



## How to Manage an Information Sharing Agreement (QRG)

Quick Reference Guide covers the following areas of maintaining an ISA:

1. Update an ISA
2. Terminate an ISA
3. Cancel Participation in an ISA

As a host organisation (an 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.

### Update an ISA

the host organisation.

Title	From Date	To Date	Status	DPIA	Risk	Participant Status							DPC		
						Active	Pending	Incoming	Associated	Host	Pending	Active	Clone	PDF	
Drop1 TESTISA2	01-Oct-2018	No end date	Live	Completed Digitally	Green	1	0	0	0	0	0	0	0	Clone	PDF
NCL Trauma OCT 18	29-Oct-2018	29-Oct-2019	Live	Completed Digitally	Green	1	0	0	0	0	0	0	0	Clone	PDF
ORG2ISA Test2910	29-Oct-2018	No end date	Draft	Required	Unknown	0	0	0	0	0	0	0	0	Clone	PDF
Isafaesgaef	02-Nov-2018	No end date	Draft	Completed Digitally	Unknown	0	0	0	0	0	0	0	0	Clone	PDF
Pan London	01-Nov-2018	No end date	Live	Completed Digitally	Green	0	0	0	0	0	0	0	0	Clone	PDF
2nd Pan London Training ISA	19-Nov-2018	31-Mar-2019	Draft	Completed Digitally	Red	0	0	0	0	1	0	0	0	Clone	PDF
Drop2 TestISA 1911 Clone	19-Nov-2018	No end date	Draft	Required	Amber	0	0	0	0	0	0	0	0	Clone	PDF

1. Click on 'ISA – Registry' tab. The ISA - Registry screen is displayed listing all ISAs the organisation is invited to
2. Search for the ISA by using the search facilities provided and select the required ISA by clicking on the title of the ISA

**Information**

This ISA is missing mandatory information and cannot be updated/saved without addressing the following:

- Risk/Issues tab needs to be completed.

Okay

3. If there is missing mandatory information on any of the tabs for the ISA an information screen is displayed, ensure all mandatory fields have been populated



4

ISA - Registry > Create New

Details

Status: Live

Region:  All London Regions  North Central London  North East London  North West London  South East London  South West London

Health Info. Exchange: Not Applicable

Title: Test ISA

Background: Basic test ISA not for connection to a Health Info. Exchange

Services: 111 x

Additional Services: Record free-text service here up to 40 characters.

Valid From: 18/11/2018 To: admin/yyyy No Expiry Date

Expiry Notification Date: admin/yyyy Review Date: admin/yyyy

Version: 1

Fair Process Notice: None

Searchable by others?: Please Select...

Publish to website?: Please Select...

Owner: DROP1 TEST ORG2

Documents: Upload New

Save and stay Save and return Cancel

4. Under the 'Details' tab, amend as required.

## Terminate an Information Sharing Agreement (ISA)

1

ISA - Registry

Agreement Title / Reference: Any Status: Any DPC Status: Any DPIA Status: Any Risk Rating: Choose Services: Apply Filter Clear Filter

Create New

Click on the icon to see related organisations

Export to Excel

Title	From Date	To Date	DPIA	Risk Rating	Participant Status				DPC		
					Active	Pending	Incoming	Associated	Host	Part Pending	Part Active
Any Qualified ISA1	22-Feb-2018	21-Feb-2019	Required	Unknown	22	4	1	1	2	4	0
Any Qualified 2	22-Feb-2018	20-Feb-2019	Completed Digitally	Unknown	1	0	0	0	0	0	1
Any Qualified Part ISA3	22-Feb-2018	21-Feb-2019	Not Required - Checklist	Unknown	1	0	0	0	1	0	0
Test Homerton	04-Apr-2018	31-May-2018	Required	Unknown	0	1	0	2	0	0	0
Homerton London*****	01-May-2018	No end date	Completed Digitally	Unknown	0	1	0	0	0	0	0

1 - 5 of 5 items

1. Click on 'ISA – Registry' from the navigation bar. The ISA - Registry screen is displayed listing all the organisation's ISAs
2. Navigate to the ISA you want terminate by clicking on the ISA title. The 'ISA - Registry > Edit details' screen is displayed with the Details tab screen in focus



- On the Details tab, change the valid 'To' field (that is adjacent to the 'Valid From' field), to the date that you want to terminate the ISA
- Update the 'Expiry Notification Date' accordingly so that it's before or the same date as the expiry date

**Note:** You cannot save record if the notification date is after the 'Valid To' date. Ensure to correct this.

• Expiry Notification Date must be between the Valid From and Valid To dates.

- 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' pop-up dialog box is displayed detailing the changes made and prompting you if you wish to inform the existing participants about the changes made to the ISA

## Cancel Participation in an ISA

Create Date	Title	Organisation	From Date	To Date	Status	DPIA	Risk Rating	DPC Count	My Org DPC	Message	
22-Feb-2018	ISA WEMBLEY DP 1	Dental Practice Wembley	21-Feb-2018	No end date	Requested	Required	Unknown	0	0		View
22-Feb-2018	ISA CL TEST 1	DCC-Mailbox	01-Feb-2018	31-Jul-2019	Requested	Required	Unknown	1	0		View
22-Feb-2018	ISA CR TEST1	Acute Trust Croydon	22-Feb-2018	28-Feb-2019	Requested	Required	Unknown	0	0		View
22-Feb-2018	ISATEST20022018	Commercial Third Party	20-Feb-2018	22-Feb-2018	Requested	Completed Digitally	Unknown	0	0		View
22-Feb-2018	ISA Southall Test 1	Ambulance Trust Southall	01-Mar-2018	No end date	Requested	Required	Unknown	0	0		View
22-Feb-2018	DPIA Nov 24 data 2	Local Authority	24-Nov-2017	23-Nov-2018	Requested	Required	Unknown	0	0		View
22-Feb-2018	Other Org ISA	Other Org	22-Feb-2018	21-Feb-2019	Cancelled	Required	Unknown	0	0		View



1. From the navigation bar at the top, select the 'ISA - Management' tab. The 'ISA-Management screen is displayed with the 'My ISA - Management' tab.
2. Use the search facility under the ISA Management to search for the ISA for which you want to cancel participation. Search results are displayed, and the required ISAs are listed
3. Click on the 'ISA Title' or the **View** (  ) button adjacent to the ISA title

**Caution:** If you select the organisation name, you will be taken to the organisation profile that created the ISA

4. Enter a reason for cancelling the ISA in the box provided, above the ISA tabs
5. Click the **Cancel ISA** (  ) button

6. A dialog window titled 'Confirmation' is displayed with a message 'please confirm you wish to make this decision'
7. Click the **Confirm** (  ) button
8. A message is displayed 'Your organisation has previously cancelled their involvement in this ISA. The reason given was: [Reason typed into field] you can request access again if required'