

Introduction to the Funded Agency Channel and My Agency

A training guide for State Government
department staff and funded organisations



To receive this publication in an accessible format, email the [Service Agreement Communications team](mailto:sacomms@dffh.vic.gov.au) <sacomms@dffh.vic.gov.au>.

Authorised and published by the Victorian Government, 1 Treasury Place, Melbourne.

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Except where otherwise indicated, the images in this publication show models and illustrative settings only, and do not necessarily depict actual services, facilities or recipients of services. This publication may contain images of deceased Aboriginal and Torres Strait Islander peoples.

Where the term 'Aboriginal' is used it refers to both Aboriginal and Torres Strait Islander people. Indigenous is retained when it is part of the title of a report, program or quotation.

Contents

Contents	3
Introduction	4
Background	4
What is a Service Agreement?	4
How is a Service Agreement structured?	4
View a sample agreement	5
Funded Agency Channel	6
Content	7
User access	7
Target audience	7
Key sections	8
My Agency	9
Content	9
User access	10
Key sections	12
Overview of key reports in My Agency	13
Running reports in My Agency	15
Service Agreement Module	18
Appendix	26
List of acronyms	26
List of My Agency reports	27
Current and forward financial year reports	27
Client specific funding reports	28
Compliance reports	28
Older version reports from 2012/13 onwards	29
User details report	29
Service delivery tracking (SDT) report	29
Structured reports	29

Introduction

The purpose of this workbook is to provide a high-level summary of the key elements of the Funded Agency Channel (FAC) website and its secure area, My Agency. These sites provide users with essential information specific to their Service Agreement with the Department of Families, Fairness and Housing (DFFH), Department of Health (DH), and/or the Department of Education and Training (DET), including the Adult Community and Further Education Board (ACFE) and the Department of Justice and Regulation.

This workbook is intended to be used as a practical guide to help you navigate the content of both FAC and My Agency. It has been written for use with the desktop version of these sites.

Background

What is a Service Agreement?

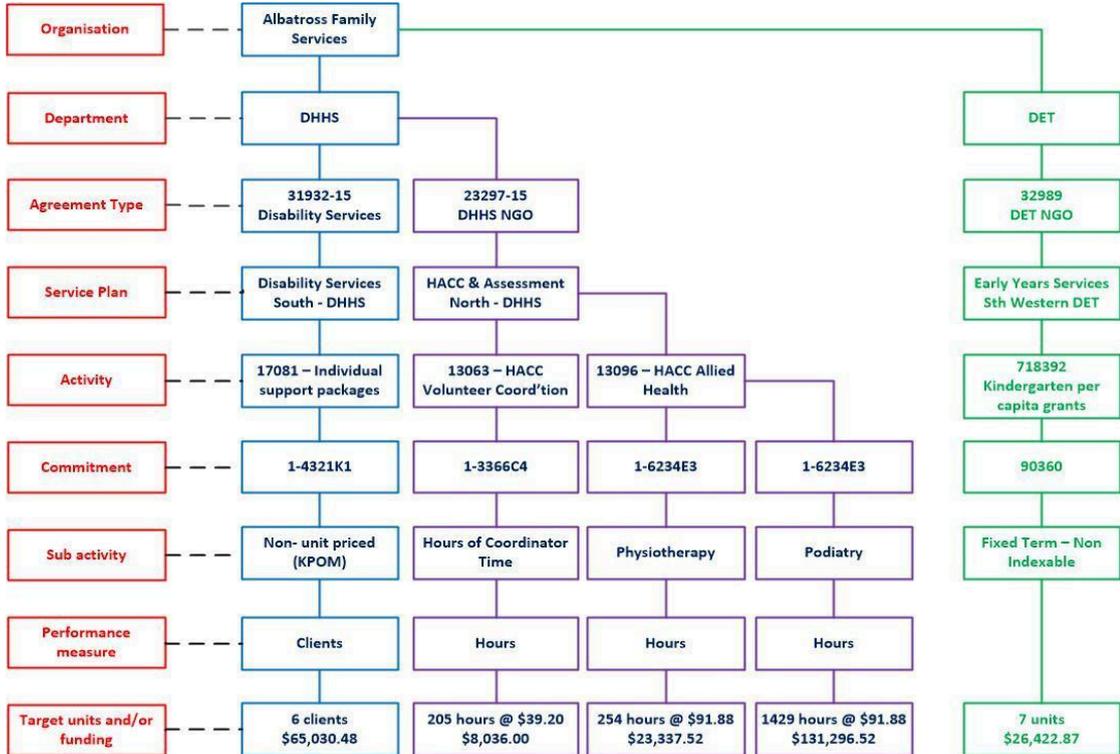
A Service Agreement is a legal contract between a government department and a funded organisation for the delivery of services to Victorian communities. The Service Agreement sets out the key obligations, objectives, rights, and responsibilities of the organisation delivering services and the department providing funding to the organisation.

How is a Service Agreement structured?

Knowing how a Service Agreement is structured will assist you to understand the information available in My Agency, its data reports, and the Service Agreement Module.

Figure 1 provides an example of a Service Agreement structure. The red boxes on the left explain each item within the agreement.

Figure 1 – example of how a Service Agreement is structured



Moving from the top of Figure 1 to the bottom:

- Each organisation has at least one agreement with one department but may have an agreement with multiple departments. In this example, the organisation is Albatross Family Services, and they have two agreements with DFFH and one with DET.
- Each agreement contains one or more activities which are grouped in services plans and divisions that fund the activities. The Disability Services agreement that Albatross Family Services has with DFFH is to provide Individual support packages in South Division.
- Each activity has one or more sub-activities that may provide further details of the service to be provided. In this example, the sub activity information for the Disability Services agreement that Albatross Family Services has with DFFH indicates that the performance measure is clients, and the target is 'six clients'.

