

## Guidelines for Using Reporting Templates

### Using the Annual Report and Annual Budget Templates

Before filling out the Annual Report and Annual Budget templates, download the most current versions from the password protected area of the Primary Care Initiative website. ([www.primarycareinitiative.ab.ca](http://www.primarycareinitiative.ab.ca))

PCNs are responsible for ensuring that they are using the most current template.

Before opening the template, check the macro security settings on your computer. The macro security on the receiving computer must be set to “medium” for the macros to work. To view or change the macro security setting, go Tools>Macro>Security and select “medium,” then close and reopen Word for the setting to take effect. When prompted, “enable” macros.

Instructions for completing the template are located within the template document. Instructions should be deleted before documents are submitted.

### Submitting the Annual Report and Annual Budget

Submit according to the Reporting Schedule by Initiation Date. See the instructions in each template for submission instructions.

### Mid-year Reports

The Mid-year Report template is under development.