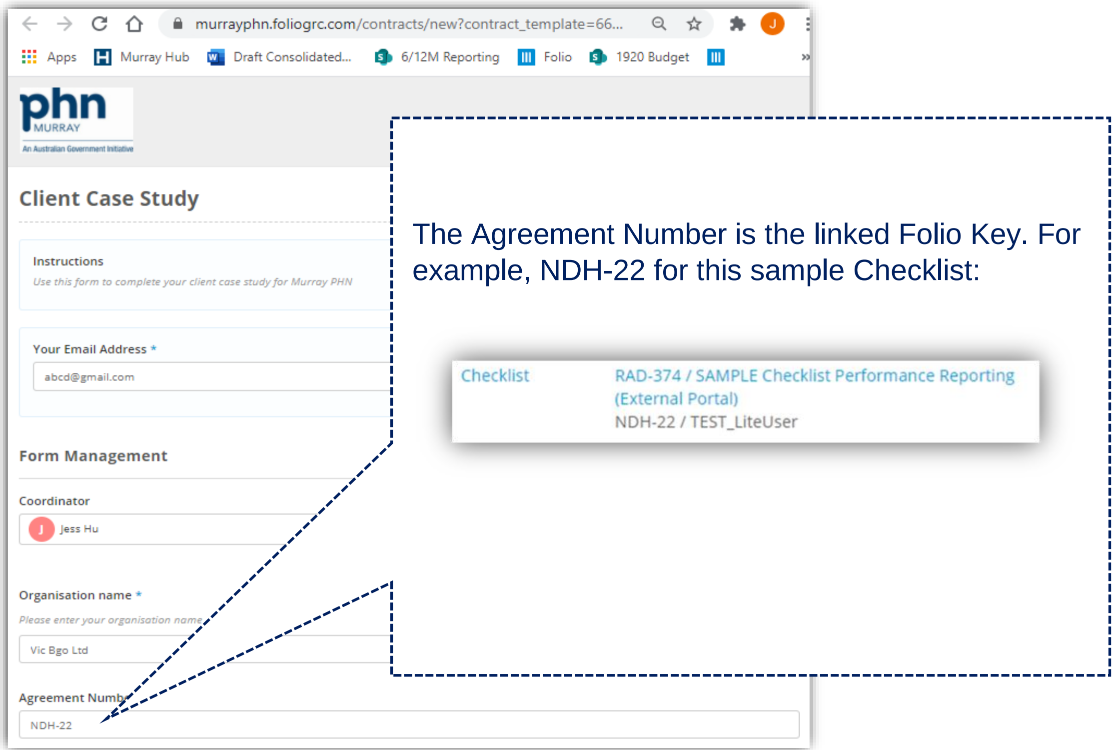
If applicable, choose whether you will be submitting a client or a system case study. Note that some checklists will not offer a choice of case study type as this is not relevant for some contracts.

A Case Study

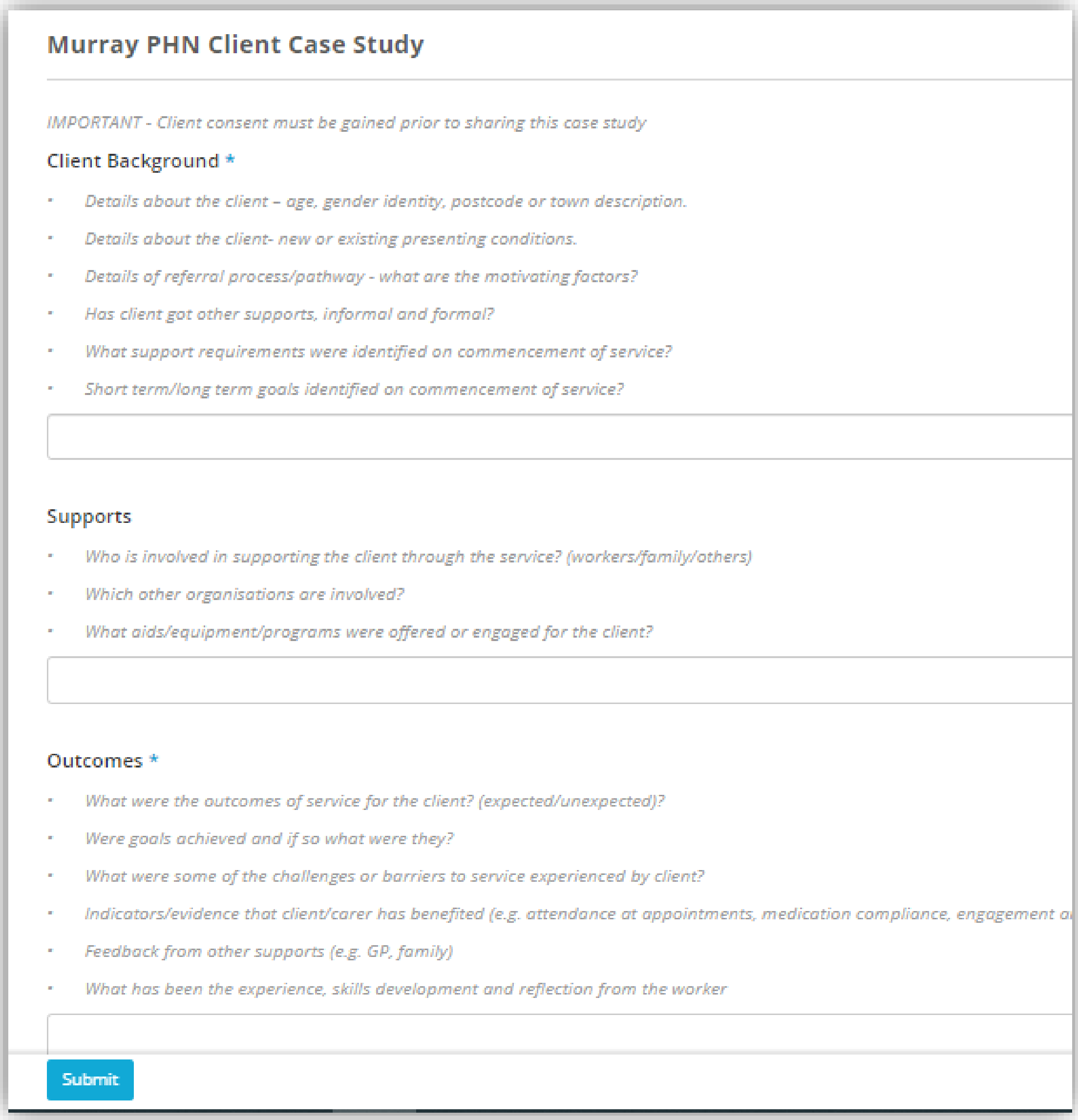
The below Case Study is only an example. The type of Case Studies in your Checklists can vary.



