



The
University
Of
Sheffield.



Admin Portal User Guide

v1.0



ON



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HOW TO LOGIN

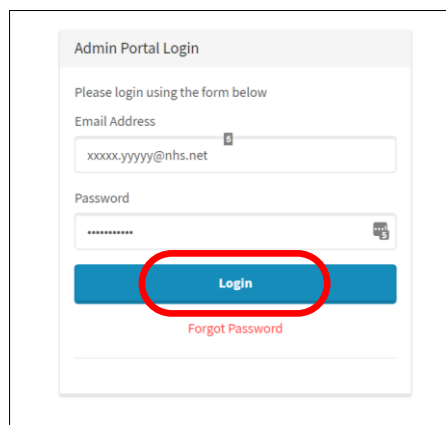
Your login details to access the MyPathway admin portal will be sent to you by email. Your username will be your email address. If you have access to both the clinical and admin portal, your username and password will be the same for both portals.

To log in to the MyPathway portal, go to the following web address:

https://portal.mypathway.care/admin_portal/login

When you login for the first time:

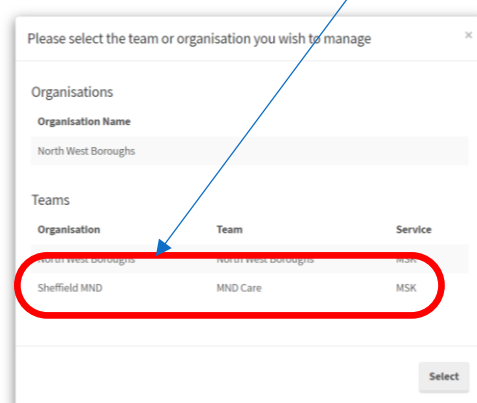
- Input your email address and password and click on login:



The image shows the 'Admin Portal Login' form. It has a title 'Admin Portal Login' and a subtitle 'Please login using the form below'. There are two input fields: 'Email Address' with the placeholder text 'xxxxx.yyyyy@nhs.net' and 'Password' with a masked password '*****'. Below the password field is a blue 'Login' button, which is circled in red. Below the button is a red link that says 'Forgot Password'.

Once you have logged in to the portal, you then needs to select the 'Team' you wish to access.

'Teams' are a feature of the Admin Portal and enable an organisation to have one portal for different services.



The image shows a modal window titled 'Please select the team or organisation you wish to manage'. It has a close button (X) in the top right corner. There are two sections: 'Organisations' and 'Teams'. The 'Organisations' section has a single entry 'North West Boroughs'. The 'Teams' section has a table with three columns: 'Organisation', 'Team', and 'Service'. The table has two rows: 'North West Boroughs' and 'Sheffield MND'. The 'Sheffield MND' row is circled in red. A blue arrow points from the text 'Teams' are a feature of the Admin Portal...' to the 'Teams' section. At the bottom right of the modal is a 'Select' button.

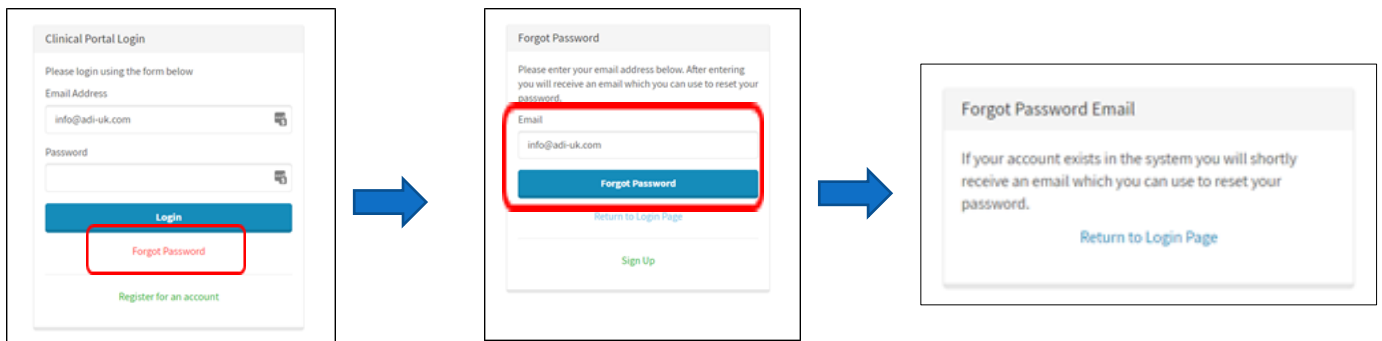
Organisation	Team	Service
North West Boroughs	North West Boroughs	MSK
Sheffield MND	MND Care	MSK

FORGOTTEN PASSWORD

Go to the login page: https://portal.mypathway.care/clinical_portal/login

Click on 'Forgot Password => Input your email address and click on 'Forgot Password'.

A message will then pop-up advising an email has been sent so you can reset your password – **please check your junk / spam folders** if it doesn't appear in your inbox.

