

# Athena



## User Guide

### Athena Local Authority

## Review Process

A review of current SOPs should take place annually.

Review Date:	24/02/2026
Approved by:	
Expiry Date:	23/02/2027

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## 1. Access Process: Registration

To access the CLD dashboard, the user will be required to register for access to Athena. Athena uses OKTA to access. OKTA is a single sign on system that will allow you to access Athena using your username and password. This will allow you to access the Client Level Data dashboard.

## 2. OKTA

Athena uses OKTA to access, so if you already have an account when you register, Athena will link your OKTA and Athena accounts together. If you do not have an OKTA account, Athena will create one for you when you register.



### NHS England Applications Sign In

Username

Password

Remember me

[Need help signing in?](#)

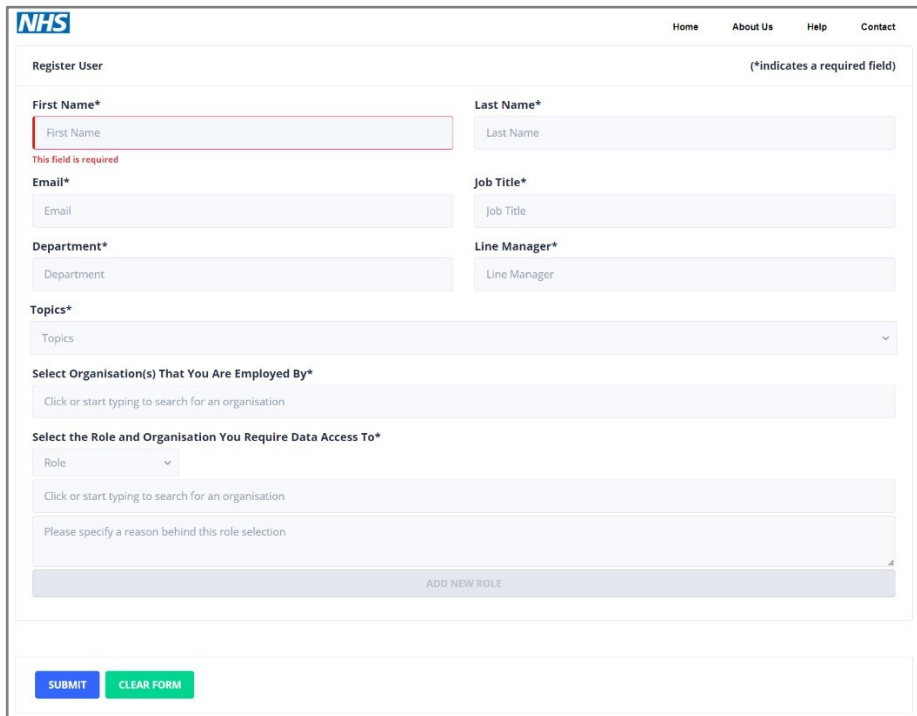
If you are unsure of your OKTA credentials or are struggling to remember your password or security question, please contact the helpdesk on [Agemsart.apps@nhs.net](mailto:Agemsart.apps@nhs.net) who will be able to assist you.

If you have not had an OKTA account before, when you register for Athena, you will receive an automatic email from OKTA, where you will need to activate your OKTA account before logging in.

### 3. Process of Registration

Please register for Athena at the following webpage:  
<https://athena.ardengemcsu.nhs.uk/home>.

Select the **Register button**. This will take you to the Register User page.



The screenshot shows the 'Register User' form with the following fields and sections:

- First Name\*** (text input)
- Last Name\*** (text input)
- Email\*** (text input)
- Job Title\*** (text input)
- Department\*** (text input)
- Line Manager\*** (text input)
- Topics\*** (dropdown menu)
- Select Organisation(s) That You Are Employed By\*** (search input)
- Select the Role and Organisation You Require Data Access To\*** (role dropdown, search input, and text area)
- ADD NEW ROLE** (button)
- SUBMIT** (button)
- CLEAR FORM** (button)

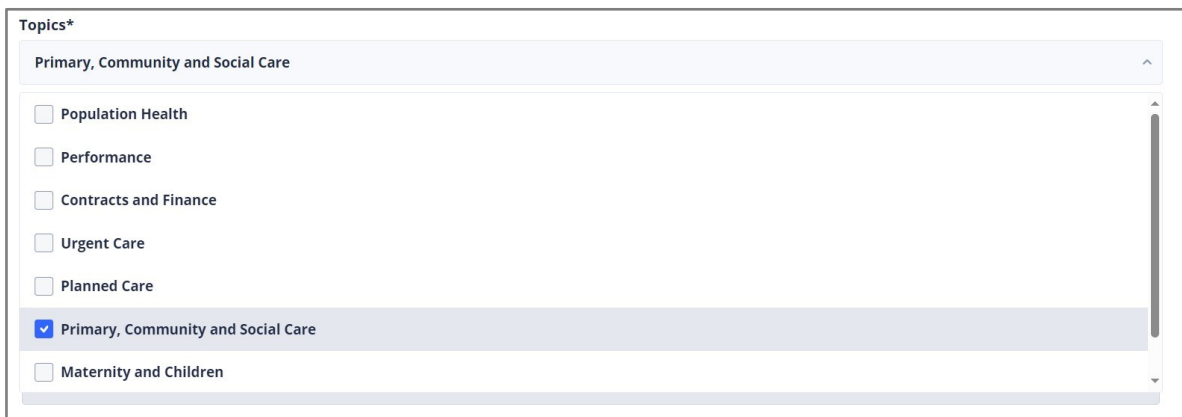
1. You will first need to enter your **First Name, Last Name, Email, Job Title, Department, and Line Manager**.

Please ensure you use an accredited email address. A list of accredited email addresses can be found here: <https://digital.nhs.uk/services/nhsmail/the-secure-email-standard#listof-accredited-organisations>.



2. You will then be required to select report **Topics**. From the menu select the report Topics you require.

**Please ensure that 'Primary, Community & Social Care' is selected for access to the CLD dashboard.**



- Next, please enter the **Organisation you are employed by** with either the full organisation name or the ODS code and select from the drop-down list.

