How to guide for service providers

Instructions for completing tasks in the PACS Portal

Dashboards and reports

I want to view my dashboard

- Go to Dashboard tab/tile
- View tiles for:
  - Total FY funding commitment
  - FY active contracts
  - Pending actions this week
  - Upcoming payments

I want to adjust dashboard settings

- Go to Dashboard tab/tile
- Dashboard settings
- Toggle on or off to change which tiles are visible

I want to view summary of pending actions

- Go to Dashboard tab/tile
- Pending actions (top 5 are visible)
- Columns can be sorted ascending / descending
- Further actions can be viewed via the pagination
- All pending actions can be downloaded to excel

I want to view funding summary

- Go to Dashboard tab/tile
- Select Funding summary
- View total FY funding

- View paid to date
- View next payment amount

I want to view next week’s payments

- Go to Dashboard tab/tile
- Select Next week’s payments
- Payments are arranged by contract
- Clicking on the ellipsis (:) will provide payment details for individual contracts
- Next week’s payments can be downloaded to excel

I want to view active contracts

- Go to Dashboard tab/tile
- Select Active contracts
- Columns can be sorted
- Clicking the pagination will bring up further contracts
- Active contracts list can be downloaded to excel

I want to view accountability

- Go to Dashboard tab/tile
- Select Accountability
- Columns can be sorted
- Clicking the pagination will bring up further Accountability records
- Records can be downloaded to excel

I want to view accountability report

- Go to Dashboard tab/tile
- Select Reports tab
- Select Accountability report tile – view report hyperlink

I want to view contract summary report

- Go to Dashboard tab/tile
- Select Reports tab
- Select Contract summary report tile – view report hyperlink

I want to view portal user report

- Go to Dashboard tab/tile
- Select Reports tab
- Select Portal user report tile – view report hyperlink
- (Note: this report is currently under construction)

Communications

Note for providers

Communications to and from the portal will not be the main means of communication with DCJ and will not replace the formal emails and advices DCJ sends to service providers.

I want to see an overview of action items and corporate messages

- Go to Communications tab/tile
- Default view tab is Overview
- See summary of Latest actions and Latest corporate messages

I want to see a list of action items

- Go to Communications tab/tile
- See all Actions by clicking the view all hyperlink or choosing the Action items tab
- Default status is Pending Action items; In progress and Completed statuses are also available by clicking on the down arrow

I want to search for action items

- Go to Communications tab/tile
- Action items tab
- Search for a specific action item in the search bar remembering to use * before and after the search words, or
- Use the arrows in the column headings to search ascending or descending

I want to see details of action items

- Go to Communications tab/tile
- Action items tab

- See details of the action item by clicking on the action number hyperlink or the ellipsis (⁝)

I want to update progress of action items

- Go to Communications tab/tile
- Action items tab
- View details of the action item after clicking the link
- Select the status for the action item by clicking the Mark in progress or Mark as completed button

I want to see all corporate messages

- Go to Communications tab/tile
- From the Overview tab, scroll down to the Latest Corporate messages Select view all
- Alternatively view all corporate messages from the Corporate messages tab
- View latest Corporate messages to and from your organisation and from PACS

I want to add a corporate message

- Go to Communications tab/tile
- Select Corporate messages tab
- Select +Comment to send a message
- Create your message in the comment box
- Select the Submit button
- Your message will appear in the Corporate messages screen and be sent to PACS

Payments

I want to see all scheduled payments

- Go to Payments tab/tile
- Select Scheduled tab
- The default will be next 7 days. You can also select either next month or next 3 months by using the drop-down arrow
- The screen will show all scheduled contract payments for the selected period

I want to see my scheduled payments by due date

- Go to Payments tab/tile
- Select Scheduled view tab
- Select Next 3 months

- Click on Date due column
- Choose either ascending or descending date order

I want to see my scheduled payments by contract

- Go to Payments tab/tile
- Select Scheduled view tab
- Select either next 7 days, next month or next 3 months
- Screen shows all scheduled contract payments for selected period
- Choose Contract ID for a specific contract to view payment details
- Use the search bar to search for a specific contract, remembering to use * before and after the search words, or
- Use the arrows in the column headings to search ascending or descending

I want to see my funding allocation

- Go to Payments tab/tile
- Select Funding allocation view tab
- The default will be current financial year. You can also select either last or all financial years using the drop-down arrow
- Screen shows funding allocation for all contracts for selected period

I want to see past payments

- Go to Payments tab/tile
- Select Payment history view tab
- The default is current financial year
- You can also select either last or all financial years
- Payments made during that period are searchable and viewable by column headings in the table shown
- Information can be downloaded in excel

