

Viewing and managing your evidence

This guide provides an overview of how to use the functionality to view and manage documents and links used as evidence in support of your assessment for:

- All organisation types

*****Please note you will need to be logged in as either organisation administrator, user, or reviewer to use this functionality.*****

To make the guide easy to follow it has been split into two main sections:

- [i. How to ... view and manage documents used as evidence](#)
- [ii. How to ... view and manage links used of evidence](#)

[i. How to ... view and manage documents used as evidence](#)

- A. Searching and Viewing Evidence Documentation**
 - B. Deleting Evidence Documentation**
 - C. Replacing Evidence Documentation**
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The Information Governance Toolkit (IG Toolkit) provides a maintenance area which allows you to view and edit your evidence documentation and links associated with your assessment via the 'Maintenance and Planning' section of the 'Assessment Summary' screen. You can also manage your evidence documentation via the assessment screen should you wish to do so. **The initial upload of evidence documentation or links must be carried out from the 'Attainment Level' section within your assessment. The linking of evidence to relevant requirement criteria can also only be carried out from the 'Attainment Level' section within your assessment.**

*****Please note that the use of this functionality does not negate the need to review your assessment and mark evidence items as obtained.*****

A. Searching and Viewing Evidence Documentation

To view evidence documentation associated with your assessment:

- **1. Click on 'Assessments' on the left hand menu, you will be taken to the 'Assessment Summary' page.**
- **2. On the 'Assessment Summary' page click on the 'View Documents used as evidence' link which can be found within the 'Maintenance and Planning' grey box.**

Lucy Lucas
test account 1
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Assessment Summary

This page gives a summary of your current IG Toolkit assessment, as well as any previous ones.

Version 11 (2013-2014)

Headlines:

Assessment Ref:	ASS/107819
Status:	Started (View History)
Next Deadline:	31 March 2014 (Publication) 312 days to go!
Audited:	No (edit)

Progress:

Requirements Answered:	5 out of 42
Requirements Not Answered:	37 out of 42
Requirements Marked Complete:	0 out of 42
Requirements Confirmed Complete:	0 out of 42

Score:

Current Score:	4% ?	Not Satisfactory ?
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[Work On This Assessment](#)

Maintenance and Planning:

- [View Documents used as evidence](#)
View, replace and delete documents uploaded as part of evidence for the assessment
- [View Links used as evidence](#)
View, replace and delete links (Internet/Intranet) entered as part of evidence for the assessment
- [Create an improvement plan and/or evidence report](#)
Generate a list of outstanding items required to fulfill target scores for the assessment

- **3. You will be presented with a full list of all documents associated with your assessment. The default setting is for documents to appear in alphabetical order by document name. Should you wish to do so you may change this setting to sort the documents by reverse alphabetical order of document name or by date uploaded. In order to do this click on the hyper linked headings 'document' and 'uploaded'.**

➤ Please select your search criteria then click 'Search'.

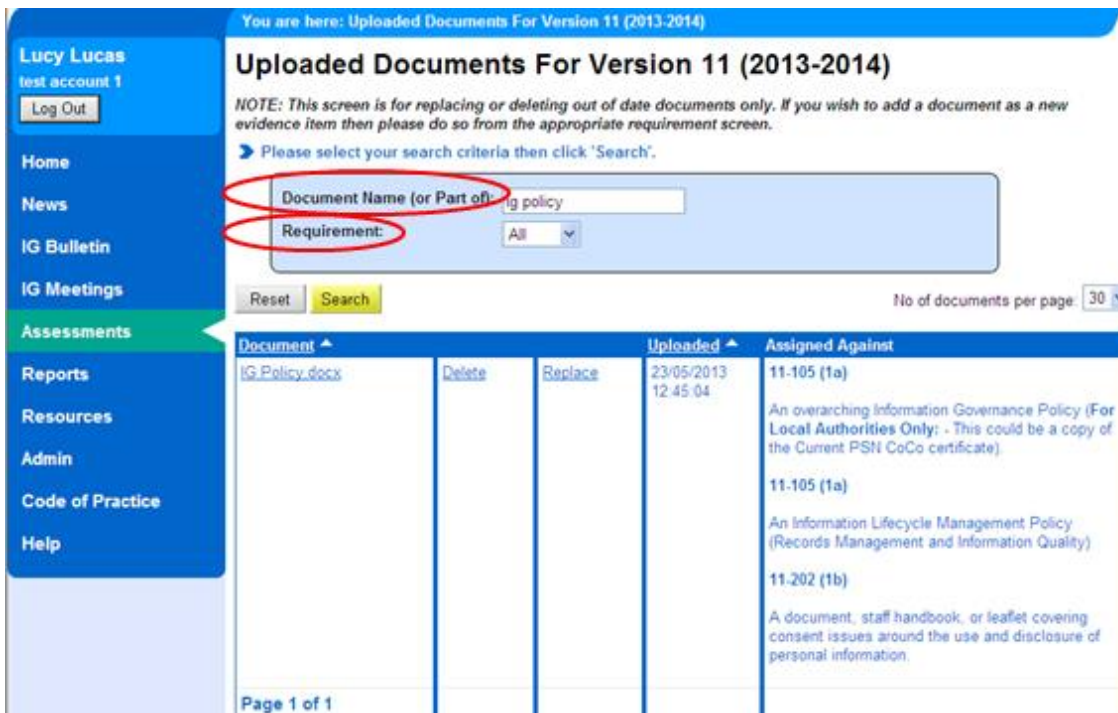
Document Name (or Part of):