View a sample agreement

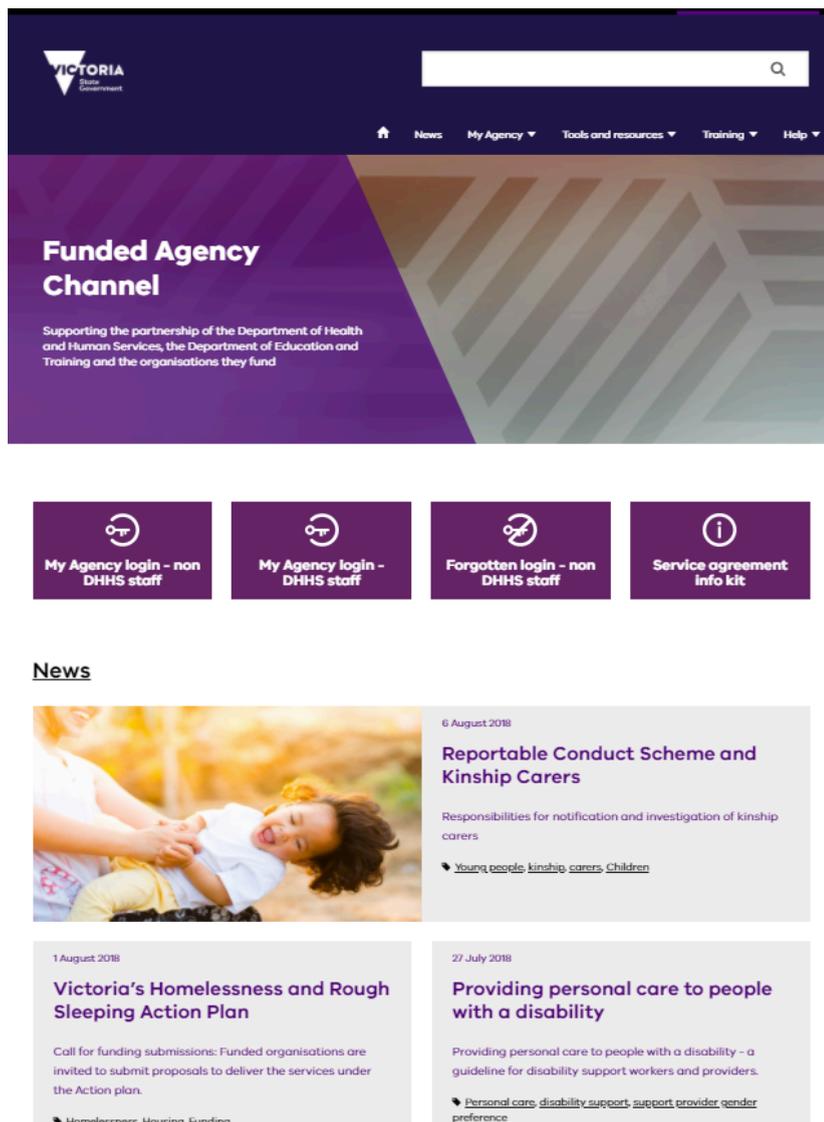
You can view a sample agreement by following the link under 'sample Service Agreements' on the [Funded Agency Channel](#)

Funded Agency Channel

The FAC website is a shared service across the Department of Families, Fairness and Housing, Department of Health, Department of Education and Training and the Department of Justice and Regulation (the departments).

Launched in 2002, FAC is managed by the Service Agreement Performance team within the Service Agreements and Quality Systems Branch of DFFH.

Figure 1 – Screenshot of the Funded Agency Channel homepage



Content

FAC provides information, news, policies, and resources to support the business relationship between the departments and funded organisations. It is the primary online communication tool for organisations funded by the departments.

User access

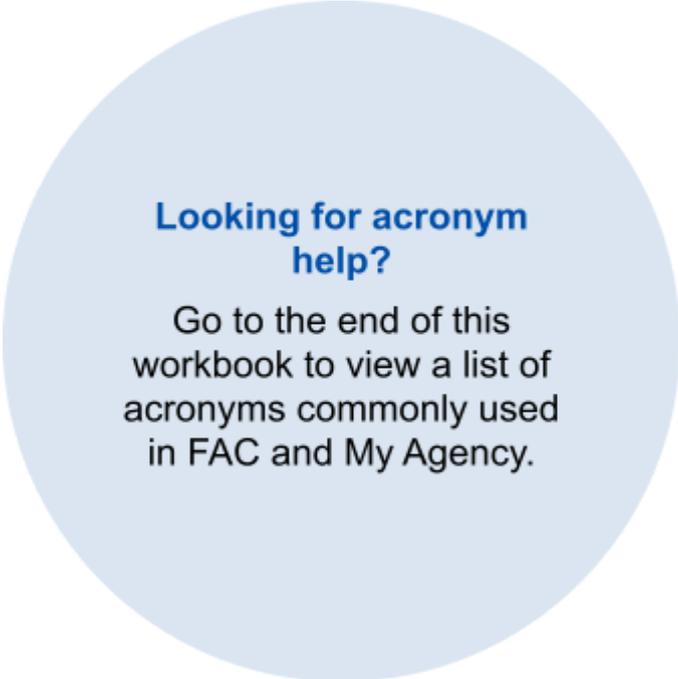
FAC is a publicly available website open to any user with internet access.

My Agency is the secure section of the FAC website and is only accessible to registered users.

Target audience

FAC is publicly available, however, the content is targeted at funded organisation and departmental staff, including:

- boards of management
- senior executives
- middle managers
- unit and program managers with management or administrative responsibilities
- staff responsible for meeting performance targets
- relevant departmental managers and staff in divisional, area and central offices.



Looking for acronym help?

Go to the end of this workbook to view a list of acronyms commonly used in FAC and My Agency.

Key sections

The FAC homepage links to a wide variety of information relevant to Service Agreement management, including:

News: the latest news for funded organisations.

My Agency: the secure section of the FAC website, only accessible to registered users.

Tools and resources:

- **Service Agreement Requirements** is designed to provide funded organisations with guidance on complying with their Service Agreement requirements, and also contains the applicable departmental policies that organisations must adhere to.
- **Policies and procedures:** information about key policies, procedures and guidelines relating to Service Agreements.
- **Incident reporting:** incident management information for funded organisations and National Disability Insurance Scheme (NDIS) providers, including details about the Client incident management system (CIMS) and reporting privacy breaches.
- **Data collection:** data collection and reporting tools for funded organisations including Service delivery tracking.
- **Systems:** information on useful systems for the funded sector, including Integrated reports and information system (IRIS), the Kindergarten IT program (KIM), Client relationship information system for service providers (CRISSP) and Crisis referral information system (CRIS).
- **Legislation:** links to Commonwealth and State legislation sources.
- **Useful links:** helpful information relevant to Service Agreement management.