I want to see my RCTI

- Go to Payments tab/tile
- Select RCTI – advice of deposit view tab
- Select time period from dropdown (default is last 7 days)
- Select hyperlink under the Payment receipt ID column
- View receipt details
- Select hyperlink in Receipt table to view or print RCTI or advice of deposit as a PDF
- Payment details and bank details can also be downloaded in excel

Accountability

I want to see current year corporate and contract accountability forms

- Go to Accountability tab/tile
- Select either corporate or contract tab
- Default view is current financial year
- Select either hyperlink or ellipsis (⁝) to view selected form

I want to start or edit current year corporate and contract accountability form

- Go to Accountability tab/tile
- Select either corporate or contract view tab
- Default view is current financial year
- Select relevant form
- Select either hyperlink or ellipsis (⁝) to start forms in status of New or edit form in status of In progress
- Follow the instructions on the form and work progressively through each question
- If you need to change or edit a previous screen of the form use the back button at the bottom of the screen to return to the previous page
- Once you've completed the form and added any required documents proceed to the declaration/certification section
- Review the form and submit the declaration/certification
- Note that forms with the status Review, Submitted, Resubmitted, Accepted can be viewed but not edited

I want to see past accountability forms

- Go to Accountability tab/tile
- Select either corporate or contract view tab
- Default view is current financial year, or you can also select either last financial year or all financial years
- Select the form you require
- Click on the hyperlink or ellipsis (⁝) to review the selected form

I want to answer my contract manager's accountability comment

- Got to Accountability tab/tile
- Select either corporate or contract view tab
- Default view is current financial year, so select relevant form

- Select Communication view tab
- Respond to messages by clicking on the +Comment button
- Enter your message in the comment box and click the Submit button

I want to send a message about my accountability form

- Go to Accountability tab/tile
- Select either corporate or contract view tab
- Default view is current financial year, so select relevant form
- Select Communication view tab
- Send a message by clicking on the +Comment button
- Enter your message in the comment box and click the Submit button

Contracts

I want to see lists of all active, inactive, draft, terminated and expired contracts

- Go to Contracts tab/tile
- Select dropdown menu where the default is Active contracts
- Select the type of contract that you want to view

I want to see list of contracts by column headings:

- Go to Contracts tab/tile
- Columns available to search include Contract ID, Operating name, Subprogram, District, Start date, End date, Subcontract, Status
- Use the search bar to search for specific criteria remembering to use * before and after the search words, or
- Use the arrows in the column headings to search ascending or descending
- Download your search results in an excel spreadsheet via the download button

I want to see profile information for a contract

- Go to Contracts tab/tile
- Search for and select a specific contract from the list
- Click the contract ID hyperlink to view the details of the contract
- Profile is the default view tab
- View the profile information for the selected contract
- You are able to request to use a subcontractor for this contract from the screen by clicking on the +Add button in the subcontractor section.

- This will open a subcontracting request form
- Note the subcontracting feature is still under development and go live; it is requested to not be used until further notice.

I want to see who my DCJ contract manager is and what DCJ district is the managing district

- Go to Contracts tab/tile
- Search for and select the specific contract
- Click the contract ID hyperlink
- Select the Contacts view tab
- DCJ District, DCJ contact, and service provider contact are displayed

I want to see and add or edit contact information for a contract

- Go to Contracts tab/tile
- Search for and select a specific contract
- Click the contract ID hyperlink
- Select the Contacts tab
- Scroll down to Contract contacts
- Use +Contact to add a contact (note that contacts must be created at the service provider level before being added to a contract)
- Use pen icon to edit a contact

I want to see and add or edit address information for a contract ·

- Go to Contracts tab/tile
- Search for and select a specific contract
- Click the contract ID hyperlink
- Select the Contacts tab
- Scroll down to Contract addresses
- Use +Address to add an address (note that addresses must be created at the service provider level before being added to a contract)
- Use the pen icon to edit an address

I want to see financial information for a contract

- Go to Contracts tab/tile
- Search for and select specific contract
- Click the contract ID hyperlink
- Select the Financials tab
- Bank details, funding commitments and payments are displayed

I want to see service information about my contract

- Got to Contracts tab/tile
- Search for and select a specific contract
- Click the contract ID hyperlink
- Select the Services view tab
- Percentage of service to the Aboriginal community under the contract is displayed
- Other contract service information – name, service level, outcome and quantity is displayed in the table, if available
- Note that detailed information may only be available for recent contracts

