


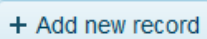


How to Manage ISA Contacts (QRG)

This Quick Reference Guide covers the following topics:

1. Add a New Hosted Contact
2. Add an Existing Hosted Contact
3. Amend a Hosted Contact
4. Delete a Hosted Contact
5. Add Other Parties Involved in ISA Contacts
6. Amend Other Parties Involved in ISA Contacts
7. Delete Other Parties Involved in ISA Contacts

Add a New Hosted Contact

1. Click on the 'Contacts' tab or at the bottom-right of the screen or select the **Next** () button from the 'Details' tab. The Contacts screen is displayed
2. Under 'Hosted contacts' to add a new contact, click the **Add new record** () button. A screen is displayed with contact fields



3. Populate all the mandatory fields with the new contact details.

Note: the Roles field can now accept multiple roles for a contact.


4. Click the **Update** () button at the bottom right of the screen. The Contact screen closes and the contact details are added to the ISA
5. Select either of the **Save and stay** () or the **Save and return** () buttons to commit the changes

6. A 'Notification' window is then displayed asking if you would like to inform the existing participants that a new user has been added. Select the appropriate option from the drop-down boxes if you want to notify the existing users


Add an Existing Hosted Contact

1. Under 'Hosted contacts' to add a contact from existing organisation contacts, click the **Add from Organisation Contacts** () button
2. A dialog box is displayed with a drop-down list of organisation contacts



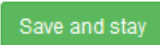
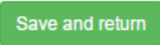
3. Select a contact from the drop-down list and select the **Add Contact** () button

4. Amend the contact details accordingly, specify the 'Role' within their organisation and the 'Function' in the ISA

5. Click the **Update** () button at the bottom right of the screen

6. Contact's screen closes, and contact details are added to the ISA

Name	Role	Email	Phone	Mobile	Create a login?	
R. Smith ReadOnly	Data Protection Officer	r.smith@demo.com	1234567890	1234567890	<input type="checkbox"/>	 Edit  Delete
J.Benny OSU	Caldicott Guardian	j.benny@demo.com	1234567890	1234567890	<input checked="" type="checkbox"/> [Read only User]	 Edit  Delete
D.Wilkinson ActiveUser	Caldicott Guardian	d.wilkinson@demo.com	1234567890	1234567890	<input checked="" type="checkbox"/> [Read only User]	 Edit  Delete

7. Select either of the **Save and stay** () or the **Save and return** () buttons to commit the changes

8. A 'Notification' window is displayed asking if you would like to inform the existing participants that a new user has been added. Select the appropriate option from the drop-down boxes if you want to notify the existing users



Notification

Any changes to an ISA may require a review of the DPIA details - please ensure you have done so if necessary.

Description of modification: Test User (test.user@nhs.net) - contact has been added

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

Do existing participants need to reaccept the terms? Yes

Cancel Confirm

3

1.1 Amend a Hosted Contact

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** | Previous | Next

Hosted contacts

+ Add new record | + Add from Organisation Contacts

Name	Roles	Functions	Email	Notify	
Tony Harvey	Caldicott Guardian, Data Protection Officer, IG Manager/Lead, Privacy Officer	Responsible for ISA	tony.harvey2@nhs.net	<input type="checkbox"/>	Edit Delete


Other parties involved

+ Add new record

Name	Type
------	------

Save and stay | Save and return | Cancel | Previous | Next

1

1. You can amend 'Hosted contacts' from an existing list by clicking the **Edit** ( Edit) button adjacent to the contact name. A screen is displayed with contact fields and the contact details populated

Edit

First Name: Tony

Last Name: Harvey

Roles: Caldicott Guardian x Data Protection Officer x IG Manager/Lead x Privacy Officer x

Role Other:

Functions:

Email: tony.harvey2@nhs.net


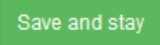
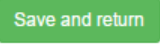
Phone: 0920145245245

Mobile: 1353635757

Notify for Updates:

Update | Cancel

2

2. Edit the fields as required and then select the **Update** ( Update) button at the bottom right of the screen
3. Select either of the **Save and stay** ( Save and stay) or the **Save and return** ( Save and return) buttons to commit the changes
4. A 'Notification' window is displayed asking if you would like to inform the existing participants that a new user has been added. Select the appropriate option from the drop-down boxes if you want to notify all the existing users



Notification

Description of modification: Main 2 User (main2@demo.com) - contact has been updated


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

Do existing participants need to reaccept the terms? No

Cancel Confirm

4

Delete a Hosted Contact

1. If you would like to delete a contact on an existing list, go to 'Hosted contacts' then click the **Delete ( Delete)** button

ISA - Registry > Edit Details

Hosted contacts

Please ensure to press [Save] to commit any changes you have made.