Training: education and training resources on subjects such as My Agency, CRISSP, IRIS, the L17 Family violence portal and NDIS.

Help: frequently asked questions, glossary and helpdesk contact details.

My Agency

My Agency is the secure section of the FAC website and is only accessible to registered users.

It provides users with quick and easy access to organisation specific information about Service Agreements.

To be eligible for My Agency access, you must be either a:

- staff member of the departments or of an organisation funded by the departments, or
- member of the board or committee of management of one of the organisations funded by the departments.

Content

My Agency provides:

- organisation specific Service Agreement information for the current, future and previous financial years
- access to payment schedules, invoices and the progress of Service Agreement variations
- organisation performance reports for funded activities
- access to the Service Agreement Module (SAM)
- links to a number of resources aimed at funded organisations
- a single point of view for information and reporting requirements, as data is gathered from various sources. For example, the Service Agreement management system (SAMS2) or the Health and community care (HACC) minimum data set.

Did you know?

My Agency provides users with a single point of view of data from a variety of program areas and systems.

User access

My Agency is only accessible to registered users.

There are two ways to access My Agency. The entry point you use depends on whether you are an employee of DFFH, or external to DFFH.

Table 1 – Access based employee type

I am:	I can access My Agency via:
An employee of DFFH	Workspace Portal on a department computer. There is no need to use a password as access is granted through single sign on when you log in to your computer.
Not an employee of DFFH For example: <ul style="list-style-type: none">• Department of Education and Training staff• Adult Community and Further Education Board staff• Funded organisation staff	The eBusiness Portal <https://hns.dhs.vic.gov.au/facadmin/home.aspx>. To log in to the eBusiness portal, you require an eBusiness username and password. If you don't already have one, you can register here <https://hns.dhs.vic.gov.au/3dhsweb/EUS_Public_WebApp/requestRegistration.htm>.

eBusiness

Users outside of Department of Families, Fairness and Housing require an eBusiness portal username and password to gain access to My Agency.

While more than one person per organisation can register for eBusiness, you must register yourself.

Organisation Authority

Each organisation has an Organisation Authority (OA). The OA approves access requests prior to eBusiness access being granted.

Did you know?

My Agency is one of many applications that users outside of DFFH can access via the eBusiness portal.

Register for eBusiness

To register for eBusiness, head to the eBusiness portal log in page and select the [I want to register](https://hns.dhs.vic.gov.au/3dhsweb/EUS_Public_WebApp/requestRegistration.htm) link <https://hns.dhs.vic.gov.au/3dhsweb/EUS_Public_WebApp/requestRegistration.htm>.

Figure 2 – Screenshot of the eBusiness login page

State Government of Victoria, Australia, Department of Human Services
eBusiness Login

[eBusiness Login](#) [Conditions of Use](#) [Monitoring of Computer Services](#) [Help](#)

Username
Password

I have read, understood and agree to abide by the [Conditions of Use](#) and [Monitoring of Computer Services](#).

> I want to register
> I forgot my login details

[Login](#) [Cancel](#)

For information relating to this page contact: DHS enquiry information
Authorised by: Director, Information Management and Technology, Corporate Services Division

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Once you have completed the registration process, you should receive your eBusiness login details within three business days. If you do not receive your login by this time, email the [eBusiness helpdesk](mailto:ebiz@dhhs.vic.gov.au) <ebiz@dhhs.vic.gov.au>.

Forgotten eBusiness login

If you are already a registered eBusiness user but have forgotten your details, visit the eBusiness portal log in page and select the [I forgot my login details](https://hns.dhs.vic.gov.au/3dhsweb/EUS_Public_WebApp/forgottenPassword.htm) link <https://hns.dhs.vic.gov.au/3dhsweb/EUS_Public_WebApp/forgottenPassword.htm>.

Help

For further information on how to navigate My Agency, eBusiness registration, username or password issues:

- visit the User guides section of FAC <<https://fac.dffh.vic.gov.au/my-agency-non-dhhs-staff>>
- browse the My Agency frequently asked questions page <<https://fac.dffh.vic.gov.au/my-agency-faqs>>.



Key sections

The My Agency homepage links to a variety of resources relevant to Service Agreement management, including:

- **Service Agreement Module (SAM):** provides access to view your organisation's current service agreements, multi-year funding and payment schedules. Organisations can accept first time agreements, change staff contact details and upload compliance information.
- **Data and performance:** access to a substantial number of reports including current and previous financial year reports, client specific funding reports, compliance reports and the performance against targets.
- **Learning resources:** materials designed to assist you to confidently and competently navigate My Agency and the Service Agreement Module.
- **Other resources:** documents and materials designed to support research, planning, reporting and delivery of services.

Departmental staff can also view:

- **Departmental resources:** specialised reports, videos and organisation monitoring information.
- **Desktop Review reports:** monitoring framework reports.

Overview of key reports in My Agency

My Agency provides users with access to organisation specific information and reports. The nine most popular reports are summarised below. Detailed instructions about how to run these reports are provided in the next section, [Running reports in My Agency](#).

User details

Displays all registered My Agency users for the organisation, including the Organisation Authority (OA). The OA is the person in the organisation responsible for approving all access requests for that organisation. If the OA or a My Agency user is no longer employed at the organisation, or if their details are incorrect, contact eBusiness on 1300 799 470. Select option 1 and then option 4 or email the [eBusiness helpdesk](mailto:ebiz@dhhs.vic.gov.au) <ebiz@dhhs.vic.gov.au>.

SAM01 Current funding and any variation awaiting acceptance

Displays the current contract version of the Service Agreement, along with any open variation, down to commitment level. The variation is only visible for a few days between organisation notification and contract date. This report is useful for providing an understanding of what variations are currently in transition.

SAM02b Current funding

Displays the current contract version of the Service Agreement, down to sub-activity level. The information is grouped by financial year, agreement, service plan, activity, commitment and then sub-activity. Rows highlighted with a light yellow background are used to indicate the most recent variations in the current agreement version.

SAM02c Old version within the current financial year

This report displays the old versions of the agreements down to sub activity level for the current financial year. The report provides useful historical information about the agreement during the current financial year.