I want to see documents related to my contract

- Go to Contracts tab/tile
- Search for and select a specific contract
- Click the Contract ID hyperlink
- Select the Documents view tab
- Documents related to the contract are displayed in the table

I want to upload documents related to my contract

- Got to Contracts tab/tile
- Search for and select a specific contract
- Click the Contract ID hyperlink
- Select the Documents view tab
- Select +Attach document button to upload a new document to the portal and PACS
- Follow the onscreen instructions to proceed (note there is a 15 MB file size limit)

I want to see my current year contract level accountability form

- Got to Contracts tab/tile
- Select the Accountability view tab
- The dropdown default is current financial year
- Search for forms using the search bar, remembering to use * before and after the search words, or
- Use the arrows in the column headings to search ascending or descending
- Click on the form hyperlink or select the ellipsis (⁝) at the end of the row to view the form

I want to see past year contract level accountability forms

- Got to Contracts tab/tile
- Select the Accountability view tab
- Current financial year is the default, however, from the dropdown select either Last financial year or All financial years
- Search for forms using the search bar, remembering to use * before and after the search words, or
- Use the arrows in the column headings to search ascending or descending
- Click on the form ID hyperlink or select the ellipsis (⁝) at the end of the row to view the form

I want to see pending, in progress and completed action items for my contract

- Go to Contracts tab/tile
- Select the Communication view tab
- View Contract actions
- Default is pending Action items
- You can also select in progress or completed Action items
- Use the arrows in the column headings to search ascending or descending
- You can search by Action number, Action type, Regarding, Assigned to, Due date, Due in x days, Created on

I want to see and add messages in relation to my contract

- Go to Contracts tab/tile
- Select the Communication view tab
- View latest contract messages to and from your organisation and PACS
- Click on the +Add comment button to send further contract messages

Documents

I want to see uploaded contract documents

- Go to Documents tab/tile
- Contract documents is the default tab
- Search for contract documents in the search bar, remembering to use * before and after the search words, or
- Search using the ascending and descending column headings
- Your contract or Letters of Variation documents will have the contract ID as the document name

- View details of the selected document by clicking the document name hyperlink or clicking on the ellipsis (⁝)

I want to see uploaded service provider documents

- Go to Documents tab/tile
- Select Service provider documents view tab
- Search for service provider documents in the search bar, remembering to use * before and after the search words, or
- Search using the ascending and descending column headings
- View details of the selected document by clicking the Request ID hyperlink or clicking on the ellipsis (⁝)

I want to upload documents for my contract manager to see

- Go to Documents tab/tile
- Select Upload view tab
- Select +Upload document button
- Complete add new document form. (Note, make sure that you name your document clearly so that you and your contract manager will be able to locate the document easily)
- Attach the file
- Submit

I want to see a list of documents I've uploaded

- Go to Documents tab/tile
- Select Upload view tab
- View the list on the screen
- View details of the uploaded document by selecting the document name hyperlink or clicking on the ellipsis (⁝)

I want to search a list of documents I've uploaded

- Go to Documents tab/tile
- Select Upload view tab
- Search for uploaded documents in the search bar, remembering to use * before and after the search words, or
- Search the upload list, using the ascending and descending column headings
- View details of the uploaded document by selecting the document name hyperlink or clicking on the ellipsis (⁝)

My provider

I want to see my service’s information

- Go to My provider tab/tile
- The Profile view tab is the default view
- Scroll down the screen to see legal and primary contact information

I want to edit primary contact information

- Go to My provider tab/tile
- Profile view tab is the default
- On the Primary contact information section, click on the pen icon
- Complete the online form with the details of the changes needed
- Click on Submit
- The details are updated.
- Note: there are some details that you will not be able to update, and you will need to submit a Provider update request and the updates will be made by PACS Admin

I want to edit a provider portal user

- Go to My provider tab/tile
- Select Contacts view tab
- Scroll down to Provider portal user section
- Click on the pen icon on the user to be amended
- Complete form and Submit
- Note that a user’s email address cannot be edited via this form. Portal user email addresses require DCJ security authentication. Contact PACS Admin.

