

My GNCR Management Portal

User guides for Global Admin/Users

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How to create an organisation

Scenario

This guide shows how to create an Organisation in the My GNCR Management Portal.

Organisations can be created by users with the role **Global Administrator**.

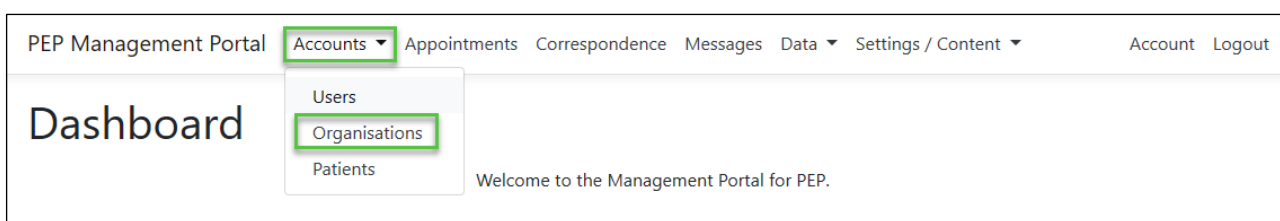
Before starting, you will require details from GOV.UK Notify at



<https://www.notifications.service.gov.uk/>

The **Notify API Key** and **Notify API template ID** will be required during the set up process.

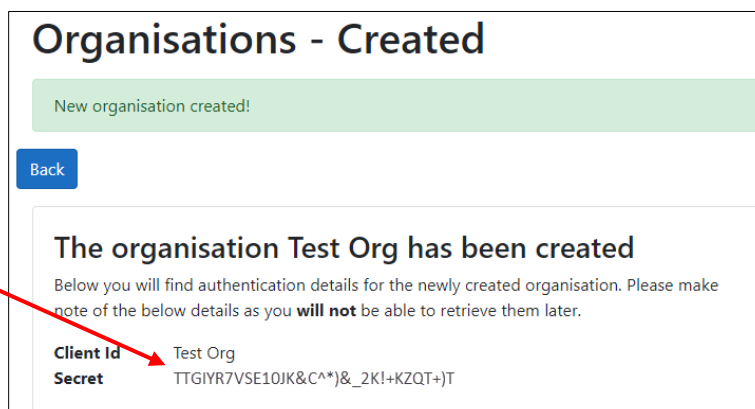
Create an Organisation

1. Select the **'Accounts'** menu and then select **'Organisations'**



2. Click **'Add'** 
3. Enter the **Organisation ID**. For most Organisations this will be their ODS code.
4. Enter the **Organisation Name** and the **Organisations Telephone Number**
5. Enter the Gov.uk Notify **API Key** and the Gov.uk Notify **API Template Id**
6. **Complete** all other required details
7. Click **'Submit'**, a confirmation message will display 
8. The **Client Secret** will be displayed. This is required when Organisations link their systems to My GNCR.

Take note of the secret as it will not display again



How to update an organisation

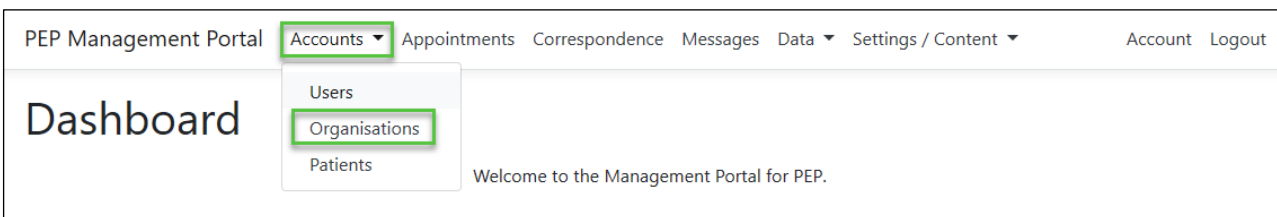
Scenario

This guide shows how to update an Organisation in the My GNCR Management Portal.

Organisations can be updated by users with the role **Global Administrator**.

