



**North West
Boroughs Healthcare**
NHS Foundation Trust

Admin Portal User Guide

v1.1



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HOW TO LOGIN

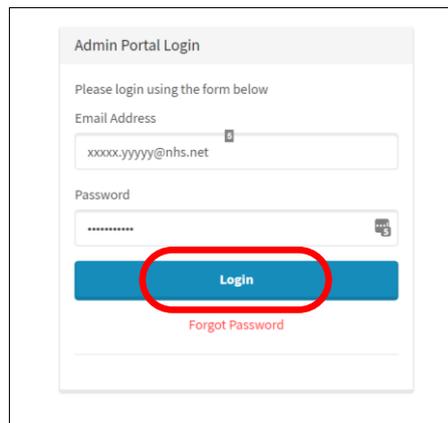
Your login details to access the MyPathway admin portal will be sent to you by email. Your username will be your NWBH.nhs or NHS.net email address. If you have access to both the clinical and admin portal, your username and password will be the same for both portals.

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:



Admin Portal Login

Please login using the form below

Email Address
xxxxx.yyyyy@nhs.net

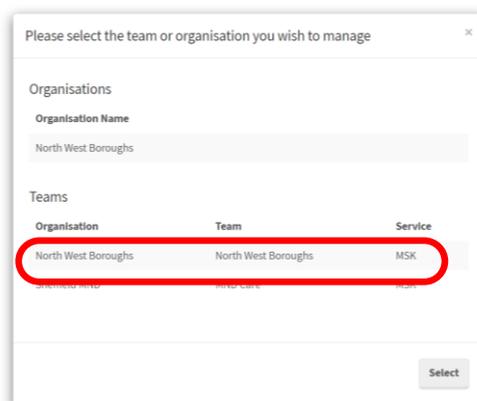
Password

Login

[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 i.e. MSK St Helens; MSK Knowsley.



Please select the team or organisation you wish to manage

Organisations

Organisation Name

North West Boroughs

Teams

Organisation	Team	Service
North West Boroughs	North West Boroughs	MSK

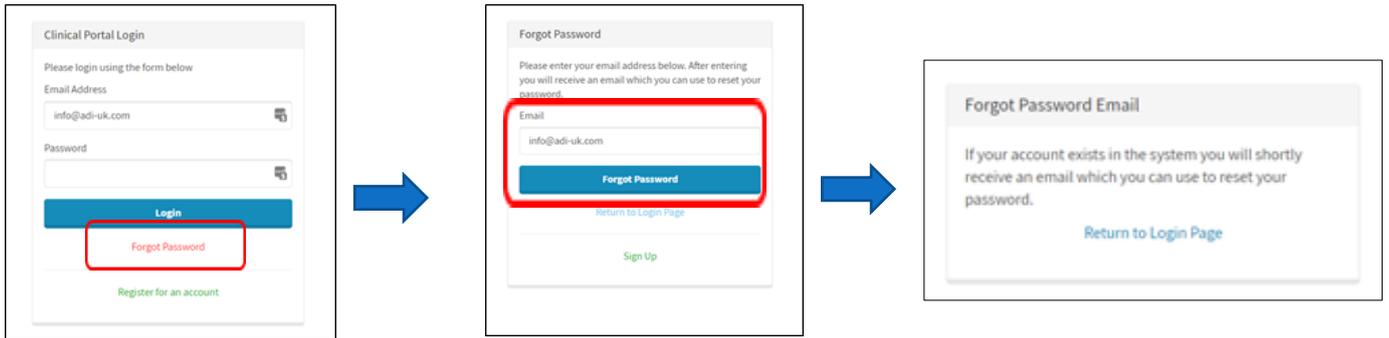
Select

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.

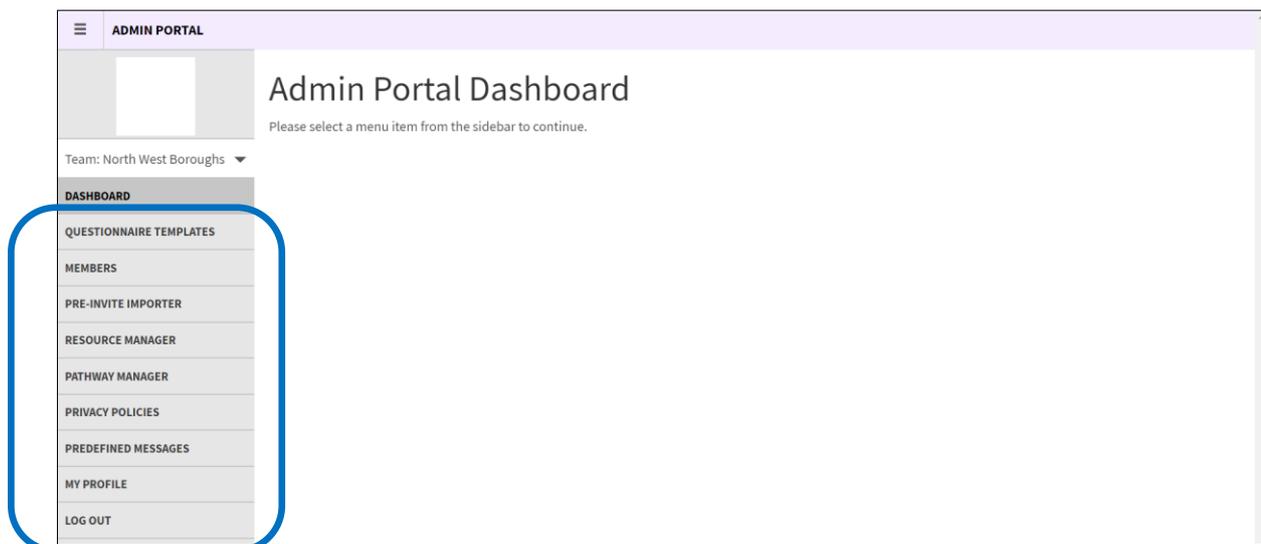


Click on 'Click here to reset your password' the link in the email then input your new password in the 'Password' field and click on 'Reset password'.



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.