Requirement:

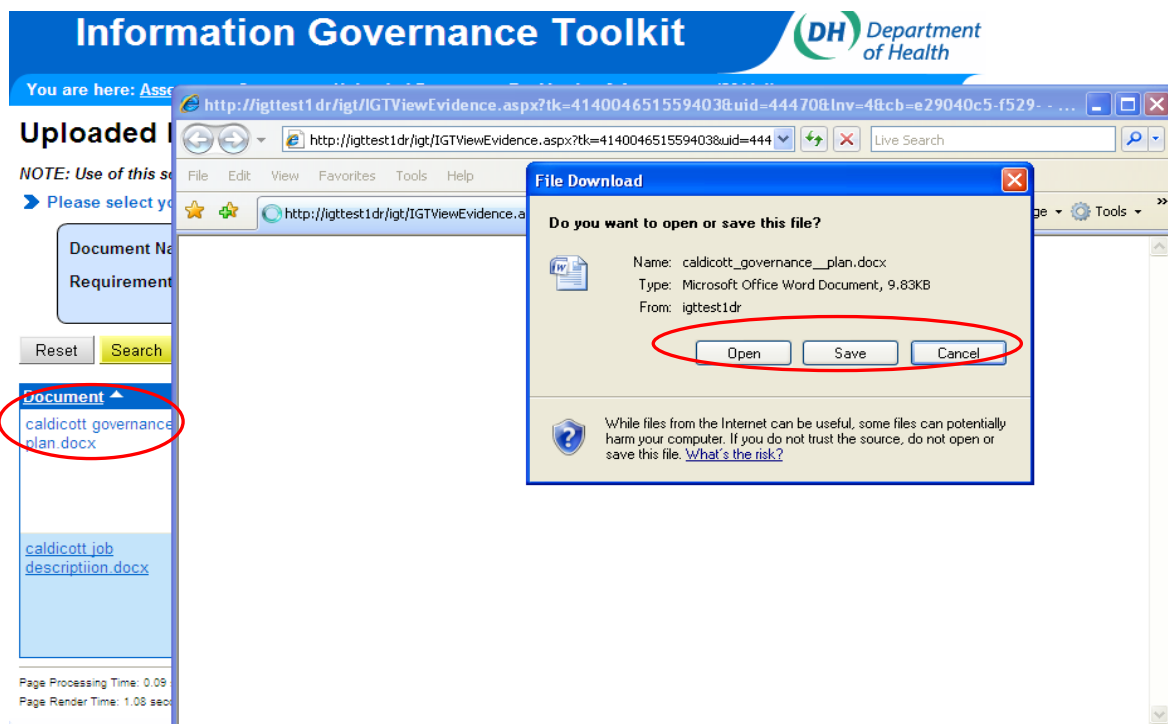
[Reset](#) [Search](#) No of documents per page:

Document			Uploaded	Assigned Against
ig board terms of reference nov 2012.docx	Delete	Replace	23/05/2013 12:43:11	11-101 (1a) A named individual's job description, or minutes of Board meetings, a note or e-mail assigning responsibility (For Local Authorities Only - This could be a copy Current Public Services Network Code of Connection (v. 2.7 or subsequent version) certificate)
ig board terms of reference nov 2012.docx	Delete	Replace	23/05/2013 12:44:23	11-101 (2b) The Terms of Reference of the key governance bodies (For Local Authorities Only - This could be a copy of the Current PSN CoCo certificate).
ig governance framework doc v2.docx	Delete	Replace	23/05/2013 12:43:36	11-101 (1b) A documented Information Governance Management Framework (For Local Authorities Only - This could be a copy of the Current PSN CoCo certificate).
ig governance framework doc v2.docx	Delete	Replace	23/05/2013 12:44:05	11-101 (2a) Senior Management sign off must be included within the documented Information Governance Management Framework, ie the date that it was signed off and by which individuals or bodies (For

- 4. If you wish to do so you can use the search function at the top of this page to filter the list of documents by specific document names / part of a document name (note this search is performed on the document filename which was uploaded to the site) or by a specific requirement number.



- 5. To view a specific document click on the hyperlinked document name in the 'document' column.
- 6. A file download pop-up box will appear prompting you to either open the document or save to your computer. Please note that you cannot edit the document via this function. If there are any changes made to the document you will need to save locally and then re-upload via the 'replace' function described below.



B. Deleting Evidence Documentation

*****Please note that if your assessment has been published the option to delete will not appear on this screen.*****

- 7. Should you wish to delete an evidence document, click on 'delete' against the relevant document. You will then receive a warning message to confirm that you wish to delete the evidence document.

*****Please note should you delete a document which is linked to more than one requirement in the current assessment this action will delete that document across all requirements. If the document is linked to a previous year's assessment the document will be deleted from the current assessment, but will remain in any previously completed assessments *****

The screenshot shows the 'Uploaded Documents For Version 11 (2013-2014)' page. A sidebar on the left contains navigation links like 'Home', 'News', 'IG Bulletin', 'IG Meetings', 'Assessments', 'Reports', 'Resources', 'Admin', 'Code of Practice', and 'Help'. The main content area has a search bar and a table of documents. A modal dialog box is displayed over the table, asking for confirmation to delete a document. The 'Delete' button in the table and the 'OK' button in the dialog are circled in red.

Document Name (or Part of):	Actions	Date	Requirement
IG Policy.docx	Delete	23/05/2013 12:45:04	11-105 (1a)

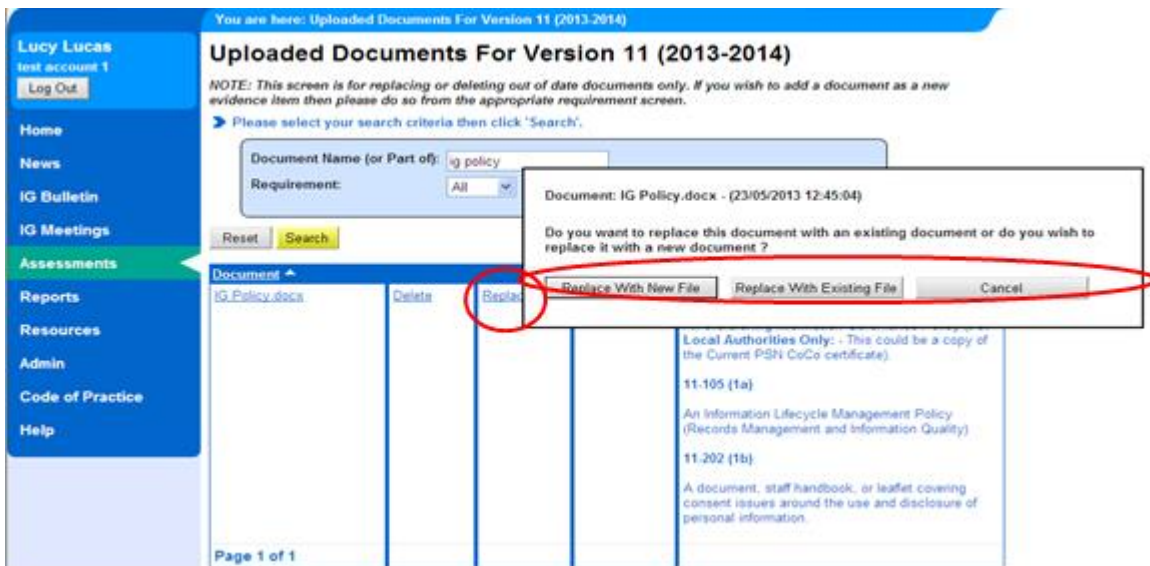
- 8. Click on 'ok' when the prompt appears. The document screen will then refresh and the deleted document will no longer appear on this page and will also be removed from the relevant requirement 'Attainment Level' section