Update an Organisation

1. Select the 'Accounts' menu and then select 'Organisations'



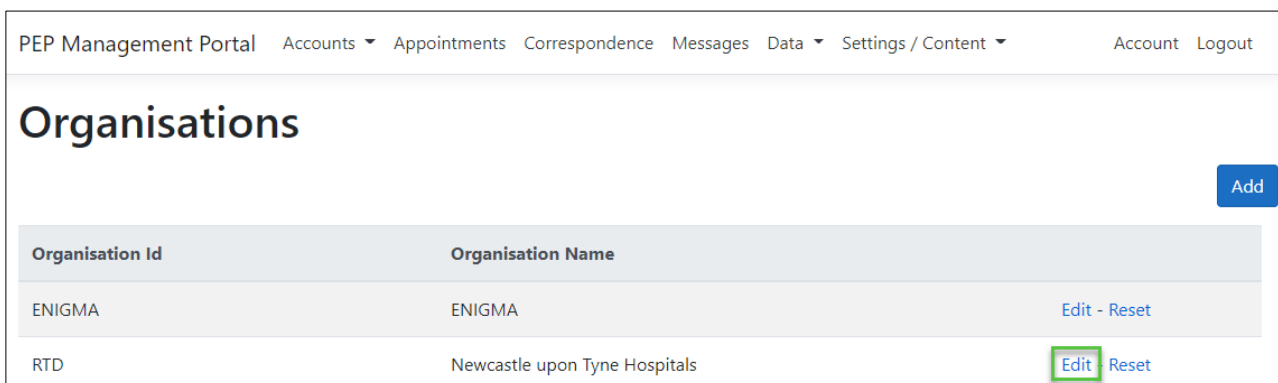
PEP Management Portal Accounts Appointments Correspondence Messages Data Settings / Content Account Logout

Dashboard

Users
Organisations
Patients

Welcome to the Management Portal for PEP.

2. Locate the Organisation you wish to change and click 'Edit'



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

Organisations

Add

Organisation Id	Organisation Name	
ENIGMA	ENIGMA	Edit - Reset
RTD	Newcastle upon Tyne Hospitals	Edit - Reset

3. **Make** the changes as required
4. Click '**Submit**', a confirmation message will display

Submit

Organisation updated!

How to reset organisation secret

Scenario

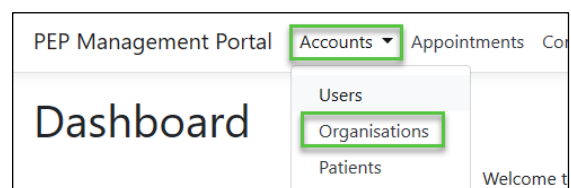
This guide shows how to reset an Organisation Secret in the My GNCR Management Portal.

The Organisation secret is used for authentication when source systems feed data into My GNCR.

Warning: Resetting an organisation secret will impact the data feed going from the organisation to My GNCR. Only use this function in consultation with the organisations technical development leads.

Reset Secret

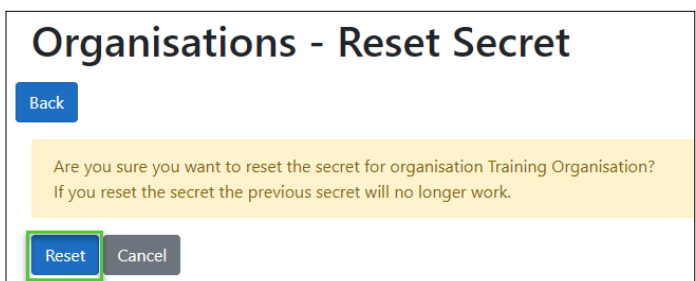
1. Select the 'Accounts' menu and then select 'Organisations'



2. Locate the Organisation you wish to change and click 'Reset'

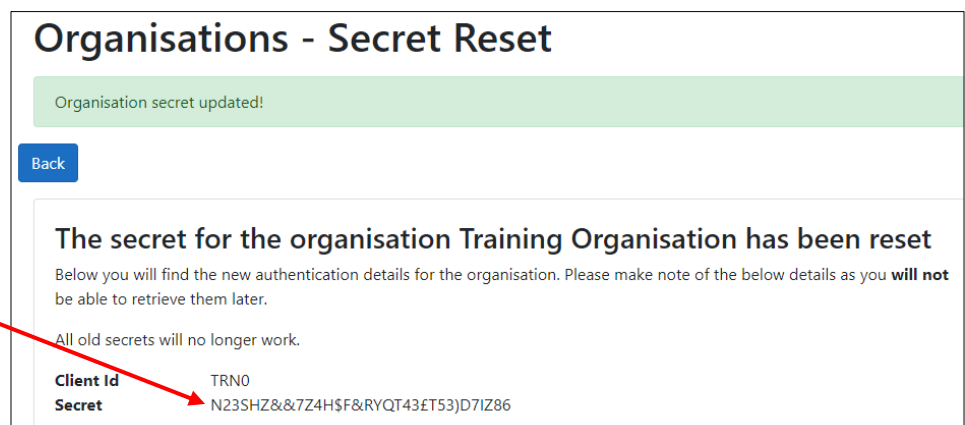
Organisation Name	
ENIGMA	Edit - Reset
Newcastle upon Tyne Hospitals	Edit - Reset

