

# How to Manage ISA Organisations (QRG)

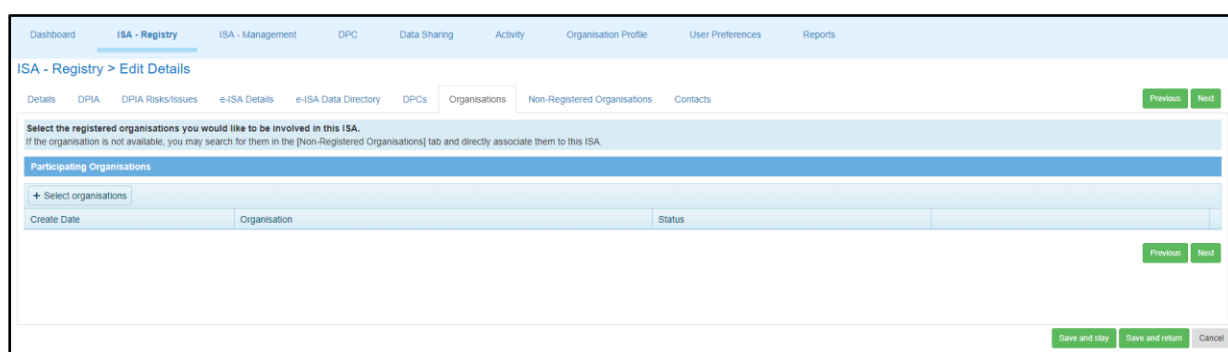
## How to Manage ISA Organisations (QRG)

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

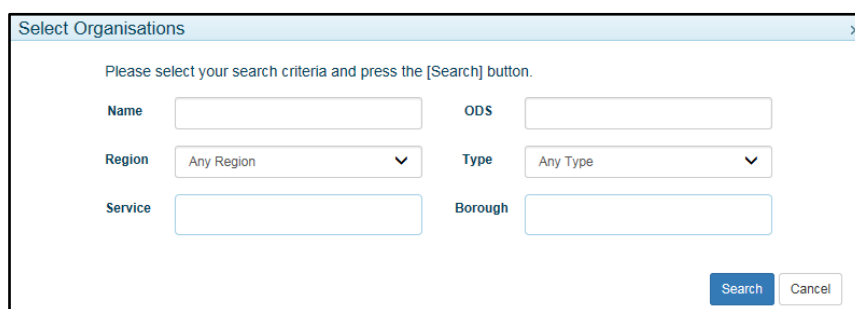
1. Add or Remove a Participating Organisation To or From an ISA
2. Add a 'Non-Registered Organisation' onto an ISA
3. Delete a 'Non-Registered Organisation' from an ISA

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

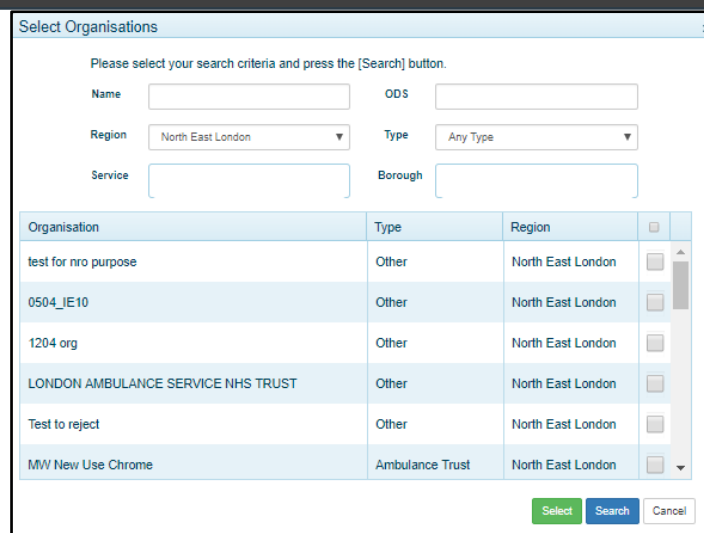


1. Click on the 'Organisations' tab. The participating 'Organisation' screen is displayed
2. To invite an organisation onto the ISA, click the **Select organisations** ( **+ Select organisations** ) button



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

# How to Manage ISA Organisations (QRG)



Select Organisations

Please select your search criteria and press the [Search] button.

