



How to Manage Organisations Profile (QRG)

This Quick Reference Guide covers the following topics:

- 1 Update your Organisations Profile details
- 2 Add a Contact in your Organisation
- 3 Edit a Contact in your Organisation
- 4 Delete a Contact in your Organisation
- 5 Update your Organisations Tagging
- 6 Add an Accreditation
- 7 Edit an Accreditation
- 8 Delete an Accreditation
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Update your organisation profile details

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

Organisation Profile

Details

Organisation Profile Details

Organisation Name: DROPI TEST ORG2

Organisation Type: Public Health England

ICO Registration Number: 27289476

Organisation Region: South West London

Postcode: SL2 2LT

Provide direct care?: Yes

ODS Code: No IG Toolkit found for this ODS

Improvement Plan in Place:

ICO Details

Name: Test-Direct Limited

Expiry: 27-Oct-2017

1. Select the 'Organisations Profile' tab from navigation bar. The 'Organisation Profile' screen is displayed
2. Under 'Organisation Profile Details' section, amend the organisation fields as desired (Both ICO Registration Number and Organisation Postcode are now mandatory fields)
3. The ICO Registration Code shown is incorrect and needs to be updated with your organisations correct ICO code click the 'Click to edit' link to update



ICO

An Information Commissioner's Office registration is required. You can search either by ICO number or name. If you cannot find the organisation, please email us and we will assist.

Search Type ICO Reference Name

Name Search Type Starts with Contains (much slower)

Search Term

Organisation	Reference	
TESTON & WATERINGBURY NURSERY GROUP	Z1270559	Select
TESTERWORLD LTD (2008846)	Z1533551	Select
TEST INSPECT LTD (5299500)	Z1767802	Select
TEST MATCH EXTRA.COM LIMITED (6871221)	Z1768199	⚠
TESTPLANT EUROPE LIMITED (6673424)	Z2495841	Select
TESTING CIRCLE LIMITED (5597367)	Z2868867	Select
TESTWOOD WORKING MENS CLUB	Z341859X	Select

Search Cancel

4. The ICO search window is displayed, select the Search Type and if searching by name select the Name Search Type
5. Enter the search criteria into the Search Term field
6. Click the Search (**Search**) button
7. Click the Select (**Select**) button adjacent to your organisation
8. If your organisation is not found click the email link for assistance

Add a contact in your organisation

Organisation Contacts

The following issues must be addressed:

- A Caldicott Guardian must be specified.
- A Data Protection Officer must be specified.

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

+ Add New Contact

Name	Functions	Email	Phone	Mobile	Create a login?		
Tony Harvey	IG Manager/Lead, Privacy Officer	None selected	tony.harvey2@nhs.net	0920145245245	1353635757	<input checked="" type="checkbox"/> [Organisation User]	Edit Delete
Ambica Ikkurti	IG Manager/Lead	None selected	ambica.ikkurti@nhs.net	01753477800	07525657891	<input checked="" type="checkbox"/> [Organisation User]	Edit Delete

Generic DPO Detail

If you use a generic email address or phone number for DPO purposes, record it here.


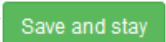
1. At the top of the Organisation Contacts section of the Organisation Profile is a section listing any issues with the contacts for the organisation. All of the issues need to be addressed before proceeding
2. To add a new contact, under the 'Organisation Contacts' section, click on the **Add New Contact** (**+ Add New Contact**) button.



3. The 'Contact' window is displayed. Populate all of the fields to add the person as a contact in your organisation.

Note: If an Organisation type is set as Local Authority, any new contacts added will have an additional **Role Category** field available to distinguish between Adult Social Care and Child Social Care.

4. To enable the contact to have a user account and login to the Data Controller Console, place a tick on the checkbox labelled 'Login account required'

5. A 'User Account Options' pane to the right of the screen is displayed. Use the options to grant user log-in permissions accordingly for the user
 - (a) Select 'Organisation User' (OSU) to give the user full access to the organisation including the ability to create other contacts for the organisation
 - (b) Select 'Active User' (AU) to give the user partial access to the organisation. This user has the access to create an ISA and manage existing ISA's, however, they cannot create contacts or amend the organisation's profile
 - (c) Select 'Read-only user' (ROU) to allow the user to only view information the organisation is associated with
6. Click the **Update** () button. The 'Contact' screen closes and the 'Organisation' screen is displayed
7. Click **Save and stay** () button at the bottom right of the page



8 You have been added as a user to an additional organisation [Main Org 1] on the Data Controller Console. Please follow this [link](#) to login.

