Healthcare Improvement Scotland eForms Portal User Guide

Contents

General information
Getting access to the system
Setting a password for the first time
Forgotten password
Applying to register a new service
Uploading supporting documents
Self-evaluation
Annual return
Notifications

General information
The web address for the Healthcare Improvement Scotland eForms Portal is https://hisportal.scot.nhs.uk.

The portal has been designed to work best with Microsoft Internet Explorer 10 or higher. You may find that the portal does not perform as expected if you are using older versions of Internet Explorer, other browsers (including the new Microsoft Edge browser), a tablet or a mobile phone.

NB: Your User ID is unique to you. Please do not share your account with someone else. If someone else needs access to the portal, please contact us and we can set up a new user account:

Ross McFarlane, Project Officer: ross.mcfarlane@nhs.net or 0131 623 4752

Natalie Graham, Administrative Officer: natalie.graham8@nhs.net or 0131 623 4596

Michelle Cassidy, Administrative Officer: michelle.cassidy@nhs.net or 0131 623 4379
On a number of screens, you will see a table showing details of forms and documents that are stored on the portal. On the right hand side of the table is a small cross. This is the delete function. Clicking the icon will delete the corresponding line from the table and the record or form it relates to. **PLEASE BE AWARE** that there is no opportunity to confirm this action and clicking the icon will result in the related item being deleted immediately. **This action cannot be reversed.**

**Getting access to the system**
You cannot set up a portal account yourself. If you are the service manager of a registered independent healthcare service, you will have been set up with an account to access the portal. If you are not the manager of the service and you think you should have access to the portal, discuss this with the registered service manager. If they agree that you require access, they should email us with your contact details and we will create an account for you.

**NB: Your User ID is unique to you.** Please do not share your account with someone else. If someone else needs access to the portal, please contact us and we can set up a new user account.

**Setting a password for the first time**
When a portal account is created for you a welcome email will be sent automatically. This will contain a link which will commence the two stage process of creating your first password.
Forgotten Password
If you have forgotten your password, you can reset this yourself. Use the ‘forgotten your password’ link at the bottom left of the log on page. This will start the password reset process.

Once you have entered your email address, you will receive an automatic email with a link to a page which will allow you to set a new password.

You can now log on with your new password.
Applying to register a new service

If you are applying to register a new service you will only be able to access the ‘applications’ and ‘documents’ part of the portal. You will find these options in the task menu at the top of the screen.

To access the parts of the application form, click on ‘applications’ and then the + icon (‘add new application to register’) button at the top right of the screen.
This will take you to the page where you can select the part of the application form you require. Guidance on how to complete the form and which part you will be required to submit can be found in ‘Guidance – online registration for IHC services’.

**NB:**
- Only one user at a time should complete the application form.
- Your user ID should not be shared with someone else.
- Two people using the same user ID at the same time to fill in an e-form will cause problems with the system.

Selecting the part of the form you require will load up the screen where you can complete the application.

Following the registration guidance, you should complete all the parts of the application form required. You can create as many Part 1a, 2a and 3a as you need.
To submit form click the green submit button in the top right of the screen.

When submitting your application form, please note that the submit button will not submit all parts of the form. It only sends the part of the form that it active at the time. You should review each part of the form and submit it when you are content it has been fully completed.
Uploading supporting documents
If you wish to upload documents to support an application, self-evaluation or notification, choose the ‘upload document’ icon from the top right of the screen in the relevant tab.

You can also select the ‘documents’ tab from the top of the screen and upload from there. However, if a document relates to a specific self-evaluation, if we have asked you to complete or update your self-evaluation you can find this by selecting forms then self-evaluation. Any new self-evaluation will have a status of ‘draft’. Once you have completed all the sections submit the form using the submit button in the top right of the screen. You can save the work you have done at any point by using the save or save and exit buttons.
Annual return
If we have asked you to complete an annual return, you can find this by selecting forms then annual return. You can create a new annual return from to complete by clicking the ‘add new annual return’ button in the top right of the screen.

Select the appropriate annual return from the list. Once you have completed all the sections submit the form using the submit button in the top right of the screen. You can save the work you have done at any point by using the save or save and exit buttons.
Notifications
If you need to submit a notification, you can find this by selecting forms then notifications. You can create a new notification form to complete by clicking the ‘add new notification’ button in the top right of the screen.

Then select the appropriate notification from the list. Once you have completed all the sections submit the form using the submit button in the top right of the screen. You can save the work you have done at any point by using the save or save and exit buttons.