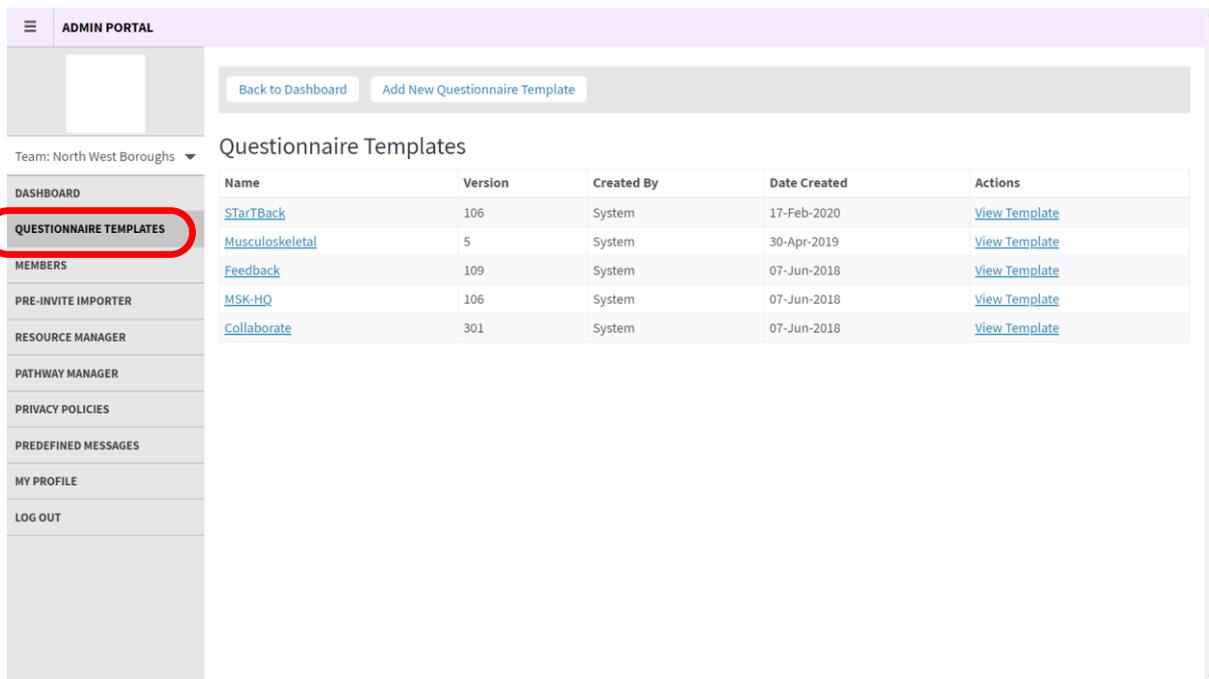


Please note that the 'PRE-INVITE IMPORTER' and 'PATHWAY MANAGER' functionality is not yet available and thus will not be covered in this guide.

QUESTIONNAIRE TEMPLATES

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

- MSK-HQ
- STarT Back
- CollaboRATE
- Feedback (*MyPathway app and NWB website feedback*)
- MSK Health and Work



The screenshot displays the 'ADMIN PORTAL' interface. On the left, a sidebar menu lists various functions, with 'QUESTIONNAIRE TEMPLATES' highlighted in red and pointed to by a blue arrow. The main content area shows the 'Questionnaire Templates' page, which includes a table of existing templates and buttons for 'Back to Dashboard' and 'Add New Questionnaire Template'.

Name	Version	Created By	Date Created	Actions
STarTBack	106	System	17-Feb-2020	View Template
Musculoskeletal	5	System	30-Apr-2019	View Template
Feedback	109	System	07-Jun-2018	View Template
MSK-HQ	106	System	07-Jun-2018	View Template
Collaborate	301	System	07-Jun-2018	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

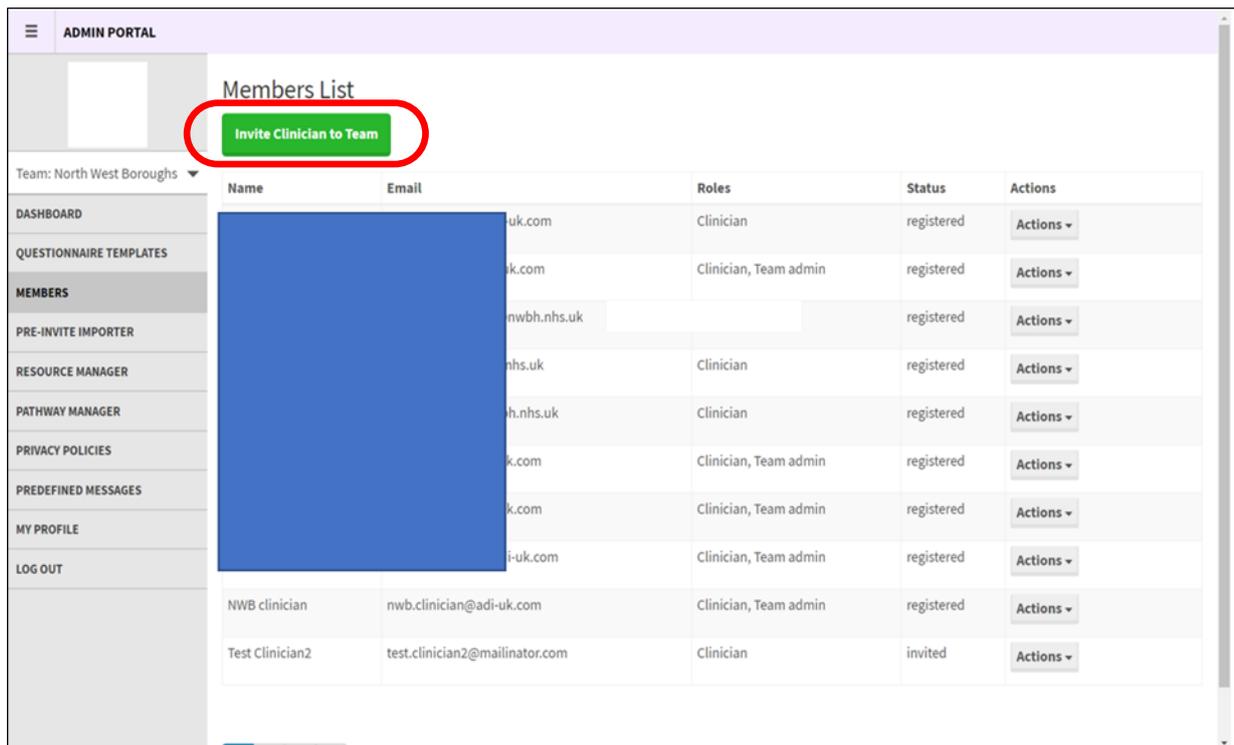
The 'MEMBERS' function enables you to:

- 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 the live North West Boroughs Healthcare 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.

