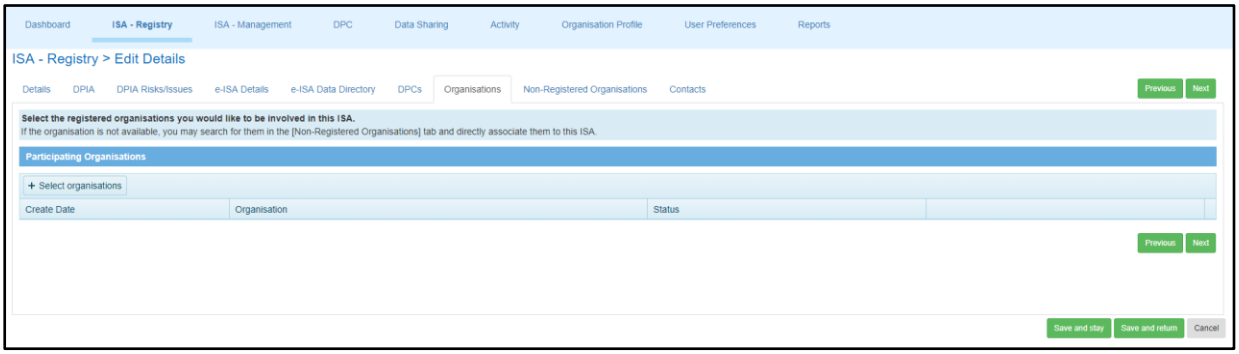
How to Manage ISA Organisations (QRG)

This Quick Reference Guide covers the following areas of managing ISA organisations:

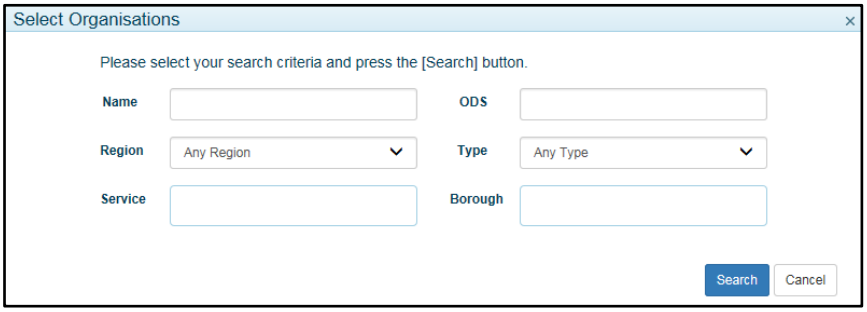
1. Add or Remove a Participating Organisation To or From an ISA
2. Add a 'Non-Registered Organisation' onto an ISA
3. Delete a 'Non-Registered Organisation' from an ISA

As a host organisation (the organisation creating the ISA), you can amend the information within it as well as invite other organisations to participate. The participant of an ISA does not have the ability to amend an ISA. They must request amendments or invitation from the host organisation.

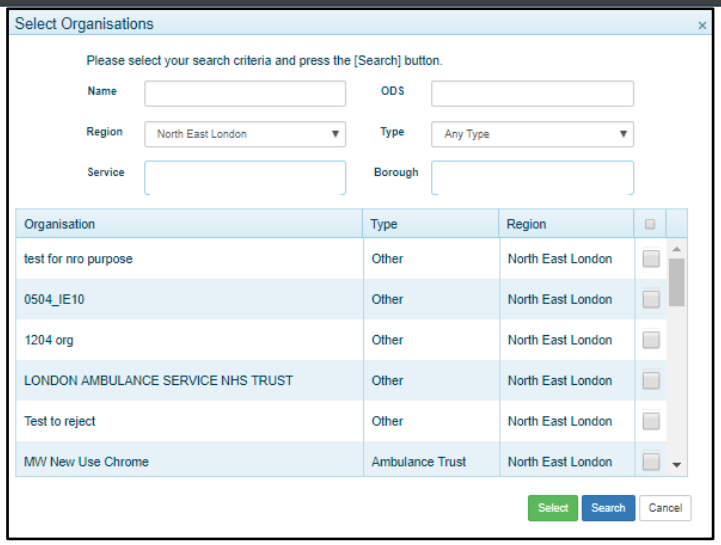
Add / Remove a Participating Organisation to / from an ISA



