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.

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

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

Terminate an Information Sharing Agreement (ISA)

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

3. 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

4. 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.

5. 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

6. 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

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** (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** (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** (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'