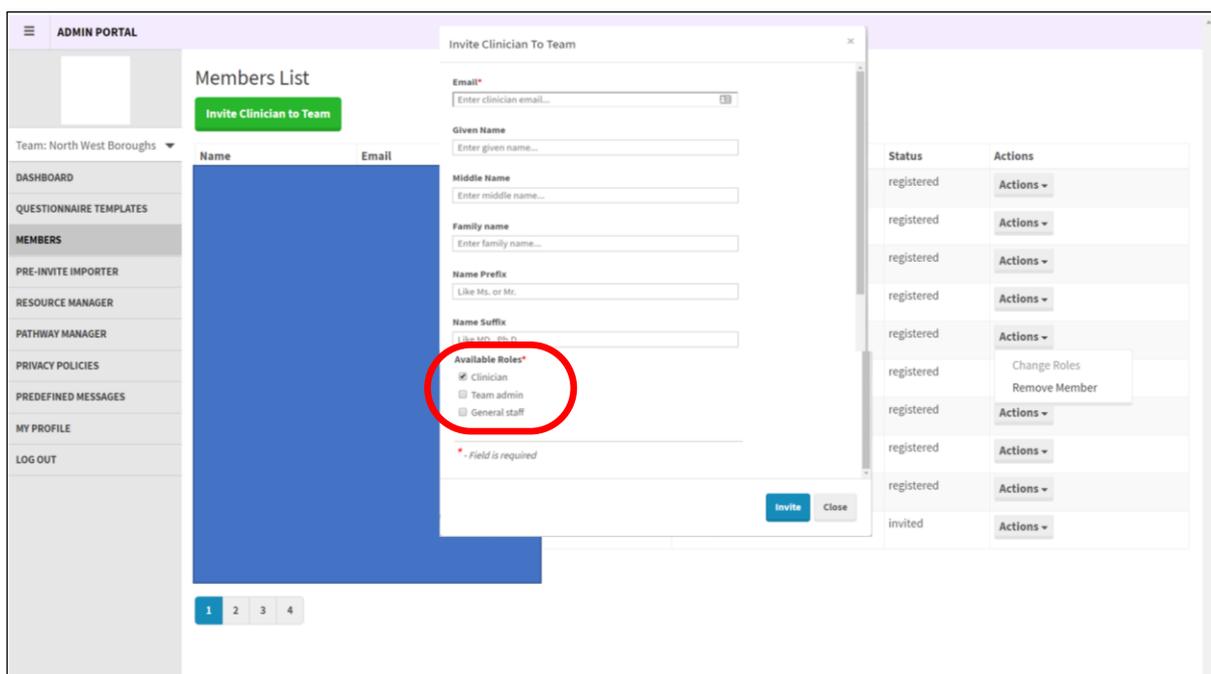
To add a new member to team, click on 'Invite Clinician to Team'



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

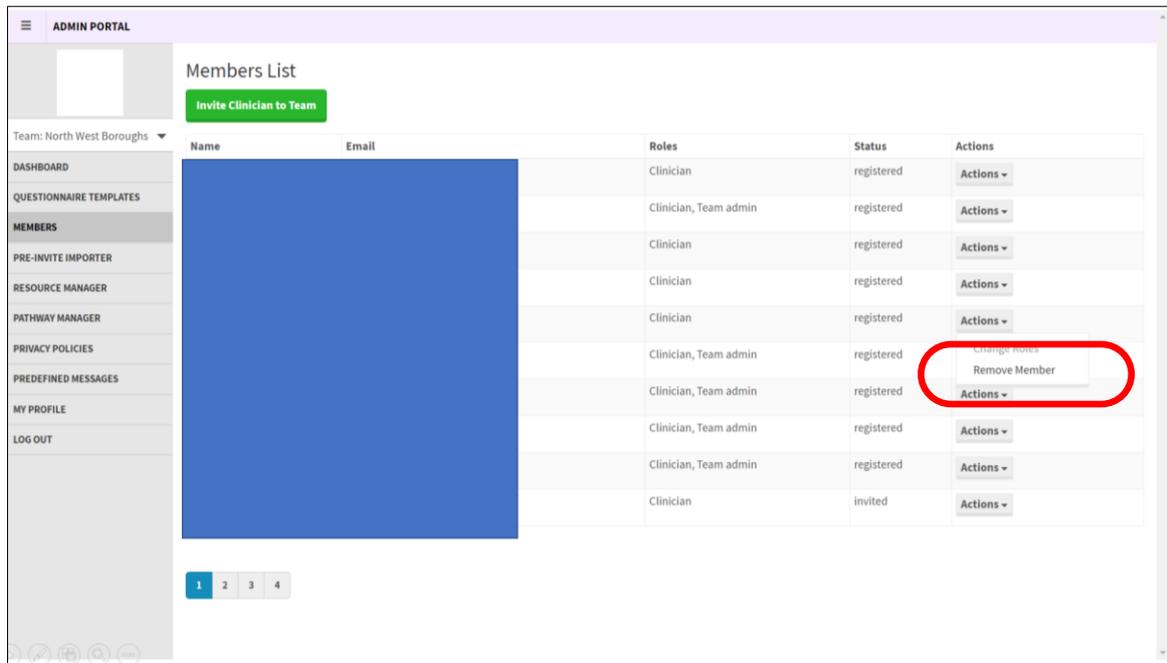
- Email address
- Given name and family name
- Tick the role/s required in the 'Available Roles' fields – this will either be 'Clinician' and or 'Team Admin' as 'General Staff' is not yet available.
- Click on 'Invite'