Name  ODS

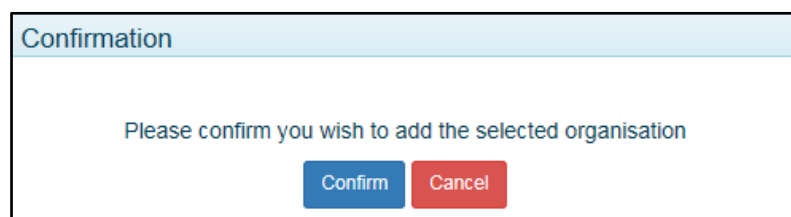
Region  Type

Service  Borough

Organisation	Type	Region	
test for nro purpose	Other	North East London	<input type="checkbox"/>
0504_IE10	Other	North East London	<input type="checkbox"/>
1204 org	Other	North East London	<input type="checkbox"/>
LONDON AMBULANCE SERVICE NHS TRUST	Other	North East London	<input type="checkbox"/>
Test to reject	Other	North East London	<input type="checkbox"/>
MW New Use Chrome	Ambulance Trust	North East London	<input type="checkbox"/>

Select Search Cancel

- From the search result place a tick next to the organisation you want to invite onto the ISA
- Click the **Select** (  ) button
- You will be prompted to **Confirm** or **Cancel** your selection



Confirmation

Please confirm you wish to add the selected organisation

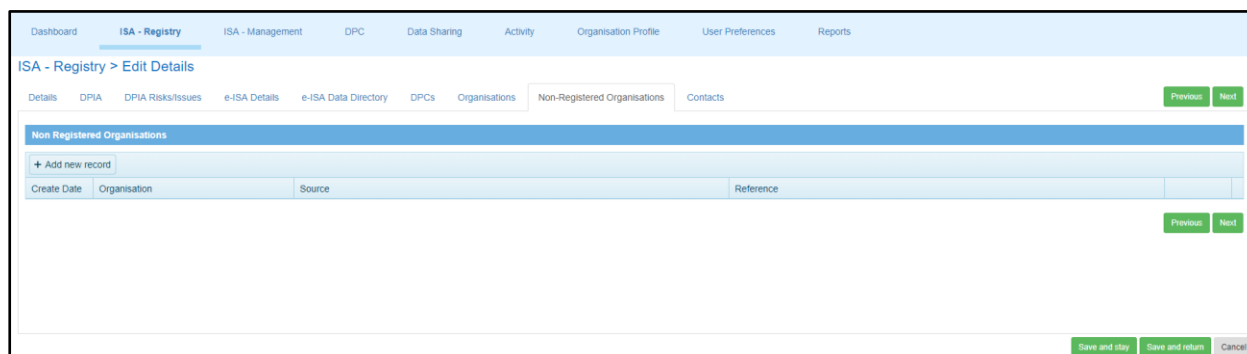
Confirm Cancel

- To remove an organisation from the 'Organisations' tab, select the **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.



Dashboard ISA - Registry ISA - Management DPC Data Sharing Activity Organisation Profile User Preferences Reports

ISA - Registry > Edit Details

Details DPIA DPIA Risks/Issues e-ISA Details e-ISA Data Directory DPCs Organisations Non-Registered Organisations Contacts

Non Registered Organisations


+ Add new record

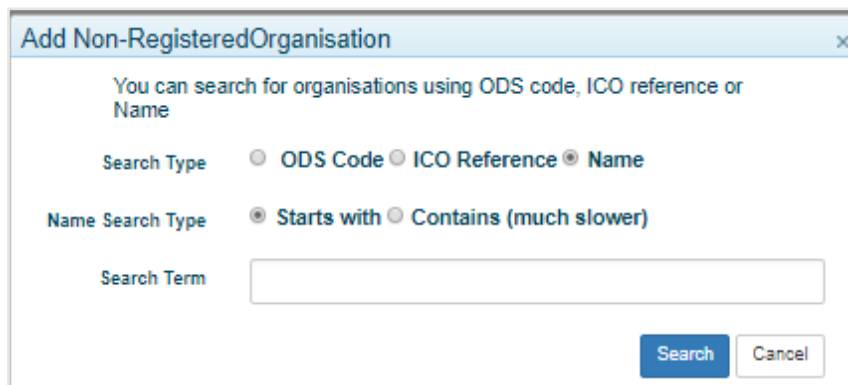
Create Date	Organisation	Source	Reference
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Previous Next

