

Adding and Removing Allocated Reports Job Aid

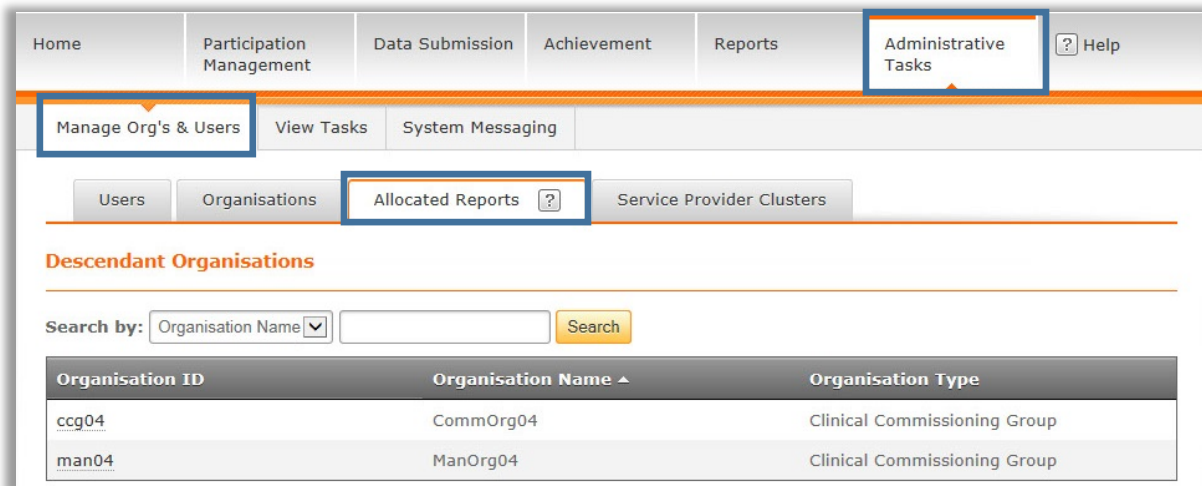
Ordinarily, Descendant Organisations are not allowed to run reports for services commissioned by their Parent Organisations. However, using the Allocated Reports functionality Parent Organisations may give permission to selected Descendant Organisations to view specific report information.

This job aid is aimed at users within a Commissioning Organisation with the role of Organisation Administrator.

Note: The data that appears in this job aid is for training purposes only and does not represent actual data.

Adding Allocated Reports

1. From the CQRS Home screen, select the **Administrative Tasks** tab, then select the **Manage Org's & Users** sub-tab, and then select the **Allocated Reports** sub-tab.



The screenshot shows the CQRS Administrative Tasks interface. The top navigation bar includes tabs for Home, Participation Management, Data Submission, Achievement, Reports, Administrative Tasks (highlighted with a blue box), and Help. Below this, the 'Manage Org's & Users' sub-tab is selected (highlighted with a blue box), and within it, the 'Allocated Reports' sub-tab is also selected (highlighted with a blue box). The main content area is titled 'Descendant Organisations' and features a search bar with a dropdown menu set to 'Organisation Name' and a 'Search' button. Below the search bar is a table with the following data:

Organisation ID	Organisation Name	Organisation Type
ccg04	CommOrg04	Clinical Commissioning Group
man04	ManOrg04	Clinical Commissioning Group

All Descendant Organisations are displayed. You may search for specific organisations using the **Search by** function.



2. Select the Descendant Organisation you wish to grant allocated report permissions to by clicking on the **Organisation ID** link.

The screenshot shows a navigation menu with 'Administrative Tasks' selected. Below it, 'Allocated Reports' is highlighted. The 'Descendant Organisations' section contains a search bar and a table with the following data:

Organisation ID	Organisation Name	Organisation Type
ccg04	CommOrg04	Clinical Commissioning Group
man04	ManOrg04	Clinical Commissioning Group

3. Select one or more Quality Services to be allocated to the Descendant Organisation. To allocate all Quality Service, use the **Select All** checkbox.

The screenshot shows the 'Select Quality Service for CommOrg04 (ccg04)' screen. It includes filters for 'Financial Year' (2016/2017) and 'Payment Type' (All). A table lists quality services with checkboxes for selection:

Select All	Quality Service Short Name	Quality Service Name
<input checked="" type="checkbox"/>	ALCC1617	Alcohol Risk Reduction 2016/17
<input type="checkbox"/>	DDE1617	Dementia Data Extract 2016/17
<input type="checkbox"/>	FFT1516	Friends and Family Test 201516
<input type="checkbox"/>	HPV1516	HPV Booster vaccination
<input checked="" type="checkbox"/>	HPV1617	HPV Booster vaccination
<input type="checkbox"/>	PT1617	Pertussis in pregnant women 2016/17
<input type="checkbox"/>	QOF1617	Quality and Outcomes Framework 2016/17

A 'Submit' button is located at the bottom left.

NOTE: Quality Services can be filtered by **Financial Year** and/or **Payment Type**.



4. Select the **Submit** button.
5. A confirmation message will display at the top of the screen to indicate the allocations have been saved. Now when the Descendant Organisation runs a report for the selected service, information from the Parent Organisation's commissioned services will be included.



Removing Allocated Reports

To remove reports from being allocated to an organisation, follow the same steps outlined above.

1. From the CQRS Home screen, select the **Administrative Tasks** tab, then select the **Manage Org's & Users** sub-tab, and then select the **Allocated Reports** sub-tab.
2. Select the Descendant Organisation.
3. Once on the Select Quality Service screen, the list of Quality Services will display with checkmarks beside the services allocated.
4. To remove the service from allocation, simply remove the checkbox beside the Quality Service.
5. Click the **Submit** button at the bottom of the page.