3. A warning screen will display. If you wish to proceed click 'Reset'



4. A confirmation message and the new secret will display

Take note of the secret as it will not display again



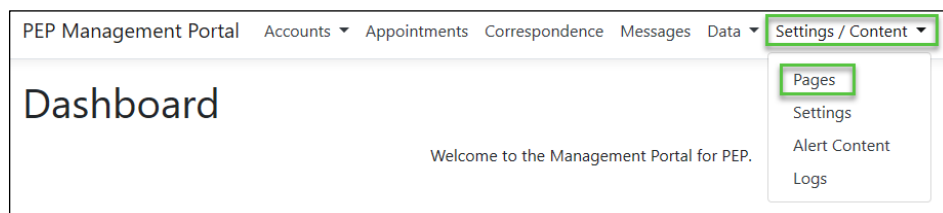
How to update pages

Scenario

This guide explains how to update the Static Pages in the My GNCR App using the Management Portal. This function is available to Global Administrators/Users.

Instruction

1. Select the 'Settings/Content' menu and then select 'Pages'



2. Locate the page you wish to change and click 'Edit'

Pages

	Handle	Meta Title	
<input type="checkbox"/>	appointment-information	Appointment Information	Edit
<input type="checkbox"/>	cookie-policy	Cookie Policy	Edit
<input type="checkbox"/>	share-data	Share Data for Research	Edit
<input type="checkbox"/>	go-paperless-information	Go Paperless Information	Edit
<input type="checkbox"/>	privacy-policy	Privacy Policy	Edit

3. Edit the information as desired

cookie-policy

MetaTitle
Cookie Policy

MetaDescription
Find out more about our Cookie Policy.

Content

Cookie Policy

Cookies

Cookies are small text files placed on your computer, or smartphone, by websites that you visit. They are widely used in order to make websites work, or work more efficiently, as well as providing services and functionality

How we use cookies

Submit

4. Click 'Submit'

5. A confirmation message will display:

Page was successfully updated.

How to change alert and reminder settings

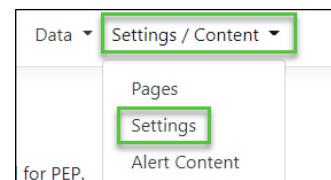
Scenario

This guide shows how to update the Global settings in the My GNCR Management Portal.

Users with a 'Global' access level can edit all of the settings.

Instructions

1. Select the 'Settings/Content' menu and then Settings
2. The settings page will be displayed. The following settings can be changed for Appointments. The values should be set in hours.



New Appointment First Follow Up Timeout	The time that the first alert will be sent out for the New Appointment alert.
New Appointment Second Follow Up Timeout	The time that the second alert will be sent out for the New Appointment alert.
New Appointment Third Follow Up Timeout	The time that the 'Not RSVPed' or 'Not Read' message will be returned to the trust.
Appointment Changed First Follow Up Timeout	The time that the first alert will be sent out for the Appointment Changed alert.
Appointment Changed Second Follow Up Timeout	The time that the second alert will be sent out for the Appointment Changed alert.
Appointment Changed Third Follow Up Timeout	The time that the 'Not RSVPed' or 'Not Read' message will be returned to the trust.
Appointment Cancelled First Follow Up Timeout	The time that the first alert will be sent out for the Appointment Cancelled alert.
Appointment Cancelled Second Follow Up Timeout	The time that the second alert will be sent out for the Appointment Cancelled alert.
Appointment Cancelled Third Follow Up Timeout	The time that the 'Not RSVPed' or 'Not Read' message will be returned to the trust.
Appointment Reminder First Follow Up Timeout	The time that the first alert will be sent out for the Appointment Reminder alert.
Appointment Reminder Second Follow Up Timeout	The time that the second alert will be sent out for the Appointment Reminder alert.