Regards

Data Controller Administrator

NHS (London Region)



8. If the user account already exists in DCC, then the user will receive a notification email that s/he has been added as a user to the organisation

8 A new user account has been created for you on the Data Controller Console.

Please follow this [link](#) to login.

You can login using the following details:

Username: [\[redacted\]](#)

Password: ABCD1234

You will be asked to change this password when you first login.

Regards

Data Controller Administrator

NHS (London Region)



9. If the user account doesn't exist in DCC, then this new contact will receive a notification email that a user account has been created for them. The new user will receive a username and a temporary password which they must change when they first login

Edit a Contact in your Organisation

Organisation Contacts						
+ Add New Contact						
Name	Role	Email	Phone	Mobile	Create a login?	
Muhitul Haque-Pete	Caldicott Guardian	muhitul.haque@nh...	1234567890		<input checked="" type="checkbox"/> [Organisation User]	Edit Delete
Debith Roberts	Caldicott Guardian	Debith.roberts1@p...	12345		<input checked="" type="checkbox"/> [Organisation User]	Edit Delete

1. To edit a contact, in the 'Organisation Contacts' section in the 'Organisations Profile' tab, click on the **Edit** ([Edit](#)) button adjacent to the contact



2

2. A Contact window is displayed with contact details populated in the field. Amend the fields accordingly then click **Update** () button

Delete a Contact in your Organisation

Name	Roles	Functions	Email	Phone	Mobile	Create a login?	
Tony Harvey	Caldicott Guardian, Data Protection Officer, IG Manager/Lead, Privacy Officer	Freedom of Information	tony.harvey2@nhs.net	0920145245245	1353635757	<input checked="" type="checkbox"/> [Organisation User]	<input type="button" value="Edit"/> <input type="button" value="Delete"/>
Ambica Ikkurti	Caldicott Guardian, IG Manager/Lead	None selected	ambica.ikkurti@nhs.net	01753477800	07525657891	<input checked="" type="checkbox"/> [Organisation User]	<input type="button" value="Edit"/> <input type="button" value="Delete"/>

1

1. To delete a contact, in the 'Organisation Contacts' section in the 'Organisations Profile' tab, select the **Delete** () button adjacent to the contact

Are you sure you want to remove this contact?

2

2. A prompt is displayed 'Are you sure you want to remove this contact? Click **OK**. The contact is removed



Update your Organisation's Tagging

In your 'Organisations Profile' tab, the two boxes in underneath the 'Organisation Tagging' section allow you to add tag groups based on the type of services your organisation provide and the boroughs it provide services to. If you have 'services provided' tags not listed in the box, please enter them onto the **Additional Services** free text box.

Organisation Tagging

Services provided ⓘ	Boroughs serviced
Dental x	Enfield x
Additional Services	Record free-text service here up to 40 characters.

Add/Delete a Services Provided Tag

A Services Provided Tag is added to show which services an organisation provides, adding a Services Provided Tag to an organisation profile will mean that an organisation is easier to search for by others

1. To add a service provided tag to your organisation, click into the 'Service provided' field to see a list of all available service tags that you can associate with your organisation

Note: there is no limit to the amount of service tags you can associate to your organisation. You have the ability to select 'All London Boroughs' tag.

2. You can also search for a specific tag by typing the first few letters of the word
3. Selecting a tag or typing a tag and selecting from the list will add each of the tags into the box. You can also select multiple tags from the drop-down list by simply clicking on each tag
4. To remove the tags, click on the 'x' next to the tag box

Add/Delete a Boroughs Serviced Tag

A Boroughs Serviced Tag is added to show which borough an organisation provides services, adding a Borough Tag a profile will mean that an organisation is easier to search for by others

1. To add a Boroughs Serviced Tag to your organisation, click into the 'Boroughs Serviced' field to see a list of all available service tags that you can associate your organisation with
2. You can search for a specific tag by typing the first few letters of the word
3. Selecting a tag from the list will add each of the tags into the box
4. To remove the tags, click on the 'x' next to the tag box
5. To select everything on the list, click 'All London Boroughs' tag.

