

## How to enhance data items after auto creation

### Scenario

Sites, Locations, Departments and Appointment Types can be auto created in My GNCR. This occurs when a new data item is received by My GNCR from an organisations source system.

Items will be autocreated when a new appointment is received for a site, location, department or appointment type that is not already present in the Management Portal.

After auto population, additional information can be added via the Management Portal. The information in the Management Portal can also be edited display something different to what is in your source system, if required.

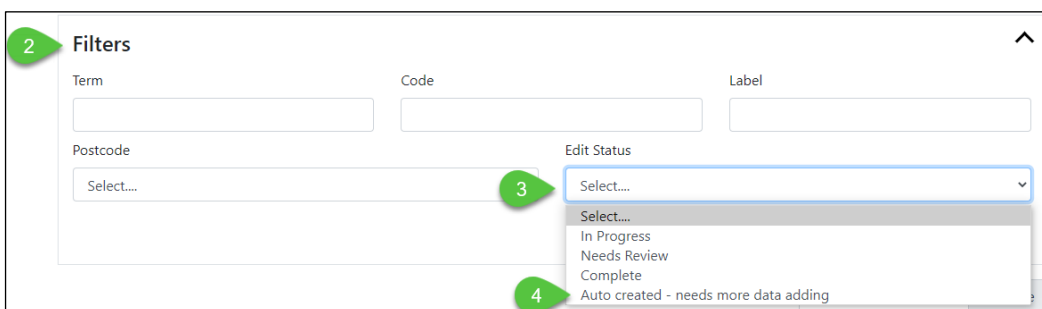
Auto created items can be identified by the edit status of *'auto created – needs more data adding'*.

Patient facing information is highlighted in yellow in this guide.

Note: *Assets and Appointment Prerequisite Reminders need to be created in the Management Portal in prior to completing these steps.*

### Filter to find auto created items

1. Go to the **Appointment Type, Department, Location or Site** sections
2. Click the **'Filters'** dropdown
3. Select the **'Edit Status'** dropdown
4. Select the status **'Auto Created – Needs more data adding'**



5. Click **'Filter'**
6. Results will be displays at the bottom of the screen:

Code	Label	Postcode	Edit Status	
FH	Freeman		Auto created - needs more data adding	<a href="#">Edit - View</a>
RR7EM	Bensham Hospital	NE1 4LP	Auto created - needs more data adding	<a href="#">Edit - View</a>

## Enhance a Site

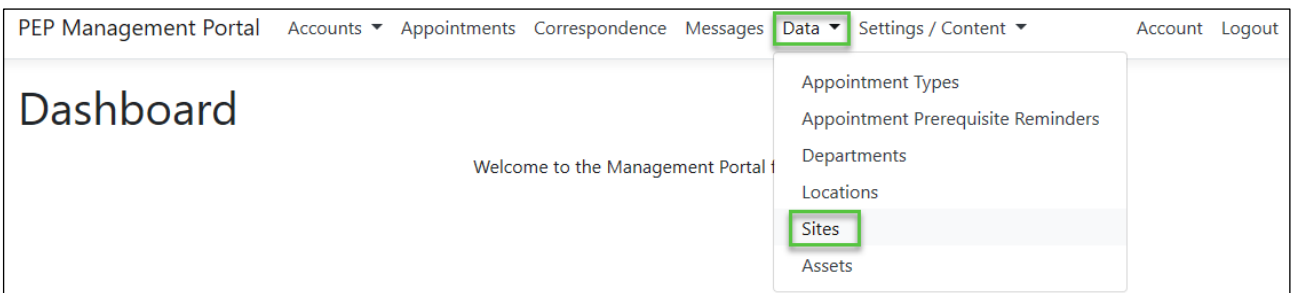
When Sites are auto created the following information can be populated from the source system:

- Code
- Label
- Address
- Postcode

This information will need to be manually added:

- Assets

7. Select the **'Data'** menu and then select **'Sites'**



PEP Management Portal Accounts ▾ Appointments Correspondence Messages Data ▾ Settings / Content ▾ Account Logout