Name	Roles	Functions	Email	Notify	
George Smith	Other ()	Correction or Amendments	George.Smith@Demo.com	<input type="checkbox"/>	
Tony Harvey	Caldicot Guardian, Data Protection Officer, IG Manager/Lead, Privacy Officer	Responsible for ISA	tony.harvey2@nhs.net	<input type="checkbox"/>	

Other parties involved

Save and stay Save and return Cancel

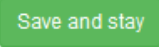
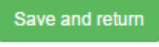
1

Are you sure you want to remove this contact?

Doing so will remove access to this organisation for this user.

OK Cancel

2

2. Select **OK** to remove the contact. The dialog window closes, and the contact details are removed from the ISA
3. Select either of the **Save and stay** () or the **Save and return** () buttons to commit the changes
4. A 'Notification' window is displayed prompting if you would like to inform the existing participants that a new user has been added. Select the appropriate option from the drop-down boxes if you want to notify all the existing users



Notification

Description of modification

Main 2 User (main2@demo.com) - contact has been removed

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

Do existing participants need to reaccept the terms? No

Cancel Confirm

Note: You must have at least one contact associated with the ISA. If you delete the only remaining contact, you will be notified of this.

- At least 1 contact must be specified.

Add Other Parties Involved in ISA Contacts

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

Hosted contacts

Please ensure to press [Save] to commit any changes you have made.

+ Add new record | + Add from Organisation Contacts

Name	Roles	Functions	Email	Notify	
George Smith	Other ()	Correction or Amendments	George.Smith@Demo.com	<input type="checkbox"/>	Edit Delete
Tony Harvey	Caldicott Guardian, Data Protection Officer, IG Manager/Lead, Privacy Officer	Responsible for ISA	tony.harvey2@nhs.net	<input type="checkbox"/>	Edit Delete

Other parties involved

+ Add new record

Name	Type

Save and stay | Save and return | Cancel

1. Under 'Other parties involved' section, to add a new contact, click the **Add new record** (+ Add new record) button

Edit


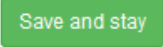
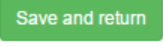
Name: Joe Bloggs

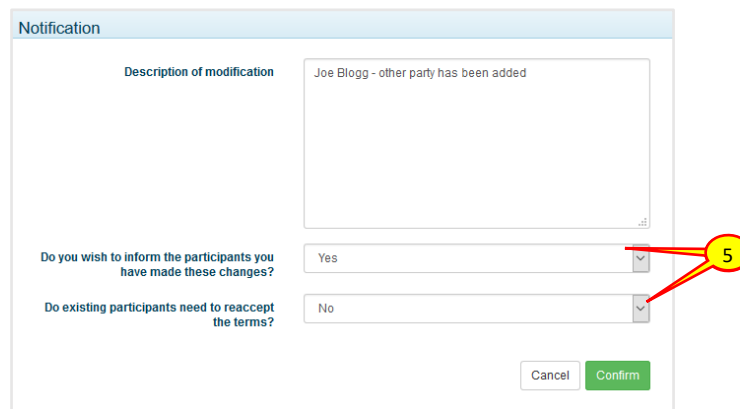
Type: Third Sector

Update Cancel

2. A window is displayed with name and type fields. Populate the fields with the other party details



3. Click the **Update** () button at the bottom right of the dialog box. The contact details are added to the ISA
4. Select either of the **Save and stay** () or the **Save and return** () buttons to commit the changes
5. A 'Notification' window is displayed asking if you would like to inform the existing participants that a new user has been added. Select the appropriate option from the drop-down boxes if you want to notify all the existing users



Notification

Description of modification: Joe Blogg - other party has been added

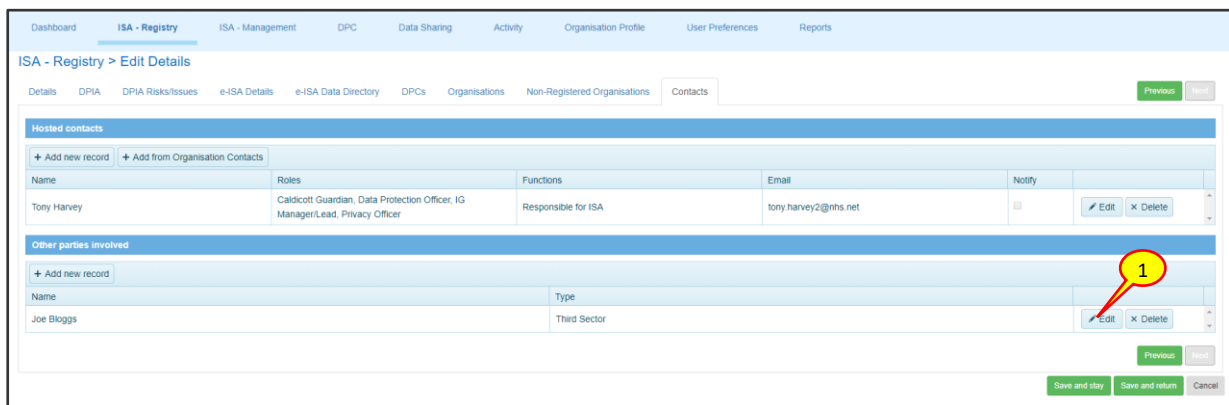
Do you wish to inform the participants you have made these changes? Yes