SAM02e Final agreement version for financial years starting from 12/13

Displays the final version of previous years' agreements, commencing from financial year 2012-13. It is useful for determining the funding status as at the end of a financial year. This information may be useful for completing end of financial year audit or reporting requirements.

SAM03 Invoices

Displays all invoices paid to the organisation. Payment details are displayed at agreement, service plan, activity and commitment level.

SAM04 Payment Schedule

Displays the payment schedule of the contract version of the agreement at commitment level including invoice number. The information is listed by the due date of the payment, financial year, agreement, service plan, activity and then commitment.

Service delivery tracking

Funded organisations are required to enter their 'actual' against 'target performance' for certain activities on the Acquittal tab in the Service Agreement Module. This report displays the monthly submitted data with details about Service plan division, Activity code, departmental and organisation acquittal contacts. Three service delivery tracking reports are available: tracking, graph and composition.

Service Agreement compliance certification (SACC)

Displays the questions and answers provided in the SACC by the organisation. The SACC is undertaken by funded organisations annually to certify their compliance with Service Agreement requirements. Questions cover financial management, risk management, privacy and staff safety screening.

I can't view a report

Each organisation has an Access Controller (AC) who manages user permissions. If you are unable to view a report, contact your AC.

Running reports in My Agency

The previous section summarised the most popular reports used by My Agency users. This section provides step-by-step instructions for running and saving reports.

Step 1

From the My Agency homepage, select the hyperlink of the report you wish to run. In this example, we will run SAM02b - Current funding report.

Figure 3 – Screenshot of the SAM02b Current funding report link

Current financial year reports 2017/18 (inc. forward years)

- ▶ [SAM01 - Current funding and any variation awaiting acceptance](#) - [[External Link](#)]
This report displays the contract version of the agreement, as well as any open variation amount down to commitment level. It has been designed to export to Excel.
- ▶ [SAM02a - Variation awaiting acceptance](#) - [[External Link](#)]
This report has been redesigned with more fields and the ability to only show the lines that are varied. This report is only available while there is an open variation awaiting acceptance. It has been designed to export to Excel.
- ▶ [SAM02b - Current funding](#) - [[External Link](#)]
This report has been redesigned with more fields and the ability to only show the lines that are varied. This report displays the current version of the agreement down to sub-activity level. It has been designed to export to Excel. Older versions within this financial year can be found in the SAM02c report under the next heading.
- ▶ [SAM02c - Old versions within the current financial year](#) - [[External Link](#)]
This report has been redesigned with more fields and the ability to only show the lines that are varied. This report displays all old versions of the agreement down to sub-activity level within the current financial year (i.e. 2017-2018). It has been designed to export to Excel.
- ▶ [SAM02f - Indexation and Equal Remuneration Order](#) - [[External Link](#)]
This report displays the indexation and Equal Remuneration Order amounts applied to the agreement down to sub-activity level (including outyears). It has been designed to export to Excel.

For all reports, the first page has information about the report particulars including the number of records, organisation details and time when the report was run. The report's data is displayed from the second page onwards. Note, the parameters default to "All" and the financial year to the current financial year.

Step 2

Based on your requirements, select appropriate parameters from the drop-down filters at the top of the screen. After selecting your parameters, click the View Report button to refresh the data.

Figure 4 – Screenshot of the filters and the view report button in SAM02b report

The screenshot shows the user interface for the SAM02b report. At the top, there are several filter fields: Department (set to <All>), Agreement Number (with a checkbox for <Select All> and a dropdown for <All>), Service Plan Template (with checkboxes for ACFE and DHHS), Area (set to <All>), Financial Year (set to 17/18), Service Plan Division/Group/Region (set to <All>), Activity (set to <All>), and a checkbox for 'Only show rows that changed in the variation' (set to 'No show all rows'). A 'View Report' button is located on the right side of the filter area. Below the filters, the page header shows the Victoria State Government logo and the text 'Funded Agency Channel, Service Agreement Module Reports'. The main heading is 'SAM02b - Service Agreement Contract report'. Below this, it states 'The data in this report is as at May 23 2018 3:25AM'. There is a section titled 'About this report:' with three bullet points: 'This report displays the contract version of your agreement(s) down to sub-activity level.', 'The information is listed by financial year, agreement, service plan, activity, commitment and then sub-activity.', and 'A row with a light yellow background indicates that it was varied in this particular agreement version.' Below this is a 'Please note:' section stating 'the data for this report is located on subsequent pages and has been designed to export.' At the bottom, there is a 'Selections:' section with 'Records returned: 53 records'.

The page below is displayed. To view the next page and other pages in the report, click the forward arrow located below the parameters.

Figure 5 – Screenshot of the forward button on the first page of SAM02b report

Department: <All> Financial Year: 17/18 View Report

Agreement Number: <All> Service Plan Division/Group/Region: <All>

Service Plan Template: <All> Activity: <All>

Area: <All> Only show rows that changed in the variation: No show all rows

14 1 of 2 Find | Next

VICTORIA
State Government Funded Agency Channel, Service Agreement Module Reports

SAM02b - Service Agreement Contract report

The data in this report is as at May 23 2018 3:25AM

About this report:

- This report displays the contract version of your agreement(s) down to sub-activity level.
- The information is listed by financial year, agreement, service plan, activity, commitment and then sub-activity.
- A row with a light yellow background indicates that it was varied in this particular agreement version.

Please note: the data for this report is located on subsequent pages and has been designed to export.