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



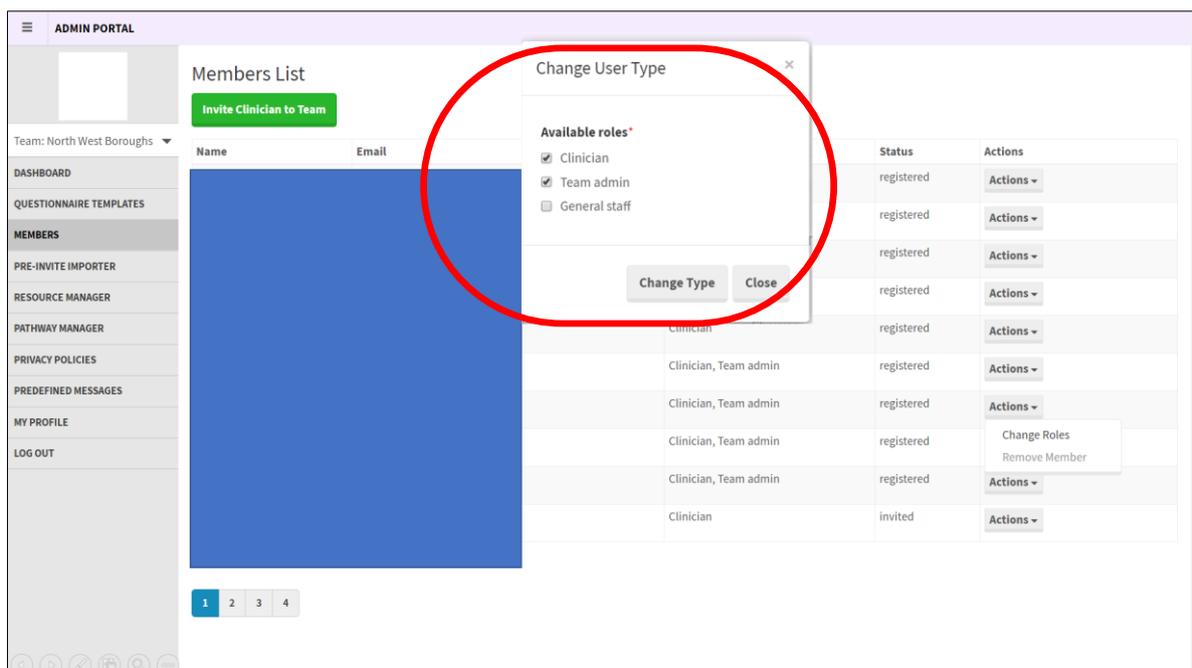
To remove a user, click on 'MEMBERS':

- 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 managed 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.

The screenshot shows the 'Resource Manager' interface in the Admin Portal. The page title is 'Resource Manager'. Below the title, there is a green 'Create Category' button. A 'Select Category' dropdown menu is open, showing a list of categories: '-- Select Category --', '-- Select Category --', Sue Test, New category test, Test, Work Wise, Upper Limb (highlighted in blue), Spinal, and Lower Limb. A red circle highlights the 'Edit Category' button on the right side of the dropdown menu. A blue arrow points from the 'Edit Category' button to the 'Upper Limb' category in the dropdown list.

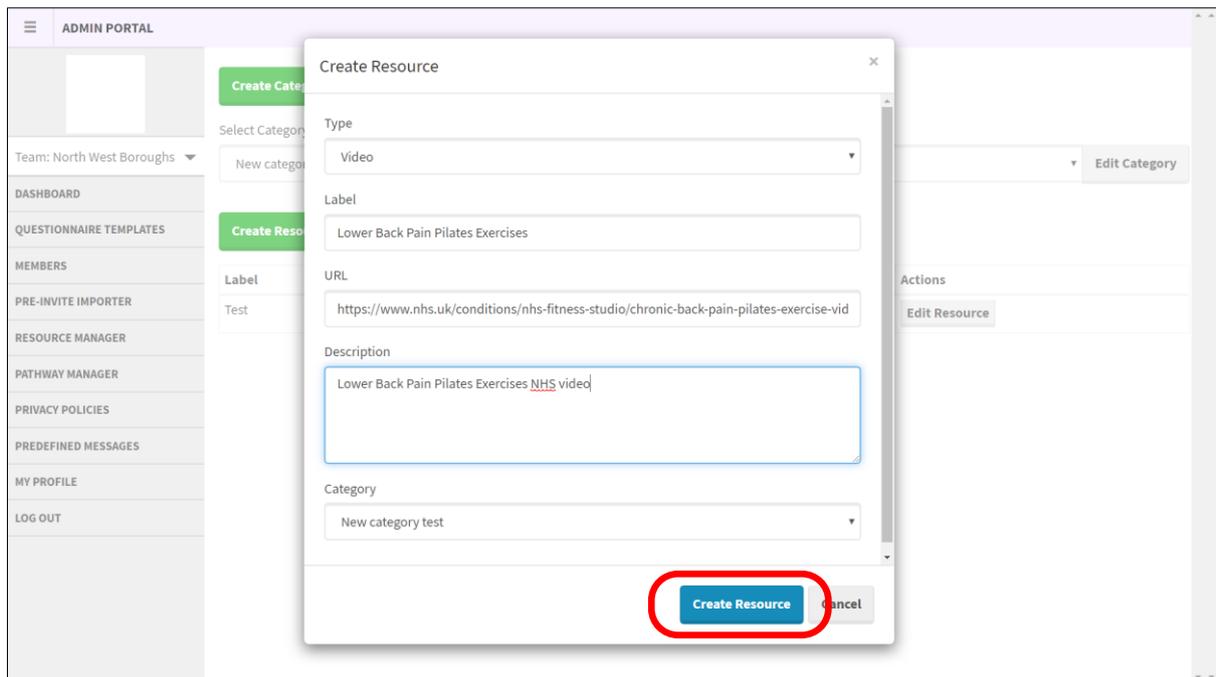
Then click on 'Create Resource':

The screenshot shows the 'Resource Manager' interface in the Admin Portal. The page title is 'Resource Manager'. Below the title, there is a green 'Create Category' button. A 'Select Category' dropdown menu is open, showing a list of categories: 'Upper Limb'. A red circle highlights the 'Create Resource' button on the left side of the page. Below the dropdown menu, there is a table with columns: Label, Type, URL, Phone, and Actions. The table contains several rows of resource data.