I want to add a contact

- Go to My provider tab/tile
- Select Contacts view tab
- Scroll down to Provider contacts
- Click + Contact button
- Complete form and click on Submit
- The contact will automatically be added

I want to edit a contact

- My provider tab/tile
- Select Contacts view tab
- Scroll down to the Provider contacts section

- Click pen icon on the contact to be amended
- Complete form and submit. The details will be updated

I want to add an address

- Go to My provider tab/tile
- Select Contacts view tab
- Scroll down to Provider addresses
- Click +Address button
- Complete form and click on submit. The address will be added

I want to edit an address

- Go to My provider tab/tile
- Select Contacts view tab
- Scroll down to Provider addresses
- Click pen icon on the address to be amended
- Complete form and submit. The details will be updated

I want to view current bank account details

- Go to My provider tab/tile
- Select Financial view tab
- Search for a bank account using the ascending and descending column headings
- See details of the selected account by clicking the bank account name hyperlink or clicking on the ellipsis (:)

I want to add a bank account

- Go to My provider tab/tile
- Select Financial view tab
- Select +Account button
- Fill in the details on the screen
- Download the bank form template
- Complete and have two authorised delegates sign the form offline. (Note: this cannot be two staff members and must be two officers from your organisation who are authorised to sign legal documents on behalf of the organisation)
- Upload the signed form
- Review and submit the form
- Note: new bank accounts can only be verified by PACS Admin

I want to see status of request to add bank account

- Go to My provider tab/tile
- Select Provider update requests view tab
- Select Bank account details menu item
- Search for a specific bank account request in the search bar, remembering to use * before and after the search words, or
- Search for a Bank account request using the ascending and descending column headings
- See details of the request by clicking the request number hyperlink or clicking on the ellipsis (⁝)
- Note: you can also add a new request on this page

I want to see my service's accreditations

- Go to My provider tab/tile
- Select Accreditation view tab
- See list of accreditations held by your organisation
- Search for a specific accreditation using the ascending and descending column headings
- See details of the selected accreditation by clicking the Accredited by hyperlink or clicking on the ellipsis (⁝)

I want to add an accreditation

- Go to My provider tab/tile
- Select Accreditation view tab
- Select +Add button
- Complete the online form
- Upload supporting documentary evidence of the accreditation
- Review and submit
- Note that only PACS Admin can add your new accreditation details

I want to see status of request to add accreditation

- My provider tab/tile
- Select Provider update requests view tab
- Select Accreditation menu item
- Search for a specific accreditation request in the search bar, remembering to use * before and after the search words, or
- Search for a specific accreditation request using the ascending and descending column headings
- See details of the request by clicking the request number hyperlink or clicking on the ellipsis (⁝)

- Note: you can also add a new request on this page

I want to add updates to legal information about my service (name, entity type, ABN info, regulatory body)

- Got to My provider tab/tile
- Select Provider update requests view tab
- Select default Provider details menu item
- Select +New request button
- Complete the request form
- Upload supporting documents
- Submit the form.
- Note only PACS Admin can update or add new legal details

I want to see status of request to update legal information

- Go to My provider tab/tile
- Select Provider update requests view tab
- Select default Provider details menu item
- Search for a specific request in the search bar, remembering to use * before and after the search words, or
- Search for a specific request using the ascending and descending column headings
- See details of the request by clicking the request number hyperlink or clicking on the ellipsis (:)

I want to add new GST request

- Got to My provider tab/tile
- Select Provider update requests view tab
- Select GST registration menu item
- Select +New request button
- Select Retrieve details button
- Upload supporting documents, if any
- Submit the form. (Note only PACS Admin can update or add GST registration details)

I want to see status of request to update GST

- Go to My provider tab/tile
- Select Provider update requests view tab
- Select GST registration menu item
- Search for a specific request in the search bar, remembering to use * before and after the search words, or
- Search for a specific request using the ascending and descending column headings

- See details of the request by clicking the request number hyperlink or clicking on the ellipsis (⁝)

I want to add new portal user request

- Go to My provider tab/tile
- Select Provider update requests view tab
- Select New user menu item
- Select +New request button
- Complete the online form
- Review and submit. (Note the request for a new portal user will be processed by PACS Admin and will be actioned by IT)

I want to see status of request to add new user

- Go to My provider tab/tile
- Select Provider update requests view tab
- Select New user menu item
- Search for a specific request in the search bar, remembering to use * before and after the search words, or
- Search for a specific request using the ascending and descending column headings
- See details of the request by clicking the request number hyperlink or clicking on the ellipsis (⁝)

I want to add new subcontractor request

- The subcontracting feature is under construction so is not currently operational. Please continue to use the online application form until further advised.