Save and stay Save and return Cancel

# How to Manage ISA Organisations (QRG)

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** (  ) button





**Add Non-RegisteredOrganisation**

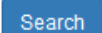
You can search for organisations using ODS code, ICO reference or Name

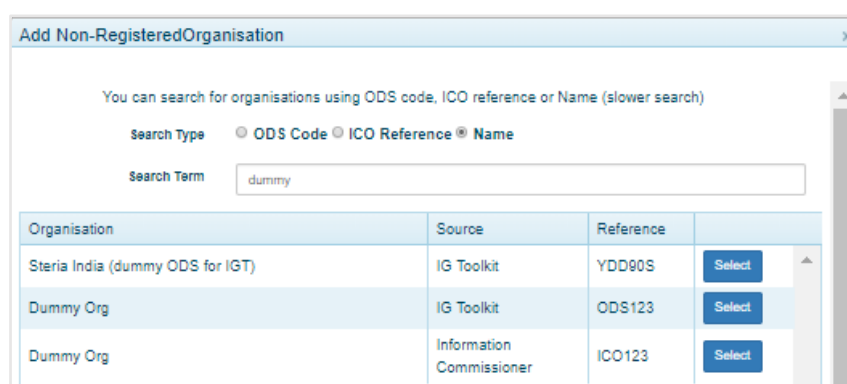
Search Type ☐ ODS Code ☐ ICO Reference ☒ Name

Name Search Type ☒ Starts with ☐ Contains (much slower)

Search Term

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 (  ) button






**Add Non-RegisteredOrganisation**

You can search for organisations using ODS code, ICO reference or Name (slower search)


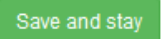
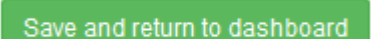
Search Type ☐ ODS Code ☐ ICO Reference ☒ Name

Search Term

Organisation	Source	Reference	
Steria India (dummy ODS for IGT)	IG Toolkit	YDD90S	
Dummy Org	IG Toolkit	ODS123	
Dummy Org	Information Commissioner	ICO123	

**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** (  ) button to add the Non-Registered Organisation to the ISA
7. Click the **Save and stay** (  ) or the **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

# How to Manage ISA Organisations (QRG)

Notification

Description of modification

Hearcare Group Limited - Non-registered organisation has been added

Do you wish to inform the participants you have made these changes?

Yes

Do existing participants need to reaccept the terms?

No

Cancel

Confirm

- 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

Dashboard
ISA - Registry
ISA - Management
DPC
Data Flow
Activity
Organisation Profile
User Preferences
Reports

ISA - Registry > Edit Details

Details
Contacts
Organisations
Non-Registered Organisations
DPIA
Risks/Issues
DPCs

Non Registered Organisations

+ Add new record

Create Date	Organisation	Source	Reference	
15-May-2018	SAMARIAID GOGLEDD - ORLLEWIN CYMRU	Information Commissioner	W3291016	Delete

Previous

Next

Save and stay

Save and return

Cancel

- Select the 'Non-Registered Organisations' tab then select the **Delete** ( × Delete ) button
- You will be prompted with the confirmation dialog box below, Click '**OK**'

Are you sure you want to remove this associated non-registered organisation?

OK

Cancel

- 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
- 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

**Notification**

**Description of modification**

Hearcare Group Limited - Non-registered organisation has been added

Do you wish to inform the participants you have made these changes?

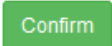
Yes

Do existing participants need to reaccept the terms?

No

Cancel

Confirm

5. Click the **Confirm** (  ) button. The 'Notification' dialog closes and the 'ISA - Registry' screen is displayed