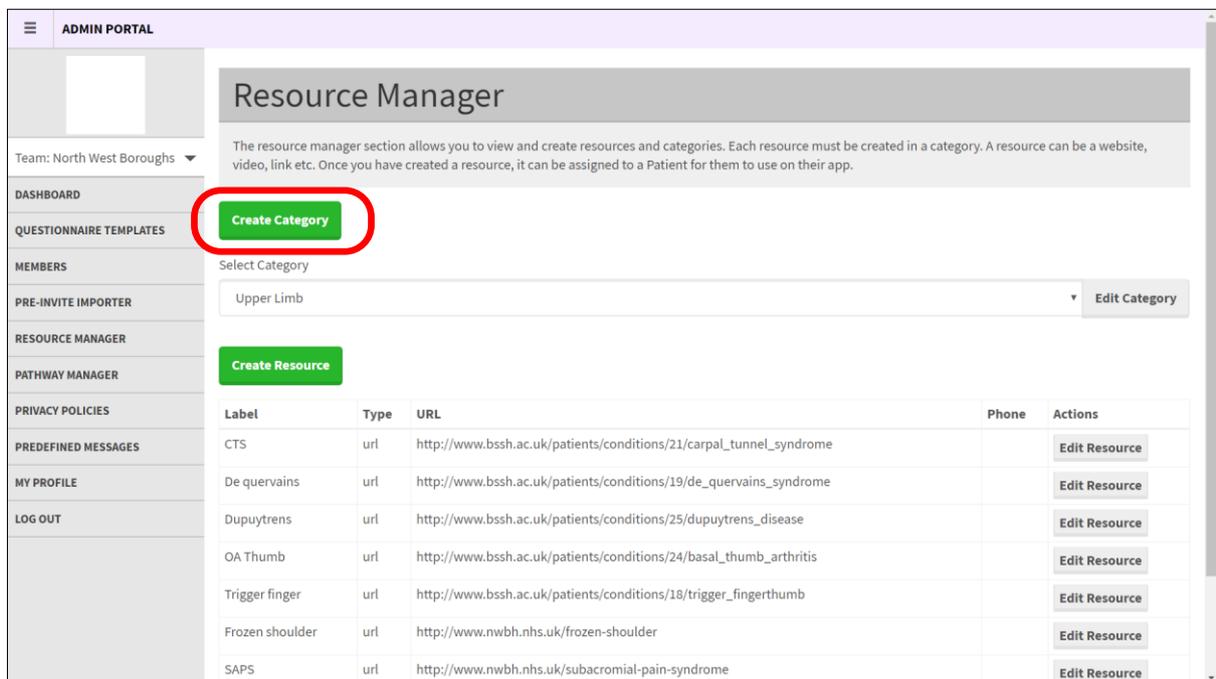
Label	Type	URL	Phone	Actions
CTS	url	http://www.bssh.ac.uk/patients/conditions/21/carpa_tunnel_syndrome		Edit Resource
De quervains	url	http://www.bssh.ac.uk/patients/conditions/19/de_quervains_syndrome		Edit Resource
Dupuytren's	url	http://www.bssh.ac.uk/patients/conditions/25/dupuytren's_disease		Edit 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

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'.

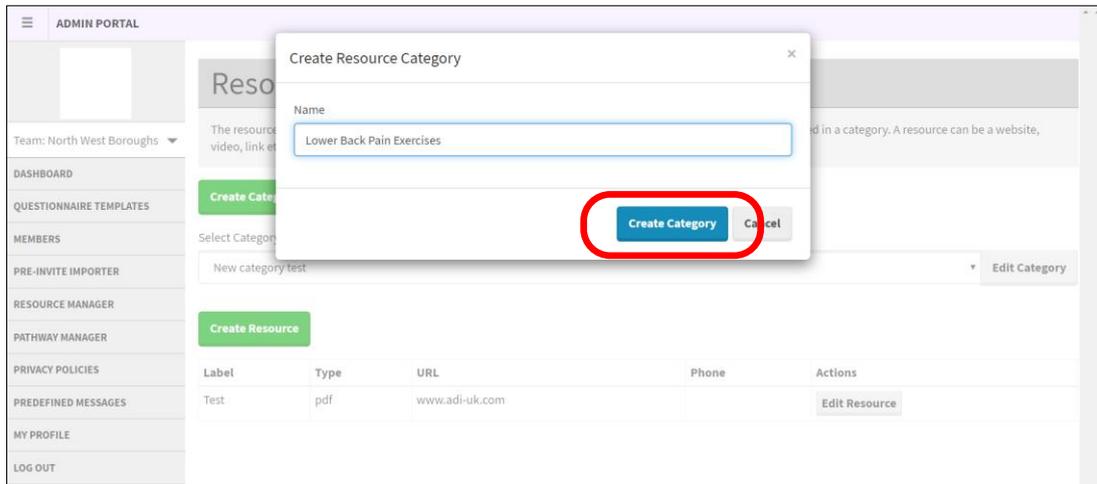
***Please note:** the 'Label' and 'Description' fields show in the patient app, so please ensure that these are clear and reflective of the resource content.