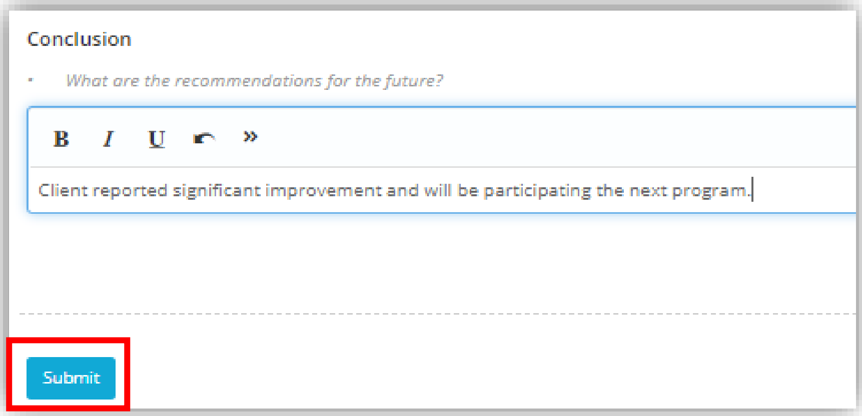
- Click on the blue hyperlink ***"Click Here (Case Study Form)".*** This will open the Case Study form. NOTE: The Case Study form is separate to your checklist.
- Answer the Case Study questions



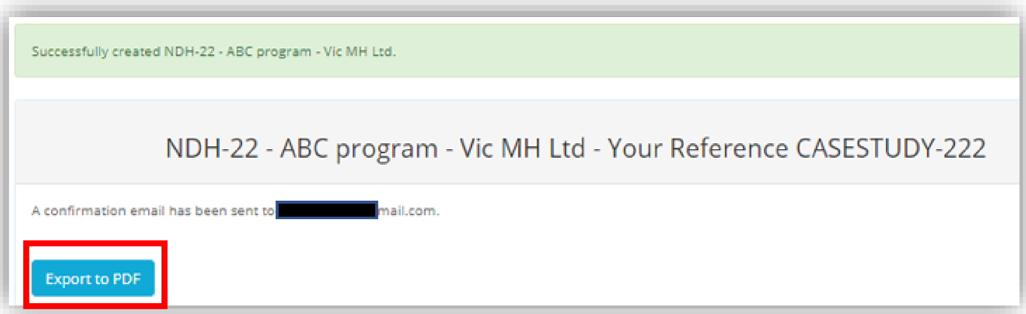
- It will then ask for the client case study information. Note: the case study must be completed in one sitting as there is no Save for Later option available. For ease, it could be completed outside of Folio and copied into the form.



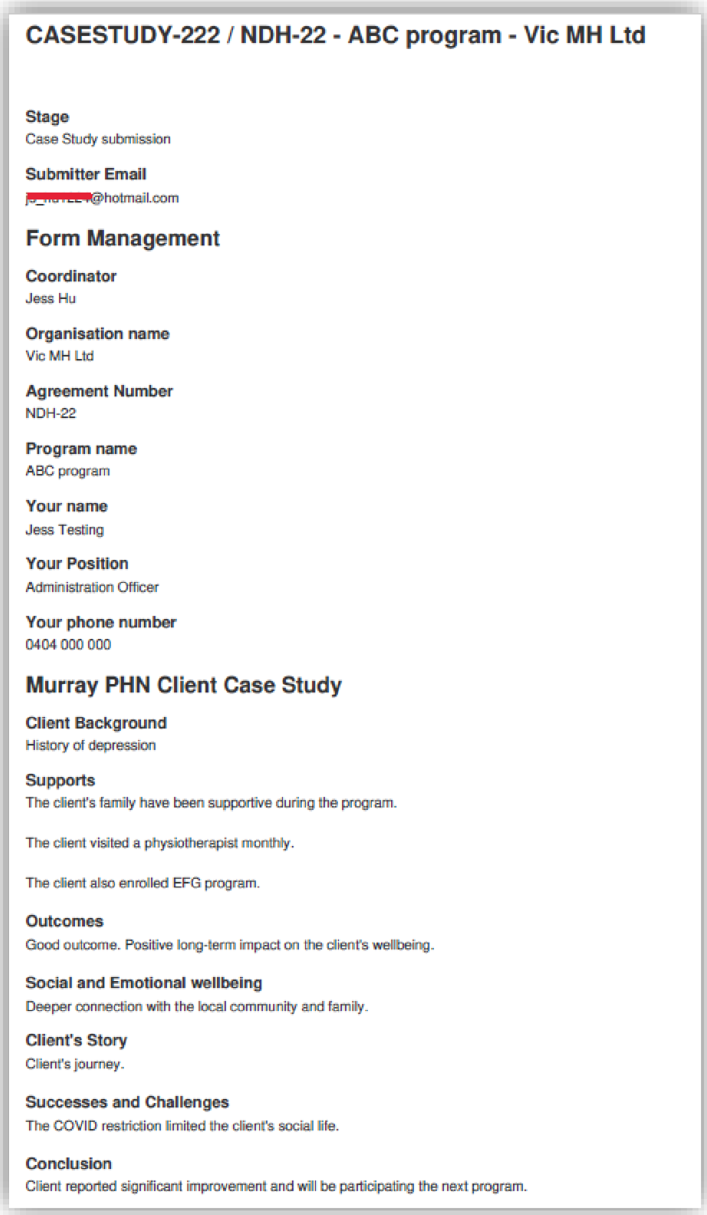
- Once completed, select the ***Submit*** button. Please note, once submitted the user will no longer be able to review or make any changes to the Case Study.



- Once the Case Study has been submitted you will see the following:



- Select ***Export to PDF*** to immediately download a copy of the case study.