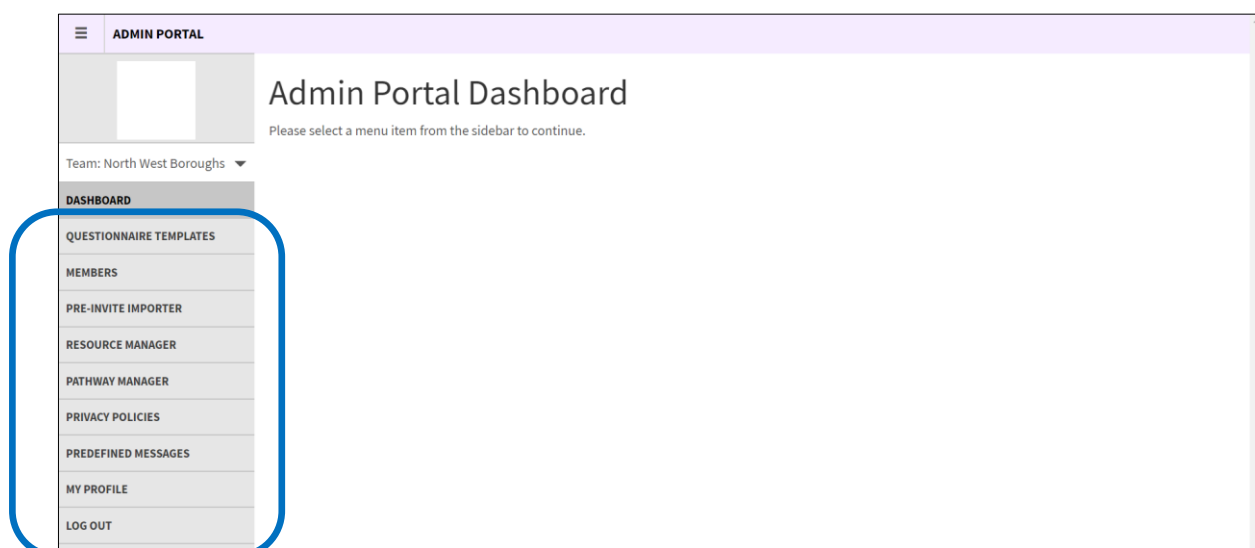


Click on 'Click here to reset your password' the link in the email then input your new password in the 'Password' field and click on 'Reset password'.



ADMIN DASHBOARD

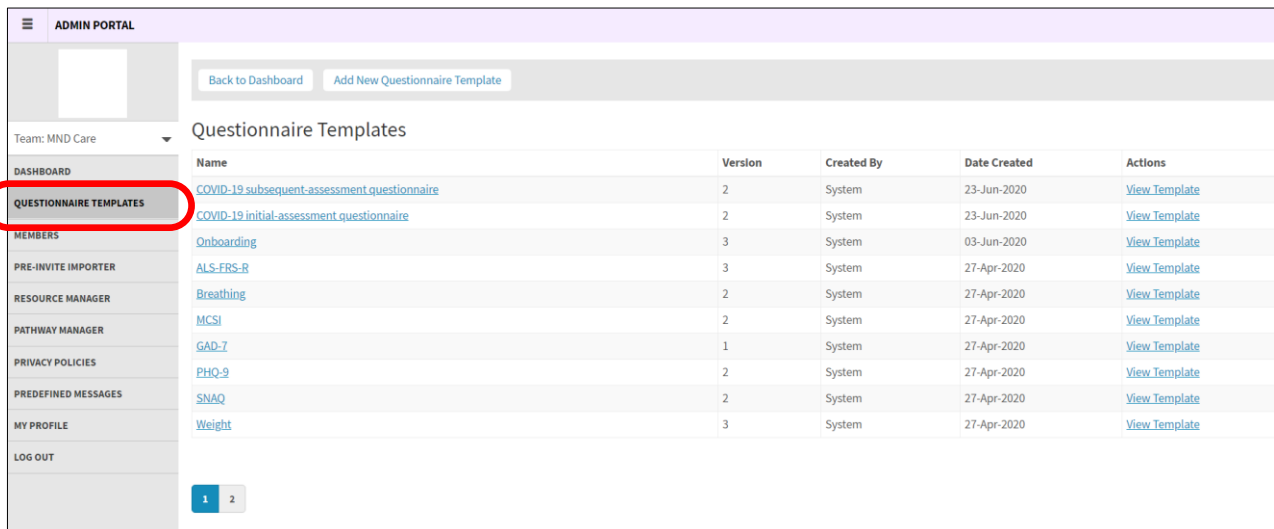
The dashboard details the functions available in the portal down the right-hand side and this guide will cover how to use each of the admin functions.



Please note that the 'PRE-INVITE IMPORTER' and 'PATHWAY MANAGER' functionality is not yet available and thus will not be covered in this guide.

QUESTIONNAIRE TEMPLATES

You can view the current questionnaires available to allocate to patients in the clinical portal by clicking on 'QUESTIONNAIRE TEMPLATES'.



ADMIN PORTAL					
Team: MND Care					
Questionnaire Templates					
	Name	Version	Created By	Date Created	Actions
	COVID-19 subsequent-assessment questionnaire	2	System	23-Jun-2020	View Template
	COVID-19 initial-assessment questionnaire	2	System	23-Jun-2020	View Template
	Onboarding	3	System	03-Jun-2020	View Template
	ALS-FRS-B	3	System	27-Apr-2020	View Template
	Breathing	2	System	27-Apr-2020	View Template
	MCSI	2	System	27-Apr-2020	View Template
	GAD-7	1	System	27-Apr-2020	View Template
	PHQ-9	2	System	27-Apr-2020	View Template
	SNAQ	2	System	27-Apr-2020	View Template
	Weight	3	System	27-Apr-2020	View Template

Whilst there is the option to 'Add New Questionnaire Template', this function requires the format of the questionnaire to be written in JSON (a technical format for storing and transporting data) and is used by MyPathway's Technical Development Team. Please do not use this functionality.