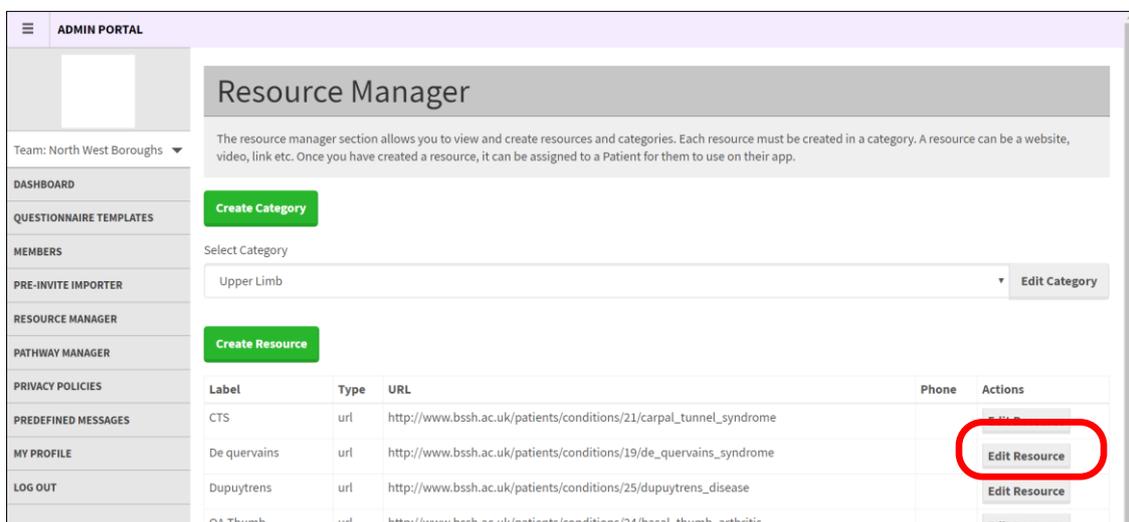
To add a new category of resources, click on 'Create Category'



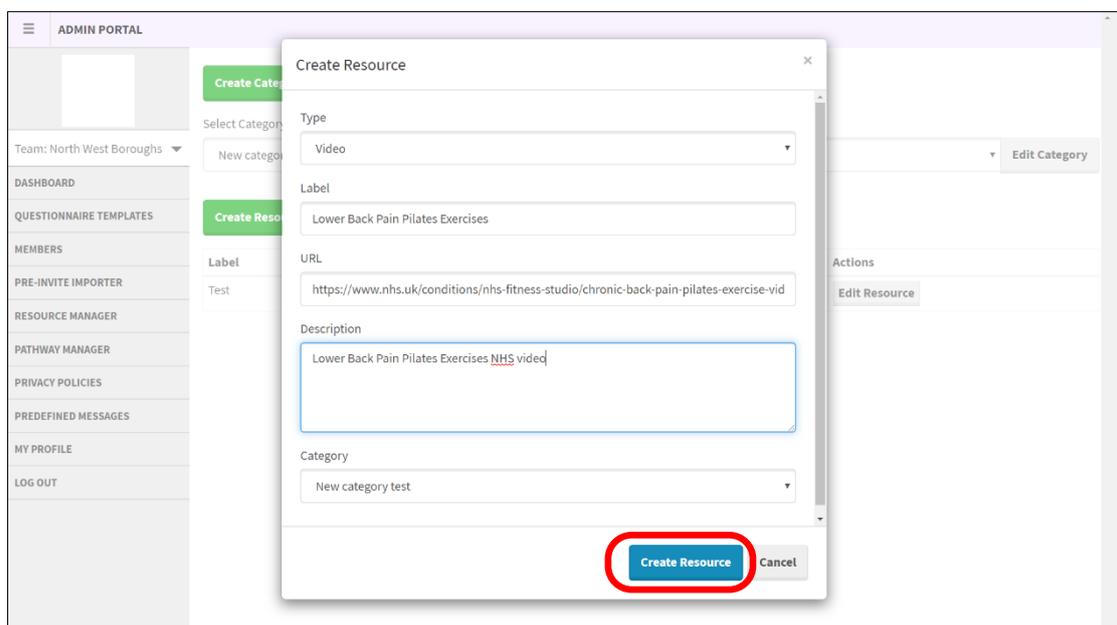
In the 'Create Resource Category' pop-up, input the name of the new category and then click on 'Create Category'



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



Then edit the details in the relevant field/s of the pop-up window:



PRIVACY POLICY

The 'PRIVACY POLICY' functionality enables changes to be made to the existing North West Boroughs Healthcare 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 Trust's 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.

The screenshot shows the 'Privacy Policy Manager' interface. On the left is a navigation menu with 'ADMIN PORTAL' at the top and various options like 'DASHBOARD', 'QUESTIONNAIRE TEMPLATES', 'MEMBERS', etc. The main content area has a header 'Privacy Policy Manager' and a sub-header 'The privacy policy manager allows you to create and update privacy policies for team, that can be agreed to by Patients.' Below this is a green 'Create Privacy Policy' button. A table lists existing policies:

Name	Language	Version	Actions
NWB Privacy Policy		2	<button>Add new version</button>
Privacy Notice		1	<button>Add new version</button>

A red circle highlights the 'Show all versions' checkbox, and a blue arrow points from it to the 'NWB Privacy Policy' link.

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'.

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.

The screenshot shows the 'Create Privacy Policy' form. It has a header 'Create Privacy Policy' and a sub-header 'You can create new version of privacy policy'. The form fields are:

- Name: NWB Privacy Policy
- Language: (empty)
- Body: A scrollable text area containing 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?
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

A red circle highlights the 'Add Privacy Policy' button at the bottom of the form.

