BRAND PARTNER PORTAL

Community Signposts.
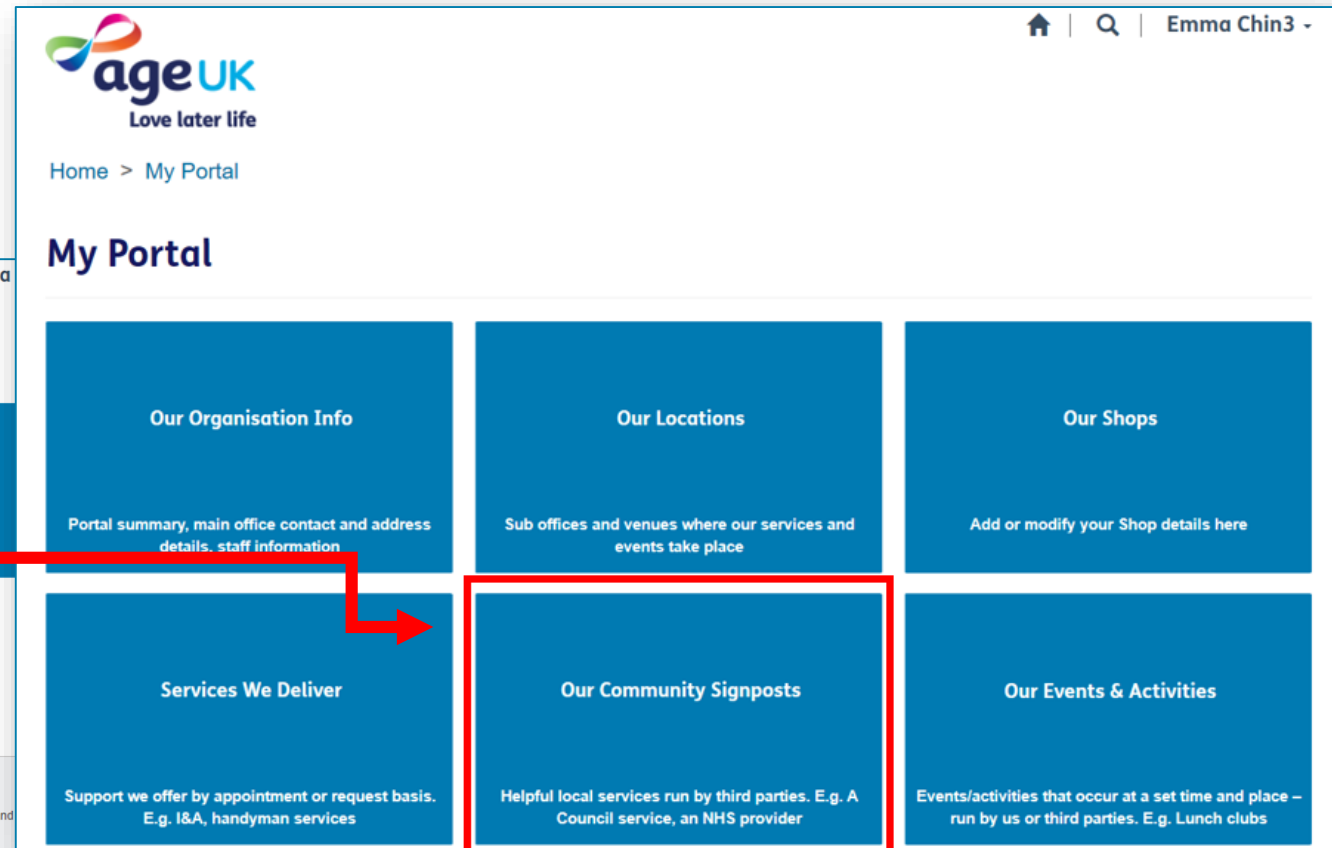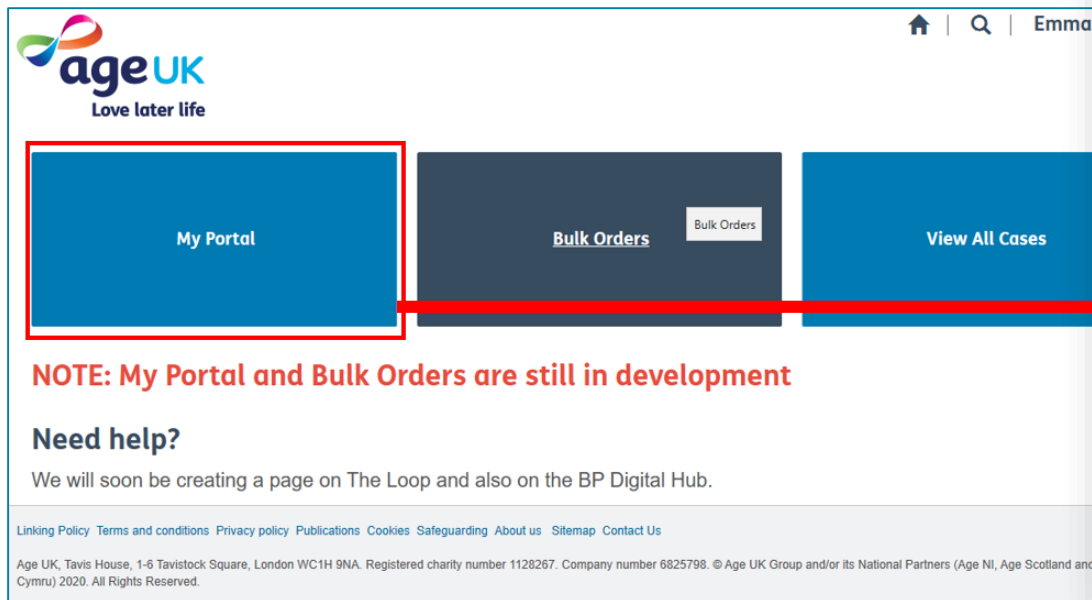
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LAST MODIFIED BY: EMMA CHIN

CONTENTS

INTRODUCTION

To access the area listing your signposts records, first click on the "My Portal" tile, then select **Our Community Signposts.**

This page will refresh and display a list of signposts that already exists in the Age UK database.

From this page you will be able to create a new signpost record, view existing ones and edit these if required.

By default, you will see a list of **active signposts** (*live records that can be edited and are visible in the local directory*).

However if needed, you can change the view to see the list of **inactive signposts** associated with your organisation (*records that have been removed from the local directory*).

You will also be able to see a list of signposts that are pending or have failed our vetting process. See appendix 1 for more information on this.

HOW TO CREATE A NEW SIGNPOST RECORD

The following pages will outline the steps for creating a new signpost record in the portal, for a service provided by a third party. We advise that you only add providers that you trust and would recommend to customers as the record will be displayed in the Age UK local directory.

1. To open blank record, select "**Create New Signpost**".

CREATE NEW SIGNPOST

Doing this will direct you to a new page, where you can type in all the essential information about the signpost.

Any field marked with a red asterisk "*" is seen as a mandatory field and must be completed before you can move onto the next page.

*At any point, if you wish to cancel and discard the changes, just press the "**Our Community Signpost**" link at the top of the form to return to the list of existing records.*

Here is an example of the type of information we would expect to see added to some of the fields within the **About the Signpost** section.

Portal Field Name	Information to be added
Name of the signpost	What the signpost is called e.g. Attendance Allowance Helpline.
Contact number / Email address / Website	The contact details for the signpost, that can be shared with the public.
Image URL	The web address for the image you want visible with this signpost.
Description	A brief explanation about the signpost.

Create a new community signpost

About the signpost

Name of signpost *

Home Support Options

Contact number *

02030331174

Email address *

emma.chin@ageuksuffolktest.org.uk

Website address *

http://www.ageuksuffolktest.org.uk

Image URL

Image URL Mobile

Description *

I&A clinic that allows service users to get advice and support regarding their housing options.

2. Additional information will be required from certain third party providers.

For certain service providers, we require additional information as part of our vetting process. Here you will need to indicate if the provider is:

- A council or government service

- An NHS service provider or GP surgery

- A citizens advice office or branch of a national volunteering service.

If they are, select **Yes**.

If not, select **No**. When you do, a pop up window will appear letting you know that we will need further information to vet this provider.

Don't worry; Age UK National will carry out this additional step. Further details about this process is outlined in <u>appendix</u> 1.

Organisation type

Signpost

Local Age UK

Age UK Suffolk - Head Office

Is the third party provider one of the following: *

- A council or government service
- An NHS service provider or GP surgery
- A Citizens Advice office or branch of a national volunteering organisation (e.g. British Red Cross)

○ Yes ○ No

This site says...

We will send an email to the third party to ask for the company and insurance information.

OK

3. Indicate if a fee is attached to this signpost.

It's important to indicate whether there are any charges to the customer for using this signpost.

Signpost fee

Signpost fee *
○ No ○ Yes

£

Fee details
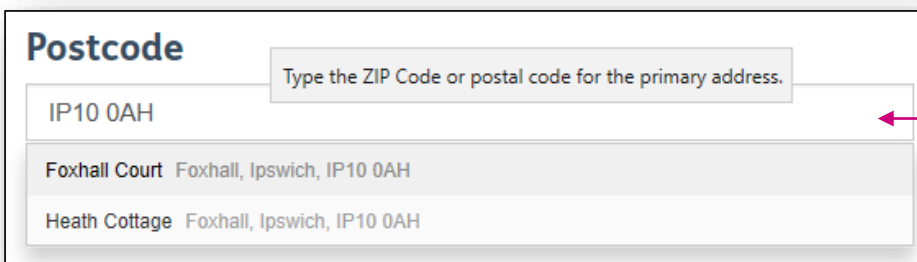
If there is a charge, click on the button next to **Yes** and type the amount.

If needed, you can add any extra information about this fee (e.g. "this fee covers transport costs) to the **Fee details** box.

If the signpost is free, then select **No**.

4. Update the address & opening times grid.

To add the address associated with this signpost, type the postcode into the **Postcode** field.

Address & opening times

Postcode
To update address, search for the postcode below:

IP1 4JP

Organisation opening times
Please specify the opening times

9am - 1pm

Postcode
Type the ZIP Code or postal code for the primary address.

IP10 0AH

Foxhall Court Foxhall, Ipswich, IP10 0AH

Heath Cottage Foxhall, Ipswich, IP10 0AH

Signpost address
Address will be populated once saved.

The system will list addresses that match it based on the information that sits on the Postcode Address File (PAF). To select the relevant one, click on the search results line. The system will then update all the information in the Main Address box when you save the record.

Alternatively you can click into the **Signpost Address** box and edit the individual address lines.

If known, add the opening times of the service.
When you have finished on this page, press the **Next** button.
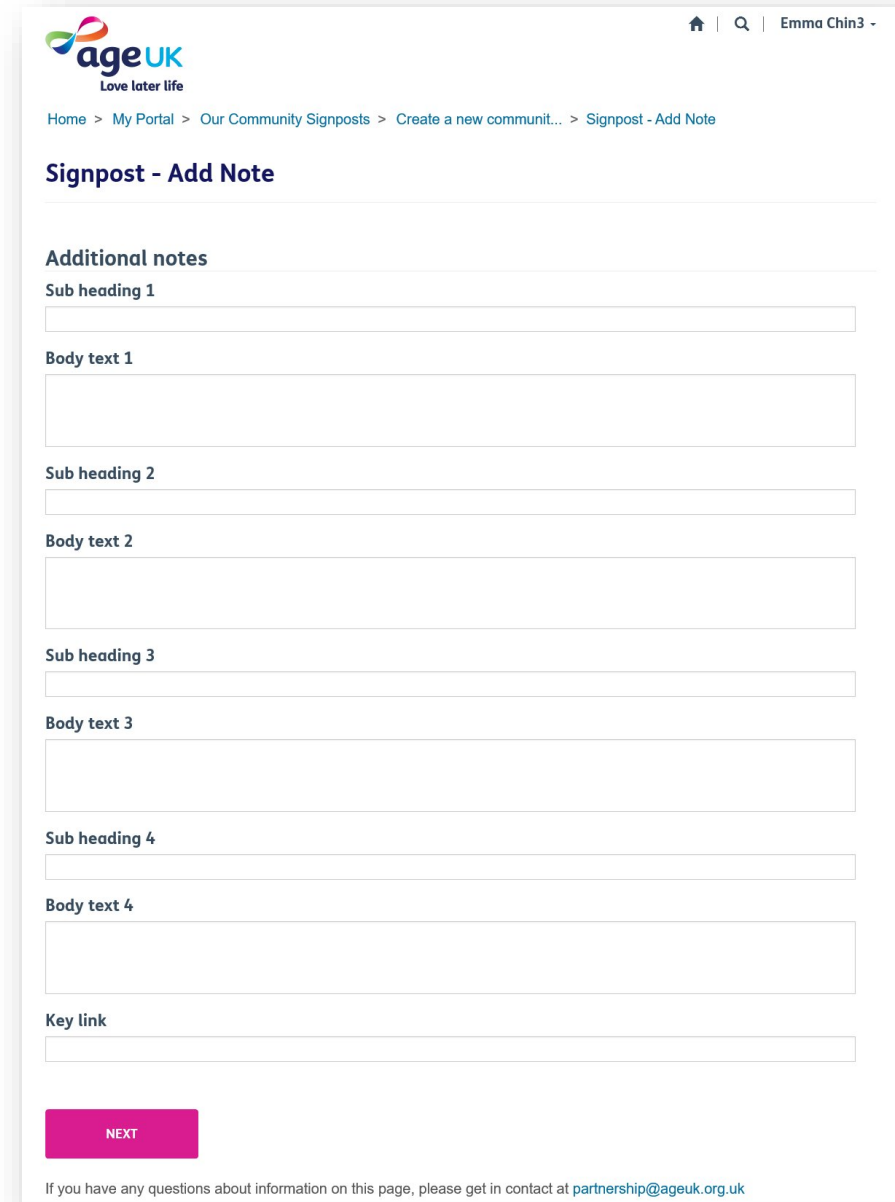
NEXT

5. Add any additional notes/ information regarding the signpost.

Here you have up to four additional description boxes (and subheadings) if you want to include more details about the service.

Any information added here will also be made visible on the web pages in the local directory.

If you already have an existing page on your website dedicate to this signpost, you can add the web address (URL) to the **key link** field at the bottom. We will then create a hyperlink to this page when the record is displayed in the local directory.

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6. Tag the record with a Service Category.

On the "**Select Categories**" page, you'll be able to select and add the service categories that relate to the signpost (in the portal, these are referred to as subcategories).

Select Categories

By category we mean your service category. Please select as many as are required.

ADD A SERVICE CATEGORY

To do this, click on the "**Add a Service Category**" button.

Then in the pop up window, scroll down and tick beside the category/subcategory to select the required service category.

Lookup records ✕

Search 🔍

✔	Subcategory ↑	Category
	Smoke alarm	Handyperson/tradesperson
✔	Social dancing	Socialising and activities
✔	Social groups	Socialising and activities
	Stairlift	Helpful equipment
	Support for carers of people with dementia	Dementia support

< 1 2 3 4 5 6 **7** 8 >

Selected records

Dance classes ✖   Social dancing ✖   Social groups ✖

Add   **Cancel**

You can tick multiple subcategories at once, each appear in the **Selected Records** box. If you've selected on by mistake, then press the **x** to remove them from the selected records box.

The page will refresh, listing all the categories you selected.

When you've finished, press **Add**.

Once you have finished adding all of the necessary information to the signpost record, press **Save**.

A confirmation window will appear:
Select **OK** if you are happy to create the record with the information you added.

Select *Cancel* to exit and go back to the record to make any additional changes.
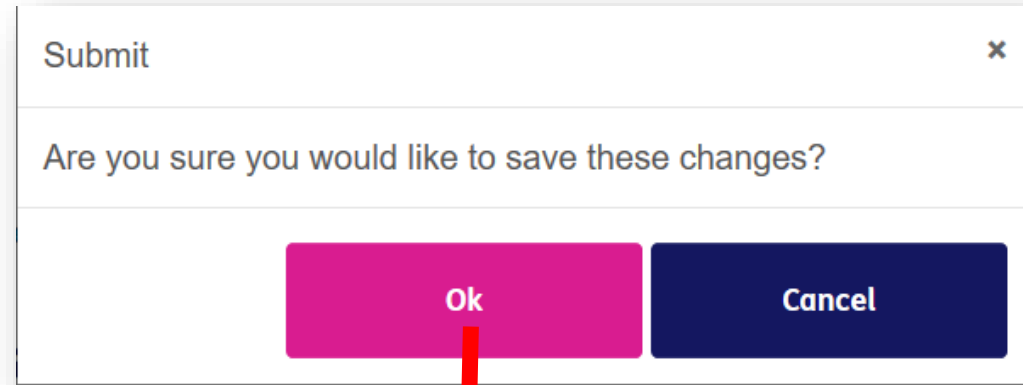
Once the record has been saved, the system will display this confirmation page.

Press the home icon 🏠 or "**Our Community Signposts**" to exit this page.

Submit   ✕

Are you sure you would like to save these changes?

| Ok | Cancel |

🏠 | 🔍 | Emma Chin3 ▾

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Home > My Portal > Our Community Signposts > Create a new communit... > Signpost - Add Note > Select Categories

Select Categories

By category we mean your service category. Please select as many as are required.

Saved

If you have any questions about information on this page, please get in contact at partnership@ageuk.org.uk

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HOW TO VIEW OR EDIT AN EXISTING SIGNPOST RECORD

The following pages will outline the steps for opening and updating signpost already in the portal/local directory. It's important to keep these records up to date so that the information in the Age UK Local Directory remains current.

There are two ways you can open to view an existing record:

Firstly, you can click on the **Organisation (signpost) name** to view the record (1).

Alternatively you can click on the drop-down arrow and select "**View details**" (2).

Using either of the aforementioned methods to open an existing record will present you with a '**Read Only**' version of the form, which you can scroll through to view the information.

If you need to edit an existing record, click on the drop-down arrow to the right of the location name, and select "**Edit**".

ℹ View details   ×

About the signpost

Name of signpost

Pete's Handyman and Van

Contact number *

01234567890

Email address

test@testdaily.oi

Website address

—

Image URL

—

Image URL Mobile

—

Description

Test signpost

Our Community Signposts

Please note: All of this information will show on the Age UK website's Local Directory and customers will see this. You should only add community signposts that you can trust and recommend to customers.

[Search community signpost 🔍]   **CREATE NEW SIGNPOST**

≣ Active Signposts ▾

Organisation Name ↑	Modified On	
Pete's Handyman and Van	15/09/2020 11:42 AM	⌄
VW Legal Advice	28/07/2020 5:39 PM	

ℹ View details
☑ Edit

Scroll through the page and if you need to amend any of the details, click into the field and over-type the existing information with the new details.

If you need to make change to the address, you can either click into the **Postcode** or **Signpost Address** box and follow the same steps outlined on .

If you need to add additional service categories, press the **Add A Service Category** button, and follow the same steps outlined on .

Edit

About the signpost

Name of signpost

Home Support Options

Contact number *

02030331174

Email address *

emma.chin@ageuksuffolktest.org.uk

Website address

http://www.ageuksuffolktest.org.uk

Image URL

Image URL Mobile

Description *

I&A clinic that allows service users to get advice and support regarding their housing options.

ADD A SERVICE CATEGORY

Signpost fee

Subcategory ⬆   **Category**

Housing Options   Information, advice and advo...   REMOVE

If you need to remove a service category from this signpost, press the down arrow on to the right of the category, then select **Remove**. The list will refreash and the categories will no longer be listed

SAVE

Once all of the information has been updated, scroll down and press **Save** to update the record.

Submit ✕

Are you sure you want to submit this record?

Ok   **Cancel**

A confirmation window will appear, and if you are sure you've added all the relevant information select **Ok**.

The changes will be immediately visible in the portal and will be updated in the local directory at the end of the working day.

HOW TO REMOVE A SIGNPOST RECORD.

The following pages will outline the steps for removing a signpost from the search lists in the local directory. The record will still exist in the portal, so you can re-open it if you need to later.

On the Our Community Signposts page:

1. Navigate to the service record you wish to edit.

2. Press the down arrow next to the modified-on date/time column.

3. Select **Edit**.

Scroll down to the bottom of the page and press "**Mark As Inactive**".

Subcategory ↑	Category	
Lunch/food facilities	Café and restaurant	⌄

SAVE

MARK AS INACTIVE

The record has been deactivated. ✕

The page will refresh, and a banner will appear with the following message "*The record has been deactivated*".

The local directory is refreshed at the end of the day, so all changes made in the portal will be visible in the local directory the next working day.

Although signpost records marked as inactive will be removed from the local directory, the records will still be stored in the portal.

Home > My Portal > Our Community Signposts

Our Community Signposts

Please note: All of this information will show on the Age UK website's Local Directory and customers will see this. You should only add community signposts that you can trust and recommend to customers.

| Search community signpost | 🔍 | **CREATE NEW SIGNPOST** | ☰ Active Signposts ▾ |

Organisation Name ↑	Modified On	Active Signposts
VW Legal Advice	28/07/2020 5:3	Inactive Signposts
		BPP - Third Party Pending/Failed Communi

If you want to see any of these records, you will need to switch the default view:
1. Within the Our Community Signpost section, select the **Active Signposts** box.
2. A drop-down list will appear.
3. Select **Inactive Signposts**.

Scroll through the list until you find the record you want to look at. Click on the down arrow next to the modified-on date/time column, and select either:

(a) **View Details** – *this will just be a read only version of the record.*

(b) **Edit** – *this will open a version of the record that will allow you to edit the record.*
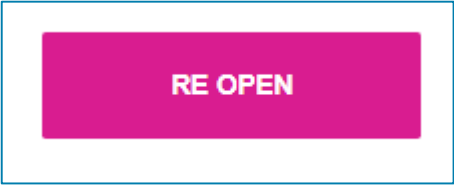
If you wish to re-open a record, select Edit. Once the record opens, scroll down and select the **Re-Open** button.

The record will now be marked as "active" and be visible in the local directory the next working day.

APPENDICES

APPENDIX 1: THIRD PARTY VETTING

We've put in place this vetting process to help make sure that third party providers have adequate insurance to cover their services before they are displayed in the local directory on the national Age UK website.

This means that certain organisations will receive an automated email from Age UK asking for their public **liability insurance** and **public indemnity insurance** where appropriate.

When creating or updating a signpost record, if you select you select **No** in this section, it will trigger an email to be sent to the provider.

Is the third party provider one of the following: *

• A council or government service • An NHS service provider or GP surgery • A Citizens Advice office or branch of a national volunteering organisation (e.g. British Red Cross)

○ Yes ◉ No

**Please ensure their correct and current email address has been added to the record.

The email will ask the provider to complete a business information form, which will need to be **returned to Age UK within 30 days**. Until we received the completed form, their details will not be listed the directory.

We've create a view in the portal, where you can check which providers are still pending or have failed the vetting process.

To access this, click on *Active Signposts*, and from the drop down list, select **BPP – Third Party Pending/ Failed Community Signposts.**

The will refresh the page and display the names of the providers and the current vetting status.

APPENDIX 2: CATEGORY AND SUBCATEGORY LIST

One of the new features in the local directory will give visitors to the site the option to filter their searches based on the type of service they are looking for.

To achieve this, we've added a standardised list of service categories to the both the local directory and the portal.

When adding a new location/shop/service/signpost record, if you tag them with one or more service categories, then this will ensure they are included in any filtered searches.

The full list of current service categories can be found on the Partner Digital Hub, https://bp-digital-hub.ageuk.org.uk/brand-partner-portal-guides/

Lookup records ✕

Search 🔍

✓ Subcategory ↑	Category
1:1 support	Computers/phones/tablets
Accessing the internet	Computers/phones/tablets
Adjustable beds	Helpful equipment
Advocacy	Information, advice and advocacy
Arts and crafts	Socialising and activities

< **1** 2 3 4 5 6 7 8 >

FURTHER SUPPORT

If you need any additional help or come across any other problems, please send an email to BSupportAdmin@ageuk.org.uk.