

GUIDANCE FOR POPULATING AND UPLOADING PRO BONO WORK AND VALUE ADD SERVICES REPORTS

This guide assists legal services providers (LSPs) on the Whole of Australian Government Legal Services Panel (the Panel) to complete and upload the Pro Bono Work and Value Add Services Reports (the Reports) to the online Portal. It covers:

1. [General information](#)
2. [Populating the templates](#)
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1. General information

- 1.1. Always use the most up to date templates, available through the OLSC [website](#) and [online Portal](#).
- 1.2. For the relevant financial year, LSPs are required to report on all:
 - Pro Bono Work that has been undertaken in the reporting period, and
 - Value Add Services that have been delivered in accordance with the Head Agreement in the reporting period.
- 1.3. LSPs are required to provide the Reports to AGD annually, within 20 days after the end of the financial year.
- 1.4. Follow the instructions in the templates when entering reporting data. The templates have been developed in accordance with the Report Specifications as listed in Schedule 8 of the Head Agreement. Do not amend the templates. They are the only version of the Reports that will be accepted and can be uploaded to the online Portal.
- 1.5. To ensure the templates work correctly you may need to adjust your settings in Excel:
Include new rows and auto fill formulas in those rows
FILE > OPTIONS > PROOFING > AUTO-CORRECT OPTIONS > click 'AutoFormat as you type' tab > tick the last two boxes > OK > OK.

Auto calculate formulas

FILE > OPTIONS > FORMULAS > look for 'Calculation options' heading at the top > under 'Workbook calculation' click 'Automatic' > OK.
- 1.6. The Reports should be submitted in CSV (Comma delimited) format utilising the templates.

2. Populating the templates

- 2.1. The templates utilise the table setting in Excel. Rows 1-3 of each template provides information to assist you in completing each Report.

Pro Bono Work Report

- 2.2. Please ensure **columns A, B and C** in **row 4** are completed. The Pro Bono Work Report has only one row that needs to be completed.

Value Add Services Report

2.3. Rows

- 2.3.1. **Rows 4 and 5** of the table have been left blank. Do not delete these rows until the template has been completed and is ready for uploading into the Portal. If rows 4 and 5 are deleted before the report has been populated, you will need to reload the template and start again.
- 2.3.2. Starting at row 6, to create a new row in the table, populate the LSP three letter acronym first (**Column A**) as this will allow the correct replication of formulas from the row above. The three letter acronym can be found on the LSP's profile page on the Portal.
- 2.3.3. Once the Report has been completed you must delete all blank rows in the table (including rows 4 and 5) prior to uploading it to the Portal.

2.4. Drop down selections

- 2.4.1. When populating **Column B**, only agencies that appear in the drop-down can be selected. The list matches the information on the Portal. Please contact LSPanel@ag.gov.au if you believe you are required to enter an agency in this field that is not available in the drop-down selection.
- 2.4.2. As a result of the recent Machinery of Government changes (MoG), some agencies have been listed as 'DEFUNCT'. You may still select this agency if it is applicable for Value Add Services delivered prior to the MoG. Post-MoG agencies have been added to the drop-down menu of agencies.
- 2.4.3. After an agency is selected from the drop-down, **Column C** will auto-populate with the selected agency's ABN. This auto-populated column is 'greyed out' as no data is required to be manually entered.
- 2.4.4. If you select the wrong agency, simply use the drop-down menu to change the selection to the correct agency name at **Column B** and this will also correct the details in **Column C**.

2.4.5. In **Column D**, select the most relevant category for the Value Add Service. These categories cover the main types of Value Add Services offered by LSPs. If the Value Add Service delivered does not fit into a category, use the 'other' category.

2.4.6. When selecting a location in **Column G**, LSPs should select where the Value Add Service was delivered. That is, if a CPD seminar was delivered to multiple agencies in multiple locations, the LSP will need to complete a separate row for each agency and location in which the Value Add Service was delivered.

2.5. *Manually inputting information*

2.5.1. When populating **Columns E and F**, insert the duration of the Value Add Service and the date on which it was delivered. The date format in **Column F** will automatically change to DD/MM/YYYY.

3. Naming conventions

3.1. The Reports are to be labelled using the following naming conventions:

- XXX_ProBono_Date
- XXX_ValAddSrvs_Date

Where: XXX is the three letter acronym that identifies the firm.

Date is the date of the report using a YYYYMMDD format, i.e. 30 June 2020, the date would be 20200630. The date of the report must be the last day of the relevant reporting period.

3.2. Using the example of a fictional LSP whose name is "An Example Firm" and three letter acronym is 'AEF', the relevant template is then to be saved in Excel as either:

File name:	AEF_ProBono_20200630
Save as type:	CSV (Comma delimited)

File name:	AEF_ValAddSrvs_20200630
Save as type:	CSV (Comma delimited)

4. Uploading the Reports to the online Portal

- 4.1. The Reports can be uploaded to the online Portal as a draft prior to submission. Submitted reports can be superseded.
- 4.2. Reports cannot be uploaded or submitted after the due date has expired.
- 4.3. When uploading a Report to the Portal:
 - Select the 'Reporting' tab on the Dashboard then select either the 'Pro Bono Report' or 'Value Add Services Report' tab.
 - Once you have identified the relevant report for the financial year, under the 'Actions' heading click the 'Details' link.
 - You will then see a screen that will list any submissions previously uploaded.
 - To upload a copy of your populated Excel report click the link under the 'Report Submission' heading, load the Report and then 'Submit Report'.
- 4.4. If your Report does not successfully upload to the Portal please check the template to ensure:
 - your report is in the Excel CSV format, and
 - manually entered data complies with the above guidance.
- 4.5. If you are having difficulty uploading or submitting a Report, or should you be unable to submit a Report by the due date, please contact lspanel@ag.gov.au as soon as possible. If you have received an error message, please provide a copy of the error message, along with a copy of your Report.