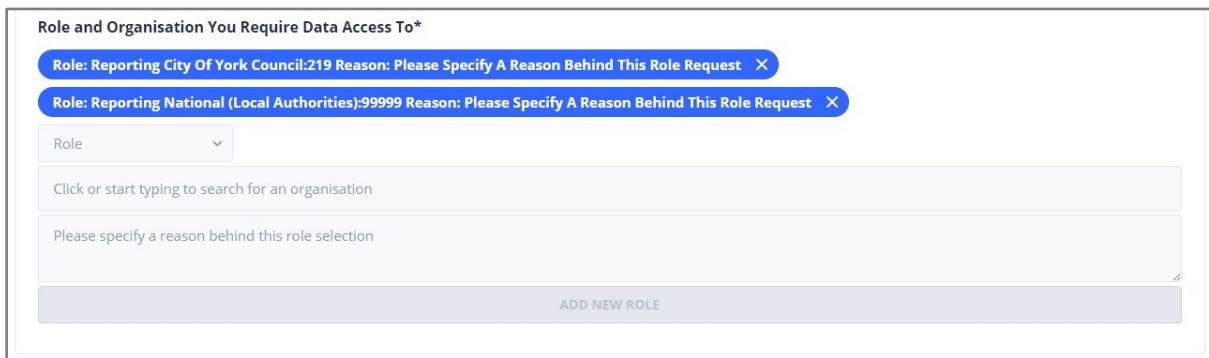
Please do not use abbreviations for organisation as the system will not have these listed.

When the organisation you are employed by displays, select the name text to add it to the form.



- After selecting the organisation you are employed by, you will need to select the role you require and the organisation for the role.

**For access to the CLD dashboard, please select the 'Reporting' role for your specific local authority and the 'National (Local Authorities)' role.**



In the **Role box**, choose **Reporting**. The organisation field is completed by searching for the organisation by name or provider code. Select your local authority when it appears in the dropdown. Once the details have been completed, please ensure the **Add New Role** bar is selected.



Select the Role and Organisation You Require Data Access To\*

Reporting

York

You will need to complete the reason for access field.  
Please include your reason for requesting access to the data. We require this field to be completed for our legal basis of sharing data for legitimate reason only.

ADD NEW ROLE

For the CLD dashboard, please then select the **National** reporting role by typing in five nines ('99999') in the organisation. Then select **National (Local Authorities) 99999** from the drop down prompt.



Select the Role and Organisation You Require Data Access To\*

Reporting

99999

Local Authority

National (Local Authorities) 99999

You will need to complete the reason for access field.

Please include your reason for requesting access to the data.

We require this field to be completed for our legal basis of sharing data for legitimate reasons only. If you would like further information on this, please email [Agemsart.apps@nhs.net](mailto:Agemsart.apps@nhs.net)

5. After you have completed these fields please select **Submit** and await approval.



SUBMIT CLEAR FORM

When registering, you will receive an email confirmation that the registration request has been received. This will be sent to the email account used at registration.

Hi Rob Orton!  
We have received an Athena registration request for you.  
The relevant admins have been notified of this and should hopefully approve your request shortly!

When the account is approved, a further email will be sent to the email account used at registration.

You have been Approved! Welcome to [Athena!](#)

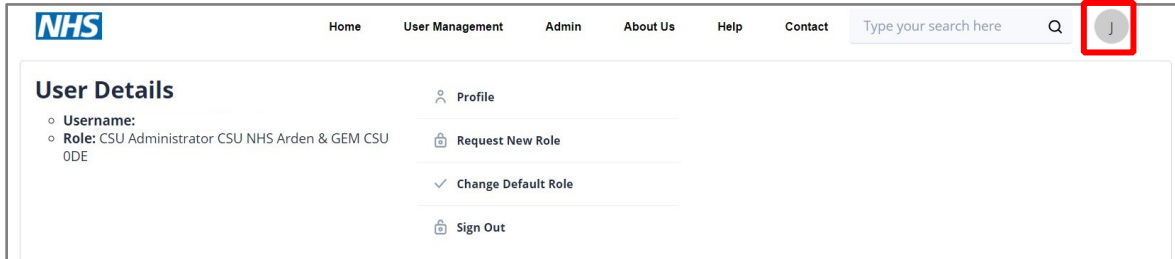
## 4. Access Process: Login

Once you have registered and your access has been approved, please select the **Log in** button, as seen in the screenshot below.



The screenshot shows the Athena login interface. On the left, there is a teal header with the text 'Welcome to Athena' and a paragraph: 'Athena gives you the intelligence you need to answer questions about your population and make better decisions about their care.' Below this is another paragraph: 'It is built in collaboration with partners and is aligned to the NHS triple aim vision of increasing the health and wellbeing of everyone in the population; improving the quality of healthcare services; and sustainable and efficient use of NHS resources.' On the right, there is a white box titled 'Login'. Inside this box, there are two buttons: a green 'LOG IN' button and a blue 'REGISTER' button. A red rectangle highlights the 'LOG IN' button and the text 'Already have an account? Click here to login.' above it.

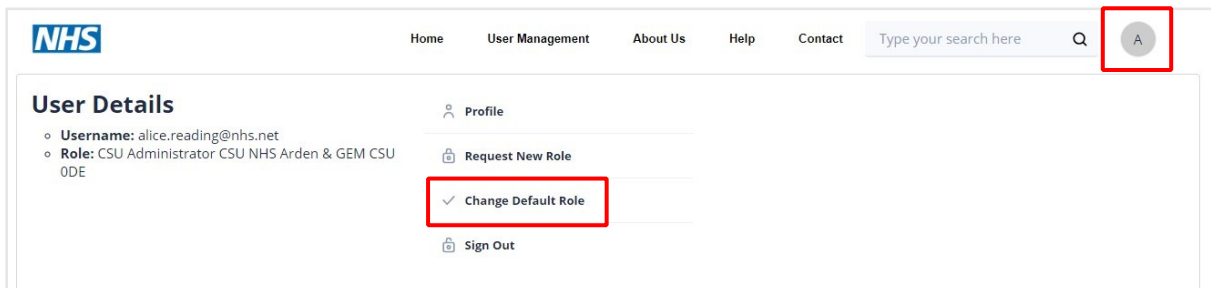
Once you have logged on to the system, by selecting the **user initial icon** in the top right corner you will be presented with a drop-down menu showing user details and links to different options within Athena.



## 5. Logging in for the First Time

If this is your first-time logging in, then please be advised that you will need to select your role.

To do this, please select the **name initial icon** in the top right-hand corner. This will show a drop-down menu, here you can set your role by selecting **Change Default Role**.



This will take you to the Select Your Role page. From here, click on the **Approved Roles** box.



This will open a drop-down menu with a list of your approved roles.



The screenshot shows two sections: 'Approved Roles' and 'Reporting Roles'. Under 'Approved Roles', 'Leicester City Council 509' is selected. Under 'Reporting Roles', 'Leicester City Council 509' is highlighted in blue, and 'National (Local Authorities) 99999' is listed below it.

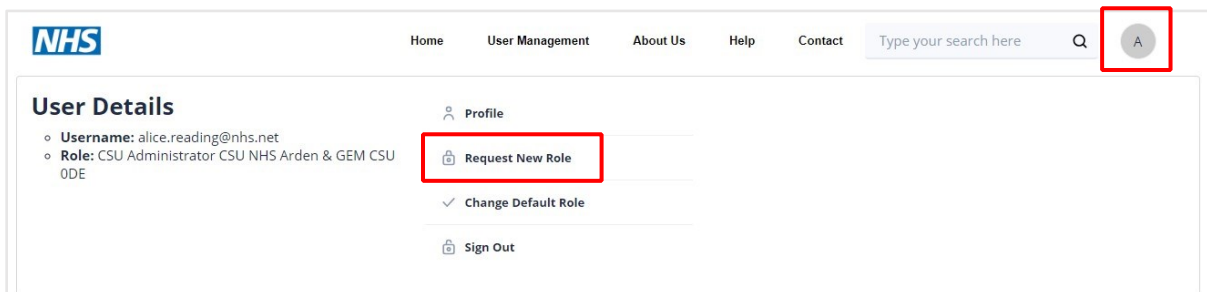
From the list, select your desired role.

This will be the default role each time you sign in, unless changed.

Please make sure that you have the correct role selected if you wish to view reports.


## 6. Access Process: Requesting Further Roles

To request an additional role, select **Request New Role** from the drop-down menu by selecting the **name initial icon** in the top right-hand corner.



The screenshot shows the 'User Details' page. In the top right corner, a circular icon with the letter 'A' is highlighted with a red box. In the 'User Details' section, the 'Request New Role' option is also highlighted with a red box. Other options include Profile, Change Default Role, and Sign Out.

Please complete the fields indicated by an asterisk and complete the process by selecting **Add Role Request**.



The screenshot shows the 'Request A New Role' form. It includes fields for 'Role\*', 'Organisation\*', and 'Reason\*'. The 'Role\*' field has a dropdown menu. The 'Organisation\*' field has a search prompt: 'Click or start typing to search for an organisation'. The 'Reason\*' field has a prompt: 'Please specify a reason behind this role selection'. At the bottom, there are two buttons: 'ADD ROLE REQUEST' and 'REFRESH'. A note in the top right corner says '(\*Indicates a required field)'. The form is enclosed in a light blue border.

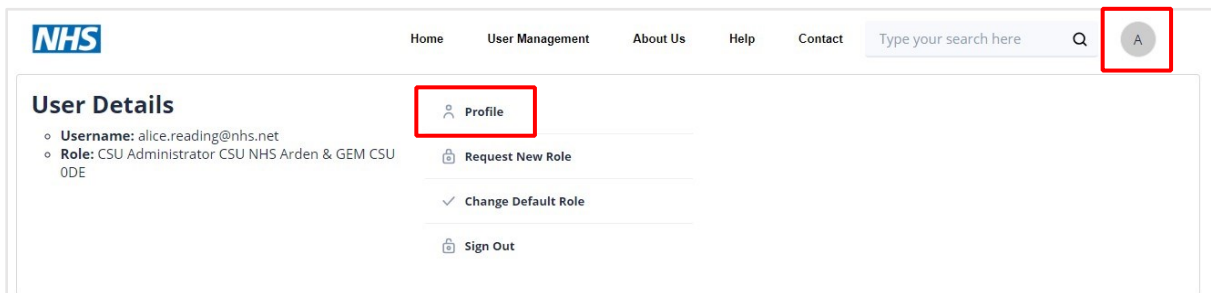
Your request will be sent for approval.

You will receive an email notification when the request has been reviewed.

**For local authorities, please select 'Reporting' for 'National (99999)' and request access.**

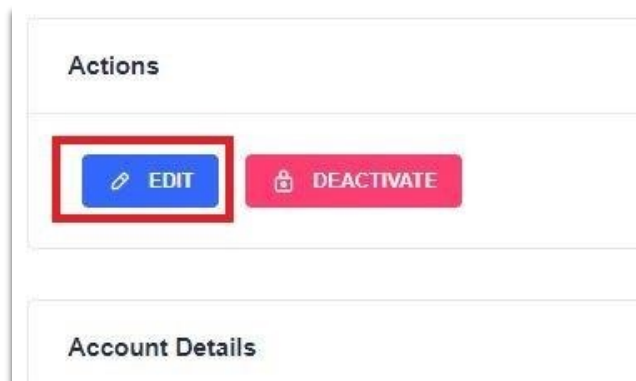
## 7. Editing Your Profile

To edit your profile, select **Profile** in the drop-down menu under your name initial letter in the top right-hand corner of the screen.



This will take you to a screen showing your profile details including your employing organisation, approved roles, and roles currently awaiting approval.

At the top of this page, you will find the **Edit** button allowing for roles and topics to be removed.



Once you have selected the edit button, you will be taken to a page that will allow you to edit your Job Title, Department, Line Manager, and Organisation.

**You cannot change your Email or your Name.**

To change your Email or Name details please contact [Agemsart.apps@nhs.net](mailto:Agemsart.apps@nhs.net) You can have more than one Organisation listed on your profile.

Site Admin

**Approved**  
Oct 30, 2023, 9:08:20 AM

**Email**

**Last Name**

**Department**  
AGEM Apps

**Approved By**

**First Name**

**Job Title**  
Helpdesk Assistant

**Line Manager**

**Employed By**

Type	Organisation Code	Organisation Name
CSU	ODE	NHS Arden & GEM CSU

**Approved Roles**

Role	Organisation Code	Organisation Name	Organisation Type	Approved By
CSU Administrator	ODE	NHS Arden & GEM CSU	CSU	
CSU Internal Reporting	ODE	NHS Arden & GEM CSU	CSU	

**Approved Topics**

Topic	Approved By
Population Health	
Performance	
Contracts and Finance	
Urgent Care	
Planned Care	
Primary, Community and Social Care	
Maternity and Children	
Mental Health	

**Pending Role Requests**

Role	Organisation Code	Organisation Name	Organisation Type
No Role Requests found...			

**Pending Topics**

Topic
No Pending Topics Found...

## 8. Adding Topics

From the **Edit Profile** page, report Topics can be requested.

**User Details** (\*indicates a required field)

<p><b>Email*</b></p> <input type="text" value="alice.reading@nhs.net"/>	<p><b>First Name*</b></p> <input type="text" value="Alice"/>
<p><b>Surname*</b></p> <input type="text" value="Reading"/>	<p><b>Job Title*</b></p> <input type="text" value="Helpdesk Assistant"/>
<p><b>Department*</b></p> <input type="text" value="AGEM Apps"/>	<p><b>Line Manager*</b></p> <input type="text" value="Vicky Nelson"/>

**Request Topics\***

You can request access to more topics below.

**Employed By**

NHS Arden & GEM CSU Code: 0DE ✕

To request further topics, select the **Request Topics box** and select from the list of topics. Only topics not already assigned will display. To select further topics, select from the list.

**Request Topics\***

You can request access to more topics below.

Population Health

The topics field will now display the topic just selected.

**Request Topics\***

You can request access to more topics below.

**Population Health**

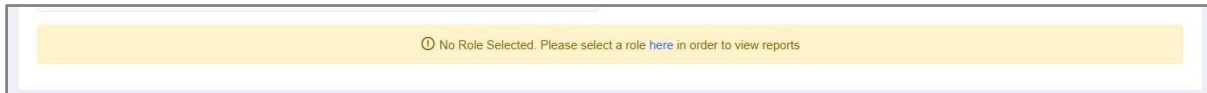
Population Health

Select **Save Changes** and await confirmation for the topic/s to be approved.

You will still have access to previously approved topics whilst waiting for new requests to be approved.

## 9. Viewing Reports

To access reports, firstly ensure you have a default role selected (see section '5. Logging in for the First Time' of this user guide). If you have not assigned your role before entering the reports page, you will not see any reports listed. The below message will instead display with a link to the **Change Default Role** section.

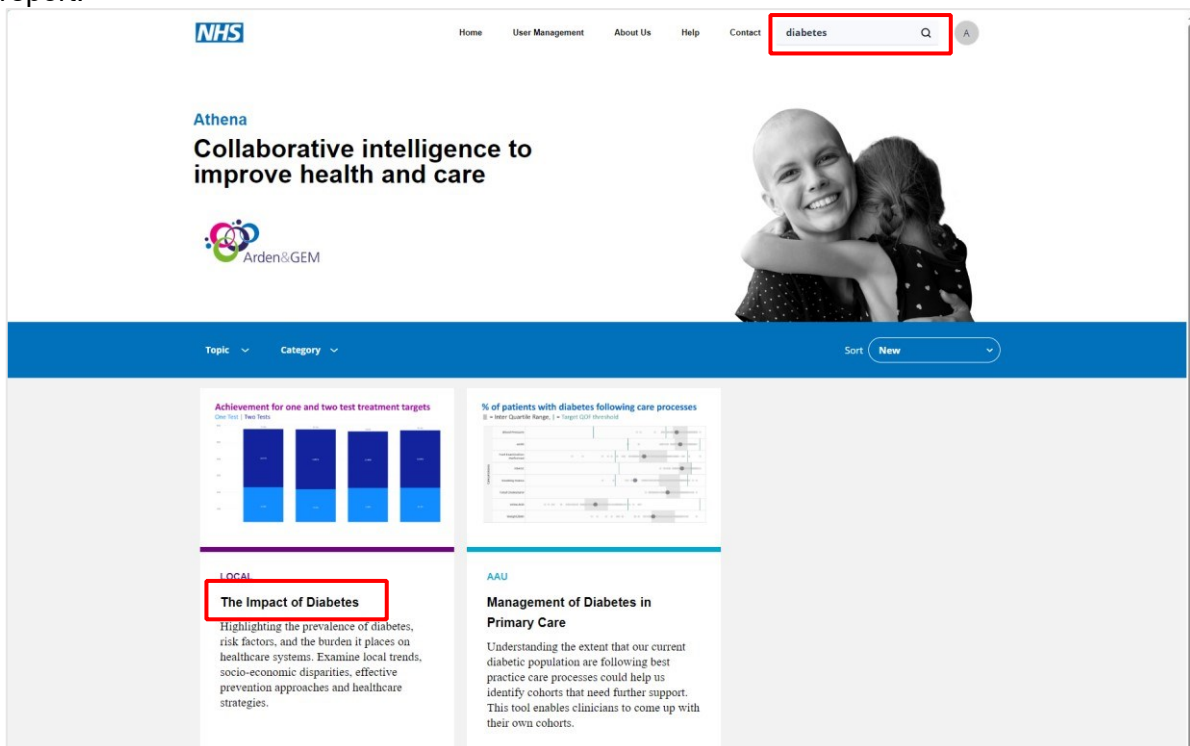


Once you have a default role selected, you will be able to view reports available to you from the **Home** page. Please note: the reports visible to you will vary on your level of access.

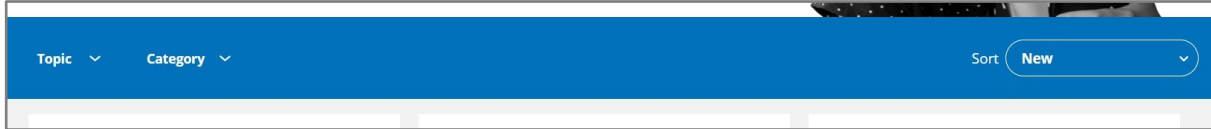
Searching for a report can be done from the **search bar** at the top right of the reports/home page.

Typing a few letters of the report title you wish to view and selecting the magnifying glass will display results.