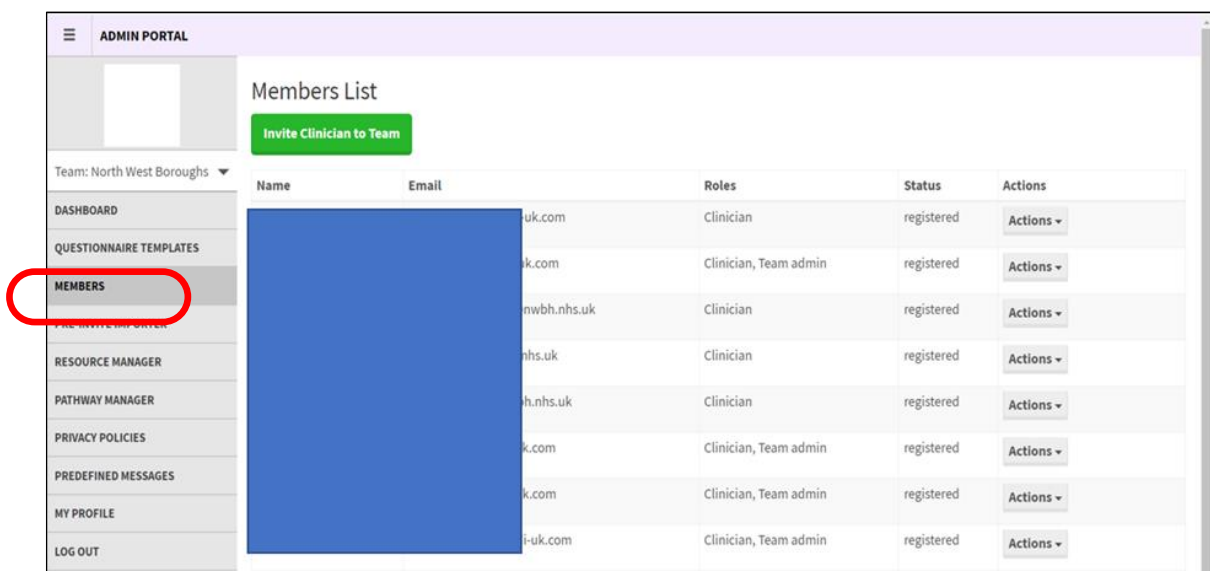
MEMBERS

The 'MEMBERS' function enables you to:

- See who in your team is already registered with access to MyPathway
- Add new members and assign a role – admin and / or clinician

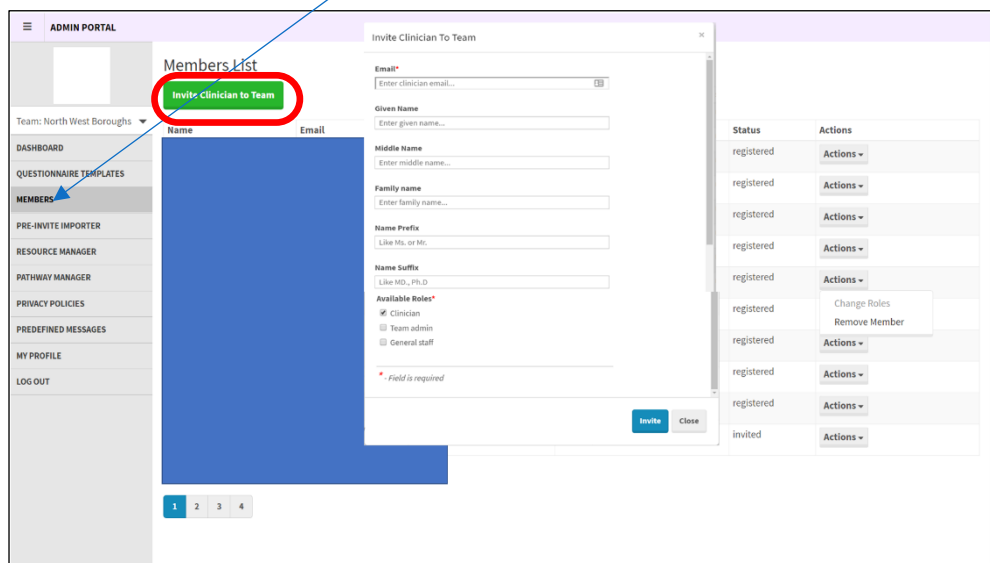
As you can set up new users with access to the MyPathway clinical portal which contains patient data and / or access to the admin portal which contains documents, messages and privacy information that can be sent to patients, you must take care to ensure the user is given the correct permissions. Always use the users 'nwbh' or 'nhs.net' email address and never use personal email address.

Please note these screenshots are from a live Admin portal so names have been hidden for data protection purposes. You will also see that members will include staff from the developers of MyPathway company ADI.



ADMIN PORTAL					
Members List					
Invite Clinician to Team					
	Name	Email	Roles	Status	Actions
	[Redacted]	[Redacted]@uk.com	Clinician	registered	Actions
	[Redacted]	[Redacted]@uk.com	Clinician, Team admin	registered	Actions
	[Redacted]	[Redacted]@nwbh.nhs.uk	Clinician	registered	Actions
	[Redacted]	[Redacted]@nhs.uk	Clinician	registered	Actions
	[Redacted]	[Redacted]@h.nhs.uk	Clinician	registered	Actions
	[Redacted]	[Redacted]@k.com	Clinician, Team admin	registered	Actions
	[Redacted]	[Redacted]@k.com	Clinician, Team admin	registered	Actions
	[Redacted]	[Redacted]@i-uk.com	Clinician, Team admin	registered	Actions

To add a new member to the team, click on 'Members' then click on 'Invite Clinician to Team'



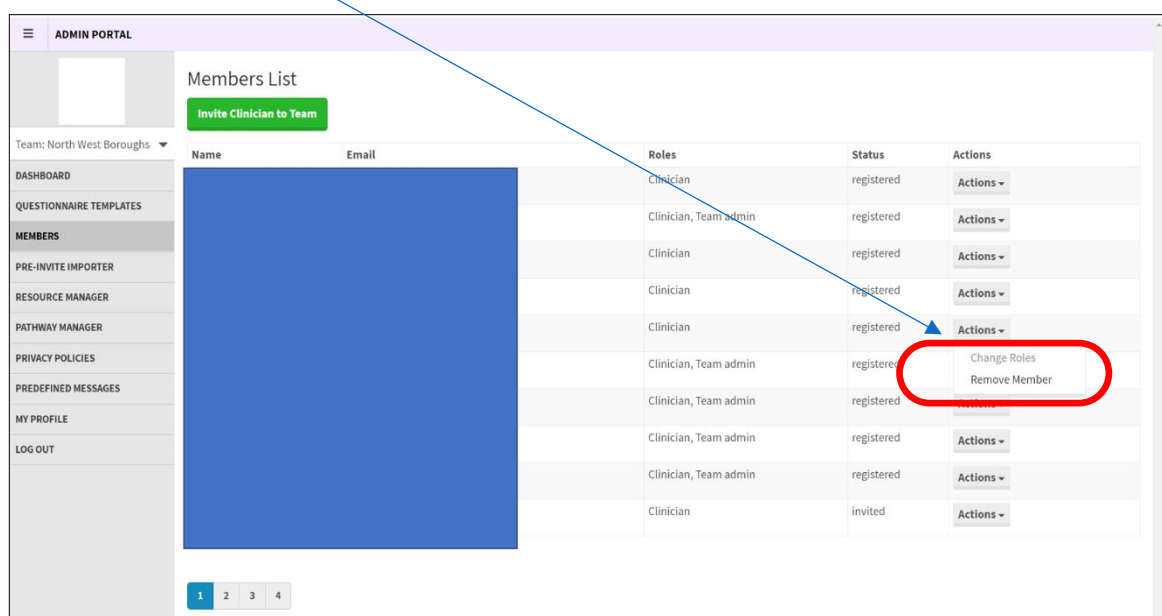
A pop-up window will open. Input the new members:

- Email address
- Given name and family name
- Tick the role/s required in the 'Available Roles' fields – this will either be 'Clinician' and or 'Team Admin' as 'General Staff' is not yet available.
- Click on 'Invite'

An email will be sent to the new team member with a link to the login page asking them to register.