3. The following settings can be changed for correspondence. The values should be set in hours.

Correspondence Source Document File Expiry	The time that a document is held on the system. This value should be in days.
New Correspondence First Follow Up Timeout	The time that the first alert will be sent out for the New Correspondence alert.
New Correspondence Second Follow Up Timeout	The time that the second alert will be sent out for the New Correspondence alert.
New Correspondence Third Follow Up Timeout	The time that the 'Not RSVPed' or 'Not Read' message will be returned to the trust.
Correspondence Updated First Follow Up Timeout	The time that the first alert will be sent out for the Correspondence Updated alert.
Correspondence Updated Second Follow Up Timeout	The time that the second alert will be sent out for the Correspondence Updated alert.
Correspondence Updated Third Follow Up Timeout	The time that the 'Not RSVPed' or 'Not Read' message will be returned to the trust.

4. The following settings are set at a global level and can only be changed by users with a Global access level:

Digital Only Timeout	This sets the interval of how often the Digital Only setting resets for patients. The value should be in days. NOTE: Changing this setting will not affect any current patients Digital Only Timeouts.
Deceased Patient Silence Period	This sets the silence period for a deceased patient. This value represents how long the cleanup process should be delayed when a patient is marked as deceased. This value should be in days.
Global Organisation	A Global Organisation Identifier that will be used when an Organisation Id cannot be obtained from an appointment or correspondence.

5. To save any changes click **'Save'**

6. A confirmation message will display:

The Settings were successfully updated.

How to change alert content

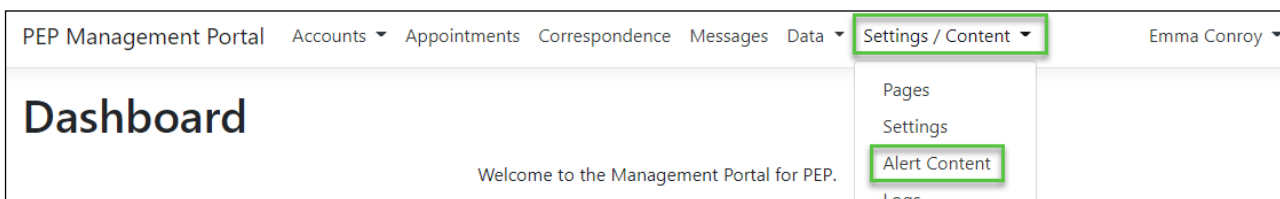
Scenario

This guide shows how to update Alert Content in the My GNCR Management Portal. Alert Content is what is sent to the patient as standard alerts and reminders.

Users with a 'Global' access level can edit Alert Content.

Instructions

1. Select the 'Settings/Content' menu and then Alert Content



PEP Management Portal Accounts ▾ Appointments Correspondence Messages Data ▾ Settings / Content ▾ Emma Conroy ▾

Dashboard

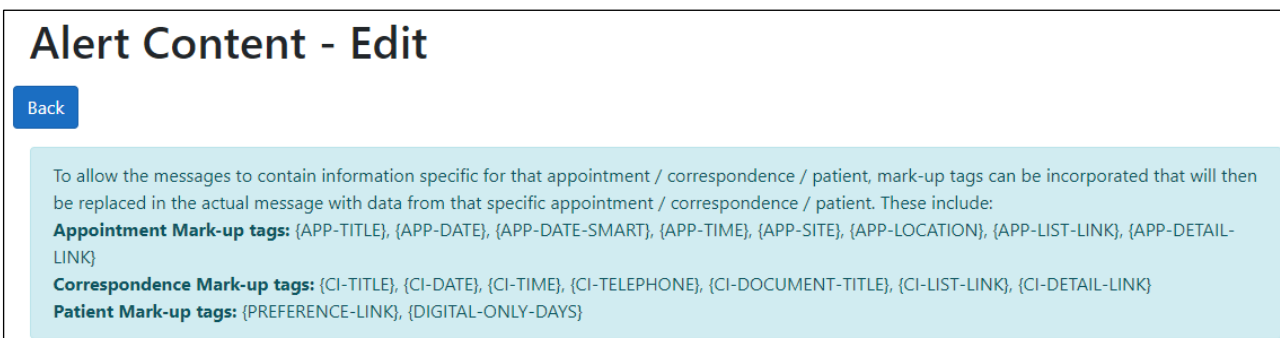
Welcome to the Management Portal for PEP.