CASESTUDY-222 / NDH-22 - ABC program - Vic MH Ltd

Stage
Case Study submission

Submitter Email
[redacted]@hotmail.com

Form Management

Coordinator
Jess Hu

Organisation name
Vic MH Ltd

Agreement Number
NDH-22

Program name
ABC program

Your name
Jess Testing

Your Position
Administration Officer

Your phone number
0404 000 000

Murray PHN Client Case Study

Client Background
History of depression

Supports
The client's family have been supportive during the program.

The client visited a physiotherapist monthly.

The client also enrolled EFG program.

Outcomes
Good outcome. Positive long-term impact on the client's wellbeing.

Social and Emotional wellbeing
Deeper connection with the local community and family.

Client's Story
Client's journey.

Successes and Challenges
The COVID restriction limited the client's social life.

Conclusion
Client reported significant improvement and will be participating the next program.

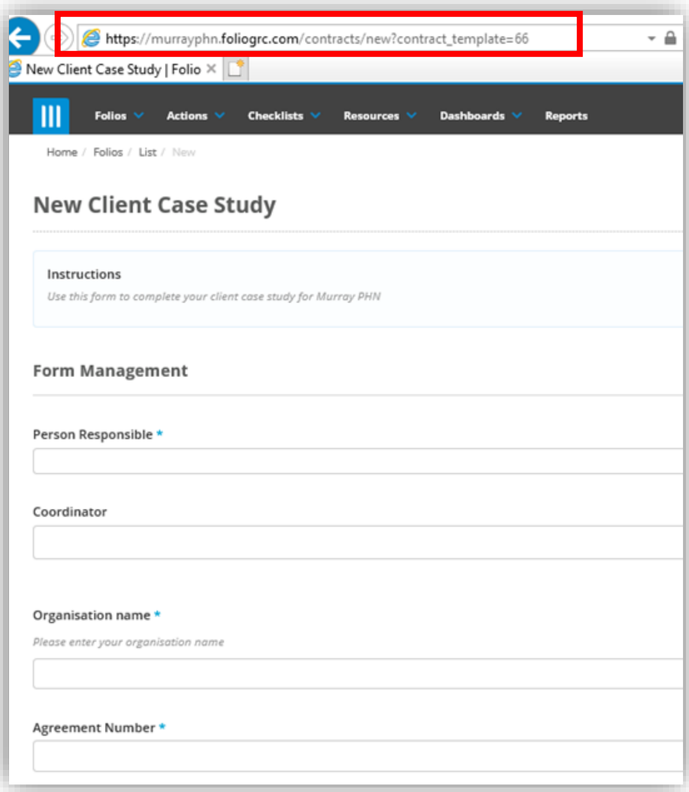
- An email will be sent to the email address provided within the form with a PDF attachment of the submitted case study.

- The PDF copy of the Case Study must be attached to the checklist before submitting. (Refer to the next part of this guide, Uploading Attachments for instruction on how to do this). This will also ensure the User can always view their submitted case studies.
- Select **"Yes"** from the dropdown menu to indicate that the case study has been completed and attach the PDF case study.

Another person completing the Case Study

The person completing the case study does not need to have access to Folio. For example, this may be the case if an allied health professional, or mental health clinician is required to complete a case study but does not need access to prepare the reports. The User can send the Case Study link to the Person required to complete the case.

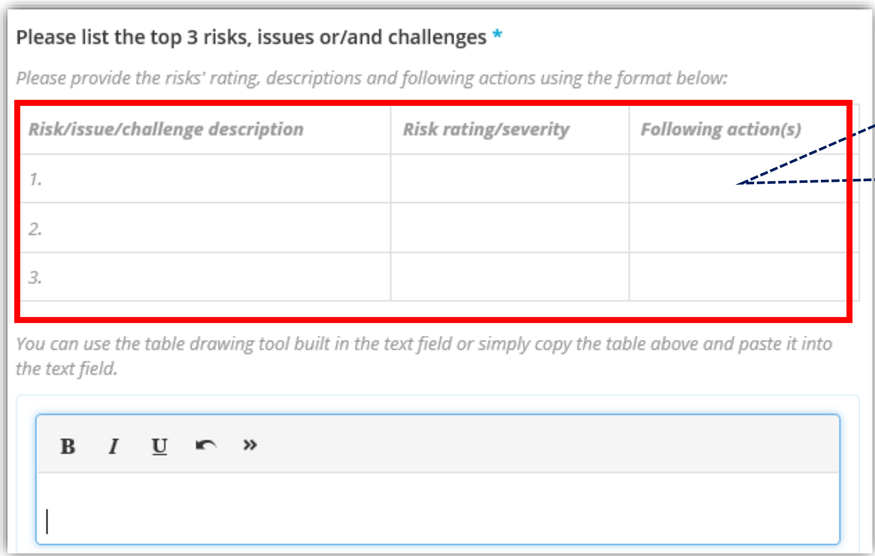
1. Click on the blue hyperlink and a Case Study form will appear in a new browser tab
2. Copy the URL address at the top of the page and email it to the person who is required to complete the case study:



3. The person completing the case study then clicks on the link provided and follows the steps provided above.
4. When the Case Study is emailed to them, they can then forward the email onto the User to upload the PDF before submitting.