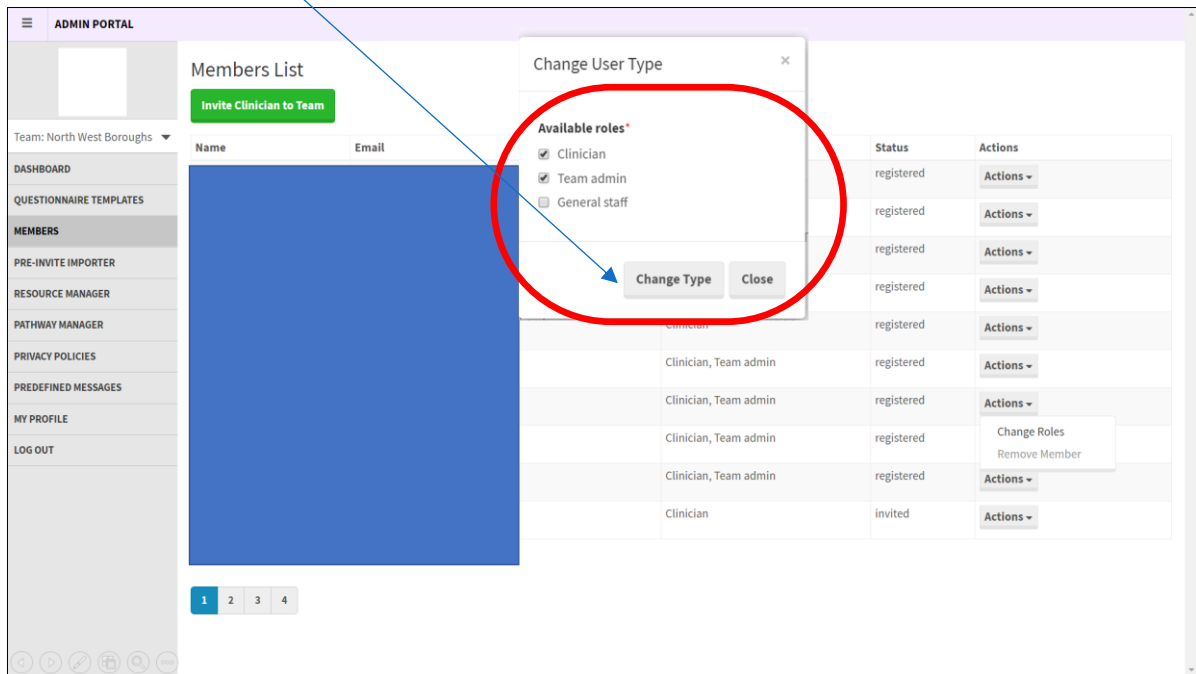
To remove a user, click on 'MEMBERS':

- Locate the user in the Members List (*you may have to scroll through each page*)
- Click on 'Actions'
- Click on 'Remove Member' in the Actions dropdown box



To change a user's role, click on 'MEMBERS':

- Locate the user in the Members List (*you may have to scroll through each page*)
- Click on 'Actions'
- Click on 'Changes Roles' in the Actions dropdown box
- Tick or untick the correct role in the 'Change User Type' pop-up box
- Click on 'Change Type'



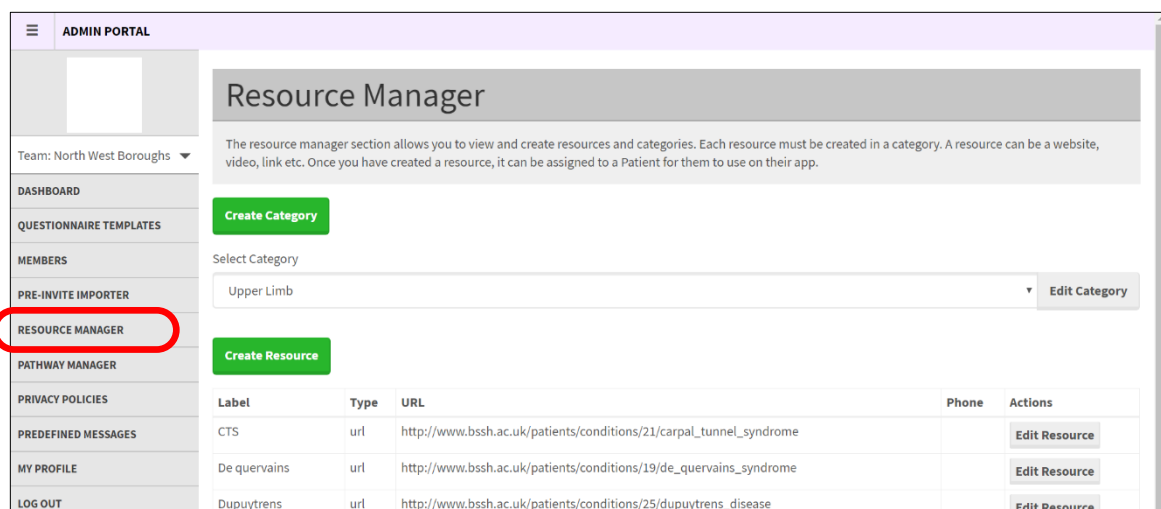
MANAGING RESOURCES

MyPathway has a library of resources available for clinicians to send to the patients app. These resources are manager via the 'Resource Manager' functionality in the admin portal.