Help and resources

I want to find help with navigating the portal

- Go to Help tab/tile
- Help and Resources view tab
- Select the appropriate resource

Dashboard and reports

I want to	Go to

View my dashboard	• **Dashboard** tab/tile
	• View tiles for:
	  – Total FY funding commitment
	  – FY active contracts
	  – Pending actions this week
	  – Upcoming payments

Adjust dashboard settings	• **Dashboard** tab/tile • **Dashboard settings** • Toggle on or off to change which tiles are visible
View summary of pending actions	• **Dashboard** tab/tile • **Pending actions** (top 5 are visible) • Columns can be sorted ascending / descending • Further actions can be viewed via the pagination • All pending actions can be downloaded to excel
View funding summary	• **Dashboard** tab/tile • Select **Funding summary** • View total FY funding • View paid to date • View next payment amount
View next week's payments	• **Dashboard** tab/tile • Select **Next week's payments** • Payments are arranged by contract • Clicking on the ellipsis (⋮) will provide payment details for individual contracts • Next week's payments can be downloaded to excel
View active contracts	• **Dashboard** tab/tile • Select **Active contracts** • Columns can be sorted • Clicking the pagination will bring up further contracts • **Active contracts** list can be downloaded to excel

View accountability	• **Dashboard** tab/tile • Select **Accountability** • Columns can be sorted • Clicking the pagination will bring up further Accountability records • Records can be downloaded to excel
View accountability report	• **Dashboard** tab/tile • Select **Reports** tab • Select **Accountability report** tile – view report hyperlink
View contract summary report	• **Dashboard** tab/tile • Select **Reports** tab • Select **Contract summary report** tile – view report hyperlink
View portal user report	• **Dashboard** tab/tile • Select **Reports** tab • Select **Portal user report** tile – view report hyperlink (Note: this report is currently under construction)

Communications

(Note that communications to and from the portal will not be the main means of communication with DCJ and will not replace the formal emails and advices DCJ sends to service providers)

I want to	**Go to**
See an overview of action items and corporate messages	• **Communications** tab/tile • Default view tab is **Overview** • See summary of **Latest actions** and **Latest corporate messages**
See a list of action items	• **Communications** tab/tile • See all Actions by clicking the *view all* hyperlink or choosing the **Action items** tab • Default status is Pending **Action items**; In progress and Completed statuses are also available by clicking on the down arrow
Search for action items	• **Communications** tab/tile • **Action items** tab

	• Search for a specific action item in the search bar remembering to use * before and after the search words, or • Use the arrows in the column headings to search ascending or descending
See details of action items	• **Communications** tab/tile • **Action items** tab • See details of the action item by clicking on the action number hyperlink or the ellipsis (:)
Update progress of action items	• **Communications** tab/tile • **Action items** tab • View details of the action item after clicking the link • Select the status for the action item by clicking the **Mark in progress** or **Mark as completed** button
See all corporate messages	• **Communications** tab/tile • From the **Overview** tab, scroll down to the **Latest Corporate messages** Select view all • Alternatively view all corporate messages from the **Corporate messages** tab • View latest **Corporate messages** to and from your organisation and from PACS
Add a corporate message	• **Communications** tab/tile • Select **Corporate messages** tab • Select **+Comment** to send a message • Create your message in the comment box • Select the **Submit** button • Your message will appear in the **Corporate messages** screen and be sent to PACS

Payments

I want to	Go to
See all scheduled payments	• **Payments** tab/tile • Select **Scheduled** tab • The default will be next 7 days. You can also select either next month or next 3 months by using the drop down arrow

	• The screen will show all scheduled contract payments for the selected period
See my scheduled payments by due date	• **Payments** tab/tile • Select **Scheduled** view tab • Select **Next 3 months** • Click on **Date due** column • Choose either ascending or descending date order
See my scheduled payments by contract	• **Payments** tab/tile • Select **Scheduled** view tab • Select either next 7 days, next month or next 3 months • Screen shows all scheduled contract payments for selected period • Choose **Contract ID** for a specific contract to view payment details • Use the search bar to search for a specific contract, remembering to use * before and after the search words, or • Use the arrows in the column headings to search ascending or descending
See my funding allocation	• **Payments** tab/tile • Select **Funding allocation** view tab • The default will be current financial year. You can also select either last or all financial years using the drop down arrow • Screen shows funding allocation for all contracts for selected period
See past payments	• **Payments** tab/tile • Select **Payment history** view tab • The default is current financial year • You can also select either last or all financial years • Payments made during that period are searchable and viewable by column headings in the table shown • Information can be downloaded in excel
See my RCTI	• **Payments** tab/tile • Select **RCTI** – advice of deposit view tab • Select time period from dropdown (default is last 7 days) • Select hyperlink under the **Payment receipt ID** column • View receipt details • Select hyperlink in **Receipt** table to view or print RCTI or advice of deposit as a PDF