1. Click on the 'Organisations' tab. The participating 'Organisation' screen is displayed
2. To invite an organisation onto the ISA, click the **Select organisations** (+ Select organisations) button



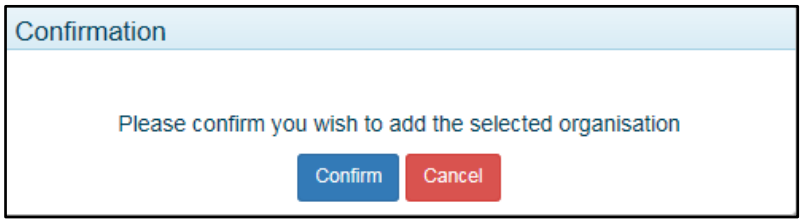
3. The 'Select Organisations' pop-up dialog box is displayed
4. You can search for an organisation any combination of these categories:
    a. Part of their name (i.e. "hospital" or "surgery")
    b. The STP footprint region
    c. The services they provide
    d. The ODS code
    e. The organisation type
    f. The boroughs they service
5. Once you have entered the search criteria, click the **Search** (Search) button



6. From the search result place a tick next to the organisation you want to invite onto the ISA

7. Click the **Select** (Select) button

8. You will be prompted to **Confirm** or **Cancel** your selection

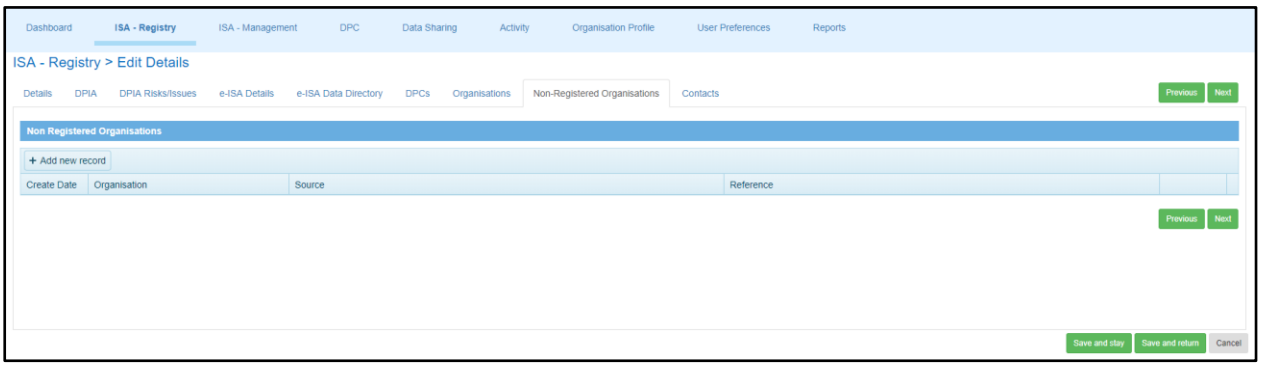


9. To remove an organisation from the 'Organisations' tab, select the **Delete** (× Delete) button adjacent to the organisation name

Add a 'Non-Registered Organisation' onto an ISA

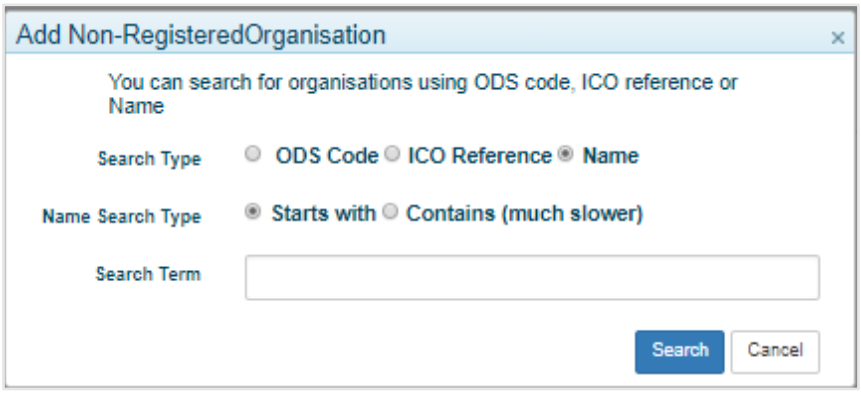
A Non-Registered Organisation can be an organisation not yet registered in the DCC or a third party entity that are not part of the NHS or Social Care and therefore not eligible to register in the DCC, however, they are a part of an Information Sharing Agreement (ISA).