Selections:

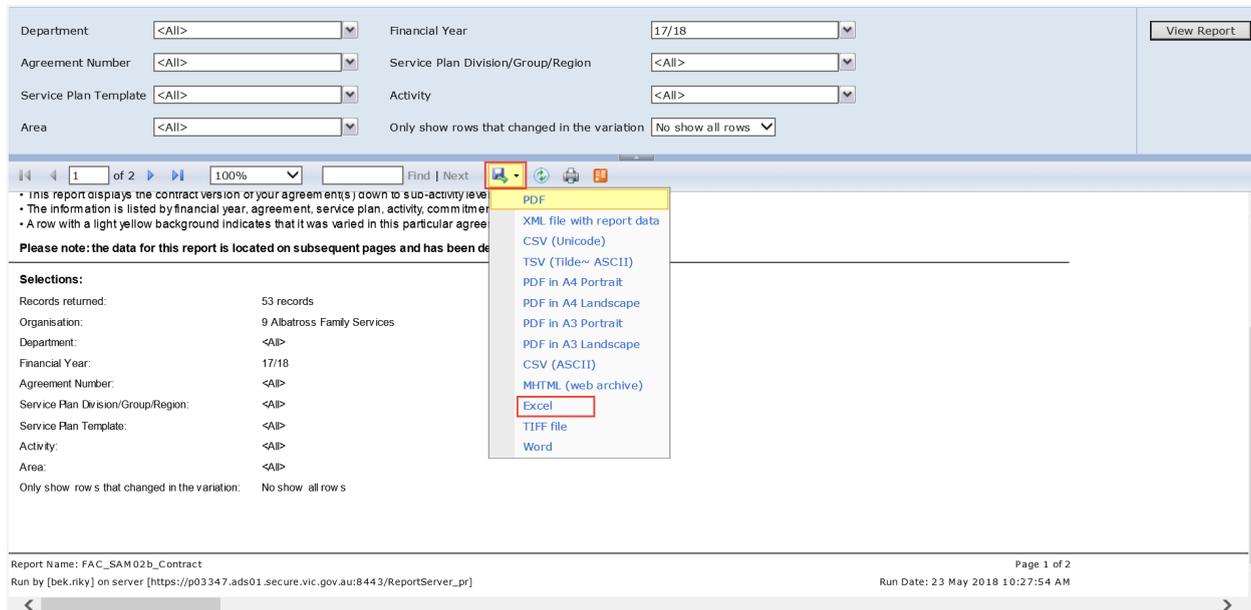
Records returned:	53 records
Organisation:	9 Albatross Family Services
Department:	<All>
Financial Year:	17/18
Agreement Number:	<All>
Service Plan Division/Group/Region:	<All>
Service Plan Template:	<All>
Activity:	<All>
Area:	<All>
Only show rows that changed in the variation:	No show all rows

Report Name: FAC_SAM02b_Contract Page 1 of 2
Run by [bek.riky] on server [https://p03347.ads01.secure.vic.gov.au:8443/ReportServer_pr] Run Date: 23 May 2018 10:27:54 AM

Step 3

To export data, click the drop-down arrow attached to the Save icon and select the format you want to export the data in. In this example, we have selected Excel.

Figure 6 – Screenshot of the Save icon and the drop-down list of export formats



Save the exported data on your computer as per your normal process.

Service Agreement Module

The Service Agreement Module (SAM) is the organisation’s view of the departments’ Service Agreement Management System (SAMS2). SAM provides real time Service Agreement information for funded organisations. SAM is accessed via My Agency.

Key functions in SAM

SAM enables organisations to undertake a number of tasks including:

- change staff member contact details
- submit their Service Agreement compliance certificate along with other compliance documents
- accept first time agreements
- submit monthly acquittals.

Access SAM

To open SAM, click the Service Agreement Module link on the My Agency homepage.

Figure 7 – Screenshot of the Service Agreement Module (SAM) link on My Agency page



Add or update user details

When opening SAM, the default view is the Organisation tab.

The Access Controller (AC) can adjust access levels for their organisation's registered users by ticking/unticking the required role box for each user.

From this screen, the AC can also add a new user or make changes to the details of an existing user. For example, the AC can update a user's email address or telephone number.

It is important that the AC does not overwrite an existing user's details with a new user's detail.

Figure 8 – Screenshot of the Organisation tab, Department advisers multipick icon and Access controller role

The screenshot shows the SAM system interface. At the top, there are navigation tabs: 'Using this module', 'Organisations' (highlighted), 'Current Agreements', 'Old Agreements', 'Invoices', and 'Contracts'. Below the tabs is the 'Organisations List' header. The main content area is divided into several sections: 'Organisation Details' (ID # 9, Name, ABN, Type: Private Non Pro, Department Advisers: Anne Hafeel), 'Incorporation Information' (Incorporation Act: Associations Inc, Incorporation Act #: A00053855), and a 'Contacts' table. The 'Contacts' table has columns for Job Title, Title, First Name, Last Name, User ID, Work Phone, Mobile Phone, Work Fax, Email Address, Primary, Access Controlle, Financial, Performance, Contact, Location, Compliance, DTR Viewer, and RIS. The 'Access Controlle' column is highlighted with a red box. The table contains three rows of user data.

Job Title	Title	First Name	Last Name	User ID	Work Phone	Mobile Phone	Work Fax	Email Address	Primary	Access Controlle	Financial	Performance	Contact	Location	Compliance	DTR Viewer	RIS
Advocacy and...	Mr.							DUMMY			<input checked="" type="checkbox"/>	Editor	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Editor	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Executive Direc...	Ms	Marie	Magdziarz	MARIE.MAGDZI...				DUMMY	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Editor	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Editor	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
FAC Tester	Ms	Rebekah	Riky	BEK.RIKY	03 90961478			DUMMY			<input checked="" type="checkbox"/>	Editor	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	None	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

When the AC adds a new user on this screen, the user does not automatically become a registered My Agency user. The user needs to register for My Agency via the normal My Agency registration process. For information on how to register for My Agency, visit the User access section of this manual or visit

<<https://fac.dffh.vic.gov.au/my-agency-non-dhhs-staff>>.

Need to remove a user?

To remove a former staff member from your list of registered users, contact the FAC helpdesk: fac@dffh.vic.gov.au.

View the list of Department advisers

If you're unsure about who your department contacts are for Service Agreements, you can view the list of Department advisers in SAM.

To access the list of Department advisers, select the multipick icon as indicated by the red arrow above. A pop-up box will display a list of all Department advisers associated with the organisation, including their name, department, division/region/group, email ID and phone number. This is only applicable to the pick list on the Organisation record.

Service Agreement compliance certificate (SACC)

The SACC is an online questionnaire completed annually by all funded organisations. By submitting the SACC, organisations are making a commitment to the department that they have appropriate systems in place to comply with their Service Agreement requirements. The questions relate to:

- financial management
- risk management
- staff safety screening
- privacy.