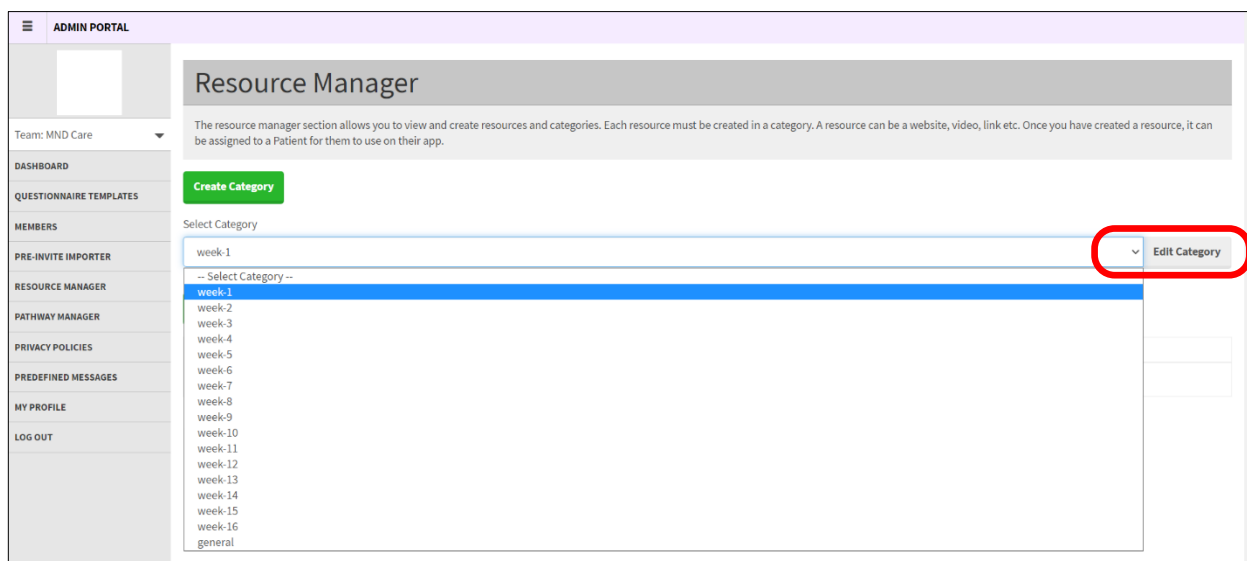
This functionality enables you to:

- Add new resources
- Create new resource categories
- Edit existing resources

Resources can be audio, URL or video. Only clinicians can upload PDFs to send to patients via the clinical portal.



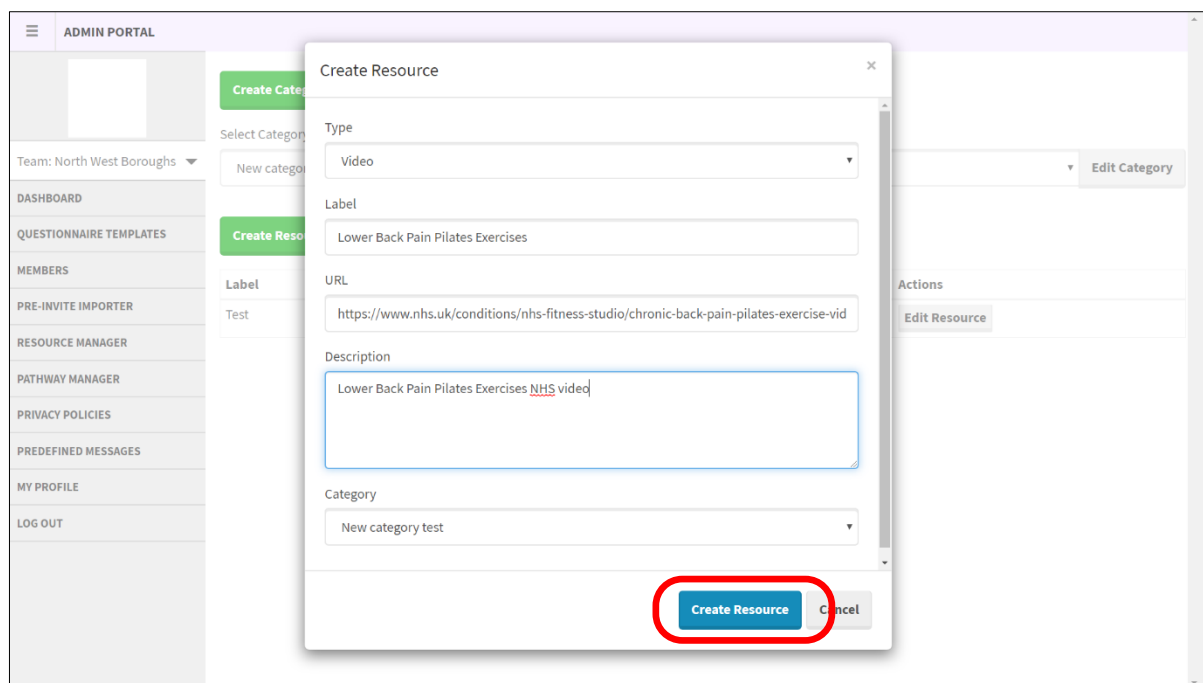
To add a new resource, click on 'Edit Category' then select the relevant category from the drop-down list.



Then click on 'Create Resource':

In the pop-up window, input the resource, type, label*, add a description* of the resource, add the resource to an existing category and then click on 'Create Resource'.

***Please note:** the 'Label' and 'Description' fields show in the patient app, so please ensure that these are clear and reflective of the resource content.



To add a new category of resources, click on 'Create Category'

The screenshot shows the 'ADMIN PORTAL' with a sidebar menu on the left. The main area is titled 'Resource Manager' and contains a description: 'The resource manager section allows you to view and create resources and categories. Each resource must be created in a category. A resource can be a website, video, link etc. Once you have created a resource, it can be assigned to a Patient for them to use on their app.' Below this, there is a 'Select Category' dropdown menu currently set to 'Upper Limb' and an 'Edit Category' button. A green 'Create Category' button is highlighted with a red circle. Below the dropdown is a green 'Create Resource' button. A table lists existing resources with columns: Label, Type, URL, Phone, and Actions. The table contains seven rows of data, each with an 'Edit Resource' button in the Actions column.