Currently non-registered organisations can only be added from an existing list of organisations that have been assessed against Information Governance policies and standards and exist in the IG Toolkit.



1. Click on the 'Non-Registered Organisations' tab. The ‘Non-Registered Organisations’ screen is displayed

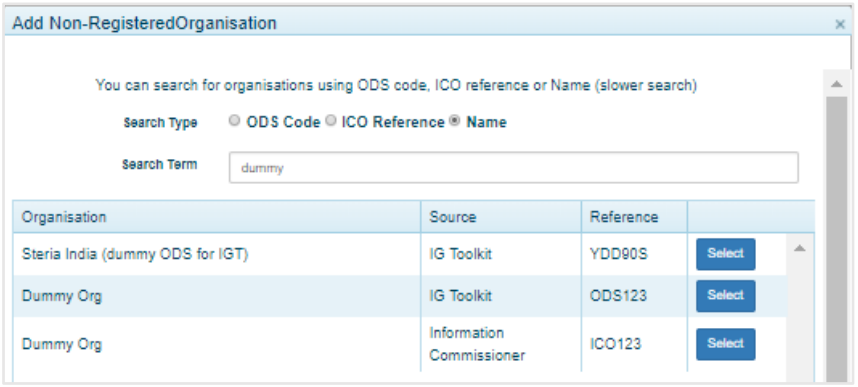
2. To add an organisation that hasn’t yet registered onto the Data Controller Console, select the **Add New Record** (+ Add new record) button



3. The ‘Add Non-Registered Organisation’ form is displayed. You can search for an organisation by the ODS code, ICO reference number or the organisations name

4. If searching using Name as the search type specify ‘Starts with’ or ‘Contains’

5. Select a **search type** option and enter the **search term** followed by the Search (Search) button



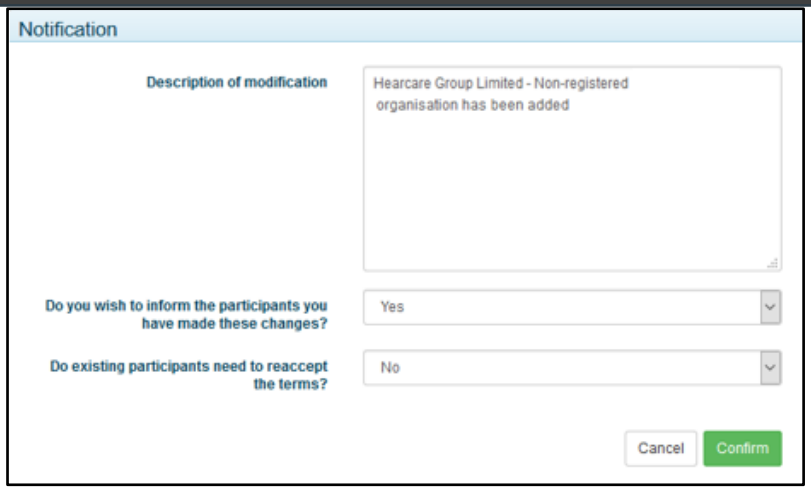
***Note**: The search results are extracted from the IG Toolkit.*

There are quarterly updates of the ICO codes, toolkits and Caldecott Guardian National Register, therefore, it may not hold the most up-to-date records.