The SACC is due 90 days after the end of the organisation's reporting period. However, if the organisation's annual general meeting (AGM) is after the due date, the organisation can insert the AGM date in SAM. The SACC due date will then automatically update to seven days after the AGM.



Completing the SACC

To submit the Service Agreement compliance certificate along with supporting compliance documents, follow these steps:

- 1) Select the Compliance tab as shown below.

Figure 9 – Screenshot of the Compliance tab

The screenshot shows the SAM system interface. At the top, there are navigation tabs: 'Using this module', 'Organisations', 'Current Agreements', 'Old Agreements', 'Invoices', and 'Contracts'. Below these is the 'Organisations List' header. The main content area displays various fields for an organisation, including ID #, Name, ABN, Type, Sub Type, Department Advisers, Primary Contact, Common Name, Organisation Reporting Period, Insurance Detail, GST Payable, GST Registered, Payment Frequency, and RCTI Agreed. Below these fields is the 'Incorporation Information' section. At the bottom, there is a navigation menu with tabs: 'Acquittal', 'Contacts', 'Locations', 'Relationship Hierarchy', 'Attachments', 'Current Agreements', 'Old Agreements', 'Desktop Review', and 'Compliance'. The 'Compliance' tab is highlighted with a red box.

- 2) Select the SACC record to be completed. Ensure that the record you are working on has a type of Open.

Figure 10 – Screenshot of the SACC record

The screenshot shows the SAM system interface with the 'Compliance' tab selected. The main content area displays a table of SACC records. The table has columns: Type, Sub Type, Description, Due Date, Status, Locations, Contact, Start Date, End Date, Submitted Date, Verified Date, Completed Date, and AGM Date. The table contains one record with the following details:

Type	Sub Type	Description	Due Date	Status	Locations	Contact	Start Date	End Date	Submitted Date	Verified Date	Completed Date	AGM Date
Open	Annual	Service Agreement C31/10/2018		Open			1/7/2017	30/6/2018				24/10/2018

- 3) Select the button, Open SACC form.
- 4) The SACC form will display.
- 5) Depending on the organisation's reporting requirements, you may be required to complete two, three, four or all five sections of the SACC. The system will only display the sections you are required to complete.
- 6) The SACC form can be saved at any time, allowing for different areas of your organisation to individually complete different sections.
- 7) Once the SACC form has been completed, select the Submit button. The SACC should be submitted by an authorised person, such as the director, chairperson, chief executive officer, president, principal or treasurer.

If you answer 'No' or 'In part' to any of the questions, you will be required to provide brief details of the actions your organisation is taking to improve practices in response to the questions. You may be contacted by your Department adviser to discuss.

For assistance with the SACC, refer to the How to complete the Service Agreement compliance certification guide in [My Agency User guides](https://fac.dffh.vic.gov.au/my-agency-non-dhhs-staff) <<https://fac.dffh.vic.gov.au/my-agency-non-dhhs-staff>>

Completing your organisation's acquittal – Service delivery tracking (SDT)

SDT supports organisations to manage their progress towards meeting agreed targets and assists the department to manage its reporting commitments. Organisations must submit their monthly service delivery actuals against Service Agreement targets for selected activities, via the Acquittal tab in SAM.

To submit your organisation's acquittal, follow the steps below.

1. Select the Acquittal tab.

Figure 11 – Screenshot of the Acquittal tab

The screenshot displays the 'Acquittal' tab within a software interface. At the top, there is a navigation bar with tabs for 'Using this module', 'Organisations', 'Current Agreements', 'Old Agreements', 'Invoices', and 'Contracts'. Below this is the 'Organisations List' section, which includes various input fields for organization details such as ID #, Name, ABN, Type, and Department Advisers. The 'Acquittal' tab is selected, showing a table of 'Actual Responses' with columns for Financial Year, Month, Due Date, Submitted, and Submitted Date. Below the table is an 'Actual Response Details' section with an 'Export...' button and a table of service plan details.

2. The current month to be submitted will be the first line displayed at the top of the sub tab, followed by any previous months.
3. In the section below the generated months, each activity that must be acquitted is listed, together with the Service Plan details relating to that activity.
4. Against each activity, complete the Actual Units by entering the number of units delivered for that month. If a target was not delivered, enter zero.
5. Complete the Comments field. Comments should explain why targets were not met and where applicable, remediation steps being taken. To maintain client confidentiality, do not include client details in your comments.
6. When all Actual units have been entered and the data saved, the Submit button will be enabled. It is located above the selected month. Select the Submit button to lodge the completed acquittal. Partially completed acquittals cannot be submitted.

View current agreements or old agreements

Select the Current Agreements tab to access information on current agreements, including details on funding, service plans, activities, commitments and sub-activities.

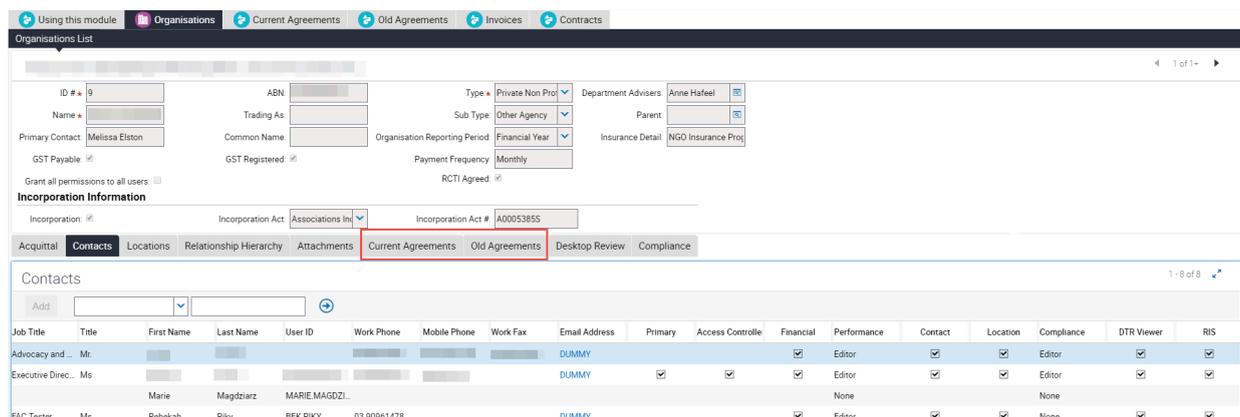
Select the Old Agreements tab to access information on preceding versions of the agreements, including the initial agreement.