	• (Payment details and bank details can also be downloaded in excel)

Accountability

I want to	Go to
See current year corporate and contract accountability forms	• **Accountability** tab/tile • Select either **corporate** or **contract** tab • Default view is current financial year • Select either hyperlink or ellipsis (:) to view selected form
Start or edit current year corporate and contract accountability forms	• **Accountability** tab/tile • Select either **corporate** or **contract** view tab • Default view is current financial year • Select relevant form • Select either hyperlink or ellipsis (:) to start forms in status of **New** or edit form in status of **In progress** • Follow the instructions on the form and work progressively through each question • If you need to change or edit a previous screen of the form use the back button at the bottom of the screen to return to the previous page • Once you've completed the form and added any required documents proceed to the declaration/certification section • Review the form and submit the declaration/certification • Note that forms with the status **Review, Submitted, Resubmitted, Accepted** can be viewed but not edited
See past accountability forms	• **Accountability** tab/tile • Select either **corporate** or **contract** view tab • Default view is current financial year, or you can also select either last financial year or all financial years • Select the form you require • Click on the hyperlink or ellipsis (:) to review the selected form
Answer my contract manager's accountability comment	• **Accountability** tab/tile • Select either **corporate** or **contract** view tab

	• Default view is current financial year, so select relevant form • Select **Communication** view tab • Respond to messages by clicking on the **+Comment** button • Enter your message in the comment box and click the **Submit** button
Send a message about my accountability form	• **Accountability** tab/tile • Select either **corporate** or **contract** view tab • Default view is current financial year, so select relevant form • Select **Communication** view tab • Send a message by clicking on the **+Comment** button • Enter your message in the comment box and click the **Submit** button

Contracts

I want to	Go to
See lists of all active, inactive, draft, terminated and expired contracts	• **Contracts** tab/tile • Select dropdown menu where the default is Active contracts • Select the type of contract that you want to view
See list of contracts by column headings: • Contract ID • Operating name • Subprogram • District • Start date • End date • Subcontract • Status	• **Contracts** tab/tile • Use the search bar to search for specific criteria remembering to use * before and after the search words, or • Use the arrows in the column headings to search ascending or descending • Download your search results in an excel spreadsheet via the download button
See profile information for a contract	• **Contracts** tab/tile • Search for and select a specific contract from the list • Click the **contract ID** hyperlink to view the details of the contract • **Profile** is the default view tab • View the profile information for the selected contract • You are able to request to use a subcontractor for this contract from the

	screen by clicking on the **+Add** button in the subcontractor section. • This will open a subcontracting request form (Note that the subcontracting feature will not be available at go live)
See who my DCJ contract manager is and what DCJ district is the managing district	• **Contracts** tab/tile • Search for and select the specific contract • Click the **contract ID** hyperlink • Select the **Contacts** view tab • DCJ District, DCJ contact and service provider contact are displayed
See and add or edit contact information for a contract	• **Contracts** tab/tile • Search for and select a specific contract • Click the **contract ID** hyperlink • Select the **Contacts** tab • Scroll down to **Contract contacts** • Use **+Contact** to add a contact (note that contacts must be created at the service provider level before being added to a contract) • Use pen icon to edit a contact
See and add or edit address information for a contract	• **Contracts** tab/tile • Search for and select a specific contract • Click the **contract ID** hyperlink • Select the **Contacts** tab • Scroll down to **Contract addresses** • Use **+Address** to add an address (note that addresses must be created at the service provider level before being added to a contract) • Use the pen icon to edit an address
See financial information for a contract	• **Contracts** tab/tile • Search for and select specific contract • Click the **contract ID** hyperlink • Select the **Financials** tab • Bank details, funding commitments and payments are displayed
See service information about my contract	• **Contracts** tab/tile • Search for and select a specific contract • Click the **contract ID** hyperlink • Select the **Services** view tab • Percentage of service to the Aboriginal community under the contract is displayed • Other contract service information – name, service level, outcome and