Dashboard

Welcome to the Management Portal

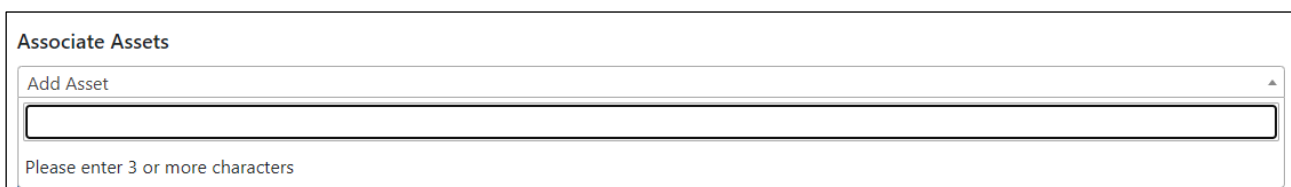
- Appointment Types
- Appointment Prerequisite Reminders
- Departments
- Locations
- Sites**
- Assets

8. Find the site that has been auto created and click **'edit'**

Code ▾	Label	Postcode	Edit Status	
FH	Freeman		Auto created - needs more data adding	<a href="#">Edit - View</a>

9. Check all of the information and update if required

10. Go to the **Assets** section and link any assets for this Site

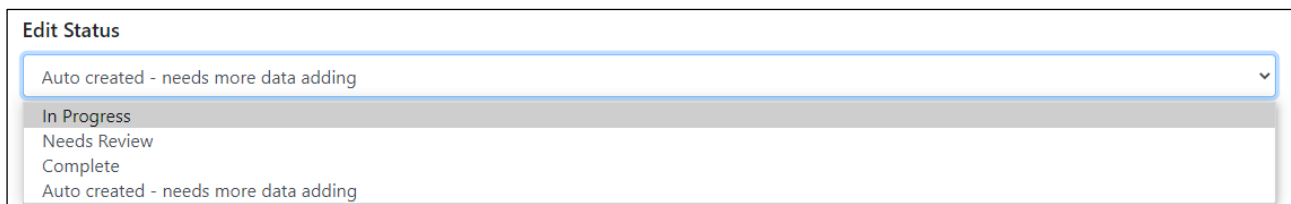


Associate Assets

Add Asset ▾

Please enter 3 or more characters

11. Update the **'Edit Status'** as per your organisations operating procedures, if required



Edit Status

Auto created - needs more data adding ▾

- In Progress
- Needs Review
- Complete
- Auto created - needs more data adding

12. Click **'Submit'** to save

Submit

## Enhance a Location

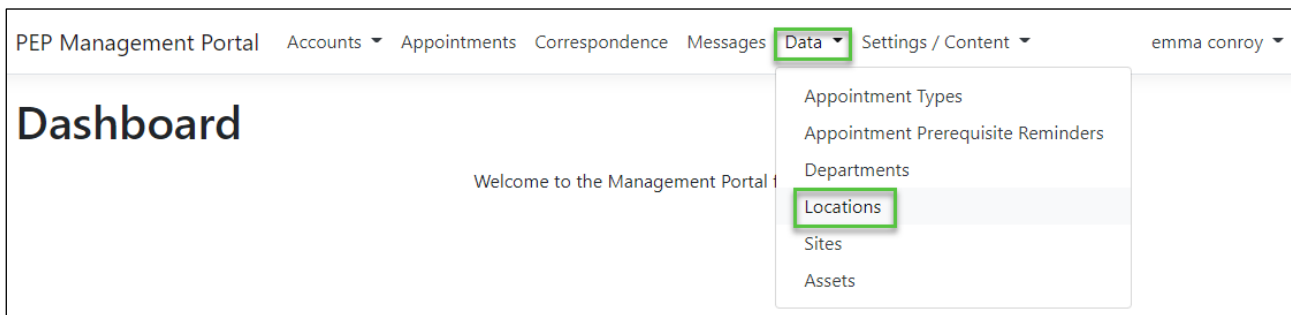
Locations that are auto populated can contain this information:

- Code
- Label
- Location Instructions
- Site

This information will need to be manually added:

- Assets

1. Select the **'Data'** menu and then select **'Locations'**



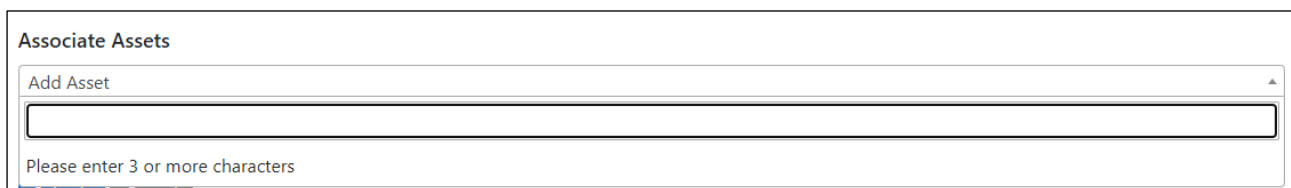
The screenshot shows the PEP Management Portal dashboard. The top navigation bar includes 'PEP Management Portal', 'Accounts', 'Appointments', 'Correspondence', 'Messages', 'Data', 'Settings / Content', and 'emma conroy'. The 'Data' menu is open, showing options: 'Appointment Types', 'Appointment Prerequisite Reminders', 'Departments', 'Locations', 'Sites', and 'Assets'. The 'Locations' option is highlighted with a green box.