Note: A search for an individual borough will bring up your organisation in the search result as you have selected all boroughs.



1.1 Update your Organisation's Accreditation

1.1.1. Add an Accreditation

Type	Date	Reference	Rating	Notes	
Care Quality Commission	12-Jun-2017	-	Outstanding		Edit Delete

1. To add an accreditation, under 'Accreditations' section in the 'Organisations Profile' tab, click the **Add New Accreditation** ([+ Add New Accreditation](#)) button
2. An 'Accreditation' pop-up dialog box is displayed

Accreditation

Type: Please Select... (dropdown menu)

Notes: (text area)

[Update](#) [Cancel](#)

3. Select the Accreditation 'Type' and populate the fields accordingly then select the **Update** ([Update](#)) button

Note: HSCN and OFSTEAD accreditations types can now be included in this section

Edit an Accreditation

Type	Date	Reference	Rating	Notes	
Care Quality Commission	12-Jun-2017	-	Outstanding		Edit Delete

1. To edit an accreditation, under 'Accreditation' section in 'Organisation Profile' tab, select the **Edit** ([Edit](#)) button adjacent to the accreditation



Accreditation

Type: Care Quality Commission

Inspection Date: 16/08/2017

Rating: Outstanding

Notes: Our organisation has achieved a rating of outstanding in performance.

Please record if there are any CQC Inspection recommendations that are pertinent to the sharing of information in the notes field

Update Cancel

2. A 'Contact' window is displayed with accreditation details populated in the field
3. Amend the fields accordingly then click **Update** () button

1.1.2.Delete an Accreditation

Type	Date	Reference	Rating	Notes	
Care Quality Commission	12-Jun-2017	-	Outstanding		<input type="button" value="Edit"/> <input type="button" value="Delete"/>

1. To delete an accreditation, under 'Accreditation' section in the 'Organisations Profile' tab, click on the **Delete** () button adjacent to the accreditation

Are you sure you want to remove this accreditation?

OK Cancel

2. A prompt is displayed 'Are you sure you want to remove this accreditation?'
3. Click **OK** button. The accreditation is removed



Add a Related Document

Version	Date	Title	Category	Description	Reason	
1	21-Aug-2017	CQC Accreditation	Accreditation	CQC Accreditation	Initial Version	New Version Delete

Other Information

[Save and stay](#) [Save and return to dashboard](#) [Cancel](#)

1. To upload a new document, under 'Related Documents' section in the 'Organisations Profile' tab, select the **Upload New** ([Upload New](#)) link

Provide details

Title

Description

Category

[Choose File...](#)

Max file size: 20240 KB

2. A 'Provide details' pop-up dialog box is displayed

Category

- Accreditation
- Appendix
- Certification
- Other

Max file size: 20240 KB

3. In the dialog box, populate the fields accordingly. Then click the **Choose File** ([Choose File...](#)) link to attach a file. The file is attached and the dialog window closes

Note: The maximum upload-able file size is 20MB.

4. To save the newly uploaded document you must select either **Save and stay** ([Save and stay](#)) or **Save and return to dashboard** ([Save and return to dashboard](#)) buttons



Update a Related Document

Version	Date	Title	Category	Description	Reason
1	21-Aug-2017	CQC Accreditation	Accreditation	CQC Accreditation	Initial Version

Other Information

Save and stay Save and return to dashboard Cancel

1. To upload a new version of a document, under 'Related Documents' section in the 'Organisations Profile' tab, click the **New Version** ([New Version](#)) button adjacent to the document
2. The 'Provide details' pop-up dialog box is displayed with an addition 'Reason' field to provide a reason for the update

Provide details

Reason Provide the reason for this update.

Title CQC Accreditation

Description CQC Accreditation

Category Accreditation

Choose File...

Max file size: 20240 KB

3. Populate the fields accordingly then click the **Choose File** ([Choose File...](#)) button to attach the new file. The file is attached and the dialog window closes
4. Click the **Save and stay** ([Save and stay](#)) or the **Save and return to dashboard** ([Save and return to dashboard](#)) button at the bottom right of the page