	quantity is displayed in the table, if available • (Note that detailed information may only be available for recent contracts)
See documents related to my contract	• **Contracts** tab/tile • Search for and select a specific contract • Click the **Contract ID** hyperlink • Select the **Documents** view tab • Documents related to the contract are displayed in the table
Upload documents related to my contract	• **Contracts** tab/tile • Search for and select a specific contract • Click the **Contract ID** hyperlink • Select the **Documents** view tab • Select **+Attach document** button to upload a new document to the portal and PACS • Follow the onscreen instructions to proceed (note there is a 15 MB file size limit)
See my current year contract level accountability form	• **Contracts** tab/tile • Select the **Accountability** view tab • The dropdown default is current financial year • Search for forms using the search bar, remembering to use * before and after the search words, or • Use the arrows in the column headings to search ascending or descending • Click on the form hyperlink or select the ellipsis (:) at the end of the row to view the form
See past year contract level accountability forms	• **Contracts** tab/tile • Select the **Accountability** view tab • Current financial year is the default, however, from the dropdown select either Last financial year or All financial years • Search for forms using the search bar, remembering to use * before and after the search words, or • Use the arrows in the column headings to search ascending or descending • Click on the form ID hyperlink or select the ellipsis (:) at the end of the row to view the form
See pending, in progress and completed action items for my contract	• **Contracts** tab/tile • Select the **Communication** view tab • View **Contract actions**

	• Default is pending **Action items**
	• You can also select in progress or completed **Action items**
	• Use the arrows in the column headings to search ascending or descending
	• You can search by:
	  ○ Action number
	  ○ Action type
	  ○ Regarding
	  ○ Assigned to
	  ○ Due date
	  ○ Due in x days
	  ○ Created on

See and add messages in relation to my contract	• **Contracts** tab/tile • Select the **Communication** view tab • View latest contract messages to and from your organisation and PACS • Click on the **+Add comment** button to send further contract messages

Documents

I want to	Go to
See uploaded contract documents	• **Documents** tab/tile • **Contract documents** is the default tab • Search for contract documents in the search bar, remembering to use * before and after the search words, or • Search using the ascending and descending column headings • Your contract or Letters of Variation documents will have the contract ID as the document name • View details of the selected document by clicking the document name hyperlink or clicking on the ellipsis (⋮)
See uploaded service provider documents	• **Documents** tab/tile • Select **Service provider documents** view tab • Search for service provider documents in the search bar, remembering to use * before and after the search words, or • Search using the ascending and descending column headings • View details of the selected document by clicking the Request ID hyperlink or clicking on the ellipsis (⋮)

Upload documents for my contract manager to see	• **Documents** tab/tile • Select **Upload** view tab • Select **+Upload document** button • Complete add new document form. (Note, make sure that you name your document clearly so that you and your contract manager will be able to locate the document easily) • **Attach** the file • **Submit**
See a list of documents I've uploaded	• **Documents** tab/tile • Select **Upload** view tab • View the list on the screen • View details of the uploaded document by selecting the document name hyperlink or clicking on the ellipsis (:)
Search a list of documents I've uploaded	• **Documents** tab/tile • Select **Upload** view tab • Search for uploaded documents in the search bar, remembering to use * before and after the search words, or • Search the upload list, using the ascending and descending column headings • View details of the uploaded document by selecting the document name hyperlink or clicking on the ellipsis (:)

My provider

I want to	Go to
See my service's information	• **My provider** tab/tile • The **Profile** view tab is the default view • Scroll down the screen to see legal and primary contact information
Edit primary contact information	• **My provider** tab/tile • **Profile** view tab is the default • On the **Primary contact information** section, click on the pen icon • Complete the online form with the details of the changes needed • Click on **Submit** • The details are updated. (Note: there are some details that you will not be able to update and you will need to

	submit a **Provider update request** and the updates will be made by PACS Admin)
Edit a provider portal user	• **My provider** tab/tile • Select **Contacts** view tab • Scroll down to **Provider portal user** section • Click on the pen icon on the user to be amended • Complete form and **Submit** (Note that a user's email address can't be edited via this form. Portal user email addresses require DCJ security authentication)
Add a contact	• **My provider** tab/tile • Select **Contacts** view tab • Scroll down to **Provider contacts** • Click **+ Contact** button • Complete form and click on **Submit** • The contact will automatically be added
Edit a contact	• **My provider** tab/tile • Select **Contacts** view tab • Scroll down to the **Provider contacts** section • Click pen icon on the contact to be amended • Complete form and **Submit.** The details will be updated
Add an address	• **My provider** tab/tile • Select **Contacts** view tab • Scroll down to **Provider addresses** • Click **+Address** button • Complete form and click on **Submit** The address will be added
Edit an address	• **My provider** tab/tile • Select **Contacts** view tab • Scroll down to **Provider addresses** • Click pen icon on the address to be amended • Complete form and **Submit.** The details will be updated
View current bank account details	• **My provider** tab/tile • Select **Financial** view tab • Search for a bank account using the ascending and descending column headings