- Pages
- Settings
- Alert Content**
- Logs

2. From the Alert Content page select 'Edit' next to the alert you wish to update

Type	
Appointment Reminder	Edit
Cancelled Appointment	Edit
Changed Appointment	Edit
New Appointment	Edit
New Correspondence	Edit
Paperless Opt-Out Expiry	Edit
Retracted Correspondence	Edit
Updated Correspondence	Edit

3. At the top of the section the available Mark-up tags are shown:



Alert Content - Edit

[Back](#)

To allow the messages to contain information specific for that appointment / correspondence / patient, mark-up tags can be incorporated that will then be replaced in the actual message with data from that specific appointment / correspondence / patient. These include:

Appointment Mark-up tags: {APP-TITLE}, {APP-DATE}, {APP-DATE-SMART}, {APP-TIME}, {APP-SITE}, {APP-LOCATION}, {APP-LIST-LINK}, {APP-DETAIL-LINK}

Correspondence Mark-up tags: {CI-TITLE}, {CI-DATE}, {CI-TIME}, {CI-TELEPHONE}, {CI-DOCUMENT-TITLE}, {CI-LIST-LINK}, {CI-DETAIL-LINK}

Patient Mark-up tags: {PREFERENCE-LINK}, {DIGITAL-ONLY-DAYS}

4. Set the message text for the In App message. A preview is shown below:

Type: Appointment Reminder

In-App Text

This text can contain Markdown links. If you are going to add links to the content please make sure that they are formatted as Markdown links.

Example: [Click Here](https://www.example.com)

REMINDER! You have an appointment {APP-DATE-SMART} {APP-TIME} at {APP-LOCATION}. If you can no longer make this appointment or have any queries please let us know.

Type your message here using text/mark-up

REMINDER! You have an appointment [Tomorrow 12:30](#) at [Haematology Outpatient Dept](#). If you can no longer make this appointment or have any queries please let us know.

A preview is shown here

Current Length: 142
Max Length: 5000

5. Set the message text for SMS. A preview is shown below:

Sms Text

REMINDER! You have an appointment {APP-DATE-SMART} {APP-TIME} at {APP-LOCATION}. If you can no longer make this appointment or have any queries please let us know.

Type your message here using text/mark-up

REMINDER! You have an appointment [Tomorrow 12:30](#) at [Haematology Outpatient Dept](#). If you can no longer make this appointment or have any queries please let us know.

A preview is shown here

Current Length: 128
Max Length: 1000

6. Set the message text for email. A preview is shown below:

Email Text

REMINDER! You have an appointment {APP-DATE-SMART} {APP-TIME} at {APP-LOCATION}. If you can no longer make this appointment or have any queries please let us know.

Type your message here using text/mark-up

REMINDER! You have an appointment [Tomorrow 12:30](#) at [Haematology Outpatient Dept](#). If you can no longer make this appointment or have any queries please let us know.

A preview is shown here

Current Length: 128
Max Length: 1000

7. Once complete, click **Submit**
8. A confirmation message will display:

Alert Content was successfully updated.

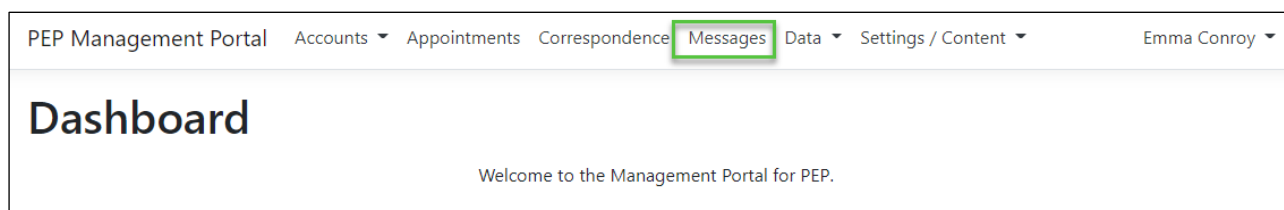
How to export messages

Scenario

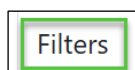
This guide explains how to utilise the Export functionality within the Messages section of the My GNCR Management Portal. Export is available for users with a 'Global' access role.