In this example, the keyword 'diabetes' has been used to search for 'The Impact of Diabetes' report.



The home page shows a blue band with three drop-down lists: **Topics**, **Categories**, and **Sort**.



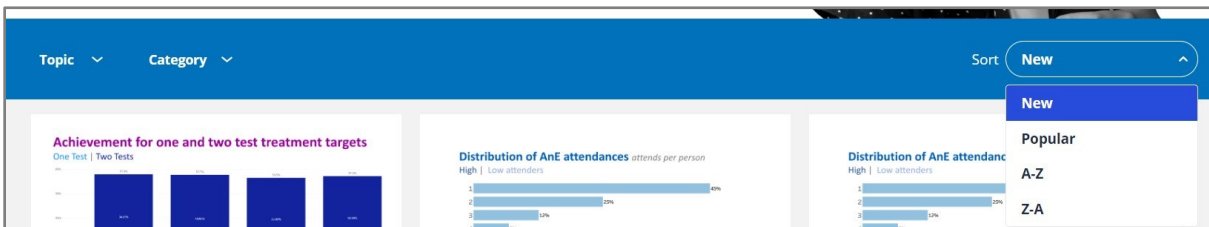
- Topic** – Ticking one or multiple topics will filter the reports you can access under those topics. If you have not been approved for any given topic it will not be selectable.



- Category** – Categories are used to further refine report searches. Report categories do not have an approval process so regardless of your role you will be able to filter reports by all categories. All Local authority reports fall under the **National Tools** category. This is also where the option to filter by reports you have selected as a **Favourite** can be found.



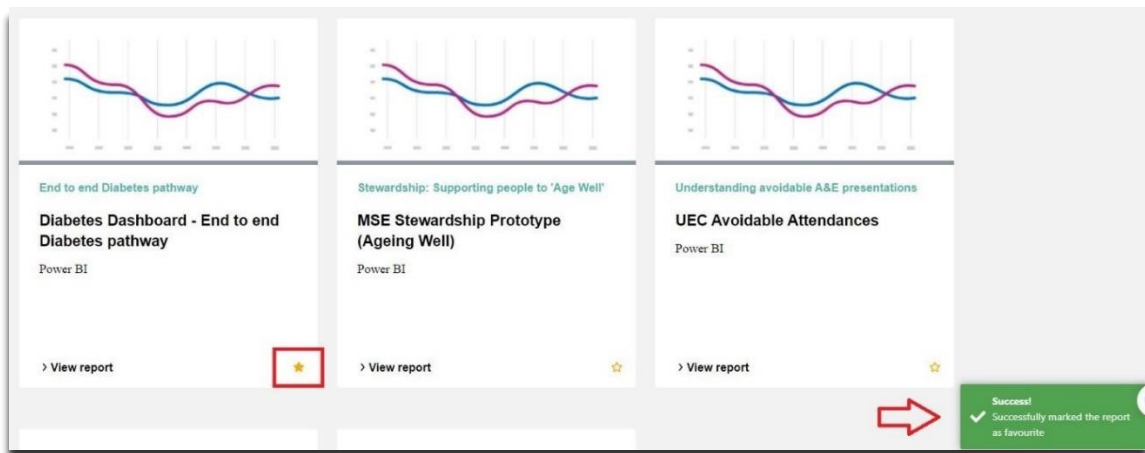
- Sort** – You can sort report results by date, popularity, and alphabetically.



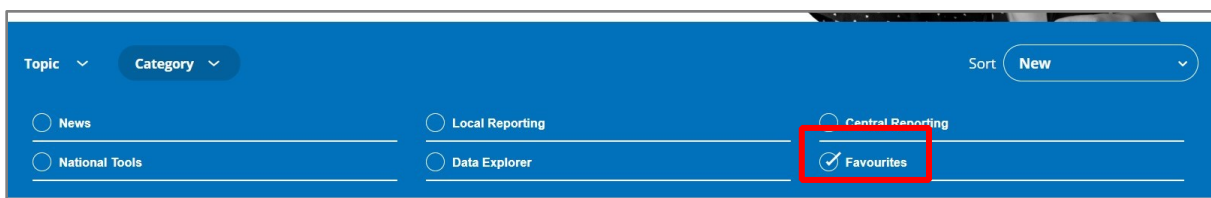
## 10. Creating Report Favourites

The visible reports have a **star icon** on each report. Selecting this will add the report as a favourite. This will make it easier to access the report if you use it often.

To remove it from your favourites, go back to the list of reports and select the star icon again. It will then be removed from your favourites.



To view reports that you have made a favourite, select the **Favourites tick box** under the **Category drop-down**.

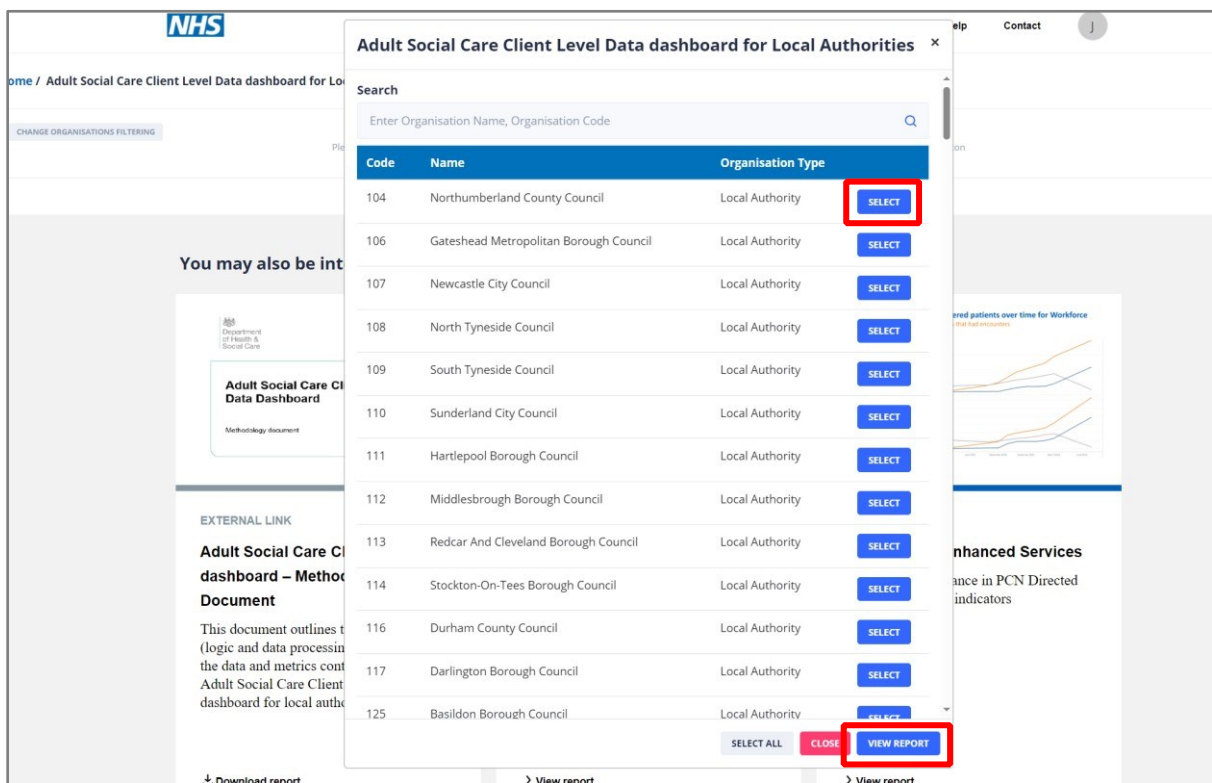


The list of reports on the home page will update and only show your favourite reports.

## 11. Report Filtering

Some reports will include an option to filter by organisation, when you click to view the report, it will present you with a list of organisations to filter the report by based on what organisations you have the **Reporting** role for in Athena.

Click the **Select** icon next to organisation/s you wish to filter by (please note some reports only allow single organisation filtering whereas others allow multiple) and click the **View Report** icon to view the report with the selected filters.



The screenshot shows a dashboard titled "Adult Social Care Client Level Data dashboard for Local Authorities". A modal window is open, displaying a search bar and a table of organisations. The table has columns for Code, Name, and Organisation Type. Each row has a blue "SELECT" button to its right. At the bottom of the modal, there are buttons for "SELECT ALL", "CLOSE", and "VIEW REPORT". The "VIEW REPORT" button is highlighted with a red box. The background dashboard shows a sidebar with "You may also be interested in" and "EXTERNAL LINK" sections, and a main content area with a line chart and "Enhanced Services" section.

Code	Name	Organisation Type	Action
104	Northumberland County Council	Local Authority	SELECT
106	Gateshead Metropolitan Borough Council	Local Authority	SELECT
107	Newcastle City Council	Local Authority	SELECT
108	North Tyneside Council	Local Authority	SELECT
109	South Tyneside Council	Local Authority	SELECT
110	Sunderland City Council	Local Authority	SELECT
111	Hartlepool Borough Council	Local Authority	SELECT
112	Middlesbrough Borough Council	Local Authority	SELECT
113	Redcar And Cleveland Borough Council	Local Authority	SELECT
114	Stockton-On-Tees Borough Council	Local Authority	SELECT
116	Durham County Council	Local Authority	SELECT
117	Darlington Borough Council	Local Authority	SELECT
125	Basildon Borough Council	Local Authority	SELECT

When viewing a report, you will be able change the current report organisation filtering using the **Change Organisation Filtering** button to the top left of the page.



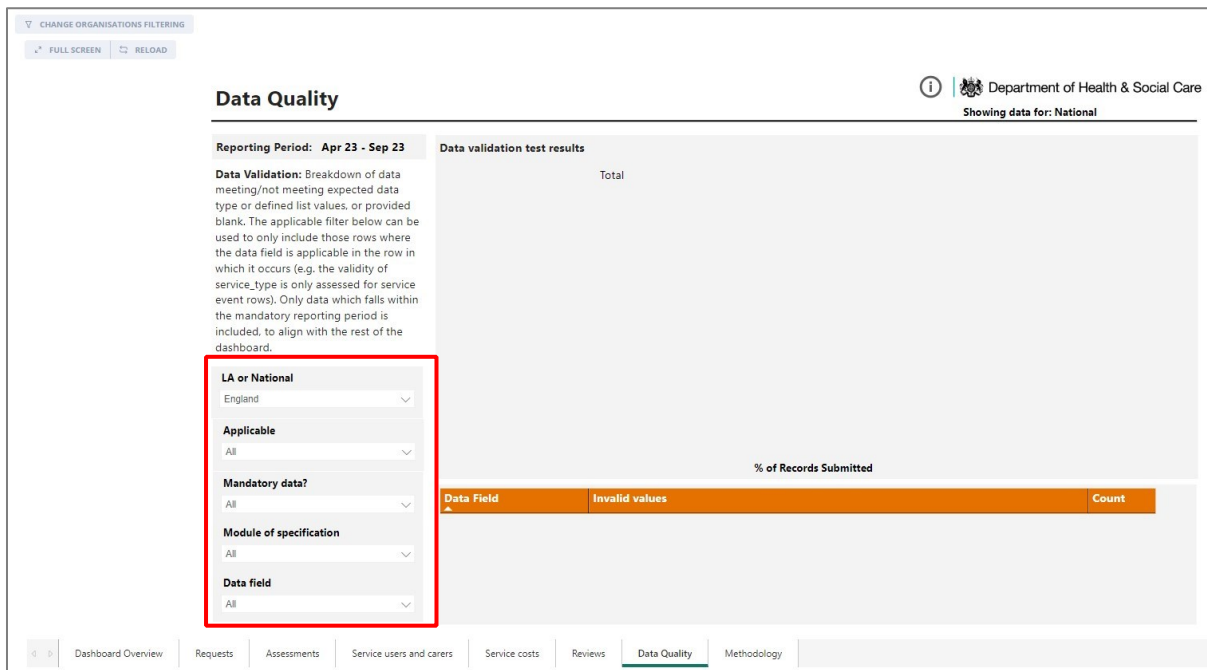
## 12. Filtering Reports

When you have a report with filters on, it is possible to set the filters and then save the report with the changed filters or share the report with the changed filters. Each time the report opens it will then display data with these changed filters.

**Below is an example of how to filter a Power BI report.**

With a report open that includes filters, filter the report via the dropdowns available (these may be located at the top or left-hand-side of the report).

In the example below, the filters are located to the left.



## 13. Bookmarking Filtered Reports

With the required filters changed, filters can be saved as a bookmark allowing the report to open on future logins with no need to manually change filters.

**Note:** for Power BI reports with multiple tabs, saved bookmarks will only be applied to one tab. To save bookmarks on more than one tab, please save a new bookmark for each tab.

To save the bookmark, go to the top right of the screen and select the **bookmark icon**.



The **Bookmarks sidebar** bar will be visible. Please see below the list of features:

- 1: This shows how many filters have been set.  
The following areas need to be completed:
- 2: A name for the bookmark will need to be added.
- 3: A description can be filled in.
- 4: If you wish this saved filter bookmark to be viewed by other Athena users, tick this box.  
Leave blank if only being viewed by yourself.

**5: Select Save Bookmark.**

A green saved notification will show in the bottom right corner.

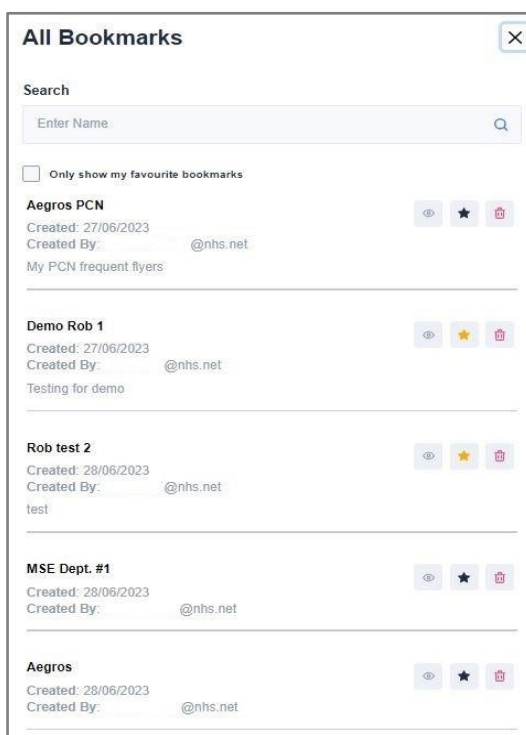
To view the saved bookmark, reload the page and select the **bookmark icon** again in the top right corner of the screen.



Select **Show All Bookmarks** to open the **All Bookmarks sidebar**.

SHOW ALL BOOKMARKS

This will display any bookmarks previously created by yourself or shared with you by others.



Each entry will show the bookmark name to the left side. On the right are 3 icons:

- 1: Eye icon. Selecting this will open the report and apply the saved filters.
- 2: Selecting this will make the bookmark a favourite.
- 3: Delete the bookmark. If the bookmark is no longer needed, select this.

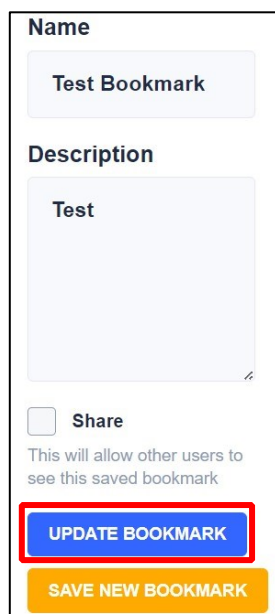


You can edit your own bookmarks.

After opening the bookmarked report and amending the filters, select the **Bookmark icon**.



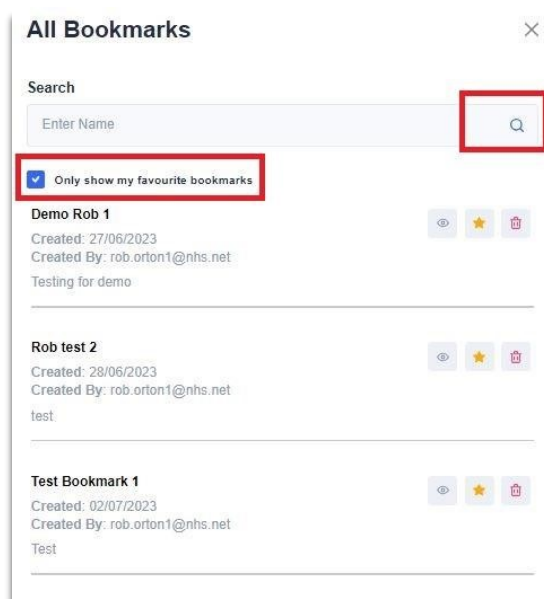
From the **Bookmarks sidebar**, select **Update Bookmark**.



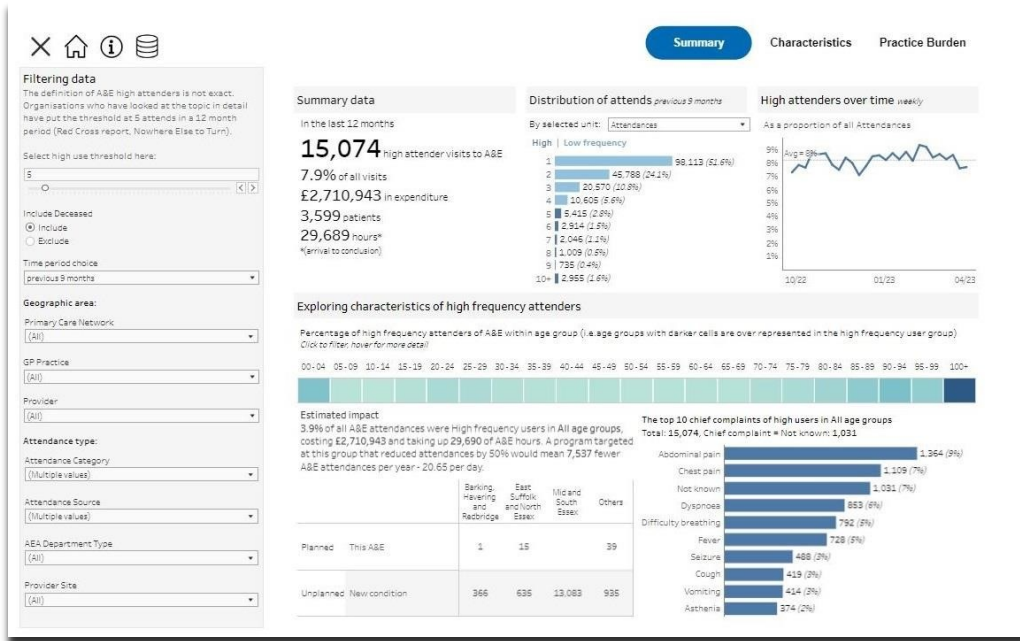
This will update the current bookmark with the new filters, name, or description.

The **Save New Bookmark button** will take the current bookmark filters and create a copy of it with the same name, description, and filters which can then be edited.

Toward the top of the All Bookmarks sidebar is a check box for **Only Show My Favourite Bookmarks**. If this is selected, followed by the magnifying glass icon, only bookmarks set as a favourite will show in the All Bookmarks sidebar.



Selecting the Eye icon will open the report and apply the saved filters.  
Selecting the Filtering Data menu again from the top left of the screen will display the filters that have loaded.



Note: Only individuals with **Reporting** roles will be able to see shared bookmarks for their organisations.

## 14. Give Report Feedback

Athena enables you to provide direct feedback on reports.

With a report open, in the top right corner of the report there is a **speech icon**.

Re-identification Test Demo Report



**A & E Attendance High Usage**  
Y06810: Whitehouse Health Centre

Provider: (All)

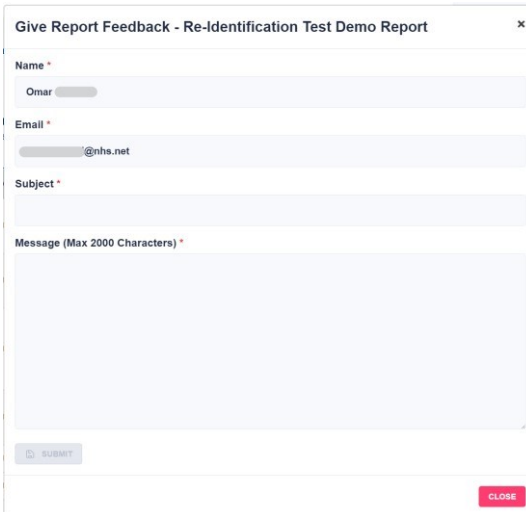
Number of Patient Attendances: 1+

Period from: February 2022 | Period to: January 2023

Pseudo NHS Number	Decased Flag	Provider	Available Attends	Arrival Date Time	Referral Source	First Diagnosis	AE Attendance Disposal	HRG	LoS	IP Cost	Cost	Yr Att Total	Yr AEA Cost
500000005293	No	RD8: Milton Keynes Hosp FT	No	08/02/2022	Referred by mchuffe (ending)	Not Recorded	Discharged				£184	2	£276
			Yes	23/12/2022	Self-referred to accident and emergency dep.	Not Recorded	Discharged				£93	2	£276



Selecting the speech icon will open a pop-up box where you can submit your feedback.



The **Name** and **Email** fields will automatically fill with your Athena account details.

You will need to enter a **Subject** for your feedback.

Enter your feedback in the **Message** field – this field has a maximum of 2000 characters.

After completing all fields, the **Submit** button will become available.

Select **Submit** to send your feedback.

## 15. Help

The help page can be accessed by selecting the **Help** tab at the top of the screen.



This page will contain user guides, video guides, and FAQ's to aid users in navigating the platform. The help page will be accessible to users before they log in to help with the registration process.

Additional support and learning resources for Athena can be found on the FutureNHS [Athena and Data Services Workspace](#).

There you can find neurodiverse accessible versions of user guides as well as short 'How To' guides in written and video formats.



# End User



## Welcome to the End User Workspace

Here we have included information and links to Athena training. Using the buttons you can navigate to different resources.

You can also access training material on the [Athena platform](#)



Training



Main User Guides



How to Guides & Videos

## 16. Contact Information

For technical help and queries please contact the AGEM Apps Helpdesk:

Email: [Agemsart.apps@nhs.net](mailto:Agemsart.apps@nhs.net)


Phone: 0333 038 4238

**For any clinical queries please contact your clinical team.**

Feedback for Athena can also be sent directly through Athena, whilst you are logged in, by selecting the **blue speech icon** located in the bottom right corner of the page.



This will send you to the **Feedback** page.

A screenshot of the 'Feedback' form in Athena. The form has a title 'Feedback' and a 'Useful links' section on the right. The form fields are: 'Name \*' with the value 'Omar', 'Email \*' with the value '@nhs.net', 'Subject \*', and 'Message (Max 2000 Characters) \*'. A 'SUBMIT' button is at the bottom left. The 'Useful links' section contains: '> About Us', '> FAQs', '> EUA', '> Contact Us', and '> Feedback'.

The **Name** and **Email** fields will automatically fill with your Athena account details.

You will need to enter a **Subject** for your feedback.

Enter your feedback in the **Message** field – this field has a maximum of 2000 characters.

After completing all fields, the **Submit** button will become available.

Select **Submit** to send your feedback.

## Version History

Version	Date	Author	Approver	Changes
<b>1.0</b>	20.09.2023	Helen Rodgers		
<b>1.1</b>	19.10.2023	Finn Mottershead		
<b>1.2</b>	20.10.2023	Helen Rodgers		
<b>1.3</b>	10.11.2023	Rob Orton		
<b>1.4</b>	18.01.2024	Jack Waters	Vicky Nelson	Screenshots
<b>1.5</b>	01.02.2024	Alice Reading	Vicky Nelson	Power Bi filtering and bookmarking
<b>2</b>	11.03.2024	Alice Reading		Updated template
<b>2.1</b>	10.04.2024	Omar Stroud		Formatting
<b>2.2</b>	15.04.2024	Omar Stroud		Branding update
<b>3</b>	02.05.2024	Omar Stroud		Report Feedback added, Feedback added
<b>4</b>	04.07.2024	Omar Stroud		FutureNHS
<b>4.1</b>	09.01.2025	Syeda Nazifa Khatun		Updated contact number
<b>5</b>	10.02.2026	Rob Orton	Elizabeth Rushton	Updated contact details