How to Manage Organisation Maintenance (How to Guide 5)

Organisation Maintenance

Organisation Maintenance allows Operational Primary Contacts to manage access to their data for Open Exeter users and organisations.

Glossary of Terms

Primary Contact

An individual, authorised by an Access Control Manager (ACM), who can create and reset passwords of user accounts for other users within their organisation using Organisation Maintenance. Newly created accounts must be approved by a Data Controller before they can be used.

Key Contact

An individual who can be contacted if there is an issue with Open Exeter affecting their organisation. A Key Contact does not have access to Organisation Maintenance and does not necessarily have to be an Open Exeter user unless they are the Primary Contact.

Return to Contents

Select an Organisation

Select an organisation(s) (multiple organisation codes may be selected from the organisation table to view and update the organisation.

Organisation Code	Organisation Name	Responsible	
Filter by code	Filter by name	Yes 💌	
TEST01	Demonstration Organisation	YES	
TESTA2	Demo Practice ePNL	YES	
TESTUS	Demonstration Screening Lab	YES	
PCT001	Demonstration PCT	YES	
TEST04	Demonstration Finance	YES	
TEST05	Demonstration Organ Donor	YES	
TESTOR	Domonstration ENP	VEQ	

Viewing organisation TEST02

Data Controllers and Assistant Data Controllers can view any organisation which has access to their data source. Primary Contacts can view the organisations they work for.

Create a New User

** Note that when creating a new user also refer to 'selecting user applications' and 'Non-Responsible Access' which can both only be completing whilst creating a new user.

Select an organisation code and click Add new user.

Users At This Organisation



Primary Contacts

Creating a user.

Enter the surname and forename for the new user and select a user role from the following.

Normal User

The user will not have any administrative responsibilities.

Primary Contact

The user can add other user accounts to their organisation.

The new accounts must then be approved by a data controller.

Assistant Data Controller

The user can add other users to any organisation in the data source. The new accounts must then be approved by a data controller.

Click Auto generate UserCode to create a new usercode and password for the user.

Organisation Code: Organisation Name:	DEMO_ORG Demo Organisation
Status:	
Surname:*	Gray
Forename:*	Demo
User Role:	Primary Contact 💉
	Auto generate UserCode
Save user	Amend user

Creating a new usercode.

Fill in the other fields i.e. Title/Job Title/Telephone Number and email address (note that an nhs.net email should be used when generating passwords) and click *Save User* to create the new user.

Expiry Date: User Category: User Expiry Date:	✓
Save Lser	Amend user
Authonse user	Reject User
Delete user	View user permissions

Saving the user.

<u>Select applications</u> for the user, and <u>request authorisation</u> to data owned by other Data Controllers if necessary.

See also:

• Select an Organisation

Return to Contents

Select User Applications

Primary Contacts of Open Exeter

Primary Contacts can create new user accounts within their practices by using Organisation Maintenance. All Primary Contacts have access to this application. These accounts still have to be approved by the Access Control Manager (previously the Data Control Manager).

- 1. Log into Open Exeter in your usual way
- 2. Click Main Menu
- 3. Under Application select Organisation Maintenance then Continue
- 4. Click the Organisation Code
- 5. Click Add new user
- 6. Enter the surname and forename for the new user and select a user role from the following:
 - Normal User the user will not have any administrative responsibilities
 - Primary Contact the user can add other user accounts to their organisation and reset passwords. The new accounts must then be approved by an Access Control Manager (ACM).
- 7. Click Auto generate User-Code to create a new user-code and password for the user.

- 8. Fill in the other fields i.e. Title/ Job Title/ Telephone Number and email address (Preferably and nhs.net email address should be used).
- 9. Click Save User to create the new user
- 10. Click in the relevant box to select the applications required
 - Note Cipher, Q Codes and PCT Codes/ Display Permissions and Primary Care Performers Directory will automatically be ticked and Organisation Maintenance for Primary Contacts
 - If Breast Screening required tick Breast Screening Episodes only
 - If a User requires Practice Finance ie: Drug Payments and GP Statemen'ts then the Access Control Manager (ACM) requires authorisation from a GP before access can be granted.
 - To apply for non-responsible access, click 'Request Fringe Authorisation' for authorisation to access data held on another data source.

Childhood Immunisation Lists (For Practice Staff)
Childhood Immunisation Lists (update only)
Childhood Immunisation Returns (For Payment Agency
Childhood Immunisations (Historic)
Cipher, Q Codes and PCT Codes
Cytology Reports
Des / Les Payments
Display Permissions
Doctors Details
Drug Payments
GP Capitation Statement
CP Home Ovygon (Ear Practice Staff)

- 11. Click Continue and Close this Window
- 12. The request will show the status of pending until authorised by the Access Control Manager.
- 13. If subsequent applications are required then an email from the Primary Contact should be sent to the Access Control Manager.

Return to Contents

Reset a User's Password

Your key contact can reset your password. This is done through Organisation Maintenance option.

							- 5
G	ttp://www.apereurie.efs.ak/v/co/	lationala.	p -	# d 1 Nitional 2 Fortal - Home	Cpen Evelor	- A	Q Q @
		You are currently	logged in with organisat	stance and stance	Open Exeter		ĥ
		Application: Organisation Maint	anance V	Data Source: Calderdate and Kinklows Halat	h Adoly (W) 💙		
			Save O	Cottnue ackilogis Settige			
-	🔂 😂 🖉	0 0	Q. 💼				

Click on the user's name

At the bottom of the screen select Reset Password

There is also an option to email the password to the user. The password will expire after 7 days

Return to Contents

Apply for Non-Responsible Access

Select a user and click *Request Fringe Authorisation* to apply for authorisation to access data held on another data source.

Category: User Expiry Date:	Reset	
Save user	Amend User	Revo
Authorise user	Reject User	Res
Delete User	View user permissions	Aud
User Movements	Request Fring Authorisation	

Requesting fringe access.

Tick the checkbox for any sites which you would like the user to be able to access, then click *Request Authorisation*.

······································
Organisation <i>Demo Practice</i> has fringe access to the following data sources. Use the checkboxes below to request authorisation for Mr Demo.
DN – Devon
SM – Somerset
Request Authorisation
Deview Deteile
Review Details Close this Window

Selecting fringe sites.

The responsible Access Control Manager (ACM) will be notified by email and must review and authorise access as appropriate.

Return to Contents

Remove a User

Revoke or delete a user to prevent them from accessing data on your data source.

Revoke a User

Select a user and click Revoke User.

~	
t.	
<u>end User</u> ect User w user permissions	<u>Revolte User</u> <u>Reset Password</u> Audit User

Revoking an user

The user will not be deleted, but they will be unable to access your data.

The user will be revoked for all organisations with access to your data.

Delete a User

Select a user and click Delete User.

User Expiry Date:	Reset	
Save user	Amend User	
Authorise user	Reject User	
<u>Delete User</u>	View user permissions	
User lovements		

Deleting a user

The user will be deleted from the organisation you have chosen. If the user has access to other organisations then they will still be able to log in and view data.

See also:

Select a User

Return to Contents

 Should you require further assistance or for any enquiries please contact the central team and your Access Control Manager at <u>pcse.openexeter@nhs.net</u>