2. Find the Location that has been auto created and click **'Edit'**

Code	Label	Site	Edit Status
BERE	Bensham Reception	Bensham Hospital	Auto created - needs more data adding <a href="#">Edit - View</a>

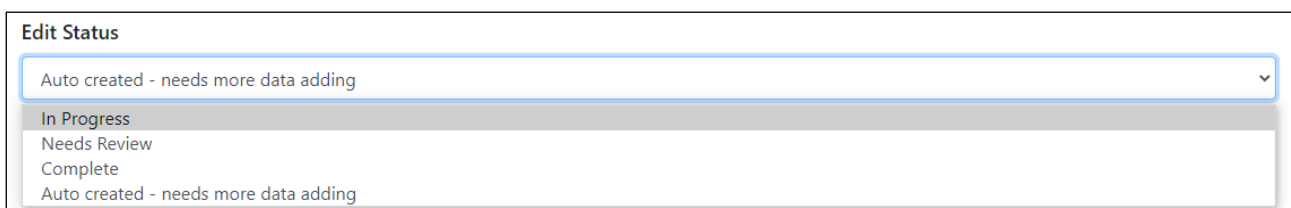
3. Check all of the information and update if required

4. Go to the **Assets** section and link any assets for this Location



The screenshot shows the 'Associate Assets' form. It has a title 'Associate Assets' and a search input field labeled 'Add Asset'. Below the input field is a placeholder text: 'Please enter 3 or more characters'.

5. Update the **'Edit Status'** as per your organisations operating procedures, if required



The screenshot shows the 'Edit Status' dropdown menu. The current status is 'Auto created - needs more data adding'. The dropdown list includes the following options: 'In Progress', 'Needs Review', 'Complete', and 'Auto created - needs more data adding'.

6. Click **'Submit'** to save

[Submit](#)

## Enhance a Department

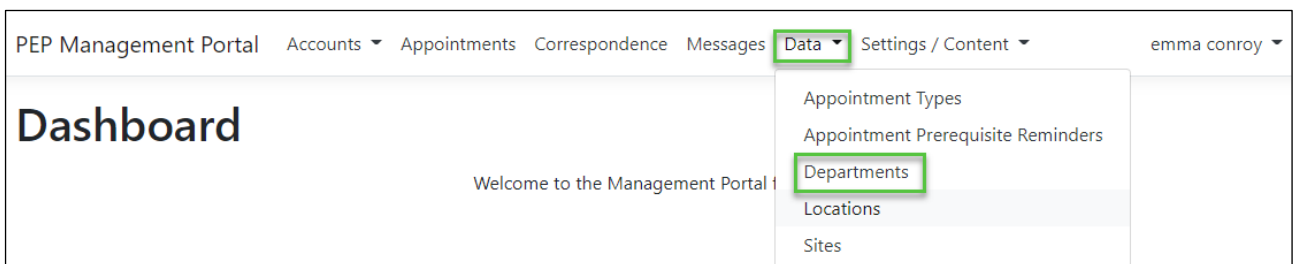
Departments that are auto populated can contain this information:

- Code
- Label
- **Speciality**
- **Phone number** (if missing will populate organisation tel)

This information will need to be manually added:

- Contact email
- Assets

1. Select the **'Data'** menu and then select **'Departments'**



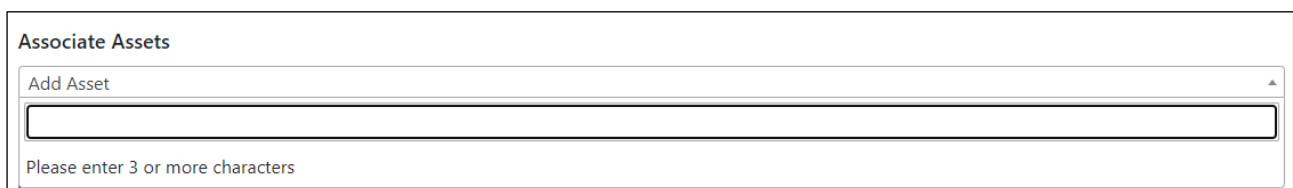
2. Find the Department that has been auto created and click **'Edit'**

Code	Label	Speciality Code	Edit Status
101	Urology	Urology	Auto created - needs more data adding <a href="#">Edit</a> <a href="#">View</a>

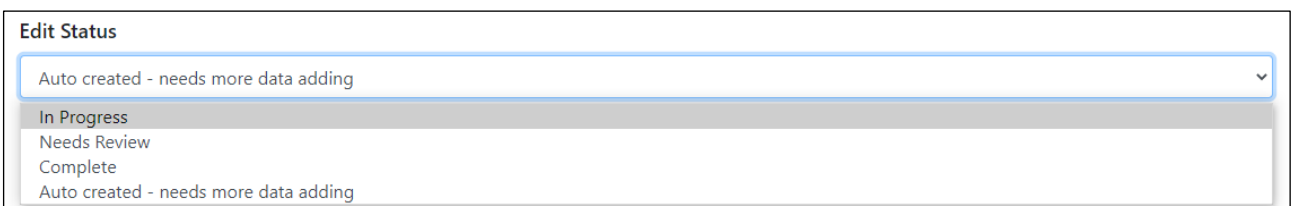
3. Check all of the information and update if required

4. Add a **Contact Email**, if applicable

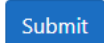
5. Go to the **Assets** section and link any assets for this department

A screenshot of the 'Associate Assets' form. It features a search bar labeled 'Add Asset' with a dropdown arrow. Below the search bar is a text input field. A message below the input field reads 'Please enter 3 or more characters'.

7. Update the **'Edit Status'** as per your organisations operating procedures, if required

A screenshot of the 'Edit Status' dropdown menu. The current selected status is 'Auto created - needs more data adding'. The dropdown list shows the following options: 'In Progress', 'Needs Review', 'Complete', and 'Auto created - needs more data adding'.

8. Click **'Submit'** to save



## Enhance an Appointment Type

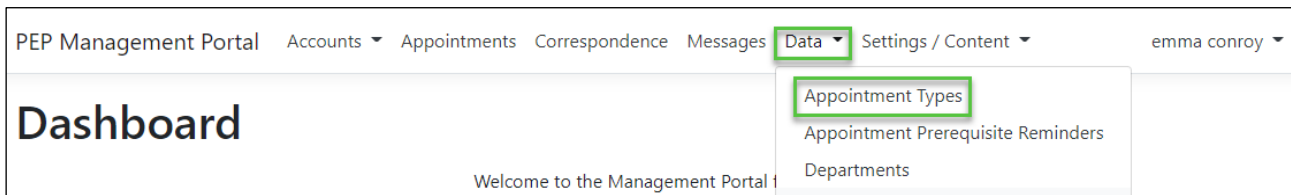
Appointment Types that are auto populated can contain this information:

- Code
- Service name
- Phone number (if missing will populate department tel)

This information will need to be manually added:

- Assets
- Prerequisite reminders

1. Select the **'Data'** menu and then select **'Appointment Types'**



2. Find the Appointment Type that has been auto created and click **'Edit'**

Code	Service Name	Department	Edit Status	
CARDIOLOGY NEW		Cardiology	Auto created - needs more data adding	<a href="#">Edit</a> - <a href="#">View</a>

3. Check of the information if required and update if required

4. Go to the **Assets** section and link any assets for this appointment type

The screenshot shows the 'Associate Assets' form. It has a search field labeled 'Add Asset' with a placeholder text 'Please enter 3 or more characters'. The search field is currently empty.

5. Go to the **Appointment Prerequisite** section and link any appointment prerequisite reminders for this appointment type

The screenshot shows the 'Associate Prerequisite' form. It has a search field labeled 'Add Appointment Prerequisite' with a placeholder text 'Please enter 3 or more characters'. The search field is currently empty.

6. Update the **'Edit Status'** as per your organisations operating procedures, if required

7. Click **'Submit'** to save

The screenshot shows the 'Edit Status' dropdown menu. The options are: 'Auto created - needs more data adding', 'In Progress', 'Needs Review', 'Complete', and 'Auto created - needs more data adding'. The 'In Progress' option is currently selected and highlighted.