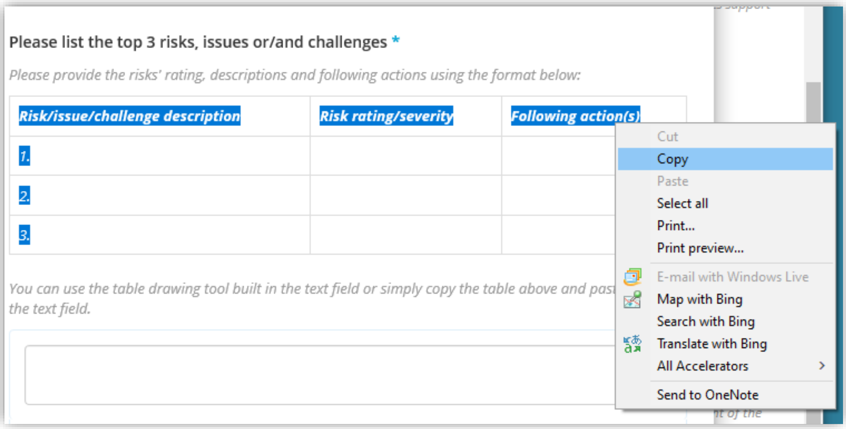
Insert a table in a text field

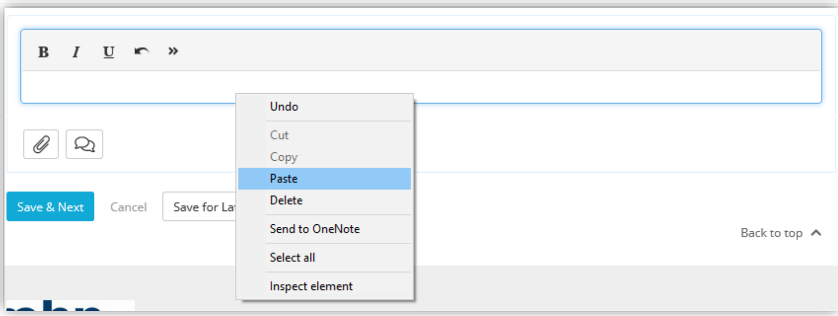
We would state any requirements or provide suggestions in the instructions of the question and provide a sample/ template table for you to use. Some questions require data to be submitted in table format. Here is an example:

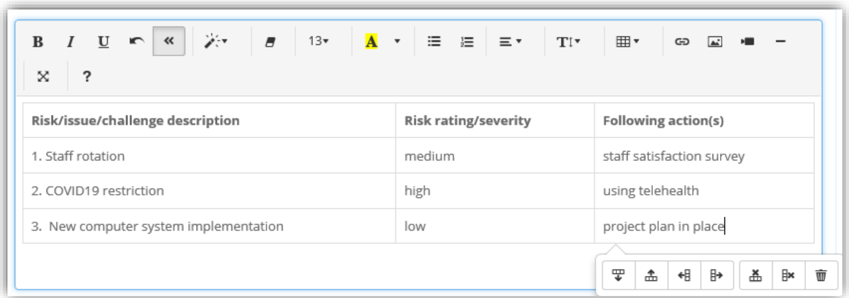


We would state the requirement or suggestion in the instruction of the question and provide a sample table for you to use.

You can simply copy the table and paste it into the text field, then enter your answer in it:

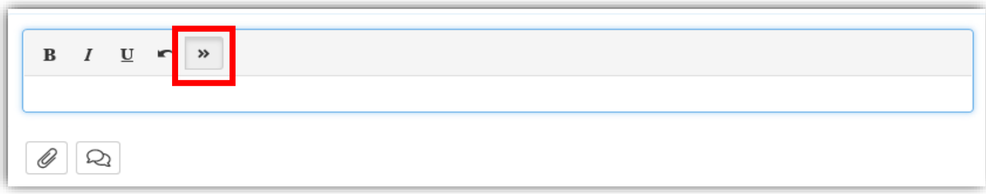




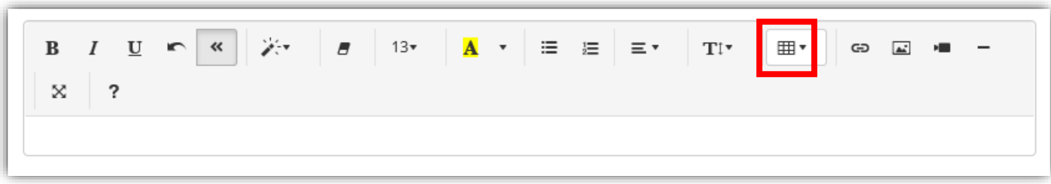


Alternatively, you can create a table in the text field using the tool in the tool bar.

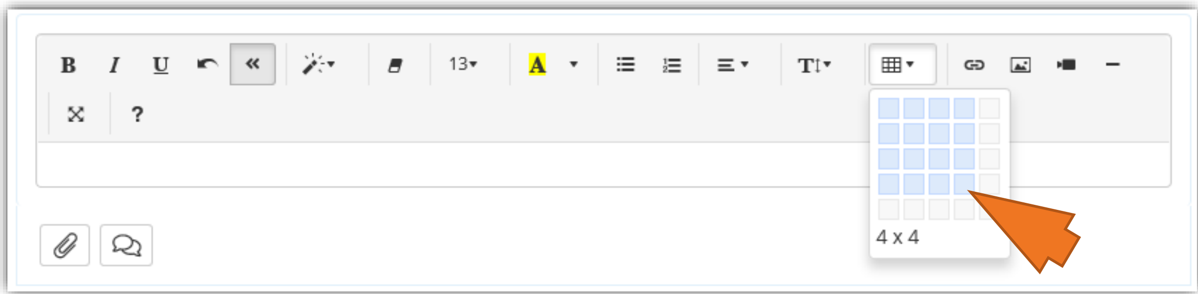
Click into the text field, the tool bar appears at the top of it. Click the arrow to see more options:



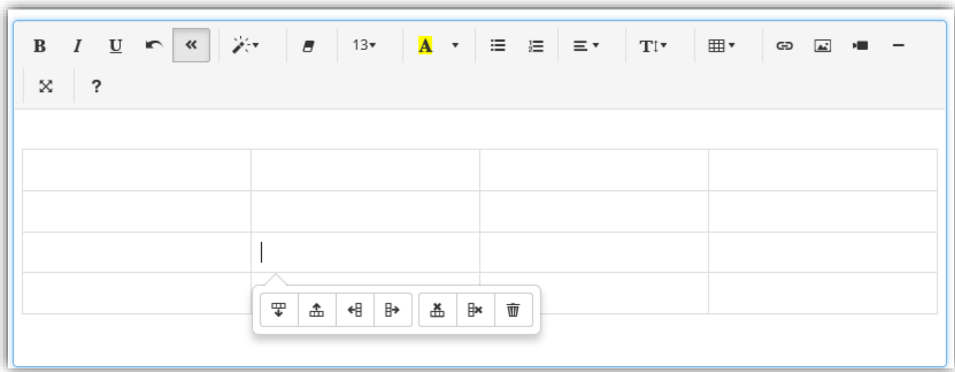
Click on the table tool:



Move the mouse cursor right to add columns and down to add rows. Then left click to add the table.