*****Please note that deleting a document may impact on your assessment score as this document will also be removed from your assessment.*****

C. Replacing Evidence Documentation

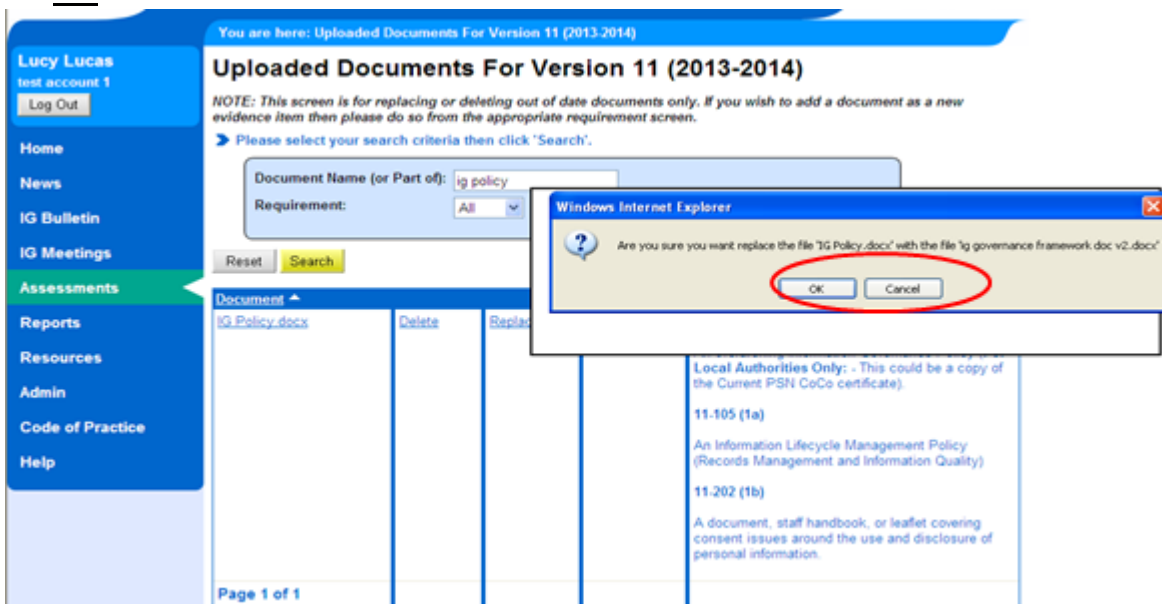
*****Please note that if your assessment has been published the option to replace will not appear on this screen.*****

- 9. If you would like to replace an existing evidence document with a different document click on 'replace' against the relevant document.
- 10. A prompt will appear as shown below which provides you with the option to either replace the current evidence document with a new file (not already uploaded to the IG Toolkit), replace the document with an existing file (already uploaded against another requirement on the IG Toolkit), or cancel the request.



- 11. If you choose to replace the document, once you have selected the replacement document (either via the 'replace with new file', or 'replace with existing file' options) a pop-up box will appear prompting you to confirm this.

*****Please note should you replace a document which is linked to more than one requirement this action will replace that document across all requirements. However, linking of documents to requirements and specific attainment level criteria can be updated within your Assessment.*****



- 12. Click 'ok' on the pop-up box and the updated document will have been uploaded and will appear on the list of documents.
- 13. An export of all uploaded documents to CSV option is available (the export will only contain document names and not actual links to the documents).

Uploaded Documents For Version 12 (2014-2015)

NOTE: This screen is for replacing or deleting out of date documents only. If you wish to add a document as a new evidence item then please do so from the appropriate requirement screen.

➤ Please select your search criteria then click 'Search'.

Document Name (or Part of):	<input type="text"/>
Requirement:	All ▾

Reset

Search

No of documents per page: 30 ▾

[Export Full List of Documents to CSV.](#) (For security purposes the export will only contain document names not actual links to the documents.)

ii. How to view and manage links used as evidence

A. Searching and Viewing Evidence Links

B. Deleting Evidence Links

C. Replacing Evidence Links

A. Searching and viewing evidence links

- 1. Click on 'Assessments; on the left hand menu, you will be taken to the 'Assessment Summary' page.
- 2. On the 'Assessment Summary' page click on the 'View Links used as evidence' link which can be found within the 'Maintenance and Planning' grey box.

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Work On This Assessment

Maintenance and Planning:

- [View Documents used as evidence](#)
View, replace and delete documents uploaded as part of evidence for the assessment
- [View Links used as evidence](#)
View, replace and delete links (Internet/Intranet) entered as part of evidence for the assessment
- [Create an improvement plan and/or evidence report](#)
Generate a list of outstanding items required to fulfill target scores for the assessment

- 3. You will be presented with a full list of all links associated with you assessment. The default setting is for links to appear in order of date entered with the most recently entered at the top of the list. Should you wish to do so you may change this setting to sort the links

by alphabetical / reverse alphabetical order of location, by type (internet / intranet) by date uploaded with the oldest links at the top of the list. In order to do this click on the hyperlinked headings 'location', 'type' and 'last modified'.

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▶ Please select your search criteria then click 'Search'.

URL/Link Location (or Part of):

Requirement:

Type:

Reset Search

Location			Type	Last Modified	Assigned Against
www.google.co.uk	Replace	Delete	Internet	23/05/2013 12:49:03	11-370 (1a) A named individual's job description, a note or e-mail assigning responsibility or in the terms of reference of a group. 11-402 (1b) One or more documented procedures (an overall data quality procedure incorporating best methods of checking information with service user, reporting errors and omissions with data, dealing with duplicates registrations/records and reconciling databases)
www.hscic.gov.uk	Replace	Delete	Internet	23/05/2013 12:49:03	11-370 (1b) Documented improvement plan(s)
www.nhs.net	Replace	Delete	Internet	23/05/2013	11-210 (1a)

- ▶ 4. If you wish to do so you can use the search function at the top of this page to filter the list of evidence links by link title / part of a link, by internet or intranet link, or by a specific requirement number.

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Public Health England 3
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You are here: [Assessment Summary](#) > Internet/Intranet Evidence For Version 11 (2013-2014)

Internet/Intranet Evidence For Version 11 (2013-2014)

NOTE: This screen is for replacing or deleting out of date links/URLs only. If you wish to add a link/URL as a new evidence item then please do so from the appropriate requirement screen.

▶ Please select your search criteria then click 'Search'.

URL/Link Location (or Part of):

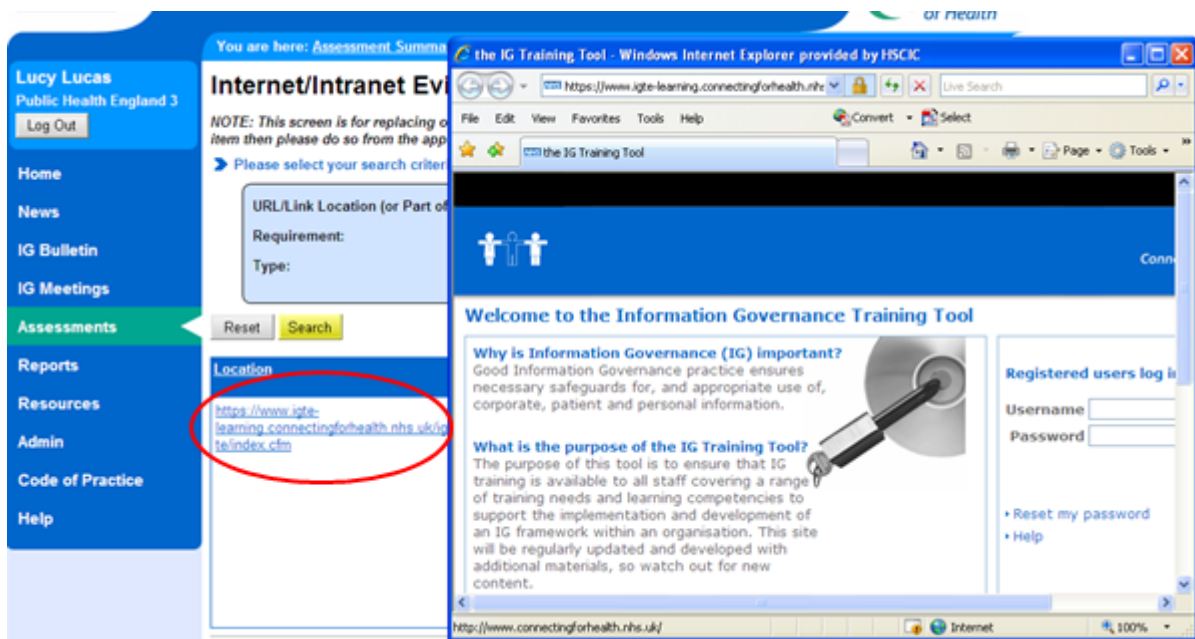
Requirement:

Type:

Reset Search

Location			Type	Last Modified	Assigned Against
https://www.igt-learning.connectingforhealth.nhs.uk/igta/index.cfm	Replace	Delete	Internet	23/05/2013 15:14:36	11-105 (1b) The Information Governance Management Framework document which includes details of the date of approval and details of the approving individual/body (For Local Authorities Only: - This could be a copy of the Current PSN CoCo certificate).

- ▶ 5. To view a specific link click on the hyperlinked link name in the 'location' column.
- ▶ 6. A new window will open displaying the webpage at that link as shown below.



B. Deleting Evidence Links

*****Please note that if your assessment has been published the option to delete will not appear on this screen.*****

- 7. Should you wish to delete an evidence link from this page click on 'delete' against the relevant link. You will then receive a warning message requesting confirmation that you wish to delete the evidence link.

*****Please note should you delete a link which is linked to more than one requirement this action will delete that link across all requirements.*****

➤ Please select your search criteria then click 'Search'.

URL/Link Location (or Part of):

Requirement:

Type:

Location	Replace	Delete	Internet	Date	Requirement
https://www.igte-learning.connectingforhealth.nhs.uk/igte/index.cfm	<input type="button" value="Replace"/>	<input type="button" value="Delete"/>	Internet	08/05/2013 14:59:06	9-202 (1a) A named individual's job description, a note or e-mail assigning responsibility or the terms of reference of a group.
www.google.co.uk	<input type="button" value="Replace"/>	<input type="button" value="Delete"/>	Internet		9-203 (1b) Notes/minutes of team meetings or awareness sessions, staff briefing materials or a document that sets out how staff have been informed.
					9-205 (1a) Named individuals' job description(s) or work area business plans.
					9-202 (1c)

Windows Internet Explorer dialog box: Are you sure you want to delete this link? PLEASE NOTE: When evidence is deleted your assessment score will be recalculated and may change.

- 8. Click on 'ok' when the prompt appears. The screen will then refresh and the deleted link will no longer appear on the list of evidence links.

*****Please note that deleting an evidence LINK may impact on your assessment score as this LINK will also be removed from your assessment.*****

C. Replacing Links used as Evidence

- 9. If you would like to replace an existing evidence link with a different link click on 'replace' against the relevant link.

*****Please note that if your assessment has been published the option to replace will not appear on this screen.*****

- 10. A pop-up box will appear as shown below. Enter the new link into the box 'please enter the new intranet / internet link' as shown below, change the internet / intranet drop-down list to reflect the link type if necessary, and click on the 'replace link' button.

*****Please note should you replace a document which is linked to more than one requirement this action will replace that document across all requirements.*****

➤ Please select your search criteria then click 'Search'.

URL/Link Location (or Part of):

Requirement: All

Type: All

Reset Search

Location		Replace	Delete
https://www.igte-learning.connectingforhealth.nhs.uk/igte/index.cfm			
www.google.co.uk			

Current Link Details:

<https://www.igte-learning.connectingforhealth.nhs.uk/igte/index.cfm>

Please enter the new Intranet/Internet Link:

Internet

Replace Link Cancel

						Named individuals' job description(s) or work area business plans.
			Internet	08/05/2013 14:59:06	9-202 (1a)	A named individual's job description, a note or e-mail assigning responsibility or the terms of reference of a group.
					9-202 (1c)	

- 11. The updated evidence link will appear in the list of evidence.