Need SDT help?

Further information on submitting the SDT acquittal is available on [FAC](https://fac.dffh.vic.gov.au/funded-agency-channel/service-delivery-tracking)

<<https://fac.dffh.vic.gov.au/funded-agency-channel/service-delivery-tracking>>.

Figure 12 – Screenshot of the Current Agreements and the Old Agreements tab



Accessing contracts

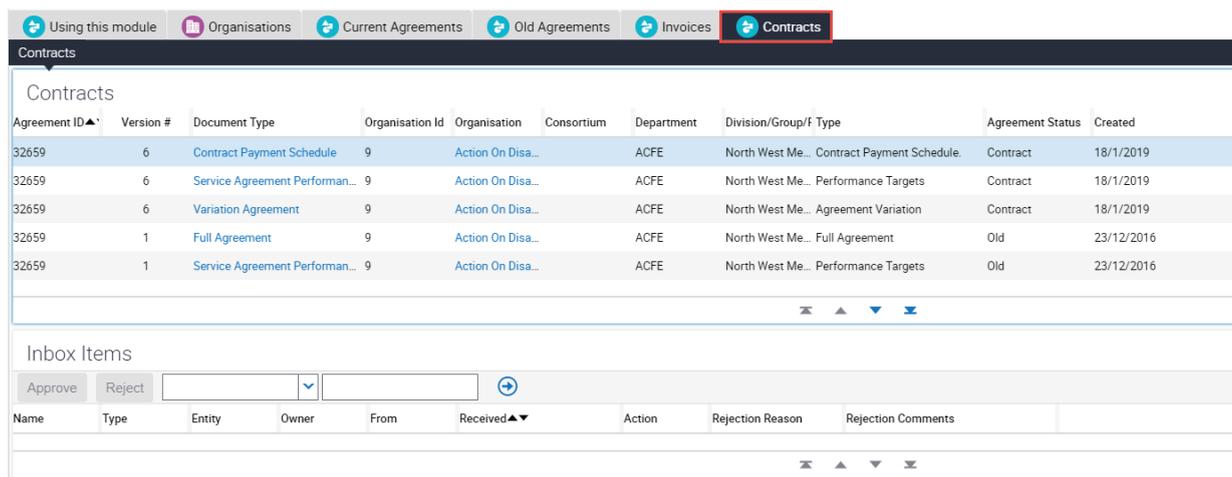
The Contracts tab displays the most recent version of each agreement the organisation holds with the department, as well as and the first version of each agreement. Initially, the screen only displays five lines but this can be expanded to 20 lines by selecting the Show more/Show less button on the far right hand side of the screen

Each contract version comprises three documents:

1. **Contract Payment Schedule:** details the full payment schedule of the agreement
2. **Service Agreement Performance:** details performance measures, targets and units of measure for each activity within the agreement
3. **Full Agreement or Variation Agreement:** a copy of the full agreement including terms and conditions or a Variation Agreement which is the latest variation to the agreement.

To access contracts, select the Contracts tab as shown below.

Figure 13 – Screenshot of the Contracts tab



When a first-time agreement is submitted for approval, its status is shown as Awaiting approval. A pdf version of the agreement is created and attached to a record on this tab.

Only the agreement signatory can approve a first-time agreement. Variations, other than version one, are not required to be approved online.

Navigating records

Querying records and exporting data in SAM

SAM provides users with access to large volumes of data. Using the query function makes it easy to search these records.

To get started select a field from the drop-down box.

Figure 14 – Screenshot of the query on the Acquittal tab

The screenshot shows the SAM system interface. At the top, there are navigation tabs: 'Using this module', 'Organisations', 'Current Agreements', 'Old Agreements', 'Invoices', and 'Contracts'. Below this is the 'Organisations List' section, which contains various search filters and fields. The 'Actual Responses' section is highlighted with a red box around the 'Submit' dropdown menu, which is open to show options like 'Financial Year', 'Month #', 'Month', 'Due Date', 'Submitted Date', and 'Submitted By'. Below this is the 'Actual Response Details' section, which contains an 'Export...' button and a table of response details.

Financial Year	Due Date	Submitted	Submitted Date	Submitted By
18/19	10/11/2018	<input checked="" type="checkbox"/>	7/11/2018 03:44:33 PM	
18/19	10/10/2018	<input checked="" type="checkbox"/>	10/10/2018 03:14:50 PM	
18/19	10/9/2018	<input checked="" type="checkbox"/>	4/9/2018 03:45:49 PM	
18/19	10/8/2018	<input checked="" type="checkbox"/>	7/8/2018 04:32:33 PM	

Service Plan Divis	Service Plan Nam	Service Plan ID	Activity Code	Activity Name	Performance Mea	Target Period	Target Units	YTD Actual	Actual Units	Comment	Updated Date	Updated By
Children, Famili...	Disability Servic...	44973	17078	Community Bas...	Number of hour...	Annual	4,675.65	456.50	100.5		7/11/2018 03:4...	

Type your parameter, for the example Due Date, enter 10/2/2018 then click enter. The requested Acquittal data will display.

Exporting data

Data in some sections can be exported by selecting the Export button.

Figure 15– Screenshot of the Export button on Acquittal tab

The screenshot shows the 'Acquittal' tab interface. At the top, there are navigation tabs: Acquittal, Contacts, Locations, Relationship Hierarchy, Attachments, Current Agreements, Old Agreements, Desktop Review, and Compliance. Below these is the 'Actual Responses' section. It features a 'Submit' button and a 'Due Date' dropdown menu set to '10/2/2018'. A table below lists response data with columns: Financial Year, Month #, Month, Due Date, Submitted, Submitted Date, and Submitted By. The first row shows '17/18', '7', 'Jan', '10/2/2018', a checked box, '9/2/2018 12:15:46 PM', and a user icon. Below the table is the 'Actual Response Details' section, which has an 'Export...' button highlighted in a red box. This section contains a table with columns: Service Plan Divis, Service Plan Nam, Service Plan ID, Activity Code, Activity Name, Performance Mea, Target Period, Target Units, YTD Actual, Actual Units, Comment, Updated Date, and Updated By. The table contains four rows of data for various service plans and activities.