If you click on any area of the table, the options of adding and reducing columns and rows for you to edit the table. You can also delete the table by clicking on the bin symbol:

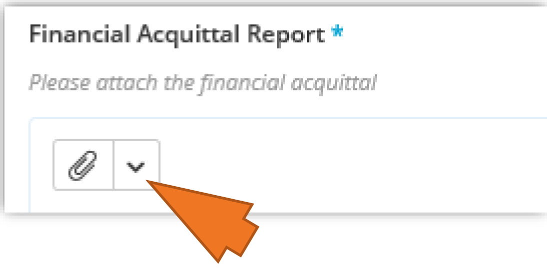


When the table is ready, you can type the answer in it:

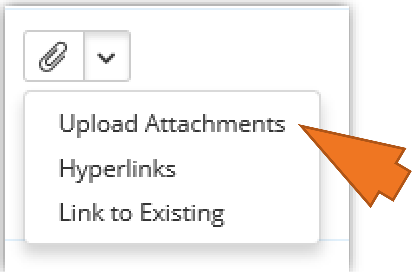
Upload attachments

Certain reports request attachments. For example, a Budget/Acquittal. The User is asked to follow these steps:

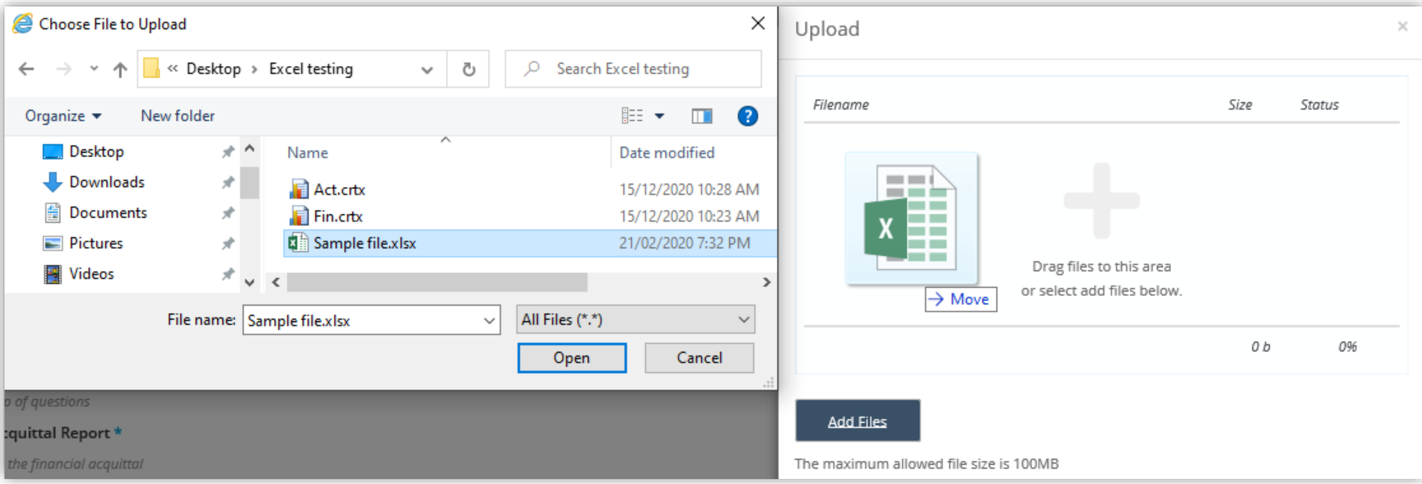
1. Click on the down arrow and upload the required document:



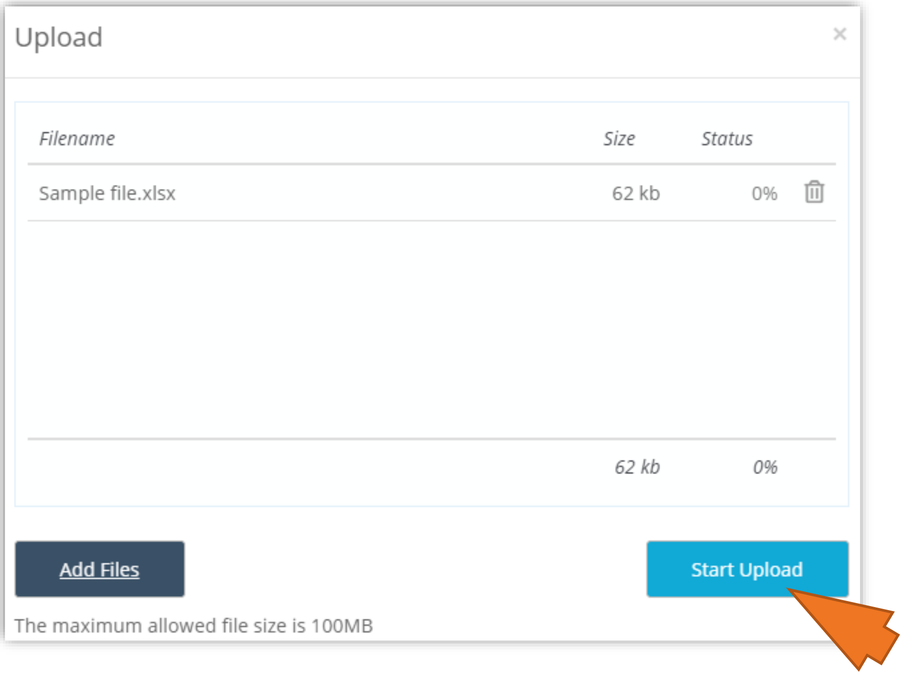
2. Click ***Upload Attachments***:



3. Select the document you wish to attach or drag and drop the document and click start upload. “Drag and drop” function is available for uploading a document, too. The instruction shows after “Upload Attachments” is selected:

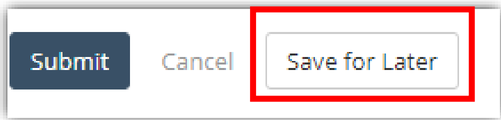


Note: the document cannot be larger than 100MB

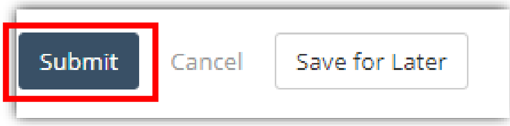


Saving and submitting your work

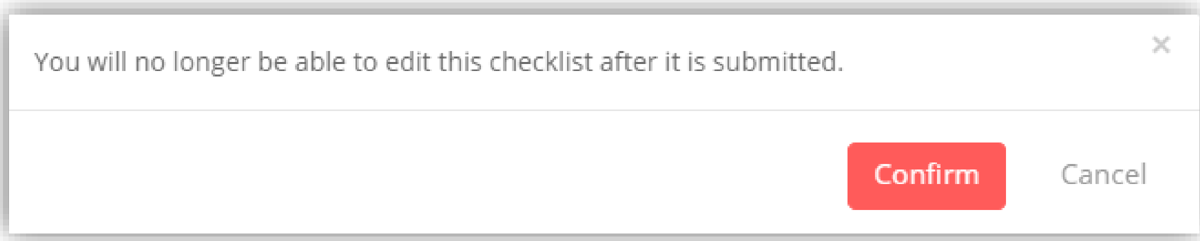
- The checklist does not need to be completed in a single sitting. If the User would like to come back to complete the checklist at another time, click ***Save for Later*** at the bottom of the page. This will change the status on your To Do List to 'In Progress'. Use this option also, if more than one user needs to complete the checklist, or if the checklist requires your organisations internal approval before it is submitted to Murray PHN.