6. Once the search result generates the desired list, click the **Select** (Select) button to add the Non-Registered Organisation to the ISA

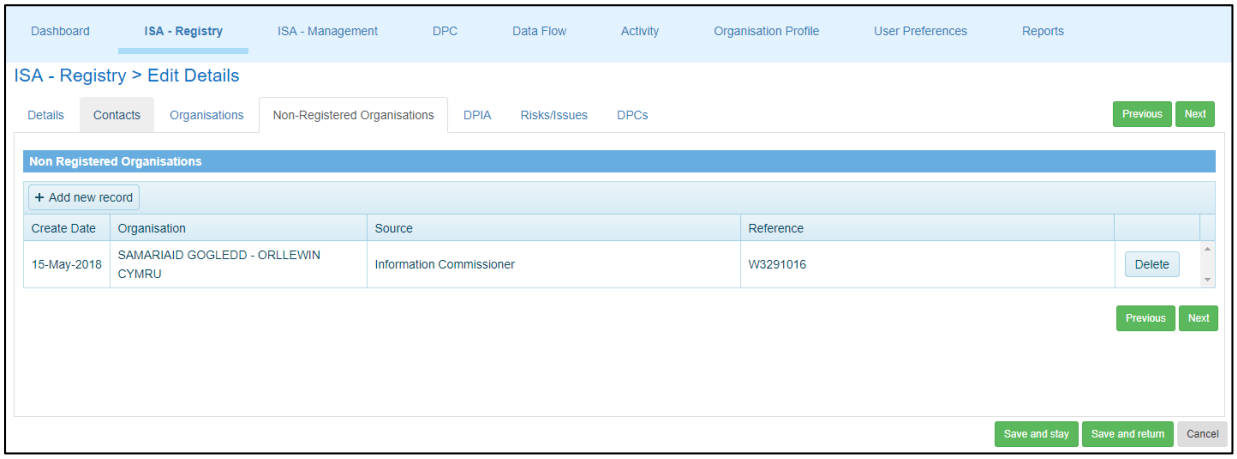
7. Click the **Save and stay** (Save and stay) or the **Save and return to dashboard** (Save and return to dashboard) button to commit the changes you’ve made

8. A 'Notification' dialog window is displayed with information of the changes made and prompts whether you wish to inform the participants about the changes made



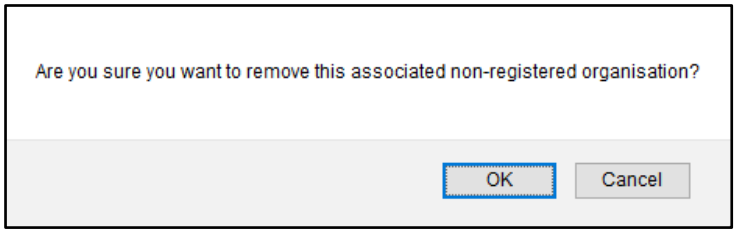
9. Once you have clicked the **Confirm** (Confirm) button, the 'Notification' dialog screen closes and the 'ISA - Registry' screen is displayed

Delete a 'Non-Registered Organisation' from an ISA



1. Select the 'Non-Registered Organisations' tab then select the **Delete** (× Delete) button

2. You will be prompted with the confirmation dialog box below, Click '**OK**'



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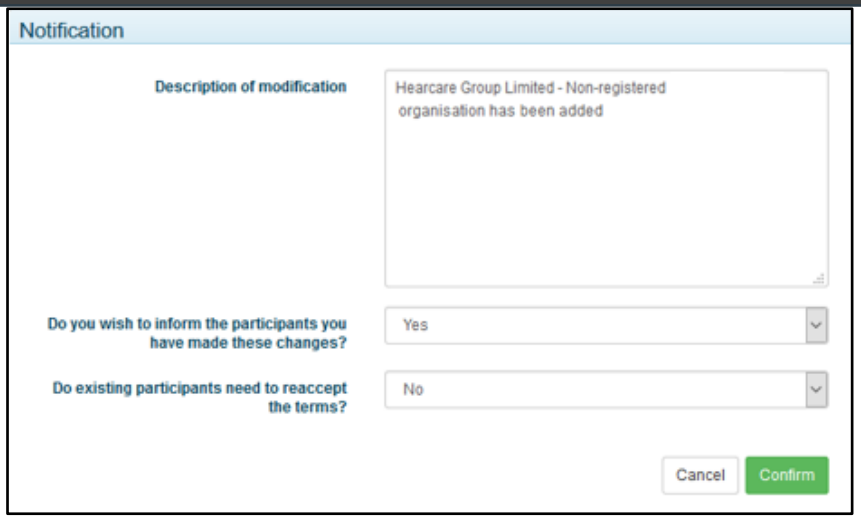

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