When exporting data, the dialogue box below appears.

Click the Next button to proceed.

Figure 16 – Screenshot of the dialogue box when exporting data

The screenshot shows an 'Export' dialog box with a title bar and a close button (X). The dialog contains three sections: 'Rows to Export:' with radio buttons for 'All Rows In Current Query' (selected), 'Only Current Row', and 'Columns To Export:' with radio buttons for 'All' and 'Visible Columns' (selected). The 'Output Format:' section has radio buttons for 'Tab Delimited Text File' (selected), 'Comma Separated Text File', 'HTML', and 'Text File With Delimiter:'. There is an empty text input field next to the 'Text File With Delimiter:' option. At the bottom, there are two buttons: 'Next' (highlighted in a red box) and 'Close'.

The exported file can be saved as per your normal process. Select Close to return to the screen.

Appendix

List of acronyms

The following is a list of commonly used acronyms relating to Service Agreement systems and reports. You may find it useful to keep this list on hand.

Table 1 – List of acronyms

AC	Access controller
ACCO	Aboriginal community-controlled organisation
ACFE	Adult, Community and Further Education Board
CIMS	Client incident management system
CRIS	Client relationship information system
CRISSP	Client relationship information system for service providers
DET	Department of Education and Training
DFFH	Department of Families, Fairness and Housing
DTR	Desktop review
FAC	Funded Agency Channel
FAR	Financial accountability requirements
IRIS	Integrated reports and information system
NDA	National disability agreement
NDIS	National Disability Insurance Scheme
OA	Organisation authority
PFG	Policy and funding guidelines
QDC	Quarterly data collection
SABRG	Service Agreement business rules and guidelines
SACC	Service Agreement compliance certification
SAM	Service Agreement Module (organisation view)
SAMS2	Service Agreement management system (department view)
SDT	Service delivery tracking

List of My Agency reports

Current and forward financial year reports

SAM01 Current funding and any variation awaiting acceptance

Displays the current contract version of the agreement, along with any open variation amounts, down to commitment level. This report provides information on the funding details of the current contract and the variations that are currently awaiting acceptance.

SAM02a Variation awaiting acceptance

Displays the funding details of the current variation version of the agreement (the agreement which is currently being varied) down to sub activity level. Once this version of agreement is accepted, the status of the agreement will go to contract. This report will only display data when the agreement is in 'awaiting acceptance' status.

SAM02b Current funding

Displays the current contract version of the agreement, down to sub-activity level. The information is grouped by financial year, agreement, service plan, activity, commitment and then sub-activity. Rows highlighted with a light-yellow background are used to indicate variations particular to the current agreement version.

SAM02c Old version within the current financial year

Displays the old versions of the agreements down to sub activity level for the current financial year. The report provides useful historical information about the agreement during the current financial year.

SAM02d Indexation and Equal Remuneration Order

Displays funds that relate to Global Price Update (GPU) indexation and Equal Remuneration Order (ERO). The report shows the amount of funding in the agreement before and after the application of the variation and the amount applied. The information is listed down to sub activity level and includes out year funding. Indexation and ERO are not applied to all sub activities.

SAM03 Invoices

Displays all invoices paid to date for the current agreement period. Unpaid invoices are not shown. Payment details are displayed at agreement, service plan, activity and commitment level.

SAM04 - Payment Schedule

Displays the payment schedule of the contract version of the agreement at commitment level including invoice number. The information is listed by the due date of the payment, financial year, agreement, service plan, activity and commitment. The actual invoice payment might differ from the amount displayed in the payment schedule.

Equal Remuneration Order (ERO) instalment

Displays the increment included in the instalment of the ERO paid in the current financial year. The information is listed by financial year, agreement, service plan, activity, commitment and then sub-activity.

Services Standards and Guidelines by department and activity

Displays all the Service Standards and Guidelines applicable to the Service Agreement. The information is listed by department, service plan template and then activity. An activity may have more than one service standard and guideline.

Client-specific funding report

Individual Funding Allocation Management System (IFAMS) Client Level Funding Report

Records client attached funding for clients receiving services under activities 17081 - Individual Support Packages, 17201 - Futures for Young Adults, 31209 - Out of Home Care - Targeted Care Packages. The reports available for these activities are:

- **Client funding reports for current and previous years**
Reports available include client funding, client variation, client indexation and the final agreement version from previous years.
- **Invoice breakdown reports**
Displays client funding breakdown contained in a particular invoice and has been designed to export to Excel for easy data manipulation (e.g sorting, pivot tables etc.).
- **Client Level Reporting System and SAMS2 automation**
This section describes the business process flow for the IFAMS / SAMS2 automation process and outlines the key steps and timelines for changes to client-attached funding.

Compliance reports

Service Agreement compliance certification (SACC) report

The SACC is undertaken by funded organisations annually to certify their compliance with Service Agreement requirements. Questions cover financial management, risk management, privacy and staff safety screening. This report displays the questions and answers provided in the SACC by the organisation.

Older version reports from 2012/13 onwards

SAM02e Final agreement version for all financial years

Displays the final version of previous years' agreements starting from financial year 12/13. It is useful for determining the funding status as at the end of a financial year and supports end of financial year audit or reporting requirements.

User details report

Organisation report

Displays all registered My Agency users for the organisation, including the Organisation Authority, the person in the organisation responsible for approving all access requests for that organisation.

Service delivery tracking (SDT) report

SDT report

Funded organisations are required to enter their actual against target performance for certain activities on the Acquittal tab in the Service Agreement Module. The reports display the submitted data with details about Service plan division, Activity code, departmental and organisation acquittal contacts. Three service delivery tracking reports are available: tracking, graph and composition.

Structured reports

Unlike other My Agency reports, structured reports are designed to be exported in PDF format rather than Excel. Once exported, they automatically appear in tabular format. This can be helpful when providing the reports to non-My Agency users or when taking reports to meetings.

The following reports are available in structured format:

- SAM02a – Variation awaiting acceptance
- SAMS02b – Current funding
- Structured SAM03 – Invoices.

Further information

For more information and help with My Agency, visit the [My Agency FAQs](https://fac.dffh.vic.gov.au/my-agency-faqs) <<https://fac.dffh.vic.gov.au/my-agency-faqs>>.