Label	Type	URL	Phone	Actions
CTS	url	http://www.bssh.ac.uk/patients/conditions/21/carpal_tunnel_syndrome		Edit Resource
De quervains	url	http://www.bssh.ac.uk/patients/conditions/19/de_quervains_syndrome		Edit Resource
Dupuytrens	url	http://www.bssh.ac.uk/patients/conditions/25/dupuytrens_disease		Edit Resource
OA Thumb	url	http://www.bssh.ac.uk/patients/conditions/24/basal_thumb_arthritis		Edit Resource
Trigger finger	url	http://www.bssh.ac.uk/patients/conditions/18/trigger_fingerthumb		Edit Resource
Frozen shoulder	url	http://www.nwbh.nhs.uk/frozen-shoulder		Edit Resource
SAPS	url	http://www.nwbh.nhs.uk/subacromial-pain-syndrome		Edit Resource

In the 'Create Resource Category' pop-up, input the name of the new category and then click on 'Create Category'

The screenshot shows the 'Create Resource Category' pop-up dialog. It has a 'Name' input field containing 'Lower Back Pain Exercises'. At the bottom right, there are two buttons: 'Create Category' (highlighted with a red circle) and 'Cancel'.

To edit an existing resource, select the resource category, find the resource, then click on 'Edit Resource':

The screenshot shows the 'Resource Manager' interface. A blue arrow points from the 'Upper Limb' category in the 'Select Category' dropdown to the 'Edit Resource' button in the Actions column of the table. The 'Edit Resource' button is highlighted with a red circle.

Label	Type	URL	Phone	Actions
CTS	url	http://www.bssh.ac.uk/patients/conditions/21/carpal_tunnel_syndrome		Edit Resource
De quervains	url	http://www.bssh.ac.uk/patients/conditions/19/de_quervains_syndrome		Edit Resource
Dupuytrens	url	http://www.bssh.ac.uk/patients/conditions/25/dupuytrens_disease		Edit Resource
OA Thumb	url	http://www.bssh.ac.uk/patients/conditions/24/basal_thumb_arthritis		Edit Resource

Then edit the details in the relevant field/s of the pop-up window and click on 'Edit Resource':

ADMIN PORTAL

Team: MND Care

DASHBOARD

QUESTIONNAIRE TEMPLATES

MEMBERS

PRE-INVITE IMPORTER

RESOURCE MANAGER

PATHWAY MANAGER

PRIVACY POLICIES

PREDEFINED MESSAGES

MY PROFILE

LOG OUT

Create Category

Select Category

week-4

Create Resource

Label

Benefits and entitlements

Type

pdf

URL

https://www.mndassociation.org/app/uploads/2019/07/10A-Benefits-and-entitlements.pdf

Description

Benefits and entitlements

Category

week-4

Edit Resource

Cancel

To delete a resource, select the resource category, find the resource, then click on 'Delete Resource'

Please note that none of the weekly resources should be deleted unless they have been replaced as this will stop them being sent to the patient as per the automated system.

ADMIN PORTAL

Team: MND Care

DASHBOARD

QUESTIONNAIRE TEMPLATES

MEMBERS

PRE-INVITE IMPORTER

RESOURCE MANAGER

PATHWAY MANAGER

PRIVACY POLICIES

PREDEFINED MESSAGES

MY PROFILE

LOG OUT

Create Category

Select Category

general

Create Resource

Resource Manager

The resource manager section allows you to view and create resources and categories. Each resource must be created in a category. A resource can be a website, video, link etc. Once you have created a resource, it can be assigned to a Patient for them to use on their app.

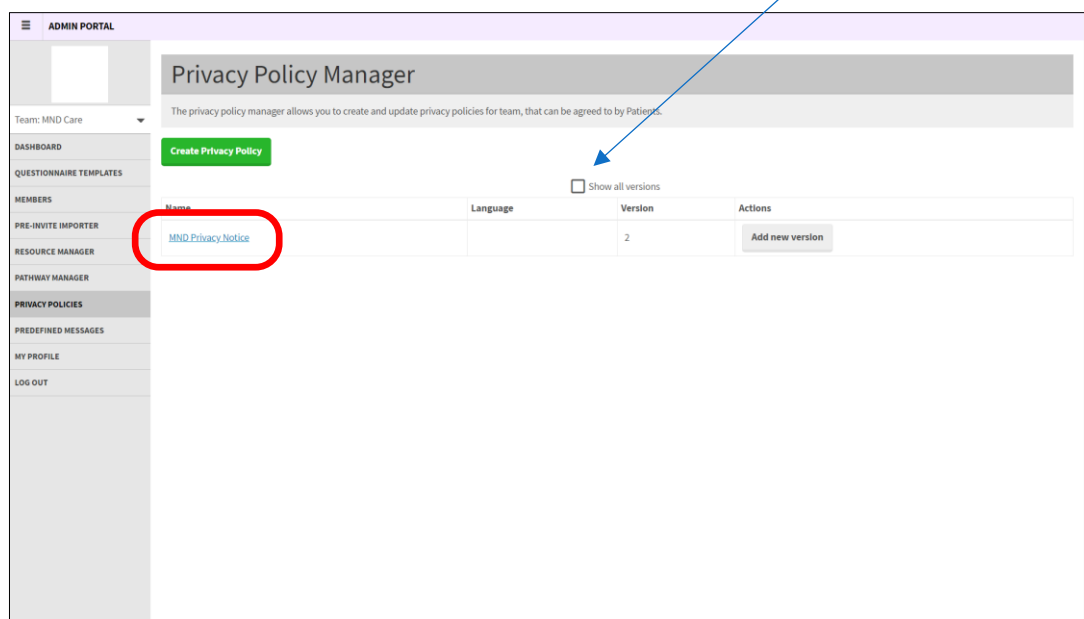
Label	Type	URL	Phone	Actions
Support for breathing problems	pdf	https://www.mndassociation.org/app/uploads/2017/05/08a-support-for-breathing-problems.pdf		Edit Resource Delete Resource
Speech and communication support	pdf	https://www.mndassociation.org/app/uploads/2017/05/07c-speech-and-communication-support.pdf		Edit Resource Delete Resource
Tube feeding	pdf	https://www.mndassociation.org/app/uploads/2019/03/07B-Tube-feeding.pdf		Edit Resource Delete Resource
Swallowing difficulties	pdf	https://www.mndassociation.org/app/uploads/2017/05/07a-swallowing-difficulties.pdf		Edit Resource Delete Resource
Hospice and palliative care	pdf	https://www.mndassociation.org/app/uploads/2017/05/03D-Hospice-and-palliative-care.pdf		Edit Resource Delete Resource

PRIVACY POLICY

The 'PRIVACY POLICY' functionality enables changes to be made to the existing e Privacy Policy (now known as a 'Privacy Notice') which is in the MyPathway patient app.