Do existing participants need to reaccept the terms? No

Buttons: Cancel, Confirm

Annotation: A red circle with the number 5 points to the 'Yes' dropdown menu.

Amend Other Parties Involved in ISA Contacts



ISA - Registry > Edit Details

Hosted contacts table:


Name	Roles	Functions	Email	Notify	
Tony Harvey	Caldcott Guardian, Data Protection Officer, IG Manager/Lead, Privacy Officer	Responsible for ISA	tony.harvey2@nhs.net	<input type="checkbox"/>	Edit Delete

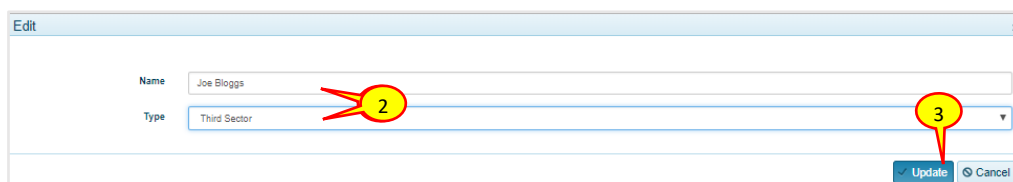
Other parties involved table:

Name	Type	
Joe Bloggs	Third Sector	Edit Delete

Buttons: Save and stay, Save and return, Cancel

Annotation: A red circle with the number 1 points to the 'Edit' button for Joe Bloggs.

1. To amend a listed party, go to 'Other parties involved', click the **Edit** () button adjacent to the contact name. A screen is displayed with name and type fields and details populated
2. Amendments the fields as desired




Edit

Name: Joe Bloggs

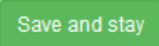
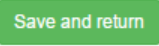
Type: Third Sector

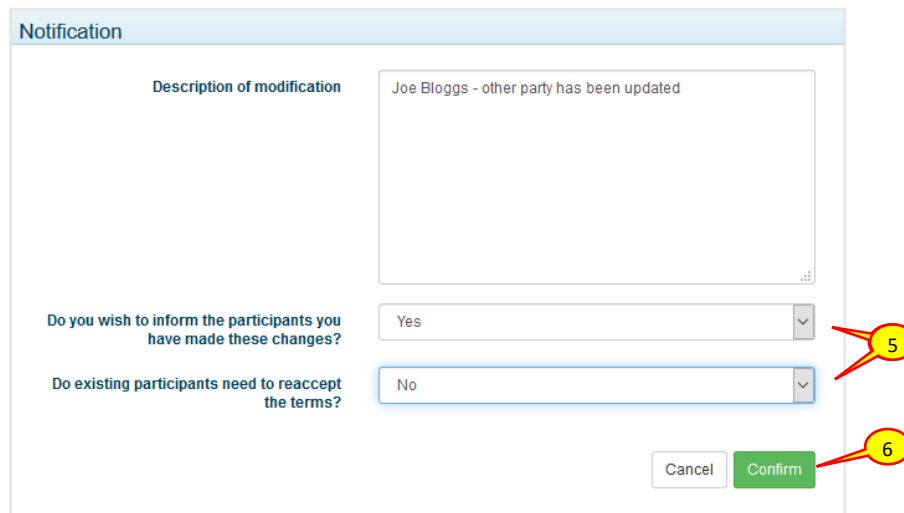
Buttons: Update, Cancel

Annotations: A red circle with the number 2 points to the Name field, and a red circle with the number 3 points to the Update button.