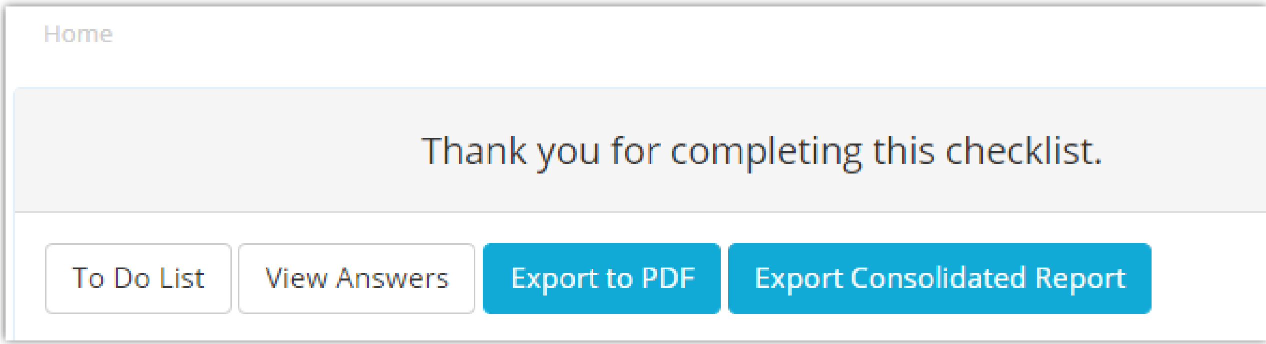
- When the User is satisfied with the information they have provided, choose the ***Submit*** button



- The following notice will appear once the checklist has been successfully submitted. Click ***Confirm*** to proceed.



1. At this point, Users can choose to view their answers, export to the report to a PDF, export a consolidated report (which will provide details of all quantitative data entered YTD) or return to the 'To do List'



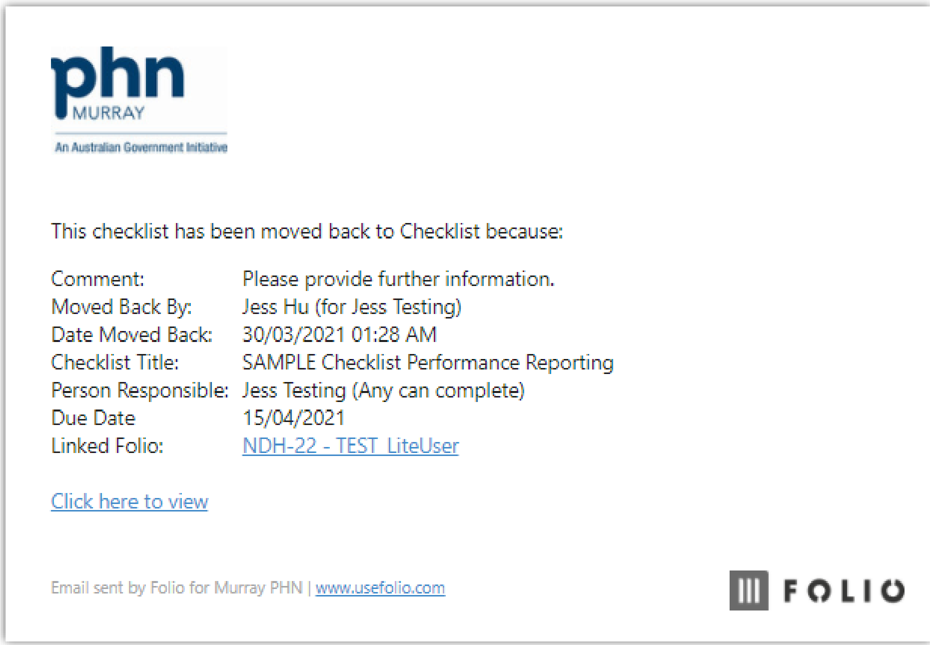
2. If a checklist has not been completed by the due date, a reminder notification will be sent from Folio to the Users assigned to the checklist on a weekly basis until the checklist has been completed.

Review and approval of Reports

The submitted report will be reviewed by Murray PHN for completeness.

When further information is required

If further information is required by the Reviewer or the Approver, the checklist will be returned via Folio. You will receive an email notification if this occurs. This will change the status of the checklist to 'In Progress' (the stage from Review to Checklist again):



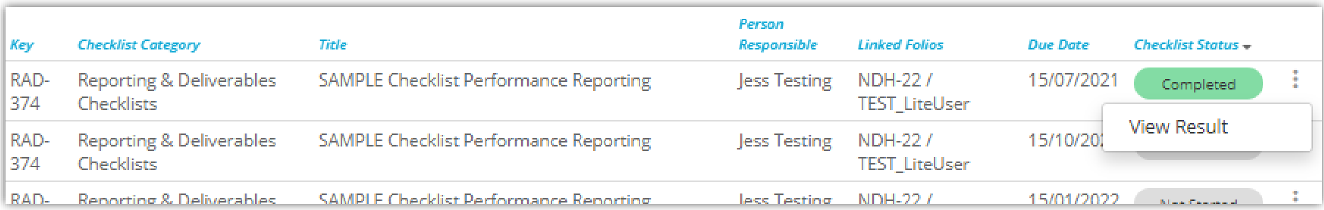
Once the information has been updated the user can follow the instructions for re-submitting a report above.