Export Messages

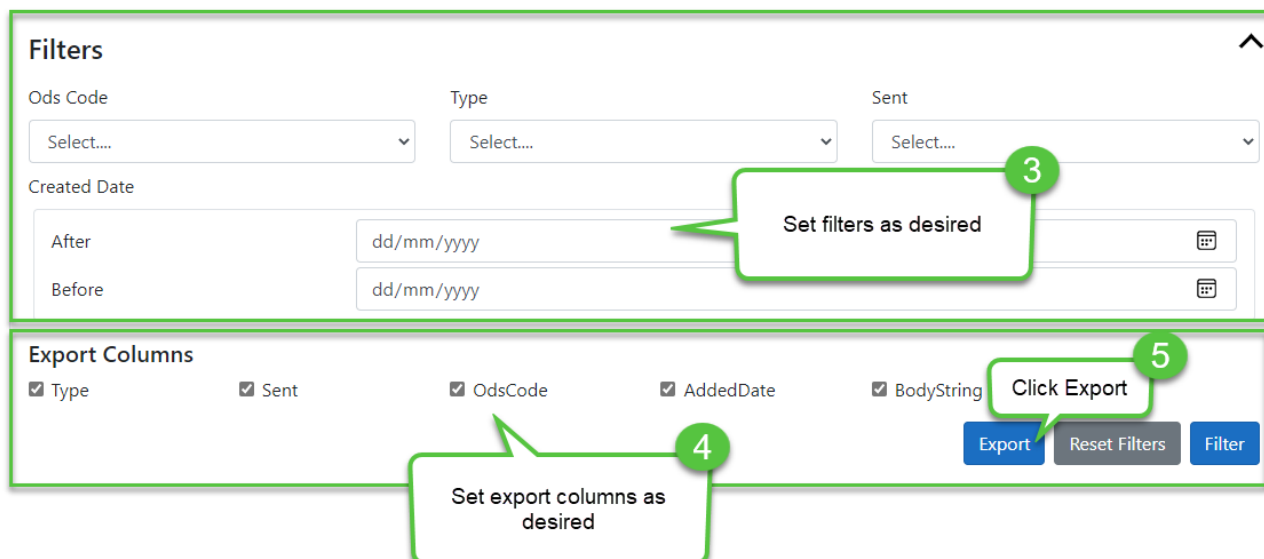
1. Select **'Messages'**



2. Select **'Filters'**



3. Set the desired **Filter criteria**
4. Set the desired **Export Columns**
5. Click **'Export'**



6. File will be downloaded in .csv format:



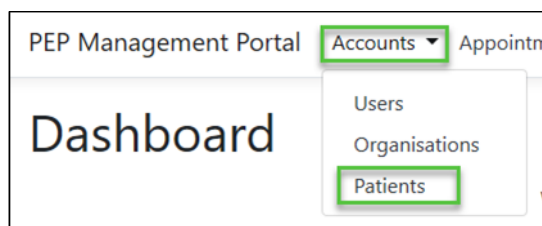
How to export patients

Scenario

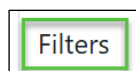
This guide explains how to utilise the Export functionality within the Patients section of the My GNCR Management Portal. Export is available for users with a 'Global' access role.

Export Patients

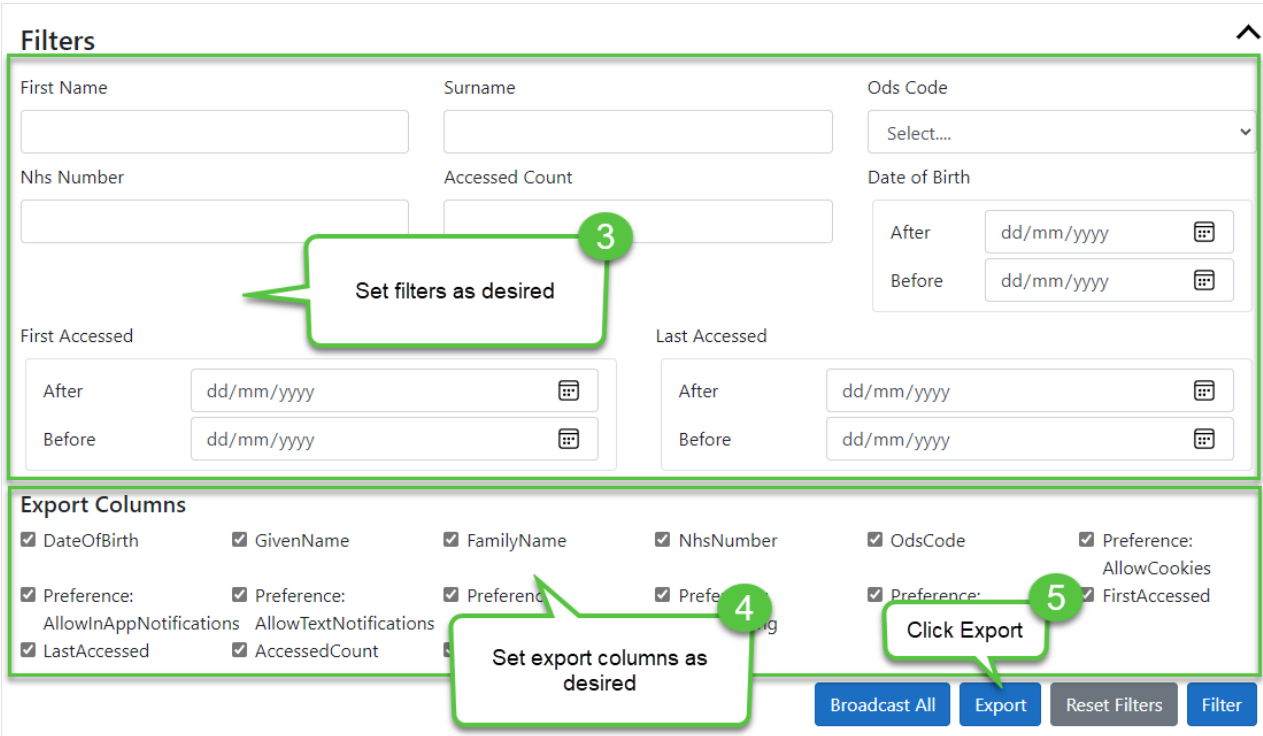
1. Select 'Accounts' then 'Patients'