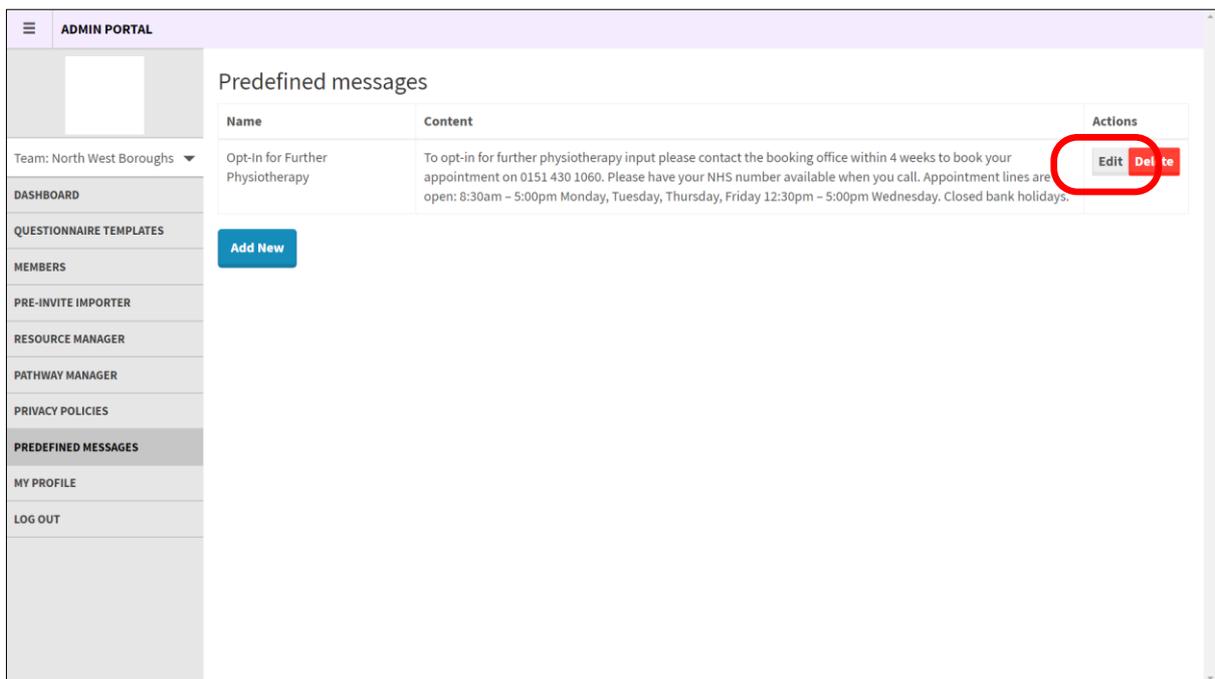
PREDEFINED MESSAGES

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:

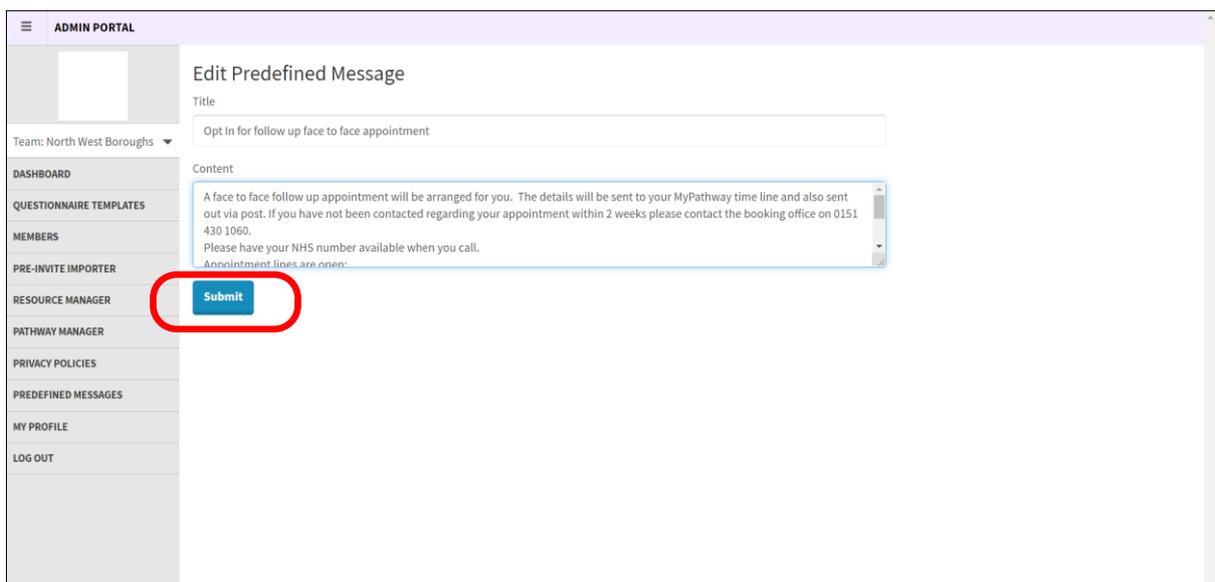


The screenshot shows the 'ADMIN PORTAL' interface. On the left is a navigation menu with options like DASHBOARD, QUESTIONNAIRE TEMPLATES, MEMBERS, PRE-INVITE IMPORTER, RESOURCE MANAGER, PATHWAY MANAGER, PRIVACY POLICIES, PREDEFINED MESSAGES (highlighted), MY PROFILE, and LOG OUT. The main content area is titled 'Predefined messages' and contains a table with columns for Name, Content, and Actions. A table row is visible with the following data:

Name	Content	Actions
Opt-In for Further Physiotherapy	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.	Edit Delete

The 'Edit' button in the Actions column is circled in red. Below the table is an 'Add New' button.

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

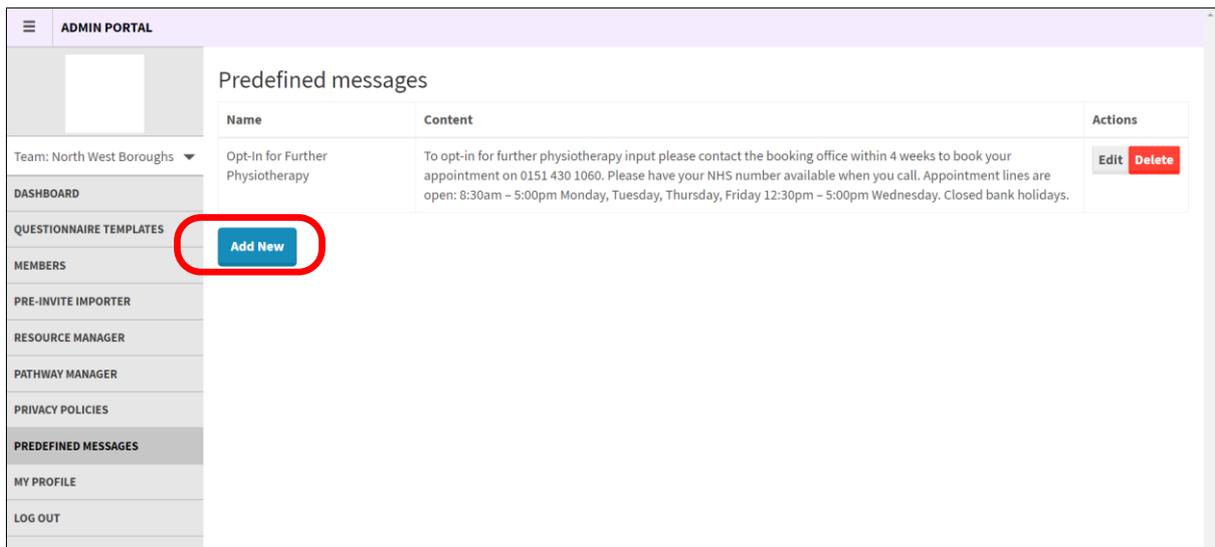


The screenshot shows the 'ADMIN PORTAL' interface for editing a predefined message. The main content area is titled 'Edit Predefined Message' and contains a form with the following fields:

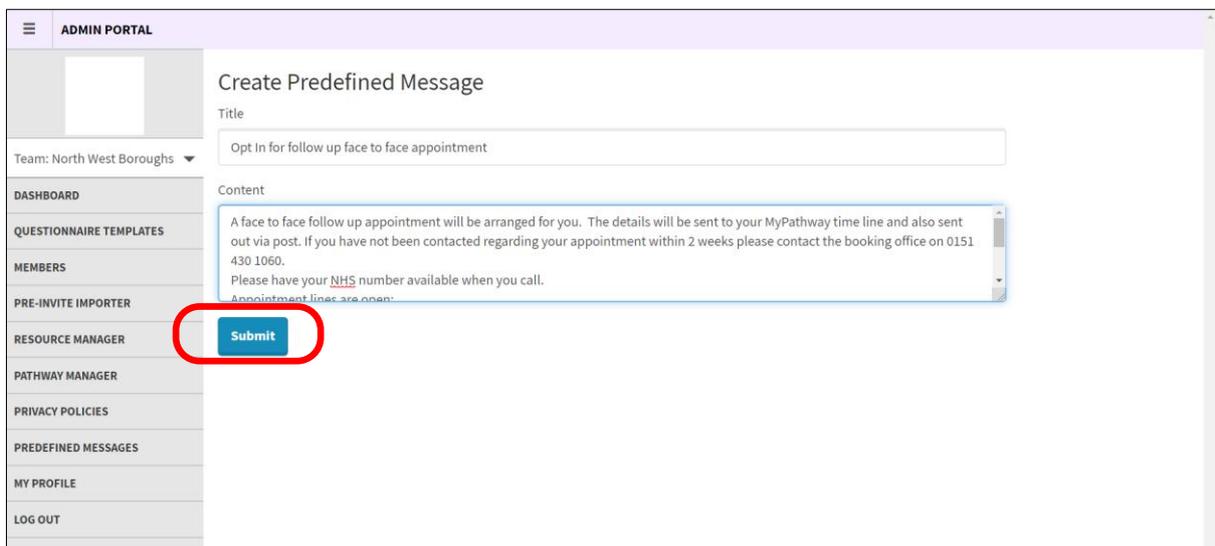
- Title:** Opt In for follow up face to face appointment
- Content:** A face to face follow up appointment will be arranged for you. The details will be sent to your MyPathway time line and also sent out via post. If you have not been contacted regarding your appointment within 2 weeks please contact the booking office on 0151 430 1060. Please have your NHS number available when you call. Appointment lines are open:

The 'Submit' button is circled in red.

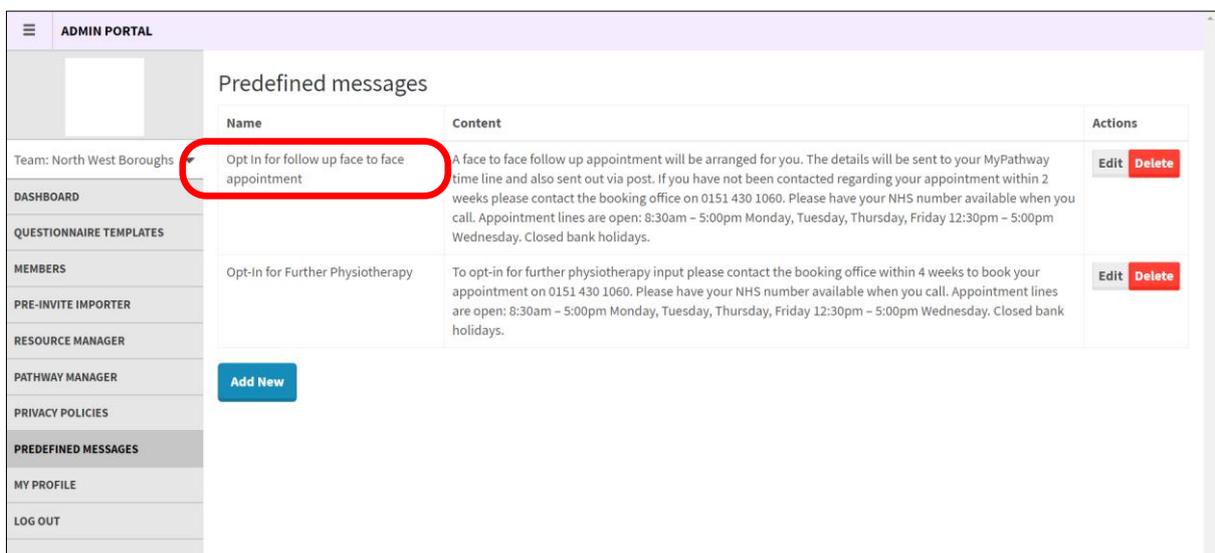
To add a new predefined message, click on 'Add new':



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



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



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 Trust 'nwbh.nhs' email address or their '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**.