You must not create a new Privacy Policy or amend an existing Privacy Policy unless the policy has been approved by the Information Governance and Data Protection team.

The latest version of the Privacy Policy will be automatically shown when you click on the 'PRIVACY POLICY' icon. You can see past versions of the Privacy Policy by clicking on the 'Show all versions' tick box.



To edit an existing version of the Privacy Policy, click on the link to the latest version which is shown by the version number in the 'Version' column; amend the content that needs to be changed; then click on 'Add Privacy Policy'.

The screenshot shows the 'Create Privacy Policy' form. The sidebar menu is the same as in the previous image. The main content area is titled 'Create Privacy Policy' and includes a subtitle 'You can create new version of privacy policy'. The form has three main sections: 'Name' with a text input field containing 'NWB Privacy Policy'; 'Language' with an empty text input field; and 'Body' with a large text area. The 'Body' section contains the following text: '## The Application', 'North West Boroughs Healthcare NHS Foundation Trust (NWBH) is offering you the MyPathway app to allow you to book and track your appointments, see your health plan, and link with your clinician.', '## What information does the app use?', and 'The app securely links to the NWBH computer systems (and those of other healthcare providers you might choose to use for your treatment). It uses this secure link to get your name and contact details, date of birth, NHS number, details of your GP, and details of your hospital/clinic appointments. The app also asks you for your email address and/or mobile phone number as part of the sign-up process - this is so it can create your personal account, confirm that it is you creating the'.

Please note, you will need to use the scroll bar on the right-hand side of the screen to scroll down to see all the Privacy Policy content and the 'Add Privacy Policy' field.

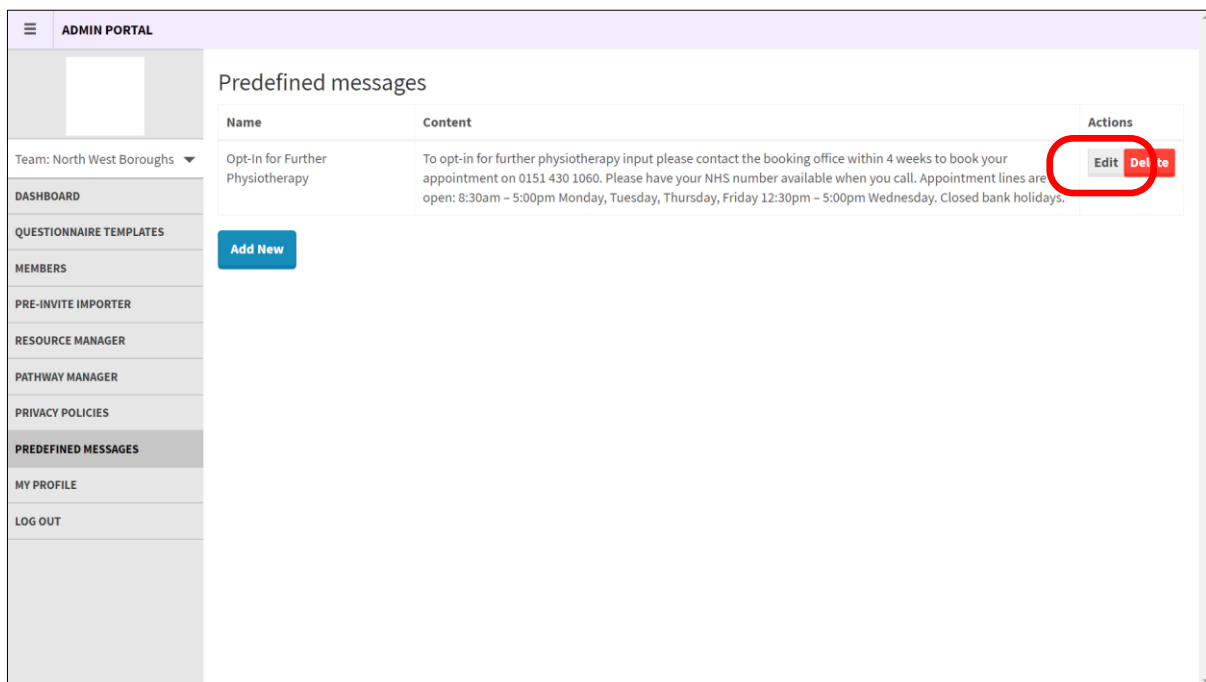
PREDEFINED MESSAGES

The predefined messages functionality enables clinicians to send standard messages to a patient's MyPathway timeline via the 'Messages' function in the clinical portal i.e. option to opt-in for further physiotherapy.