Review and Approve Statuses

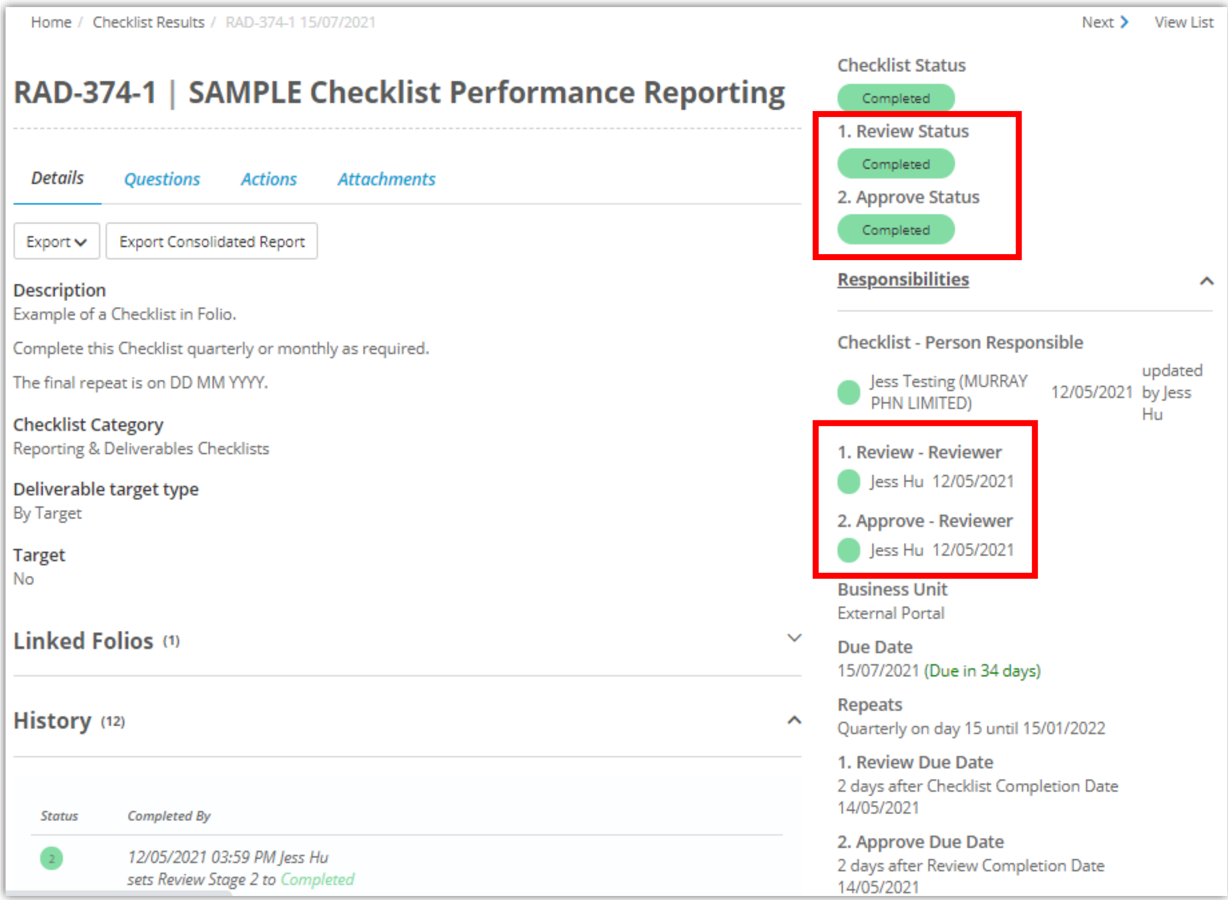
When Murray PHN is satisfied that all requirements of the Checklist have been met the report will be reviewed and approved. The user can check if the Checklist has been reviewed or/and approved in the submitted repeat.

*Note: the user/Checklist submitter does **NOT** receive a notification by email when a Checklist is reviewed or approved by Murray PHN. The statuses of Review and Approve are in the submitted repeat.*

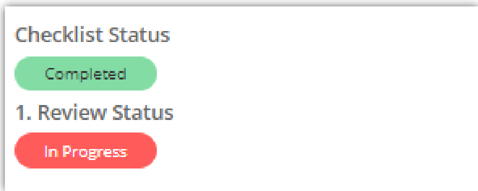
Find the repeat you submitted (see the next chapter "Accessing Submitted Checklists" on how to find the submitted Checklists and their results) and view result:



The Review Status and Approve Status are near the to-right corner. Under the statuses, in Responsibilities, you can find out which Reviewers have reviewed and approved the Checklist on which dates:

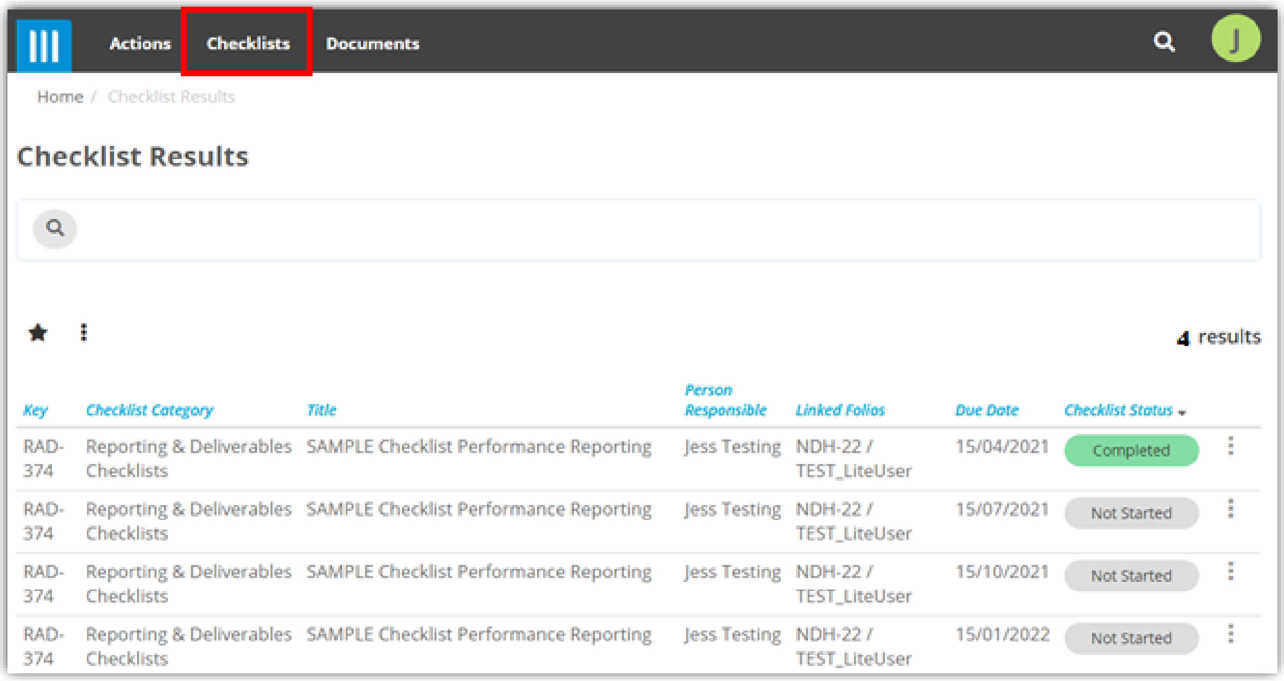


When the Checklist has not been reviewed or approved, the Review or Approve status is either "Not Started" or "In Progress":

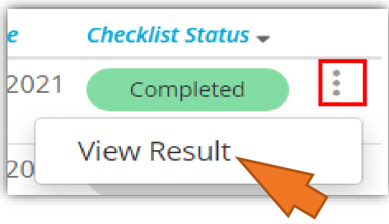


Accessing Submitted Checklists

To view all checklists, click on the ***Checklists*** tab. The below example shows the SAMPLE Checklist Performance Reporting quarterly report with the four due dates of each report (one completed and three not started).



- To see previous reports submitted, click on the 'three vertical dots' below and click View Result.



- The submitted result will appear as screenshot below and include:

  a. Details – shows the User the description and the movement of the Checklist status.

  The result can be exported in a spreadsheet or a PDF file.

  b. Questions – shows the User all of the answers to the checklist that was submitted.

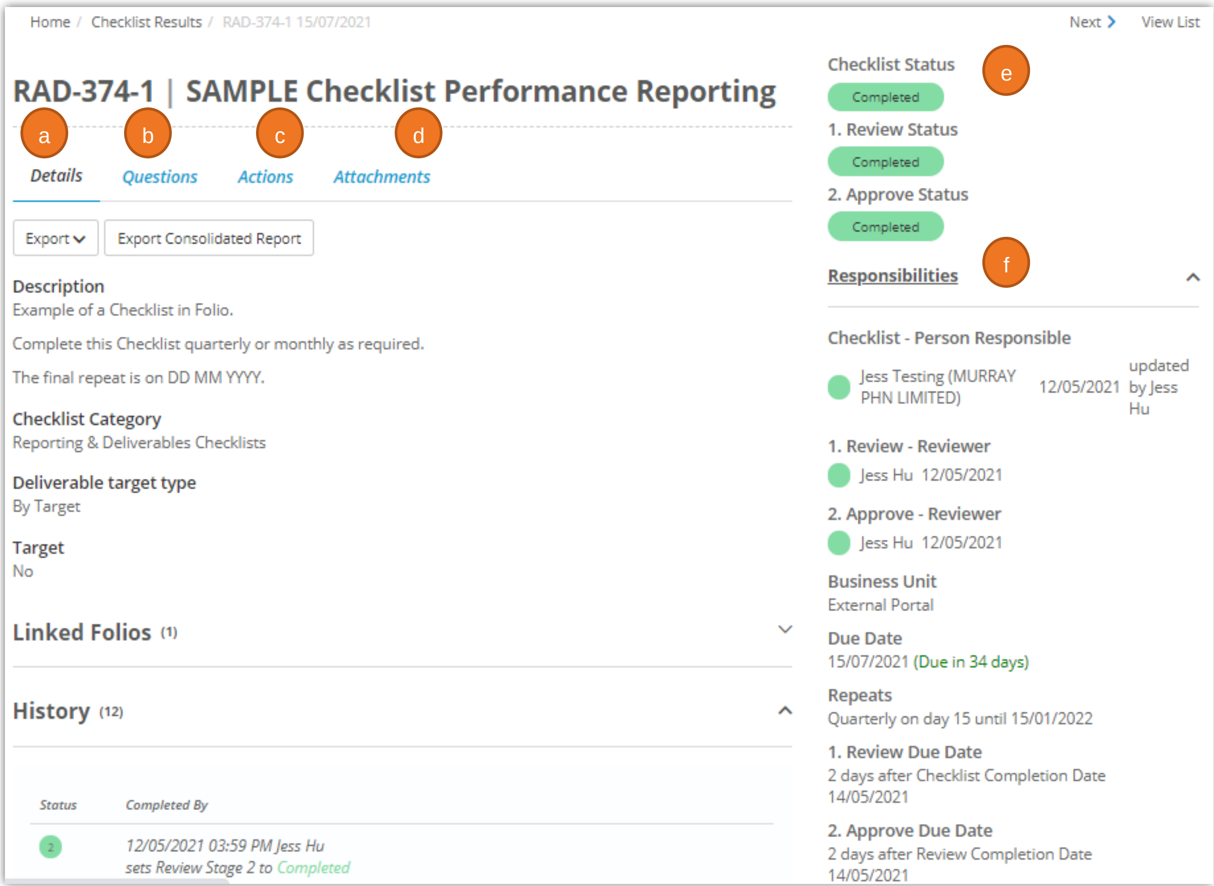
  Questions (Case Study) – scroll through the questions and if a case study was required, a hyperlink will be supplied for the User to download.

  c. Actions – Not applicable. Murray PHN is not currently using Actions.

  d. Attachments – shows any attachments that were made by the User. For instance, Progress as against Budget and Client Case Study.

  e. Checklist Status, Review Status and Approve Status

  f. Responsibilities – Who and when the Checklist repeat was submitted (by the Lite User), reviewed (by the Contract Manager or Quality Improvement Consultant) and approved (by the Activity Lead).



Folio support

If you have further queries, please contact your Murray PHN representative.

You can also visit the Murray PHN website, Contract Reporting subpage (https://www.murrayphn.org.au/portfolio-view/contract-reporting/) for an introduction video and downloadable guide.

This guide is available in ***Hub*** on the top of the homepage of Folio: