



Universal Care Plan

Business Intelligence Standard Operating Procedure

Title	Business Intelligence (BI) Standard Operating Procedure
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Purpose

The purpose of this operating procedure is to set out the Universal Care Plan (UCP) Programme Business Intelligence (BI) Dashboard user access process, to ensure that utilisation of the UCP data is safe and effective.

The UCP helpdesk is responsible for receiving and processing BI dashboard access requests. The UCP helpdesk shall log, prioritise, assign, track, escalate, resolve, close and archive queries relating to access to the UCP BI Dashboard. The UCP Helpdesk will be normally operational from Monday to Friday, 9AM to 5PM except for any public/bank holidays.

Business Intelligence Onboarding

The exchange of information between organisations must always adhere to legal requirements such as the Data Protection Act 2018 and the General Data Protection Regulation. Each organisation that supplies patient information through the UCP platform is the Data Controller of that information and has specific responsibilities toward it.

Organisations that have been included in the UCP onboarding DPIA (organisation and ODS code) are automatically approved to access the UCP BI Dashboard.

For organisations that are not named in the UCP onboarding DPIA at go-live but have users that wish to access the UCP BI dashboard, an access request can be made by completing the [BI Dashboard organisation onboarding form](#). This will need to be completed by the Information Governance lead of the organisation requesting access.

On receipt of the new BI Dashboard organisation onboarding form, the UCP helpdesk shall follow the steps detailed in the table below

Task	Detail
Organisation verification	Search for the organisation via the NHS Digital ODS Portal NHS Digital ODS Portal
DPIA verification	Check organisation is not already listed in the UCP Onboarding DPIA
Head of Programme onboarding approval	Where an organisation is not listed on the NHS Digital ODS Portal or in the UCP onboarding DPIA, help desk shall seek onboarding approval from Head of UCP Programme after the BI Dash organisation onboarding form is received

User Responsibility

It is the user's responsibility to ensure that they undertake UCP BI Dashboard training, located on the [UCP website](#).

It is the user's responsibility to ensure they have familiarised themselves with the dashboard specification (refer to the BI Report Appendices 1, 2 & 3).

It is the user's responsibility to ensure that any data that is extracted or shared, is presented according to the report specifications.

User Onboarding

Approved DPIA Organisations

Users will apply for access to the Dashboard using the below form, linked [here](#) on the UCP Website:

[Link to UCP BI Dashboard application form](#)

Once approved, access to the BI Dashboard will be enabled, and the dashboard can be accessed using the link provided on the [UCP website](#).

This process has a lead time of approximately 1 week.

Non-approved DPIA Organisations

If the user's organisation is not listed on the DPIA the UCP will forward the below form to the email address provided on the access application form, for completion by the user organisation's Information Governance lead.

[BI Dashboard Organisation Onboarding form](#)

Upon receipt of the **completed form**, the UCP will progress the user's account application.

Removal & Expiry of user accounts

User access will be reviewed every 6 months and those users who have not accessed their accounts will have their accounts disabled. Users can re-apply if they need to access the BI dashboard in future.