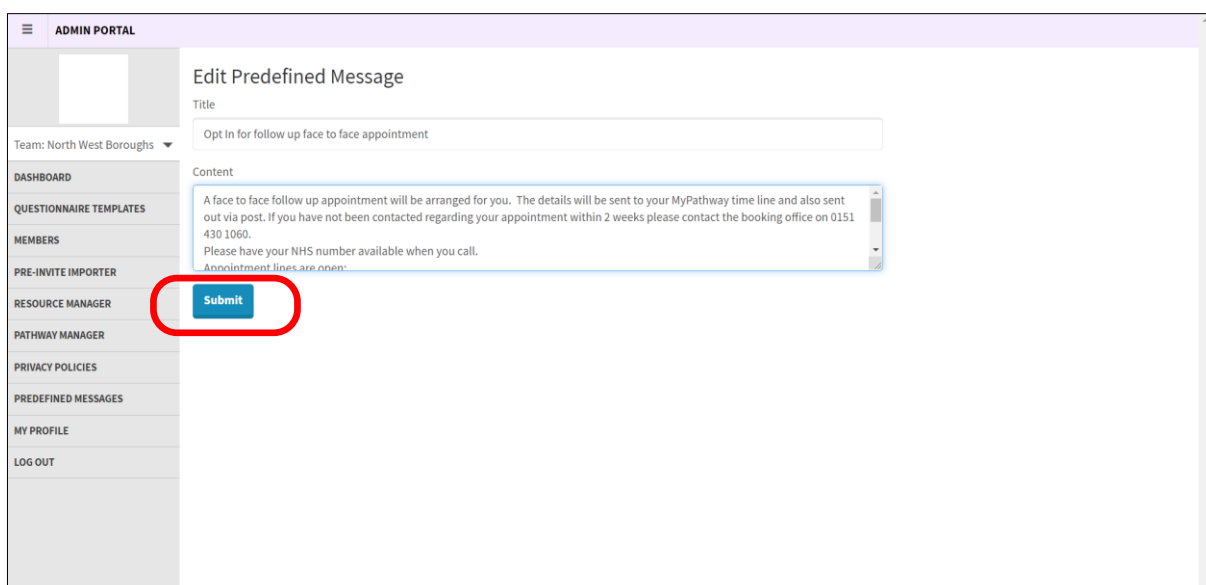
The 'PREDEFINED MESSAGES' functionality in the admin portal enables you to edit existing messages and add new messages.

Please do not create new messages, or edit or delete any existing predefined messages, without your line managers approval.

To edit an existing message, click on edit:



Make the required changes to the title / content of the message, then click on submit:



To add a new predefined message, click on 'Add new':

The screenshot shows the 'ADMIN PORTAL' interface. On the left is a sidebar menu with options: DASHBOARD, QUESTIONNAIRE TEMPLATES, MEMBERS, PRE-INVITE IMPORTER, RESOURCE MANAGER, PATHWAY MANAGER, PRIVACY POLICIES, PREDEFINED MESSAGES (highlighted), MY PROFILE, and LOG OUT. The main content area is titled 'Predefined messages' and contains a table with columns: Name, Content, and Actions. The table has one row with the name 'Opt-In for Further Physiotherapy' and content 'To opt-in for further physiotherapy input please contact the booking office within 4 weeks to book your appointment on 0151 430 1060. Please have your NHS number available when you call. Appointment lines are open: 8:30am – 5:00pm Monday, Tuesday, Thursday, Friday 12:30pm – 5:00pm Wednesday. Closed bank holidays.' The 'Actions' column for this row has 'Edit' and 'Delete' buttons. A blue 'Add New' button is located below the table, highlighted with a red circle.

Input the title and content of the new message then click on 'Submit':

The screenshot shows the 'ADMIN PORTAL' interface with the 'Create Predefined Message' form. The form has a 'Title' field with the value 'Opt In for follow up face to face appointment' and a 'Content' text area with the text 'A face to face follow up appointment will be arranged for you. The details will be sent to your MyPathway time line and also sent out via post. If you have not been contacted regarding your appointment within 2 weeks please contact the booking office on 0151 430 1060. Please have your NHS number available when you call. Appointment lines are open:'. A blue 'Submit' button is located below the content field, highlighted with a red circle.

Your new message will then show in the existing predefined messages list:

The screenshot shows the 'ADMIN PORTAL' interface with the 'Predefined messages' list. The table now has two rows. The first row has the name 'Opt in for follow up face to face appointment' (highlighted with a red circle) and content 'A face to face follow up appointment will be arranged for you. The details will be sent to your MyPathway time line and also sent out via post. If you have not been contacted regarding your appointment within 2 weeks please contact the booking office on 0151 430 1060. Please have your NHS number available when you call. Appointment lines are open: 8:30am – 5:00pm Monday, Tuesday, Thursday, Friday 12:30pm – 5:00pm Wednesday. Closed bank holidays.' The second row is the same as in the first screenshot. The 'Add New' button is still present below the table.

Functionality in the MyPathway admin portal links directly to the MyPathway clinical portal which is used by clinicians to send Patient Reported Outcome Measure questionnaires, resources and pre-defined messages directly to the patient. As a user, you are also able to set up users with access to both the clinical and admin portals. The admin portal must therefore be used with due diligence. Below are some do's and don'ts that must be considered when using the MyPathway admin portal.

When adding a new user, or changing an existing user's access, you **must** take care to ensure that the correct access permissions are given and the user has the correct role(s). You **must** also take care not to remove an existing user's permissions, particularly where they have a clinician role as this may prevent them from being able to access clinical information about the service's patients.

Always use the users business / society / nhs.net email address; **never** use personal email when setting up a new user. Monthly management reports which detail which user has accessed the clinical portal and when they accessed it are automatically generated and sent to the services management team for review.

Any new users **must** be set up with the required access roles in a timely manner and any users leaving the Trust must be removed by their official leaving date or before this date at the management's request.

You **must not** create a new Privacy Policy or amend an existing Privacy Policy unless the policy content has been approved by the Trust's Information Governance and Data Protection team.

Please **do not** create new messages, or edit or delete any existing predefined messages, without your line managers approval.

Do not amend the content of existing questionnaires or upload a new questionnaire. Any changes or additions to the service's questionnaires will be managed by the MyPathway Technical Development Team.

If your team has a "bot" (robot team member) assigned to process real-time or daily data ingests, in the admin portal, in the list of current team members, there will be a "bot" user. This will be clearly identified as such and will have an appropriate email address in the adi-uk.com domain. Please **do not** remove this bot account from the team or change its privileges; doing so will cause the automated data ingest to stop working.

HELP & ASSISTANCE

If you have any queries regarding content in the MyPathway portal, please speak with your Line Manager in the first instance.

If you experience any technical problems with the MyPathway portal, please contact ADI on **0330 321 1223**.