3. Click the **Update** () button at the bottom right of the screen. The amended contact details are added to the ISA



4. Select either of the **Save and stay** () or the **Save and return** () buttons to commit the changes
5. A 'Notification' window is displayed asking if you would like to inform the existing participants that a new user has been added. Select the appropriate option from the drop-down boxes if you want to notify all the existing users



Notification

Description of modification Joe Bloggs - other party has been updated

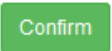
Do you wish to inform the participants you have made these changes? Yes

Do existing participants need to reaccept the terms? No

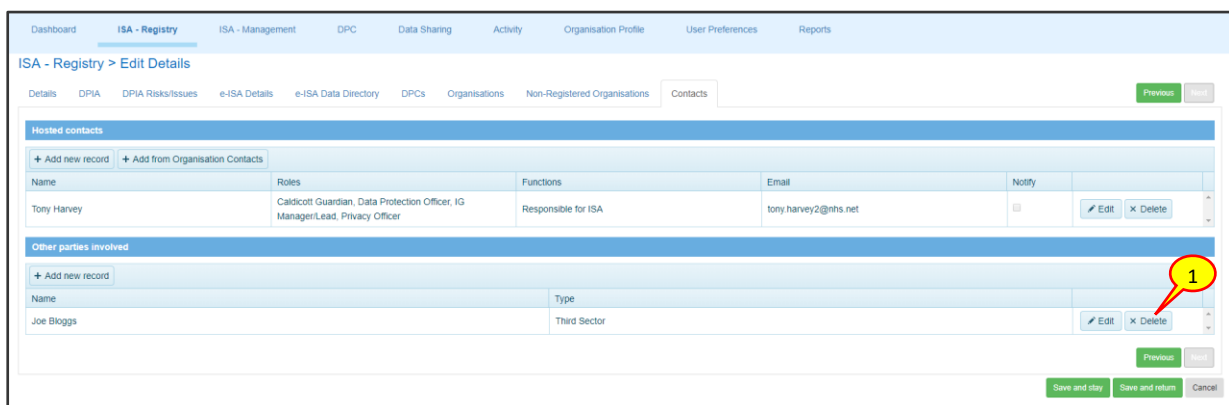
Cancel **Confirm**

5

6

6. Click the **Confirm** () button

1.2 Update ISA Contact Details – Delete Other Parties Involved in ISA Contacts





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** Previous Next



Hosted contacts

+ Add new record + Add from Organisation Contacts

Name	Roles	Functions	Email	Notify	
Tony Harvey	Caldicott Guardian, Data Protection Officer, IG Manager/Lead, Privacy Officer	Responsible for ISA	tony.harvey2@nhs.net	<input type="checkbox"/>	 

Other parties involved


+ Add new record

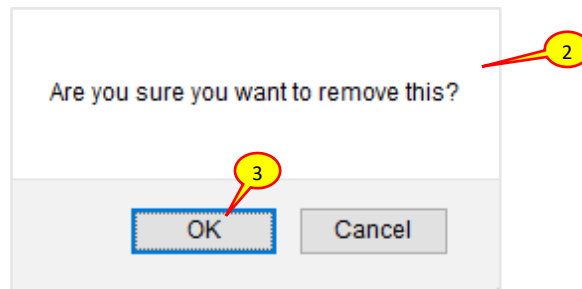
Name	Type	
Joe Bloggs	Third Sector	 

Previous Next

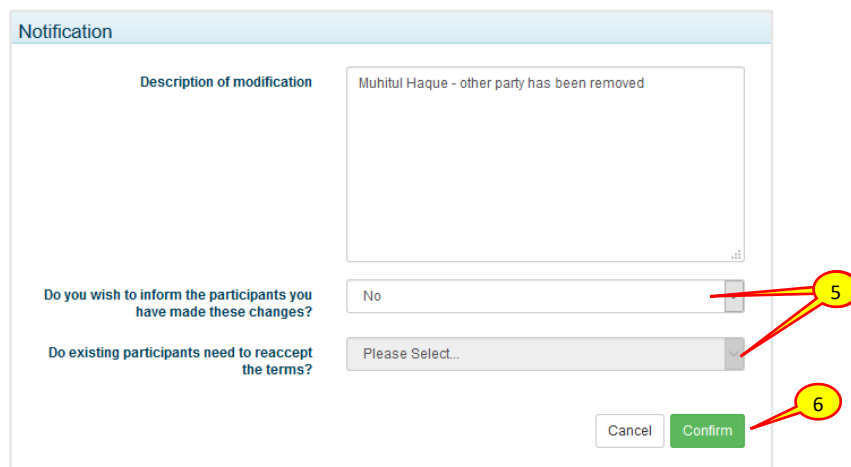
Save and stay **Save and return** Cancel

1

1. To delete a listed party, go to 'Other parties involved', click the **Delete** () button adjacent to the name.
2. A dialog window is displayed with the message 'Are you sure you want to remove this?'



3. Click '**OK**' to remove the record. The dialog window closes and the record is removed from the ISA
4. Select either of the **Save and stay** () or the **Save and return** () buttons to commit the changes
5. A 'Notification' window is displayed asking if you would like to inform the existing participants that a new user has been added. Select the appropriate option from the drop-down boxes if you want to notify all the existing users.



6. Click the **Confirm** () button