



# Discontinuations and Shortages (DaSH) Portal

## Marketing Authorisation Holder Administrator Manual

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# User Manual

## 1. Introduction

### 1.1 About the portal

The Discontinuation and Shortages (DASH) Portal was created to improve the process by which Marketing Authorisation Holders notify the Medicines Shortage Team of potential shortages and discontinuations which may/will affect their marketed products.

The system allows you to report and track shortages over their lifetime, as well as keep track of any actions DHSC may assign you to assist with the resolution of these shortages. You may also assign actions to yourself to assist with your own internal response.

The portal is made up of several components, each of which will be discussed in this manual:

- Secure login, comprising:
  - Username/password
  - Multifactor (time-based passcode) authentication
  - Password reset
  - Password lockout
- Shortage reporting
- Shortage action management
- Discontinuation reporting
- Discontinuation action management
- Your company's details
- Viewing company notes
- Adding company notes
- Viewing a list of company users
- User management
  - Adding users
  - Editing users

### 1.2 A few notes about security

When using the portal, you should not:

- Choose to "remember password" when using a shared computer
- Disclose account details to others
- Use easily guessable passwords – though the system will enforce some common-sense password strength rules

## 2. Process information

### 2.1 Escalation points for the portal

If you have a question about functionality in the portal which you can't answer, for example if a user isn't sure how to accomplish a task, or you have a suggestion for a process improvement, contact DHSC at [dash@dhsc.gov.uk](mailto:dash@dhsc.gov.uk).

If one of your users is experiencing a genuine issue with the portal, such as an outage or they have encountered an error, contact DHSC at [dash@dhsc.gov.uk](mailto:dash@dhsc.gov.uk). Start your email subject with DASH Portal Issue: - this will help route the problem to the correct destination. If you do not start your email subject in this way, your issue may take longer to be responded to.

To make sure that the problem can be resolved as quickly as possible, include as much detail as possible about what the user was doing when the error occurred. Include screenshots and a timeline if possible.

## 3. Application access

### 3.1 Requesting access

If you do not have an account, but you believe you should have access, please ask your manager to submit a service request for access.

### 3.2 Signing up

[Watch a video on signing up for the portal](#)

You will receive an email which notifies you that an account has been created for you, the text of which will be something like:

An account has been set up for you on the DHSC DaSH portal. To finish setting up the account, you need to set a password.

Click the link below to access the system and choose a password for your account. The link will expire after 24 hours.

Importantly, the system will use your first and last name and the link text will include the address of the portal: <https://report-discontinuations-shortages.service.dhsc.gov.uk>. The journey will ask you to enter your email address to confirm that it's you.

Next, you will be asked to create a password. Your password should:

Be between 8 and 60 characters in length

Contain at least one of each of the following:

Upper case letters

Lower case letters

Numbers

Special characters

Not contain your email address

Finally, you will be asked to set up two-factor authentication. You can use either the provided QR code on the right of the page, or the secret shown below to add the time-based code to your authenticator. Once you've set up the code, enter the current value and click Continue to finish setting up your account.

More information on setting up two-factor authentication is in [Appendix I](#).

### 3.3 Logging in

The address of the portal is <https://report-discontinuations-shortages.service.dhsc.gov.uk>. Prior to logging in, you will be presented with a message:

## DHSC DaSH

Welcome to the Discontinuations and Shortages (DaSH) portal, a system for Marketing Authorisation Holders to submit notifications to the Department of Health & Social Care Medicine Supply Team relating to potential medicine shortages, discontinuations or updates on current medicine supply issues.

To proceed to the Department of Health & Social Care Medicine Supply Team's DASH portal, click on the link below.

Login

Click the Login button to proceed to the login screen.

The login screen looks like this:

## Sign in

Email

Password

Authenticator

### Notice

You are about to login to the Department of Health & Social Care's Discontinuations and Shortages (DaSH) portal. This is managed on behalf of the Department by the NHS BSA. The DHSC Medicine Supply Team will acknowledge receipt of the information submitted and conduct a thorough risk assessment in order to determine the potential impact and management options. Companies may be approached for further information.

DHSC recognises that the information submitted is confidential and commercially sensitive and must be handled in accordance with the statutory restrictions on disclosure in s264B of the National Health Service Act 2006.

[Sign in](#) [Forgotten password](#)

Enter your email address, password and the current time-based code from your authenticator app. Click Sign in to sign in. After signing in, you'll be taken to the dashboard.

## 3.4 Resetting your password

[Watch a video on how to reset your password](#)

If you have forgotten your password, you can request a password reset. Visit the login page and click Forgotten password. Enter the email address associated with your account and click Send email. If the email address is associated with an account, you will be sent an email.

The email will look much like the account activation email, will use your first and last name will contain the address of the portal: <https://report-discontinuations-shortages.service.dhsc.gov.uk>.

The process is very similar to the activation process, but you won't be asked to set up the authenticator code. In addition to the password strength restrictions discussed in the Signing up section, your password must also not be a password you've used before.

## 4. Navigation

### 4.1 A brief overview of the system headings

[Watch a video overview of the main system headings](#)

[Watch a video overview of the admin-specific headings](#)

Once you have logged in, the headings at the top of the page will take you to different locations in the system:

Dashboard – this will bring you back to the dashboard. Here you will find a list of open cases and any active actions assigned to you.

Shortages – this will take you to the shortages page. From here, you can:

View a list of all shortages reported by your company

View a list of shortages raised by you

View a particular shortage

Report a new potential shortage

Discontinuations – this will take you to the discontinuations page. From here, you can:

View a list of all discontinuations reported by your company

View a list of all shortages raised by you

View a particular shortage

Report a new potential shortage

My account – this will take you to a page which allows you to change your password

Users – this will take you to the user management page. From here, you can:

Add users

Edit users

My company – this will take you to the company details page for your company.

From here, you can:

View your company details

Edit your company's address and postcode

View any company notes

Add company notes

View a list of users for your company

Log out – this will log you out of the system

## 5. Shortages

### 5.1 Reporting a shortage

[Watch a video on reporting, viewing, and editing a shortage](#)

From the Shortages page, click Report new potential shortage. From here, you will be asked a series of questions to gather information about the shortage, starting with the date you became aware of the shortage:



## When did you become aware of the shortage?

For example, 01 01 2020. You cannot specify a future date.

Day    Month    Year  
       

Answer each question and click Continue to move to the next question. You can use the breadcrumb at the top of the page to revisit questions you have already answered. Most questions are straightforward but there are a few notes regarding particular pages:

### Who is dealing with this shortage?

This page will ask you to select a contact from your company or add a new contact specific to this shortage.

Click Add to add someone to the list and Remove to remove them from the list.

If you decide to Add a new contact, you will be asked “Tell us about the contact,” where you will need to specify the person’s first and last name as well as their email address before being returned to the contact list.

Once you’ve added the contacts you want to, click Continue.

### Which product is experiencing a shortage?

This page will ask you to specify the product pack experiencing a shortage. You can search by:

- Product/Generic Name
- Supplier (this may not be the name of your MAH)
- SNOMED (the pack-level SNOMED code)
- Form (an autocomplete – you must click the option to populate it correctly)

Once you’ve searched for a product, you will be given a list of results, which will look something like this:

System Products	
Details	Add
<a href="#">▶ Paracetamol 500mg caplets - Wockhardt UK Ltd - Pack Size: 100</a>	<a href="#">Add</a>
<a href="#">▶ Paracetamol 500mg capsules - Focus Pharmaceuticals Ltd - Pack Size: 100</a>	<a href="#">Add</a>
<a href="#">▶ Paracetamol 500mg capsules - Teva UK Ltd - Pack Size: 32</a>	<a href="#">Add</a>
<a href="#">▶ Paracetamol 500mg caplets - A A H Pharmaceuticals Ltd - Pack Size: 100</a>	<a href="#">Add</a>

You can expand each of these by clicking on the name of the item. This will show more information about each item and allow you to determine whether you have found the right one.

Once you're confident that you've found the correct product pack, click Add to add it and click Continue. If you make a mistake, you can click Remove after you add it to search again.

What is the reason for the shortage?

If you select "Other", you will be asked to provide some more information about the reason – this is required.

What stock levels and market share does the product have?

You must provide an estimate of the quantity available (and the unit which you are referring to, "packs," "bottles" or "litres") as well as your estimated monthly sales of that unit.

If you don't know your market share, check the "Don't know" box. If you do tick this box, any value you enter into the percentage box will be removed.

Is this shortage linked to any other shortages?

If your company has reported at least one other shortage, you will be asked if your current shortage relates to any of them. This might be if a shortage has had a knock-on effect on other products or pack sizes.

Which shortage or shortages is this shortage linked to?

You will be given a list of shortages present in the system. You can Add as many shortages as needed and Remove if you make a mistake.

You can also search by shortage reference (the 6-digit code) or the product name as written on DaSH to narrow down the list of results.

Once you have added the shortages you want to add, click Continue.

#### Alternative Products

If you indicate that there may be alternative products available which your company provides, you will be asked to specify what these products are. This page is the same as the previous product search page, but it allows you to add more than one product to the list.

Once you've finished entering the details of your shortage, you'll be presented with a screen which allows you to check over the details you've entered. If you need to amend them, you can use the breadcrumb at the top of the page to return to a particular section, or the Change links down the right-hand side of the screen.

Once you're satisfied with the information you've provided, click Continue to save the shortage. You will be returned to the Shortages page where your reported shortage will now be visible and will have been given a unique ID which you can use to refer to this shortage. This ID is used elsewhere in the system to refer to this shortage.

## 5.2 Viewing a shortage

From the dashboard, you can click the hyperlink on the ID for a particular shortage.

From the Shortages page, you can click the View link.

From the view page, you can change the details you provided if required by using the Change links down the right-hand side.

From the view page, you can also see any actions which may be attributed to the shortage at the bottom of the page and add a new one if necessary.

### Actions

#### List of Available Actions

Created	Assigned To	Status	Due Date	Notes	Documents	View
1 Oct 2020 - 16:59	somebody@something.com	To Do	2 Oct 2020	0	0	<a href="#">View</a>

Add a new action

## 5.3 Viewing a list of shortages and searching

From the dashboard, you can click the Shortages link at the top of the page. This will show you all open shortages from your company, as well as a link to show just shortages that you've raised. You can also view the same but for closed shortages.

There is also a search box available:

# My Potential Shortages

## Manage

Search for shortages by product name or reference

Search

[Open Shortages](#)

[Closed Shortages](#)

My Open Shortages

[My Closed Shortages](#)

Sort by

Exhaustion Date

Reference	Product	Raised By	Exhaustion Date	Resupply Date
<a href="#">ATPMXQ</a>	Paracetamol 500mg tablets (100 TABLET)	email@company.com	23/05/2022	24/05/2022

The search box allows you to search by product name and shortage reference.

## 5.4 Reporting a shortage as back in stock

When viewing a shortage, you can choose to amend whether the shortage has come back into stock - this heading is listed among the rest of the information you provided when reporting the shortage.

You will be asked to choose Yes or No.

**Has this product returned to stock?**

Yes

No

If you choose Yes, you'll be asked to confirm the resupply date.

### Is this resupply date correct?

**29 Jun 2022**

Yes

No

If you select that the date is no longer correct, you will be taken to a page asking to update it.

## 6. Discontinuations

### 6.1 Reporting a discontinuation

[Watch a video on reporting, viewing, and editing a discontinuation](#)

From the Discontinuations page, click Report new discontinuation. From here, you will be asked a series of questions to gather information about the discontinuation, starting with the date you became aware of the discontinuation:

## When did you become aware of the discontinuation?

For example, 01 01 2020. You cannot specify a future date.

Day    Month    Year

<input type="text"/>	<input type="text"/>	<input type="text"/>
----------------------	----------------------	----------------------

Answer each question and click Continue to move to the next question. You can use the breadcrumb at the top of the page to revisit questions you have already answered. Most questions are straightforward but there are a few notes regarding particular pages:

### Select Related Contacts

This page will ask you to select a contact from your company or add a new contact specific to this discontinuation.

Click Add to add someone to the list and Remove to remove them from the list.

If you decide to Add a new contact, you will be asked “Tell us about the contact,” where you will need to specify the person’s first and last name as well as their email address before being returned to the contact list.

Once you’ve added the contacts you want to, click Continue.

### Select Related Product

This page will ask you to specify the product pack which will be discontinued. You can search by:

- Product/Generic Name
- Supplier (this may not be the name of your MAH)
- SNOMED (the pack-level SNOMED code)
- Form (an autocomplete – you must click the option to populate it correctly)

Once you’ve searched for a product, you will be given a list of results, which will look something like this:

## System Products

Details	Add
<a href="#">▶ Paracetamol 500mg caplets - Wockhardt UK Ltd - Pack Size: 100</a>	<a href="#">Add</a>
<a href="#">▶ Paracetamol 500mg capsules - Focus Pharmaceuticals Ltd - Pack Size: 100</a>	<a href="#">Add</a>
<a href="#">▶ Paracetamol 500mg capsules - Teva UK Ltd - Pack Size: 32</a>	<a href="#">Add</a>
<a href="#">▶ Paracetamol 500mg caplets - A A H Pharmaceuticals Ltd - Pack Size: 100</a>	<a href="#">Add</a>

You can expand each of these by clicking on the name of the item. This will show more information about each item and allow you to determine whether you have found the right one.

Once you're confident that you've found the correct product pack, click Add to add it and click Continue. If you make a mistake, you can click Remove after you add it to search again.

What is the reason for the discontinuation?

If you select "Other", you will be asked to provide some more information about the reason – this is required.

What stock levels and market share does the product have?

You must provide an estimate of the quantity available (and the unit which you are referring to, "packs," "bottles" or "litres") as well as your estimated monthly sales of that unit.

If you don't know your market share, check the "Don't know" box. If you do tick this box, any value you enter into the percentage box will be removed.

## Alternative Products

If you indicate that there may be alternative products available which your company provides, you will be asked to specify what these products are. This page is the same as the previous product search page, but it allows you to add more than one product to the list.

Once you've finished entering the details of your discontinuation, you'll be presented with a screen which allows you to check over the details you've entered. If you need to amend them, you can use the breadcrumb at the top of the page to return to a particular section, or the Change links down the right-hand side of the screen.

Once you're satisfied with the information you've provided, click Continue to save the shortage. You will be returned to the Discontinuations page where your reported discontinuation will now be visible and will have been given a unique ID which you can use to refer to this discontinuation. This ID is used elsewhere in the system to refer to this discontinuation.

## 6.2 Viewing a discontinuation

From the dashboard, you can click the hyperlink on the ID for a particular discontinuation.

From the Discontinuations page, you can click the View link.

From the view page, you can change the details you provided if required by using the Change links down the right-hand side.

From the view page, you can also see any actions which may be attributed to the discontinuation at the bottom of the page and add a new one if necessary.

### Actions

#### List of Available Actions

Created	Assigned To	Status	Due Date	Notes	Documents	View
1 Oct 2020 -16:59	somebody@something.com	To Do	2 Oct 2020	0	0	<a href="#">View</a>

Add a new action

## 6.3 Viewing a list of discontinuations and searching

When viewing a discontinuation, you can click the Discontinuations link at the top of the page. This will show you all open discontinuations from your company, as well as a link to show just discontinuations that you've raised.

# My Discontinuations

## Manage

Search for discontinuations by product name or reference

Search

[Open Discontinuations](#)

[Closed Discontinuations](#)

My Open Discontinuations

[My Closed Discontinuations](#)

Reference	Product	Raised By	Occurrence Date	Exhaustion Date
<a href="#">ATO20</a>	Paracetamol 500mg tablets (Paracetamol 500mg caplets) (32 TABLET)	email@company.com	01/05/2021	01/05/2021

The search box allows you to search by product name and discontinuation reference.

## 7. Actions

### 7.1 About actions

Actions have an assigned user, a status, a due date and a description:

#### Action Details

<b>Assigned User</b>	someone@something.com
<b>Status</b>	To Do
<b>Due Date</b>	2 Oct 2020
<b>Description</b>	Stock take

The description is a free-text box which allows you to describe the task in some detail.

Actions can also have notes added, and documents uploaded – you can do this once you've created the action to start with.

### 7.2 Creating an action

[Watch a video on creating, viewing, and responding to an action](#)

Navigate to the “view” page for a discontinuation or shortage. At the bottom of the page, click the Add a new action button.

Provide a description – this can be up to 500 characters. Click Continue.

The due date must be in the future. If you're editing an existing action, and the due date has passed, you must either leave the due date as it is or change it to a future date.

The “High Priority” field will typically be used by DHSC, but this can be used by you to mark actions as particularly urgent. Once you have filled these in, click Continue.

You may only assign an action to users who are registered on the portal and who belong to your company. Once you have assigned a user, click Continue.

By default, the action's status will be set to “To Do.”

You will be taken to a confirmation page. You can use the Change links to change the details you've provided. Once you're happy with the detail you've provided, click Save Action. An email will be sent to the assignee and you'll be returned to the “view” page for the related discontinuation or shortage.



## 7.3 Viewing an action

Navigate to the “view” page for a discontinuation or shortage. At the bottom of the page, a table with related actions will be shown. Click the View link for the action.

From the view page, you can change the details you provided if required by using the Change links down the right-hand side.

From the view page, you can also see two tabs for any action notes and documents which may be attributed to the action at the bottom of the page and add a new one if necessary. You can switch between them by clicking on the tabs.

## 7.4 Responding to an action

When you are assigned an action, you will be sent an email which looks something like this:

An action has been assigned to you against Paracetamol 500mg tablets.

To log in and see details of the action, click the link below.

Click the link in the email to be taken to the action (you may have to log in first). The description of the action will detail what is required of you, and there may be extra notes under the “Action Notes” tab which may provide more information. By default, your action will have a status of “To Do”.

Once you’ve completed your action, you can use the Complete Action button to mark the action as done. You’ll be presented with a summary of the action you’re about to close – if you’re happy that it’s the action you want to close, click the Complete Action button on this page to close it.

Note: once you’ve marked an action as “Done,” you won’t be able to add notes or documents to it anymore.

## 7.5 Adding an action note

[Watch a video on action notes and documents](#)

Navigate to the “view” page for an action. At the bottom of the page, make sure the “Action Notes” tab is selected. Click the Create note button. You will be asked to give the note a title and summary. Click Save note to be returned to the action view page – your note will now be visible:

Action Notes **Documents**

---

## Notes

Add a new note

▶ [26-Oct-2021 16:59 - My note - \(Updated 26-Oct-2021 16:59\)](#)

Click on the title of the note or the arrow to expand/collapse the note:

Action Notes **Documents**

---

## Notes

Add a new note

▼ [26-Oct-2021 16:59 - My note - \(Updated 26-Oct-2021 16:59\)](#)

My summary

## 7.6 Adding a document

Navigate to the “view” page for an action. At the bottom of the page, make sure the “Documents” tab is selected. Click the Add Document button. You will be asked to give the document a title (the filename will be changed for privacy reasons) and pick a file to upload.

The allowed file types are recorded in [Appendix II](#).

Once you have chosen a valid document and specified a title, click Save Document.

The document will be uploaded, and you will be returned to the view action page. You can click the “Documents” tab to see the file you just uploaded:

Action Notes **Documents**

---

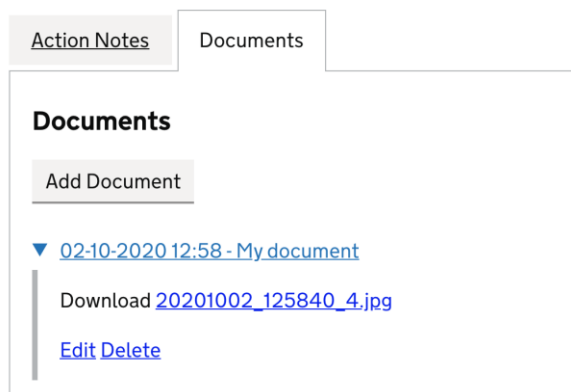
## Documents

Add Document

▶ [02-10-2020 12:58 - My document](#)

Click on the title of the document or the arrow to expand/collapse the document.

Once expanded, you can see the details of the document:



Note: files are virus scanned before being made available for download. You may not immediately see your file, and it may show as being unavailable for a short period of time. After this period, the file will be made available for download, and the link will be available.

You can click the filename to download the document, the Edit link to change the title (or upload a new version of the document) and Delete to remove the document from the system – though a record that there was once a file will still be shown.

## 7.7 DHSC Actions

Occasionally DHSC may directly assign you an action, rather than one specifically related to one of your notifications. This will appear on the dashboard alongside the other actions assigned to you. You can respond to it as you would any other action and set the status to “Done” as you would normally.

## 8. Managing your company

### 8.1 About the My Company page

[Watch a video on viewing and editing your company's details](#)

The My Company page displays your company's information, any notes which have been added against your company, and a list of users for your company.

By using the edit link, you can change your company's address and postcode. In order to change your company's name, you must contact DHSC.

You may also add notes to your company such as availability, preferred contact information, etc.

## 8.2 Editing your company information

From the My Company page, click the Edit link next to your company's name:

### MAH Edit

<b>Name</b>	MAH
<b>Address</b>	MAH Address
<b>Postal Identifier</b>	NE15 8NY
<b>Marketing Authorisation Holder</b>	Yes
<b>Active</b>	Yes

You will be taken to a page where you can edit your company address and postal identifier (postcode). Once you have finished making changes, click Save company to return to the My Company page.

## 8.3 Adding/viewing company notes

Any notes which have been added against your company will be shown in the "Company Notes" tab. You can use the small form to the right of the list to add a new note:

The screenshot shows a web interface with two tabs: 'Company Notes' and 'Company Users'. The 'Company Notes' tab is active. Below the tabs, there is a section titled 'Company Notes'. To the left of this section is a blue arrow pointing to the word 'Title'. To the right, there is a text input field for the title. Below the title field is a larger text area for the summary. At the bottom of this form is a green button labeled 'Add Note'.

To expand a note, click on the title of the note or the arrow:

## Company Notes

▼ [Title](#)

Summary

By someone@something.com - 5 Oct 2020 13:01

## 8.4 Viewing company users

From the My Company page, switch from the Company Notes tab to the Company Users tab.

A list of users registered with the system will be shown.

## 9. Notifications

### 9.1 About notifications

DaSH now creates notifications when note-worthy events happen within the system. These notifications are intended to be high-level and not a comprehensive run-down of important information.

### 9.2 Viewing notifications

Upon login, if you have notifications, you'll see a message underneath your username advising you of this:



Clicking on this link will take you to the notifications list.

### 9.3 The notifications list

Actions

## Action Notifications

Notification	Link	Delete
<a href="#">NEW: An action has been assigned to you (Paracetamol 500mg tablets (Paracetamol 500mg caplets) (100 TABLET))</a>	<a href="#">View</a>	<a href="#">Delete</a>

[Clear all notifications](#)
[Manage notification preferences](#)

The list includes one or more tabs which split notifications into the following categories:

- Shortages – this includes notifications about potential shortages
- Discontinuations – this includes notifications about discontinuations
- Actions – this includes notifications about actions

You can change tabs by using the arrow keys or clicking on each tab heading.

Clicking on the arrow or headline of a notification expands it.

At the bottom of the page there are two buttons:

- Clear all notifications removes all the current notifications you have under all tabs
- Manage notification preferences takes you to a page where you can decide which notifications you want to subscribe to

### 9.4 The structure of a notification

Actions

## Action Notifications

Notification	Link	Delete
▼ <a href="#">NEW: An action has been assigned to you (Paracetamol 500mg tablets (Paracetamol 500mg caplets) (100 TABLET))</a>	<a href="#">View</a>	<a href="#">Delete</a>
<b>Summary</b> An action for case AN4LV4 has been assigned to you		
Created at 11:02 04 Nov 2021		

All notifications will have:

- a headline, the text next to the arrow which gives a high-level overview of what you're being notified about

a summary, which may contain more information about the specifics of the notification

a created stamp, which shows when the event happened

a view link, which will take you to the item which the notification is for (this will mark the notification as having been read and will remove the NEW: text beside the headline)

a delete link, which will delete the notification

## 9.5 Clearing notifications

Use the Clear all notifications link on the notifications list to clear all notifications. This will permanently delete all your current notifications but does not remove the cases or actions which the notifications were about.

When clicking the link, you will be presented with a warning message to prevent accidental deletions.

## 9.6 Notification preferences

From the notifications list, click the Manage notification preferences button. This will take you to the notification preferences page.

[Notification list](#) > Manage notification preferences

# Manage notification preferences

## Shortages

You will be notified when...

You have been added as a contact to a shortage

A product is due out of stock in the next 2 days

A product is due back in stock in the next 2 days

One of your shortages has been archived

## Discontinuations

You will be notified when...

You have been added as a contact to a discontinuation

A discontinued product is due out of stock in the next 2 days

One of your discontinuations has been archived

On this page, you can check and uncheck the various notifications which the system offers. If a box is ticked, you will receive a notification when the corresponding event occurs. If it is unchecked, your existing notifications of that type will remain, but you won't get any future notifications.

Once you've made changes, click Save notification preferences at the bottom of the page.

A full list of notifications which the system sends is available in [Appendix III](#)

## 10. User management

### 10.1 About user management

[Watch a video about adding and editing users](#)

The Users page shows a list of users who you have authority to edit. This may not be every single user assigned to your company – this is by design. To create a user in the portal, you will need the following information:

- First Name
- Last Name
- Email address

You must ensure that the user's email address is correct, including making sure that the part of the email address after the "@" symbol is valid for your company as this is your responsibility as a system administrator.

If an account is created in error, the account can be disabled and locked. However, the more time which passes between the account being created and the account being disabled, the greater security risk posed. It is important that you double and triple check this information.

### 10.2 Adding a user

From the Users page, click the Add user button. You will be shown a form asking for the following information:

- First Name – the first name of the user
- Last Name – the last name of the user
- Email address – the company email address of the user
- Company – your own company will be listed – select this option
- User type – choose the role you intend the user to have
- Account active – whether or not the account can be used to access the portal



Account locked – this field is used to show whether the user has locked their account through too many failed attempts at entering their login information  
Default contact – whether a user should be shown in the list of contacts when your company is reporting a shortage/discontinuation

Once you've entered the above information, click Save user to be returned to the Users page.

#### 10.2.1 About user types

Which user types you're allowed to create is controlled at a higher authorisation level. If a user type you believe you should have the authorisation to create is missing, please contact DHSC.

#### 10.2.2 About default contacts

You can create a user in the system without making them a default contact. You may also add a person as a contact to a shortage or discontinuation even if they are not a default contact in the system, however you will have to do this manually.

#### 10.2.3 About account lockout

Accounts are locked after 10 unsuccessful login attempts. At this stage, users can either reset their password (from the login screen, detailed above) to unlock their account, or an administrator can amend the "Account locked" field to "No" if the user is confident that they have remembered their login information.

### 10.3 Editing a user

This works the same way as adding a user. From the Users page, click Edit for a user in the list. You will be taken to the same form for adding a user, at which point you can amend any values and click Save user to be returned to the Users page.

### 10.4 Viewing a user

From the Users page, click View to be taken to a read-only view of the user's information.

## 11. Archival

### 11.1 A few words about archival

Once you've taken all appropriate action relating to a notification, DHSC may close and archive the notification. Notifications are archived to avoid the day-to-day operations of the system being cluttered with historic data.

## **11.2 Searching for an archived notification**

From the Archive page, you can search by a variety of fields. These are:

Generic Name (the generic name of the product relating to the notification)  
Branded Name (the branded name of the product relating to the notification)  
Case Reference (the 6-character DaSH reference for the notification)  
Case Type (the type of the notification – this is mandatory)  
Start Date (the start of the date range to search – based on reported date)  
End Date (the end of the date range to search – based on reported date)

You can enter as many or as few search terms as you wish, however case type is mandatory. To search, click the Search button.

## **11.3 Viewing search results**

After clicking search, you will be taken to a results page which lists any matches for your search. From here, you can click the Reference link to be taken to a page showing the details of the notification, though the notification is not editable.

# Appendix I

## Multifactor Authentication (aka MFA or 2FA)

### An introduction to multifactor authentication

Multi-factor authentication is used to provide an extra layer of security and protect your data. There are many different kinds of multi-factor authentication.

The approach used in DaSH is a 6-digit passcode which changes every 30 seconds. Because this is only one extra authentication step, this is referred to as two-factor authentication, or 2FA.

To make this work, you need to make sure you've got an authenticator app installed on one of your work devices, and you must have it to hand when you want to log in to the system. You cannot access the portal (or complete the sign-up journey) without one.

### Choosing an app

There are a lot of options for authenticator app but two that are recommended are Google Authenticator and Authy.

Google Authenticator is available for mobile devices. Authy is available for mobile devices and for desktop devices, as well as a browser plugin. It is recommended that you use one of these solutions. If you have a secure work mobile, you can use either Google Authenticator or Authy. If you only have a work computer, you can use Authy.

Any Authenticator app which can be used to generate verification codes can be used but refer to your company's security guidance to check that software is approved before downloading it.

### Installing Authy/Google Authenticator on a mobile device

The Google Play Store has an icon that looks something like this:



The Apple App Store has an icon that looks something like this:



Depending on whether you're on an Apple device or an Android device, you'll see one of these icons somewhere on your device. Consult your phone's manual to find out exactly where it will be. If your organisation has a mobile device management policy, you may need to contact your organisation's mobile device administrator in order to get one an authenticator installed.

Once you've found either the Play Store or the App Store, you can search for either Google Authenticator or Authy.

As of October 2020, the Google Authenticator logo looks something like this:



It should be displayed in either store as "Google Authenticator" with a provider of "Google LLC".

As of October 2020, the Authy logo looks something like this:



It should be displayed as "Twilio Authy 2-Factor Authentication" (Play Store) or "Twilio Authy" (App Store) with a provider of "Authy" (Play Store) or "Authy Inc." (App Store).

You should have a button for "Install" or "Get" or "Download" – click this button to start the download.

## Installing Authy on a computer

Authy provides downloads and guides for its software at <https://authy.com/>

You can use these guides to help familiarise yourself with the use of Authy as a 2FA app. As of October 2020, the downloads page is available at <https://authy.com/download/>

To download Authy, under the "Desktop" portion, choose your operating system from the dropdown and click Download. If you don't know your operating system, ask your manager or IT help desk for assistance – you may also have to ask your help desk to install Authy.

If you are installing yourself, start the installer and follow the guidance to install Authy. Unless instructed otherwise by your IT department, use the defaults for any settings you are asked for.

## **Using Google Authenticator to add a code**

When you first download Google Authenticator and open it, you'll be asked to add your first account. Leave this as is until you're ready to scan the QR code described in the activation instructions earlier in the manual.

When the QR code is displayed on screen, line it up with your phone's camera. Once scanned, Google Authenticator will display a 6-digit code, which will refresh every 30 seconds.

If you already have a code added, you can use the + in the bottom corner to scan a new QR code.

If you cannot scan the QR code, the code displayed underneath can be entered by using the Enter a setup key option. You must enter this exactly right or it won't work.

## **Using Authy to add a code**

Using Authy is similar to using Google Authenticator. After opening Authy, press the + to add a new code. You can then scan the QR code by pressing the Scan QR Code button to open the camera.

Once scanned, Authy will display a 6-digit code, which will refresh every 30 seconds.

If you cannot scan the QR code, the code displayed underneath can be entered by using the Enter key manually option. You must enter this exactly right or it won't work.

## **Using your time-based code**

Once you've scanned the QR code once, you never have to scan it again. The 30-second code will work even if your device isn't connected to the internet (although you'll need to be connected to the internet to access the portal).

When logging in, enter the current code alongside your email and password.

If the portal tells you that the code is incorrect, it's possible that the code has just switched over to another 30-second code as you were logging in. Make sure there's plenty of time left on the code and re-enter your details. You can enter your email and password and wait until the code has refreshed before entering it if you need longer.

# Appendix II

## File Types

### File treatment

Files are limited to particular extensions. This is to prevent the upload of malicious files to the portal which might compromise your data. As well as restricting the file extensions you may upload, the content of the file must match the file extension.

Normally, this won't make any difference and you can ignore it. If you are notified that your file extension doesn't match the file content, you may need to create a new version of your file as it may have become corrupted.

Your files are virus scanned and will be made available once they've been verified as clean.

### Allowed extensions

The current allowed extensions are:

- msg
- eml
- xlsx
- docx
- txt
- jpg
- pdf
- png
- pptx

# Appendix III

## System Notification List

DaSH sends notifications under certain conditions. All of these can be disabled. Certain events also send an email – the notifications can be disabled, but the emails will always be sent.

Notification	Sends Email?
Shortage back in stock in 2 days	No
Assigned shortage has been archived	No
Assigned discontinuation out of stock in 2 days	No
Assigned discontinuation has been archived	No
Action assigned to you	Yes
Action assigned to you has been updated	Yes
Note added to assigned action	Yes
Document added to assigned action	Yes
Assigned action is due	Yes
Assigned action is overdue	Yes
Assigned action has been reopened	Yes
Added as a contact to a shortage	No
Shortage out of stock in 2 days	No
Added as a contact to a discontinuation	No

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