2. Select 'Filters'



3. Set the desired **Filter criteria**
4. Set the desired **Export Columns**
5. Click 'Export'



Filters

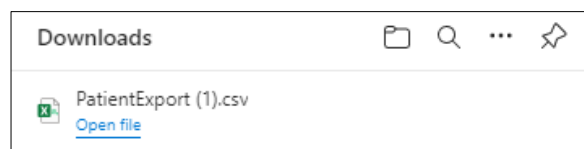
First Name Surname Ods Code
Nhs Number Accessed Count Date of Birth
First Accessed Last Accessed

Export Columns

DateOfBirth GivenName FamilyName NhsNumber OdsCode Preference: AllowCookies
 Preference: AllowInAppNotifications Preference: AllowTextNotifications Preference: FirstAccessed
 LastAccessed AccessedCount

Broadcast All **Export** Reset Filters Filter

6. The file will be downloaded in .csv format:



How to export appointments

Scenario

This guide explains how to utilise export functionality within the Appointments section of the My GNCR Management portal. Export is available for user with a 'Global' role.

Export Appointments

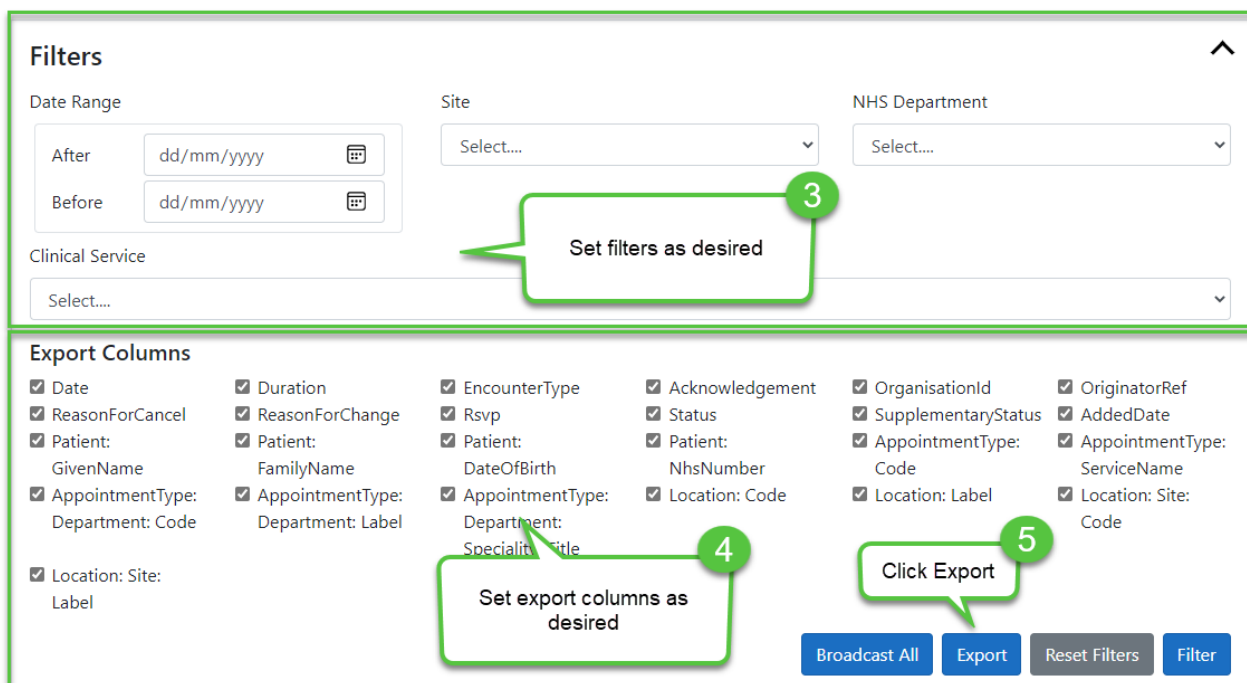
1. Select the 'Appointments' menu



2. Select 'Filters'

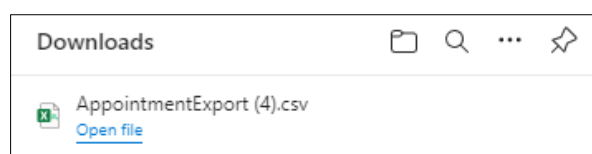


3. Set the desired **Filter criteria** (Multiple criteria can be entered, e.g. a date range and a NHS Department).
4. Set the desired **Export Columns**
5. Click '**Export**'