	• See details of the selected account by clicking the bank account name hyperlink or clicking on the ellipsis (⁝)
Add a bank account	• **My provider** tab/tile • Select **Financial** view tab • Select **+Account** button • Fill in the details on the screen • Download the bank form template • Complete and have two authorised delegates sign the form offline. (Note: this cannot be two staff members and must be two officers from your organisation who are authorised to sign legal documents on behalf of the organisation) • **Upload** the signed form • **Review and submit** the form • (Note: new bank accounts can only be verified by PACS Admin)
See status of request to add bank account	• **My provider** tab/tile • Select **Provider update requests** view tab • Select **Bank account details** menu item • Search for a specific bank account request in the search bar, remembering to use * before and after the search words, or • Search for a Bank account request using the ascending and descending column headings • See details of the request by clicking the request number hyperlink or clicking on the ellipsis (⁝) (Note: you can also add a new request on this page)
See my service's accreditations	• **My provider** tab/tile • Select **Accreditation** view tab • See list of accreditations held by your organisation • Search for a specific accreditation using the ascending and descending column headings • See details of the selected accreditation by clicking the **Accredited by** hyperlink or clicking on the ellipsis (⁝)
Add an accreditation	• **My provider** tab/tile • Select **Accreditation** view tab • Select **+Add** button • Complete the online form

	• **Upload** supporting documentary evidence of the accreditation • **Review and submit** (Note that only PACS Admin can add your new accreditation details)
See status of request to add accreditation	• **My provider** tab/tile • Select **Provider update requests** view tab • Select **Accreditation** menu item • Search for a specific accreditation request in the search bar, remembering to use * before and after the search words, or • Search for a specific accreditation request using the ascending and descending column headings • See details of the request by clicking the request number hyperlink or clicking on the ellipsis (:) (Note: you can also add a new request on this page)
Add updates to legal information about my service (name, entity type, ABN info, regulatory body)	• **My provider** tab/tile • Select **Provider update requests** view tab • Select default **Provider details** menu item • Select **+New** request button • Complete the request form • **Upload** supporting documents • **Submit** the form. • (Note only PACS Admin can update or add new legal details)
See status of request to update legal information	• **My provider** tab/tile • Select **Provider update requests** view tab • Select default **Provider details** menu item • Search for a specific request in the search bar, remembering to use * before and after the search words, or • Search for a specific request using the ascending and descending column headings • See details of the request by clicking the request number hyperlink or clicking on the ellipsis (:)
Add new GST request	• **My provider** tab/tile • Select **Provider update requests** view tab

	- Select **GST registration** menu item - Select **+New request** button - Select **Retrieve details** button - Upload supporting documents, if any **Submit** the form. (Note only PACS Admin can update or add GST registration details)
See status of request to update GST	**My provider** tab/tile - Select **Provider update requests** view tab - Select **GST registration** menu item - Search for a specific request in the search bar, remembering to use * before and after the search words, or - Search for a specific request using the ascending and descending column headings - See details of the request by clicking the request number hyperlink or clicking on the ellipsis (⁝)
Add new portal user request	**My provider** tab/tile - Select **Provider update requests** view tab - Select **New user** menu item - Select **+New request** button - Complete the online form **Review and submit.** (Note the request for a new portal user will be processed by PACS Admin and will be actioned by IT)
See status of request to add new user	**My provider** tab/tile - Select **Provider update requests** view tab - Select **New user** menu item - Search for a specific request in the search bar, remembering to use * before and after the search words, or - Search for a specific request using the ascending and descending column headings - See details of the request by clicking the request number hyperlink or clicking on the ellipsis (⁝)
Add new subcontractor request	**My provider** tab/tile - Select **Provider update requests** view tab - Select **Subcontracting** menu item - Select **+New request** button - Complete the online form

	• Upload any relevant document/s • Complete online declaration • **Submit.** The request will be reviewed by your contract manager and if approved your contract record will be updated with the subcontracting arrangements. (Note: the subcontracting feature is under construction so is not currently operational. Please continue to use the online application form until further advised)
See status of add new subcontractor request	• **My provider** tab/tile • Select **Provider update requests** view tab • Select **Subcontracting** menu item • Search for a specific request in the search bar, remembering to use * before and after the search words, or • Search for a specific request using the ascending and descending column headings • Forms with the status of **New** can be edited • Forms with the status of **Submitted** can't be edited • See the form by clicking the request number hyperlink or clicking on the ellipsis (⋮)

Help and resources

I want to	Go to
Find help with navigating the portal	• **Help** tab/tile • **Help and Resources** view tab (Note: this page is currently under construction)