The screenshot shows the 'Filters' and 'Export Columns' sections of the interface. The 'Filters' section includes fields for Date Range (After and Before), Site, NHS Department, and Clinical Service. A callout '3' points to the 'Set filters as desired' text. The 'Export Columns' section displays a grid of checkboxes for various data fields. A callout '4' points to the 'Set export columns as desired' text. A callout '5' points to the 'Click Export' text above the 'Export' button. At the bottom, there are buttons for 'Broadcast All', 'Export', 'Reset Filters', and 'Filter'.

6. The file will be downloaded in the .csv format:



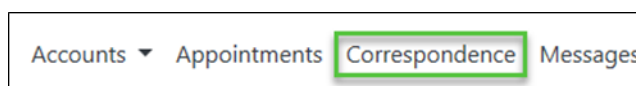
How to export correspondence

Scenario

This guide explains how to utilise the Export functionality within the Correspondence section of the My GNCR Management Portal. Export is available for users with a 'Global' access role.

Export Correspondence

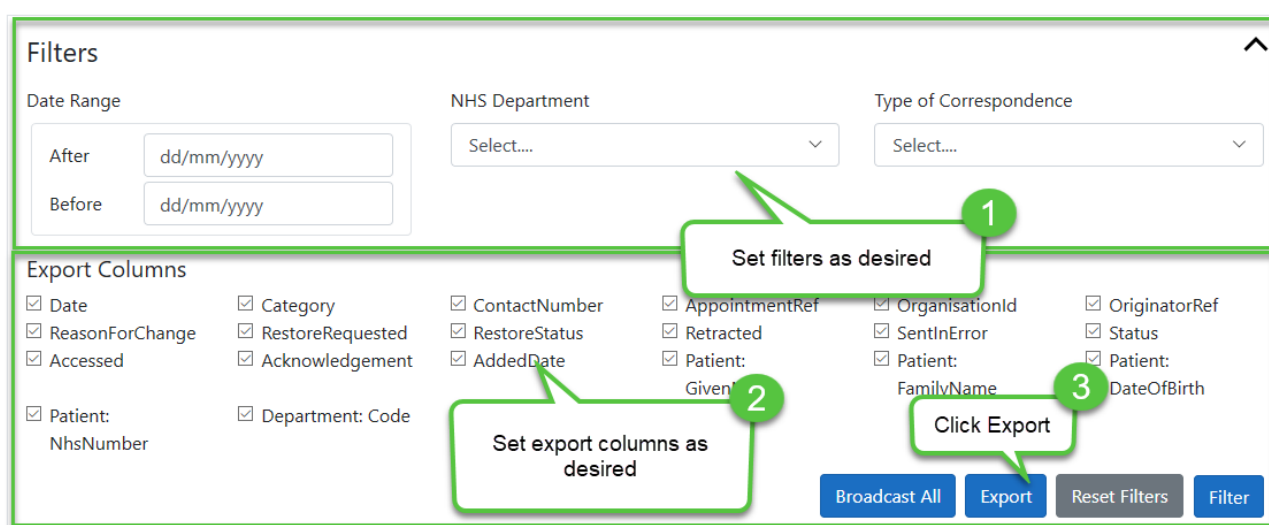
1. Select the **'Correspondence'** menu



2. Select **'Filters'**



3. Set the desired **Filter criteria**
4. Set the desired **Export Columns**
5. Click **'Export'**



6. The file will be downloaded in the .csv format:

