

# Healthcare Improvement Scotland Portal User Guide

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## General information

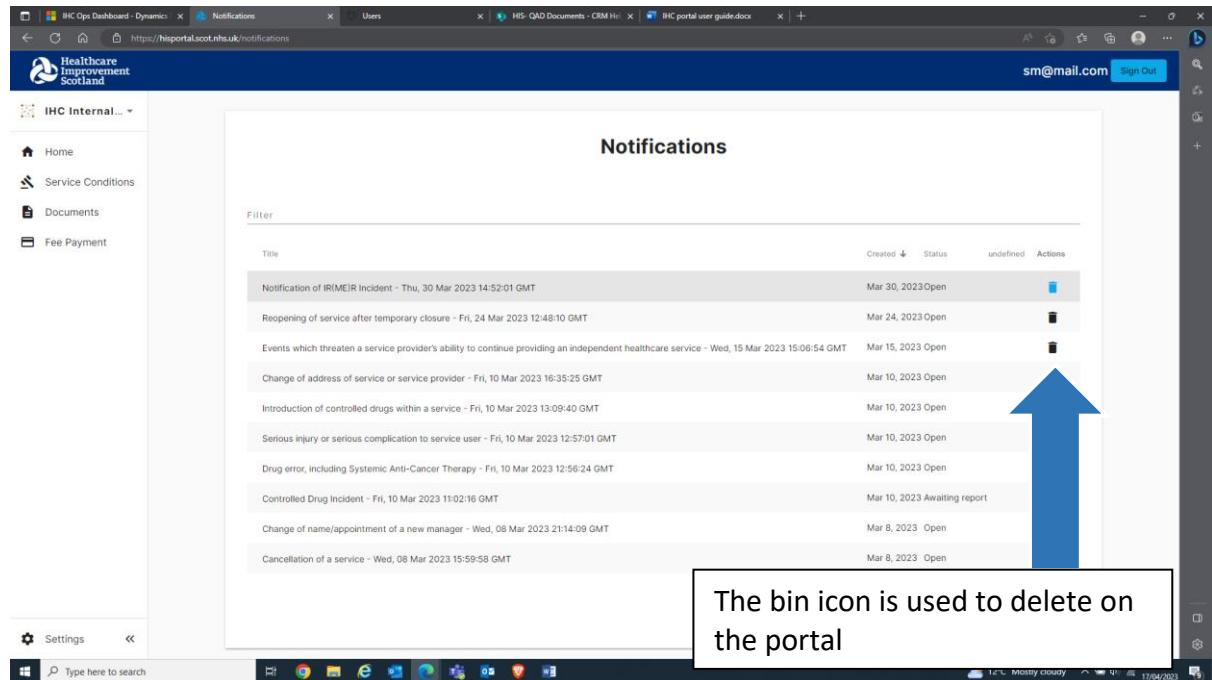
The web address for the Healthcare Improvement Scotland eForms Portal is <https://hisportal.scot.nhs.uk>.

The portal has been designed to work best with Microsoft Edge. You may find that the portal does not perform as expected if you are using other browsers, 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 at [his.ihcregulation@nhs.scot](mailto:his.ihcregulation@nhs.scot) and we can set up a new user account.

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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 an icon of a bin.



The bin icon is used to delete on the portal

Title	Created	Status	Actions
Notification of IR/MEIR Incident - Thu, 30 Mar 2023 14:52:01 GMT	Mar 30, 2023	Open	
Reopening of service after temporary closure - Fri, 24 Mar 2023 12:48:10 GMT	Mar 24, 2023	Open	
Events which threaten a service provider's ability to continue providing an independent healthcare service - Wed, 15 Mar 2023 15:06:54 GMT	Mar 15, 2023	Open	
Change of address of service or service provider - Fri, 10 Mar 2023 16:35:25 GMT	Mar 10, 2023	Open	
Introduction of controlled drugs within a service - Fri, 10 Mar 2023 13:09:40 GMT	Mar 10, 2023	Open	
Serious injury or serious complication to service user - Fri, 10 Mar 2023 12:57:01 GMT	Mar 10, 2023	Open	
Drug error, including Systemic Anti-Cancer Therapy - Fri, 10 Mar 2023 12:56:24 GMT	Mar 10, 2023	Open	
Controlled Drug Incident - Fri, 10 Mar 2023 11:02:16 GMT	Mar 10, 2023	Awaiting report	
Change of name/appointment of a new manager - Wed, 08 Mar 2023 21:14:09 GMT	Mar 8, 2023	Open	
Cancellation of a service - Wed, 08 Mar 2023 15:59:58 GMT	Mar 8, 2023	Open	

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

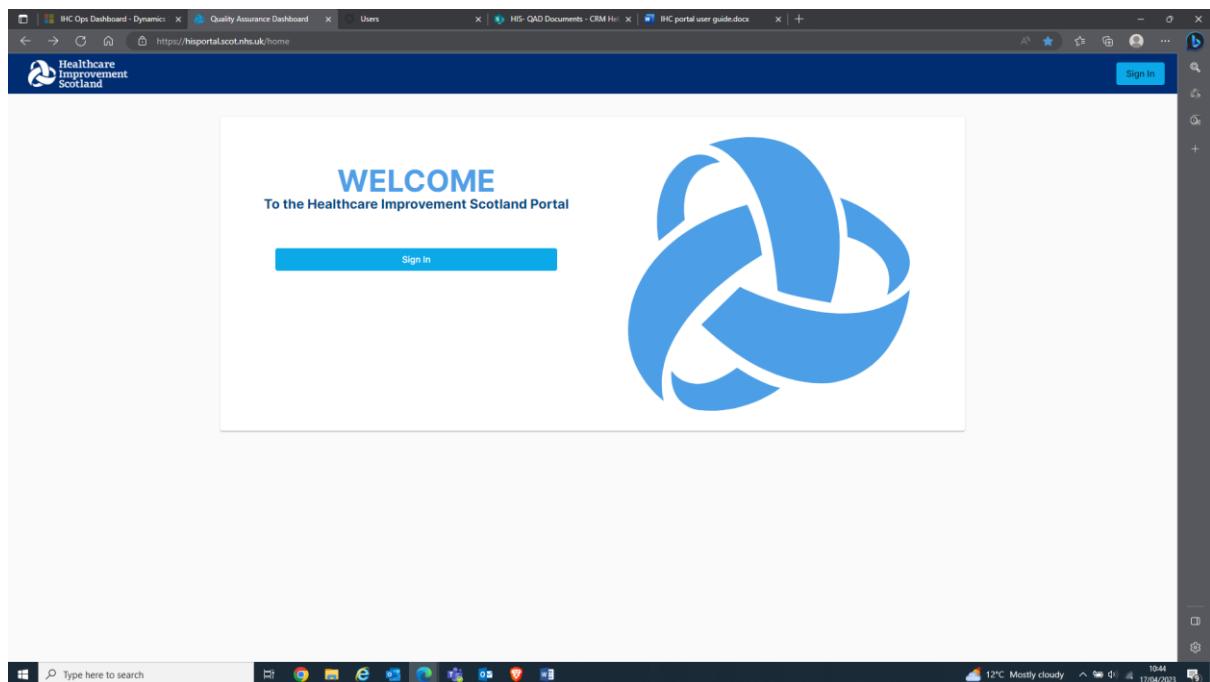
You cannot set up a portal profile yourself. If you are the service manager of a registered independent healthcare service, you will have been set up with a profile in our system and given permissions to access the portal for your service. If you are not the manager of the service and you think you should 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.

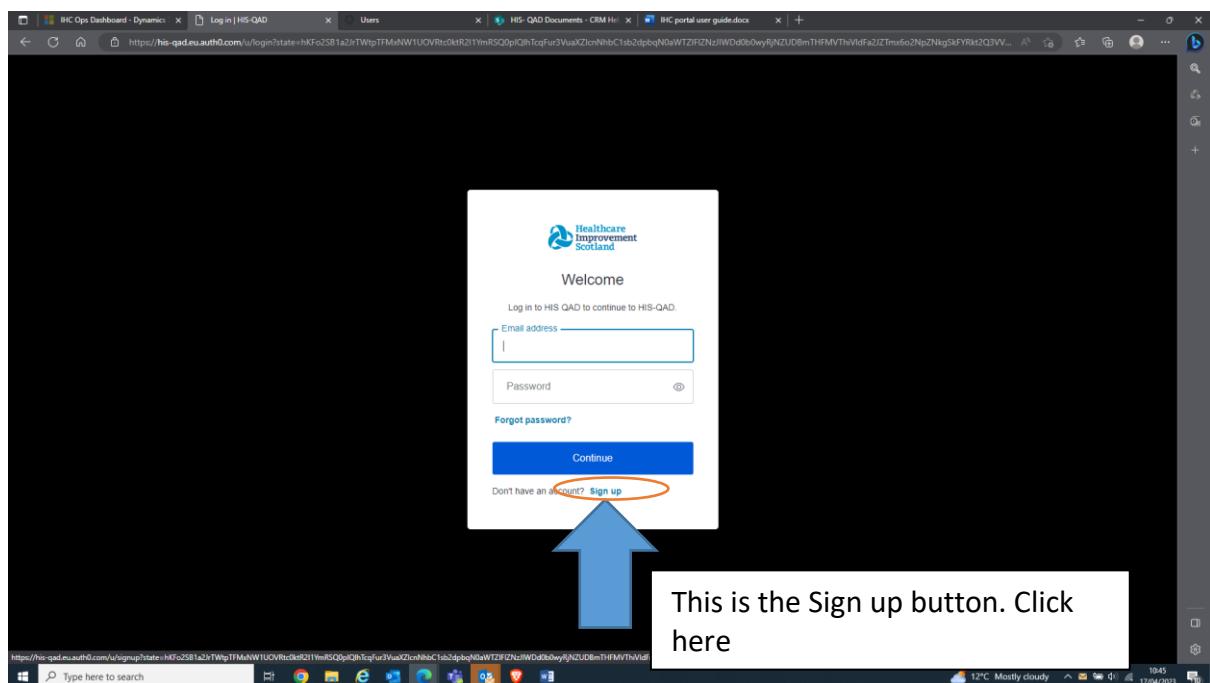
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## Setting a password for the first time

Once a portal profile has been created for you, go to the Welcome page of the portal and click on the blue 'Sign in' bar.

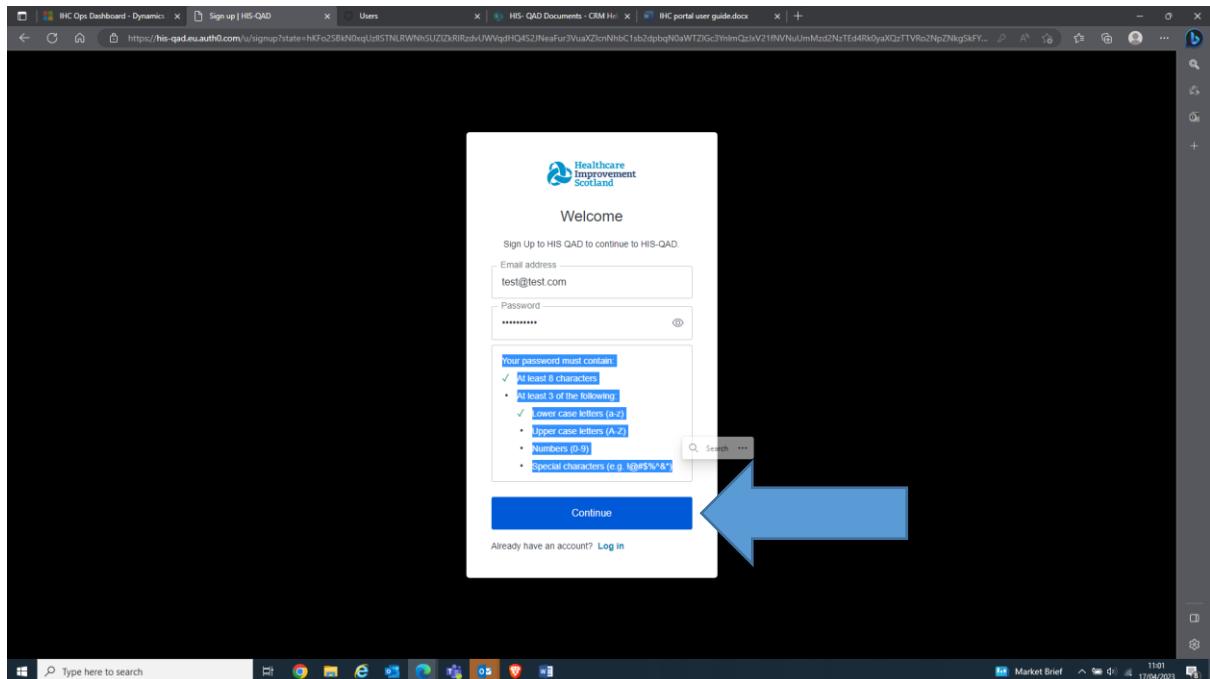


This will take you to the sign in page. Click on the 'Sign up' link underneath the blue 'Continue' bar.



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On the next page, type in your email address and the password you want to use (there are rules for what is accepted as a password, set out on this page when you are entering it), and click 'Continue'.

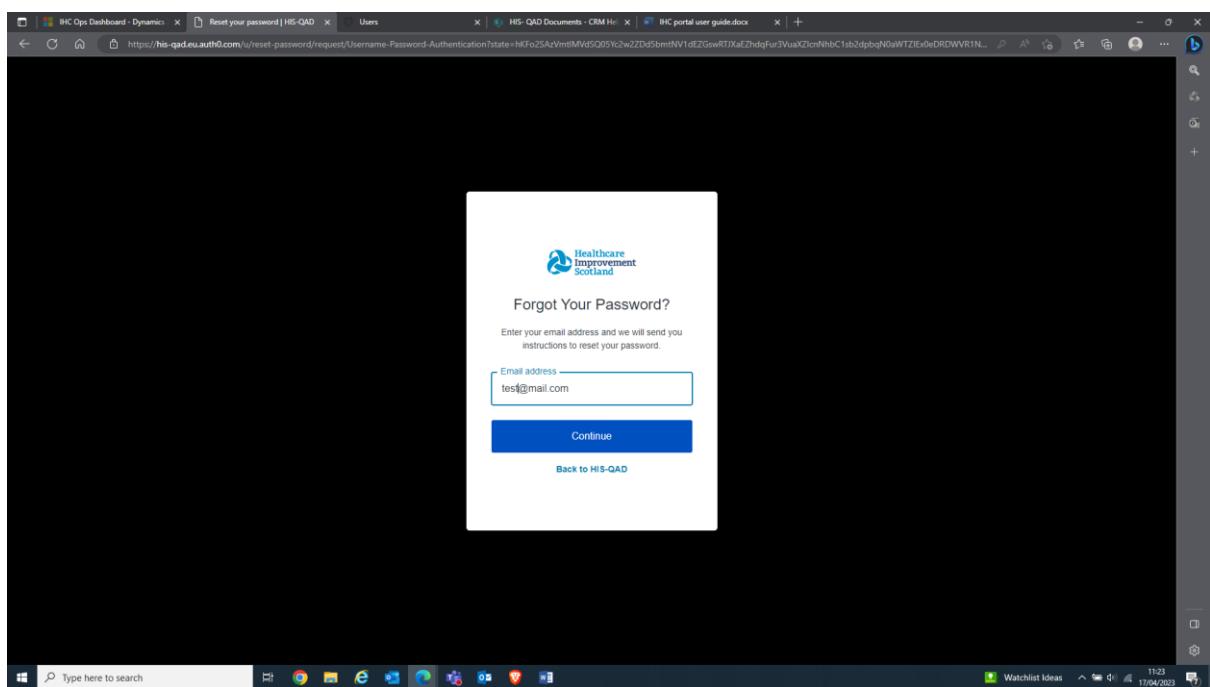
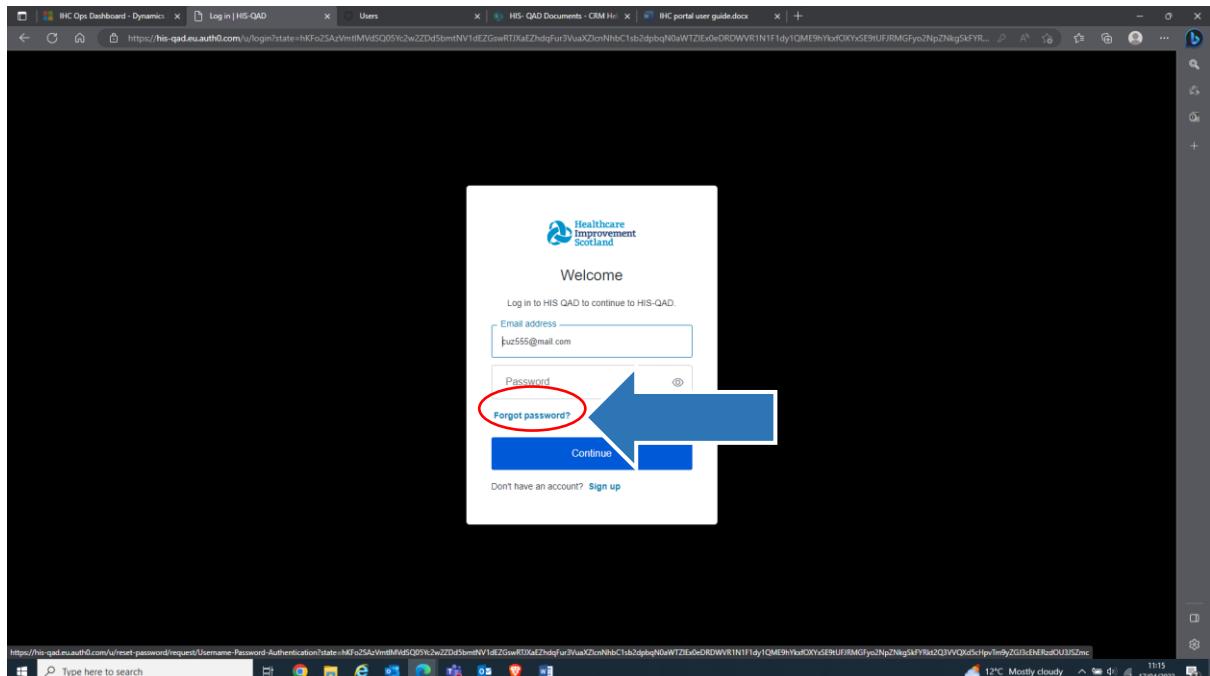


This will trigger a verification email to be sent out to your email address. Open that email from your inbox (check your spam folder if it does not come through to your inbox) and this will verify your email address. Log in with your email address and password at the sign in page from then on.

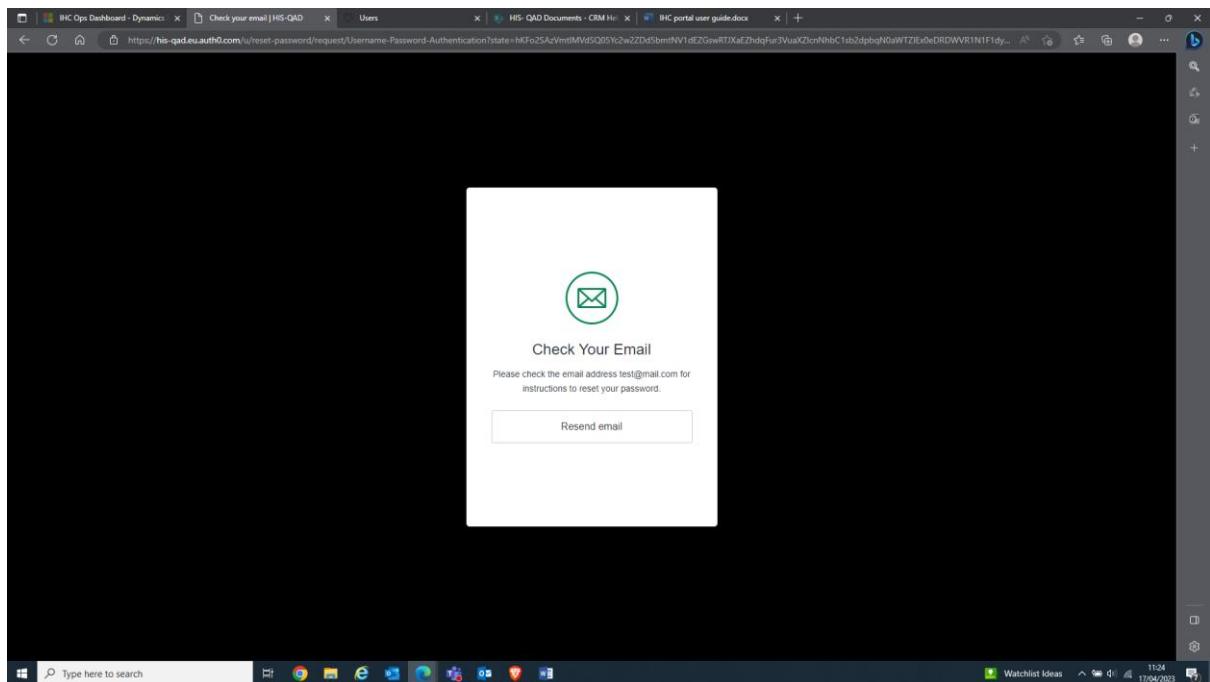
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## Forgotten Password

If you have forgotten your password, you can reset this yourself. Use the 'Forgot password?' link above the blue 'Continue' bar on the sign in page. This will take you to another page to enter your email address.



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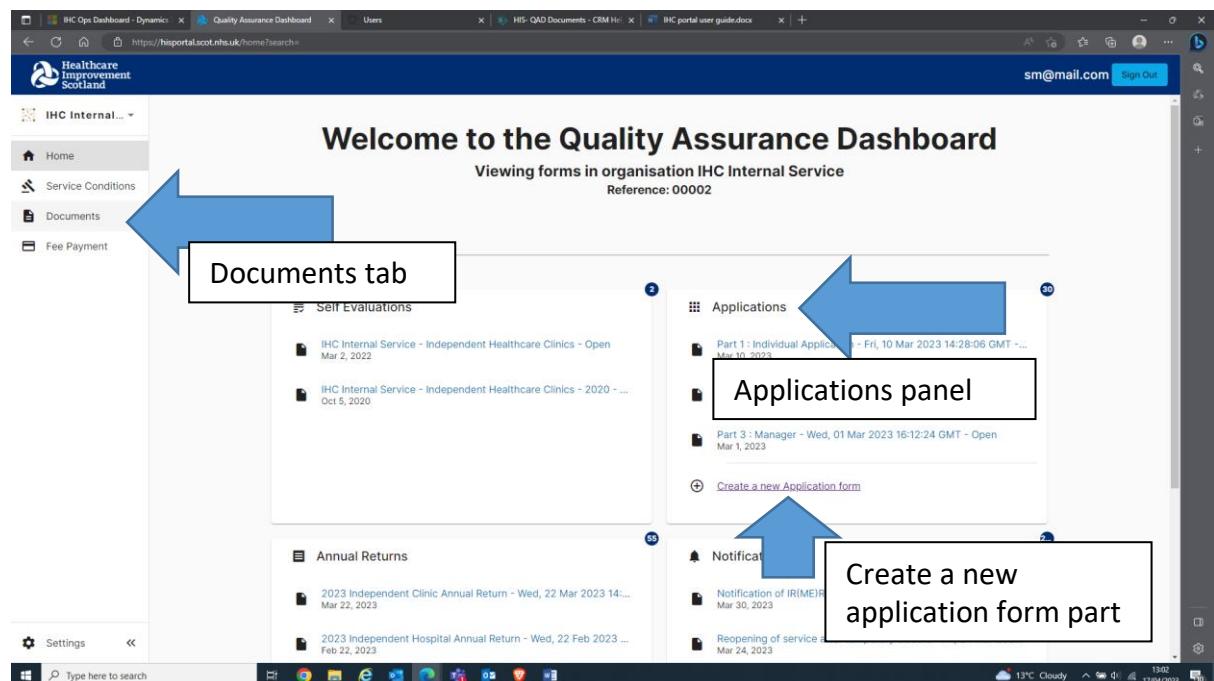
Once you have entered your email address and clicked 'Continue', you will receive an automatic email with a link to a page which will allow you to set a new password.

You can now log on with your new password.

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## Applying to register a new service

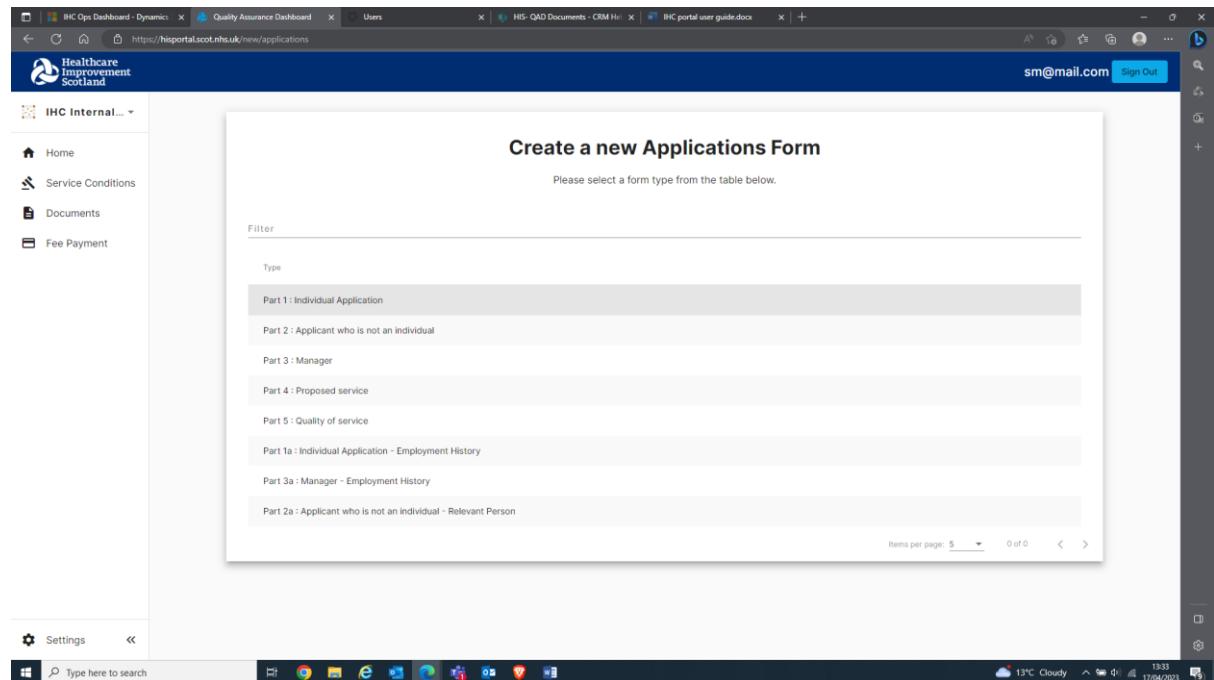
If you are applying to register a new service you will usually only be able to access the 'applications' and 'documents' parts of the portal. You will find the Applications panel on the homepage once you have logged in. The documents tab is to the left of the screen. To access the parts of the application form already open, click on 'Applications' at the top of the panel to open up the full list of application form parts you have opened or completed.



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To start a new application part, click on 'Create a new Application form' at the bottom of that panel. This will then take you to the list of application parts to open and complete, as below.

**NB: You must create a new application form in this way for each part of the application you are required to complete. The parts do not auto-create.**



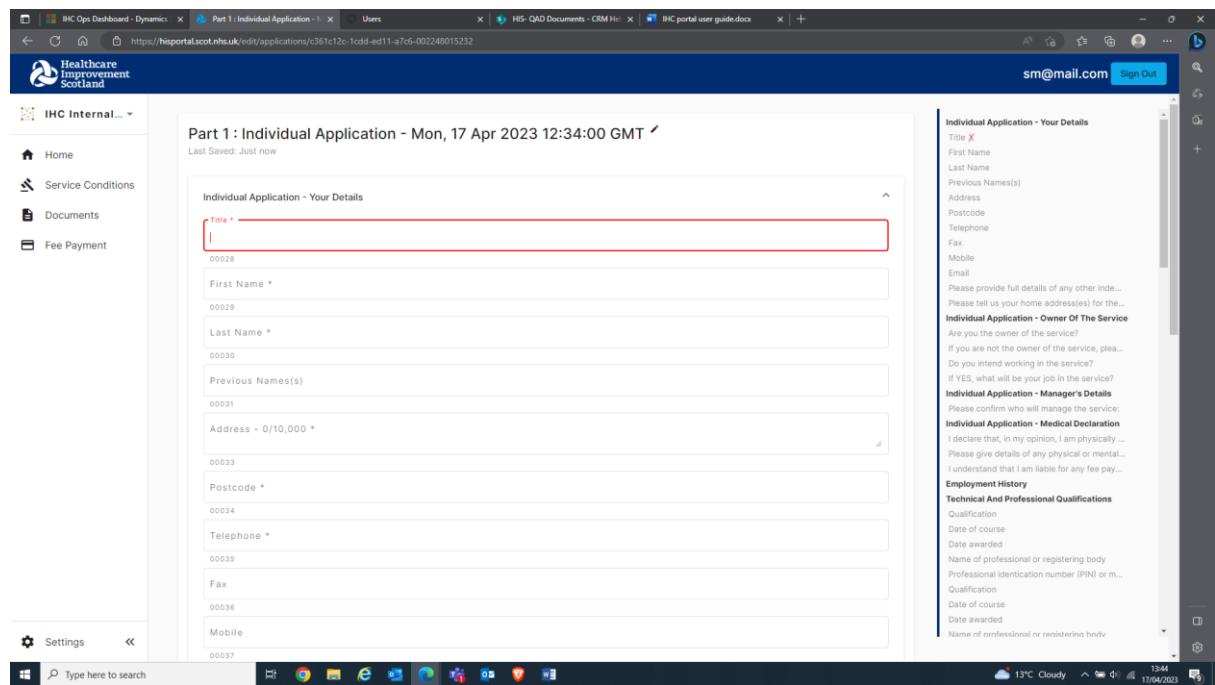
Guidance on how to complete the form and which part you will be required to submit can be found in '[Guidance – online registration for IHC services](#)'.

**NB:**

- Only one user at a time should complete the application form.
- Your profile should not be shared with someone else.
- Two people using the same profile at the same time to fill in an e-form will cause problems with the system.
- If another user requires access to the portal, please contact us on [his.ihcregulation@nhs.scot](mailto:his.ihcregulation@nhs.scot)

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



Part 1: Individual Application - Mon, 17 Apr 2023 12:34:00 GMT

Last Saved: Just now

Individual Application - Your Details

Title \*

First Name \*

Last Name \*

Previous Names(s)

Address - 0/10,000 \*

Postcode \*

Telephone \*

Fax

Mobile

Individual Application - Your Details

Title X

First Name

Last Name

Previous Names(s)

Address

Postcode

Telephone

Fax

Mobile

Email

Please provide full details of any other ind...

Please tell us your home address(es) for...

Individual Application - Owner Of The Service

Are you the owner of the service?

If you are not the owner of the service, plea...

Do you intend working in the service?

If YES, what will be your job in the service?

Individual Application - Manager's Details

Please confirm who will manage the service:

Individual Application - Medical Declaration

I declare that, in my opinion, I am physically ...

Please give details of any physical or mental...

I understand that I am liable for any fee pay...

Employment History

Technical And Professional Qualifications

Qualification

Date of course

Date awarded

Name of professional or registering body

Professional identification number (PIN) or m...

Qualification

Date of course

Date awarded

Name of professional or registering body

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 an application form part, fill in all relevant fields and click the blue 'Submit' button at the bottom of the form.

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Individual Application - Manager's Details

Individual Application - Medical Declaration

Employment History

Technical and Professional Qualifications

References

Invoice Contact Details

Financial information

Individual Application - Declaration about bankruptcy and sequestration

Click the Submit button after the form is completed.

Documents attached to Part 1: Individual Application - Mon, 17 Apr 2023 12:34:00 GMT

Upload Sensitive

Upload

You can also upload documents for each part here.

Submit

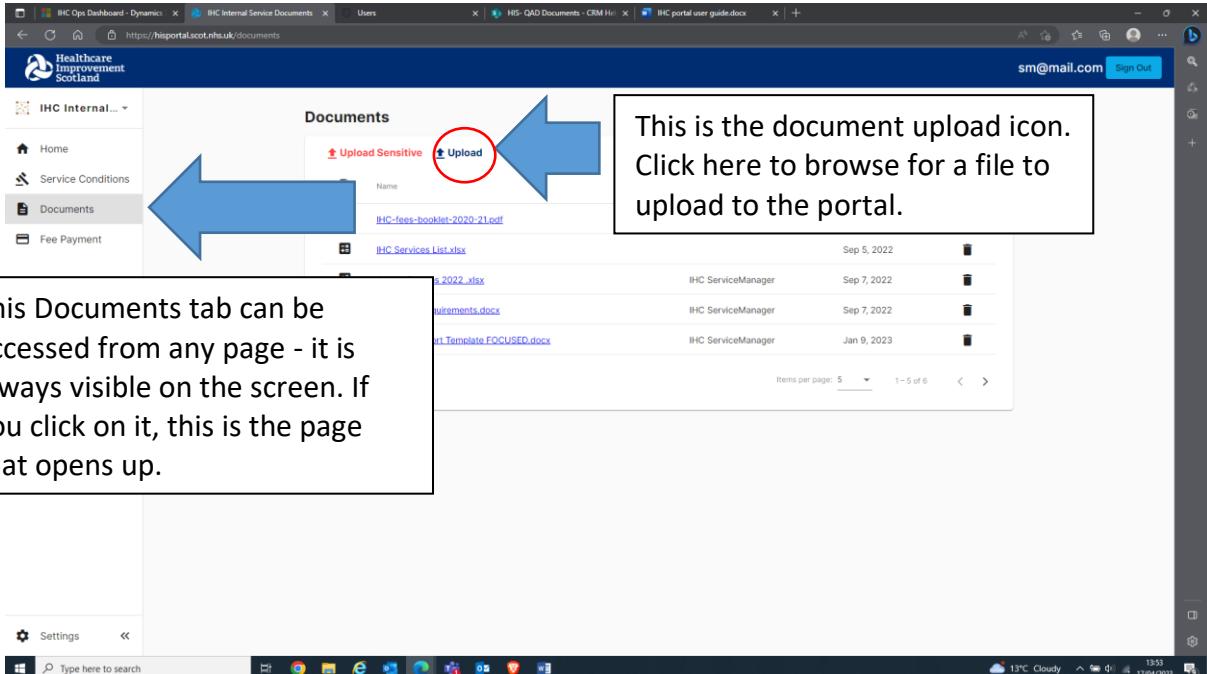
When submitting your application form, please note that the submit button will not submit all parts of the form. It only sends the part of the form that is active at the time. You should review each part of the form and submit it when you are content it has been fully completed.

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## Uploading supporting documents

If you wish to upload documents to support an application, self-evaluation or notification, you can choose the 'Upload' icon from the bottom of any of those forms (**NB: this is the preferred route for uploading documents to the portal as it makes it clear which documents relate to which form**).

However, you can also use the Documents tab on the left hand side of the screen to upload any documents at any time.



This screenshot shows the IHC Internal Service Documents portal. On the left, a vertical navigation bar includes 'Home', 'Service Conditions', **Documents** (which is the active tab, highlighted in blue), and 'Fee Payment'. The main content area is titled 'Documents' and shows a list of uploaded files. At the top of this list are two red 'Upload' buttons: 'Upload Sensitive' and 'Upload'. The 'Upload' button is circled in red. A large blue arrow points from the left towards this 'Upload' button. Another blue arrow points from the right towards the same 'Upload' button. A callout box with a black border and white text is positioned over the 'Upload' button, stating: 'This is the document upload icon. Click here to browse for a file to upload to the portal.' Below the 'Documents' list, there is a table showing file details: Name, Date, and User. The table includes files like 'IHC-fees-booklet-2020-21.pdf', 'IHC Services List.xlsx', 'Requirements.docx', and 'IHC Template FOCUSED.docx'. The last file was uploaded by 'IHC ServiceManager' on 'Jan 9, 2023'. At the bottom of the screen, the Windows taskbar is visible with various icons and the system tray showing the date and time.

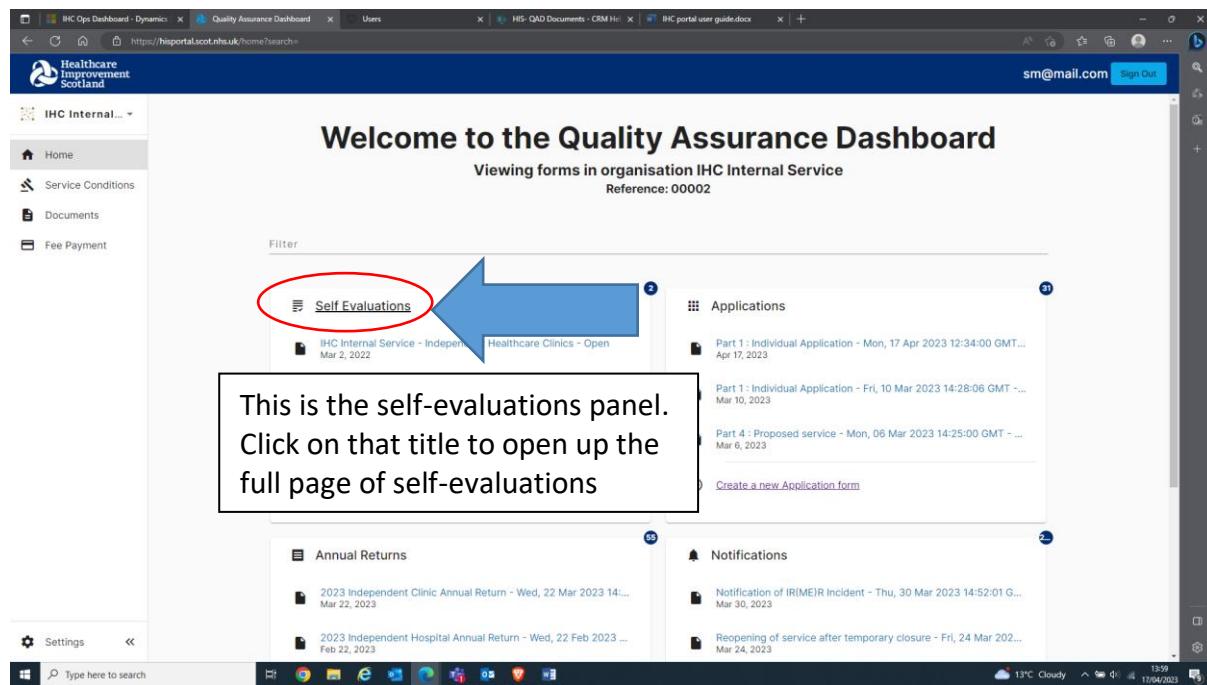
This Documents tab can be accessed from any page - it is always visible on the screen. If you click on it, this is the page that opens up.

This is the document upload icon. Click here to browse for a file to upload to the portal.

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## Self-evaluation

If we have asked you to complete or update your self-evaluation, navigate to the Self-Evaluations panel on the homepage.



This screenshot shows the 'Welcome to the Quality Assurance Dashboard' page. A large blue arrow points from the text 'This is the self-evaluations panel. Click on that title to open up the full page of self-evaluations' to the 'Self Evaluations' link in the 'Applications' section. The 'Self Evaluations' link is highlighted with a red circle.

**Welcome to the Quality Assurance Dashboard**  
Viewing forms in organisation IHC Internal Service  
Reference: 00002

**Applications**

- Part 1 : Individual Application - Mon, 17 Apr 2023 12:34:00 GMT ...  
Apr 17, 2023
- Part 1 : Individual Application - Fri, 10 Mar 2023 14:28:06 GMT ...  
Mar 10, 2023
- Part 4 : Proposed service - Mon, 06 Mar 2023 14:25:00 GMT ...  
Mar 6, 2023

[Create a new Application form](#)

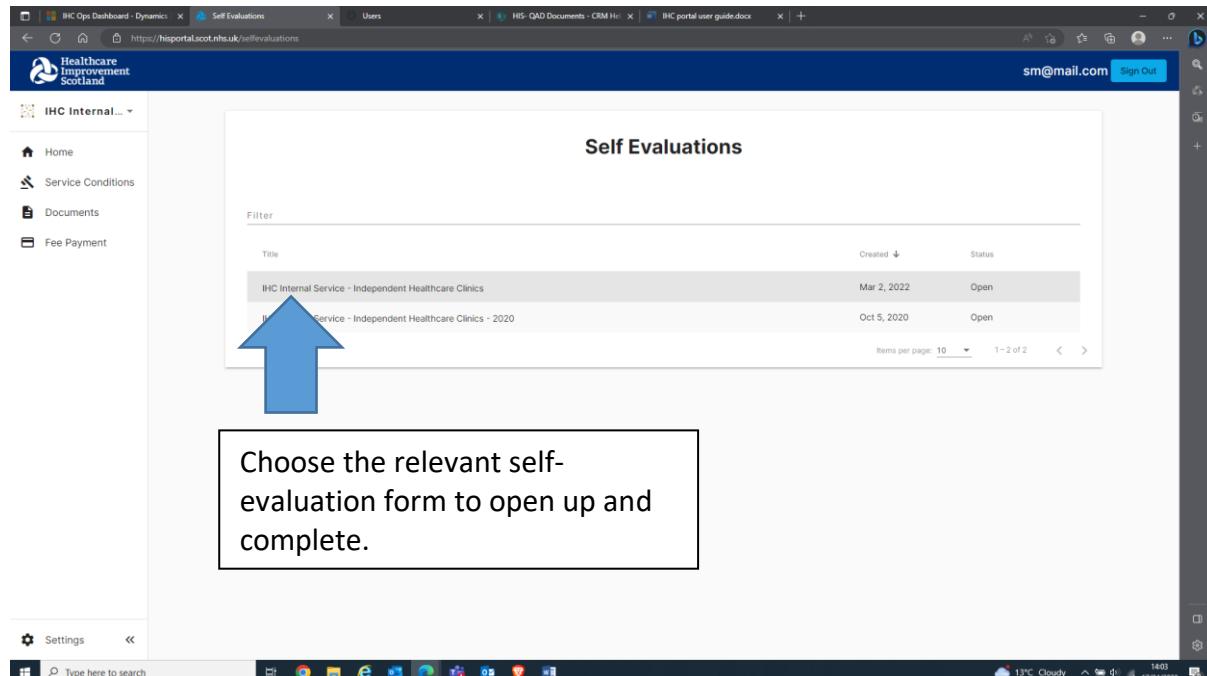
**Annual Returns**

- 2023 Independent Clinic Annual Return - Wed, 22 Mar 2023 14:...  
Mar 22, 2023
- 2023 Independent Hospital Annual Return - Wed, 22 Feb 2023 ...  
Feb 22, 2023

**Notifications**

- Notification of IR(ME)R Incident - Thu, 30 Mar 2023 14:52:01 G...  
Mar 30, 2023
- Reopening of service after temporary closure - Fri, 24 Mar 202...  
Mar 24, 2023

Any new self-evaluation that has been published by Healthcare Improvement Scotland for your service will have a status of 'Open'. Self-evaluations that have been previously completed and submitted will also appear on this list. Choose the one you want to complete.



This screenshot shows the 'Self Evaluations' page. A large blue arrow points from the text 'Choose the relevant self-evaluation form to open up and complete.' to the list of evaluations. The first evaluation in the list, 'IHC Internal Service - Independent Healthcare Clinics', is highlighted with a blue box.

**Self Evaluations**

Title	Created	Status
IHC Internal Service - Independent Healthcare Clinics	Mar 2, 2022	Open
IHC Internal Service - Independent Healthcare Clinics - 2020	Oct 5, 2020	Open

Items per page: 10 1-2 of 2

**Choose the relevant self-evaluation form to open up and complete.**

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Documents associated with your self-evaluation can be uploaded at the bottom of the self-evaluation document.

Once you have completed all the sections, and uploaded your documents, submit the form using the submit button at the bottom of the form.

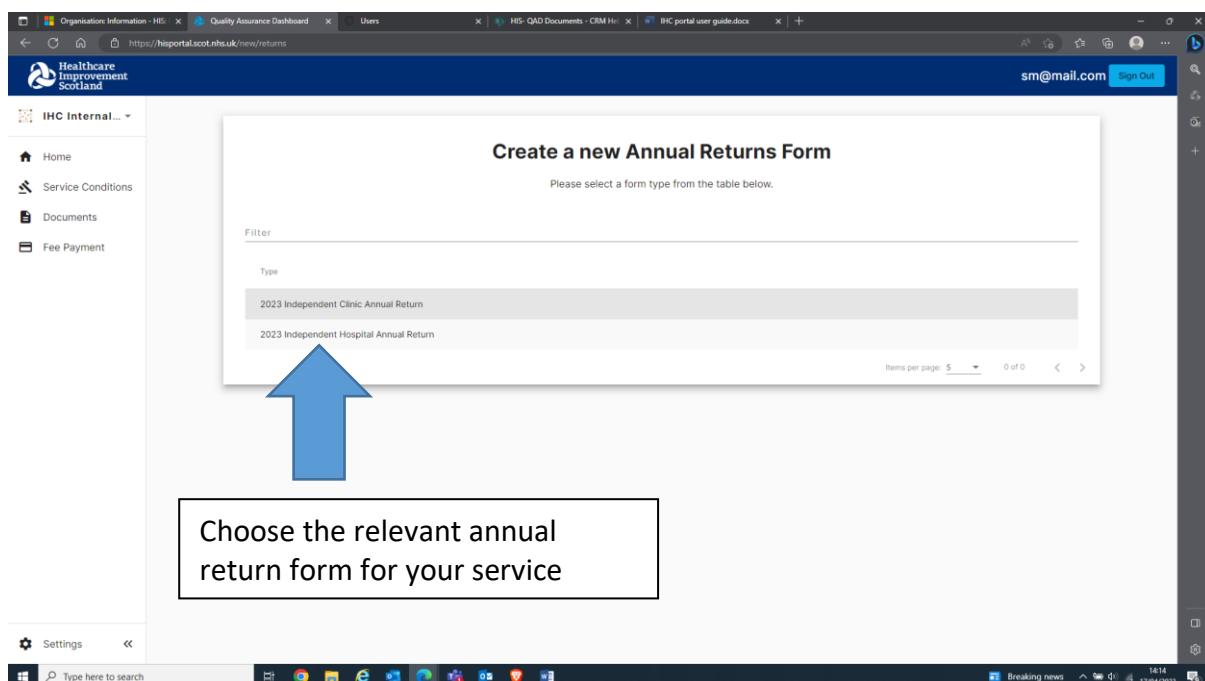
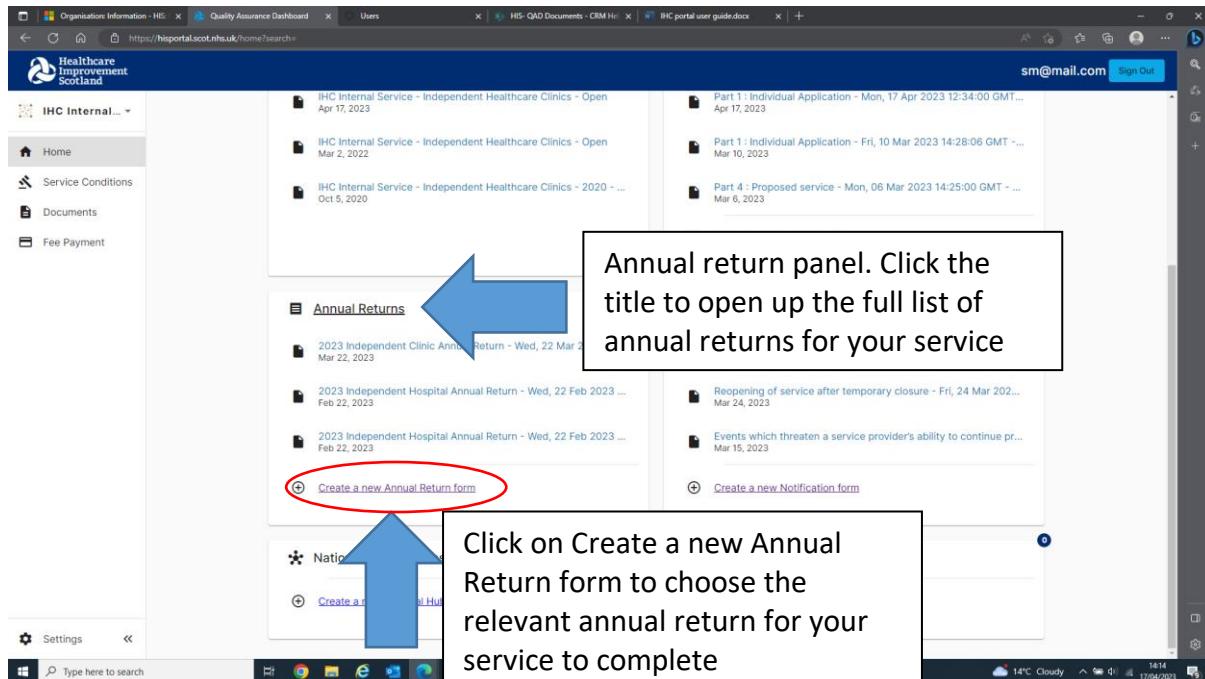
The form auto-saves as you fill it in, so you can exit the form and come back to fill in more at any time.

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## Annual return

If we have asked you to complete an annual return, navigate to the Annual Returns panel on the homepage. Click the 'Create a new Annual Return form' link at the bottom of that panel to open up the annual returns page and choose the form for your service (clinic or hospital).



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2023 Independent Clinic Annual Return - Mon, 17 Apr 2023 13:15:01 GMT

Last Saved: Just now

2023 Independent clinic annual return - Provider Details

What is the correct name of the provider organisation?

00938 Is this correctly displayed on the current certificate of registration?  Yes  No

00939 What is the registered address of the provider organisation (inc postcode)? - 0/10,000 \*

00940 Is this correctly displayed on the current certificate of registration?  Yes  No

00941 What is the current legal status of the provider organisation? \*

00942 Has the legal status of the provider organisation changed since the date of registration?  Yes  No

00943 If yes, have you submitted the 'Change of legal entity' notification to Healthcare Improvement Scotland?  Yes  No

00944 Has anyone been added to/removed from the provider organisation in the last year - e.g. added or removed from Companies House, OSCR or partnership agreement? \*

2023 Independent Clinic Annual Return - Service Details

What is the correct name of the service? ...

Is this correctly displayed on the provider's ...

If no, have you submitted a 'Change of nam...'

What is the address of the service (inc post...)

Is this correctly displayed on the current cer...

If no, have you submitted a 'Change of addr...'

What is the contact telephone number for ...

What is the name of the manager of this ser...

Is this correctly displayed on the provider's ...

If no, have you submitted a 'Change of regis...

What is the registered manager's telephone ...

What is the registered manager's email addr...

Where is the service provided from? If 'Othe...

Other details

Please describe the treatments offered (sel...)

If your service offers any treatments not list...

Has the range of treatments offered change...

If yes, what are the new treatments offered?

If breast implant treatment is offered, are yo...

What is the age range of your service users?

Does this match the conditions on the prov...

If no, have you submitted an 'Application to ...

Once you have completed all fields in all of the sections, submit the form using the submit button at the bottom of the form. You can upload supporting documents to the form as well.

2023 Independent clinic annual return - Third Party Accreditation

2023 Independent clinic annual return - Pharmacy and Medicines

2023 Independent clinic annual return - Infection Prevention and Control

2023 Independent clinic annual return - Quality Improvement

2023 Independent clinic annual return - Incidents and Accidents

2023 Independent clinic annual return - Complaints

2023 Independent clinic annual return - Duty of Candour

2023 Independent clinic annual return - Contingency Planning

2023 Independent clinic annual return - Waste Management

2023 Independent clinic annual return - Declaration

Submit button

Documents attached to 2023 Independent Clinic Annual Return - Mon, 17 A 2023 13:15:01 GMT

Upload documents here for this form

Actions

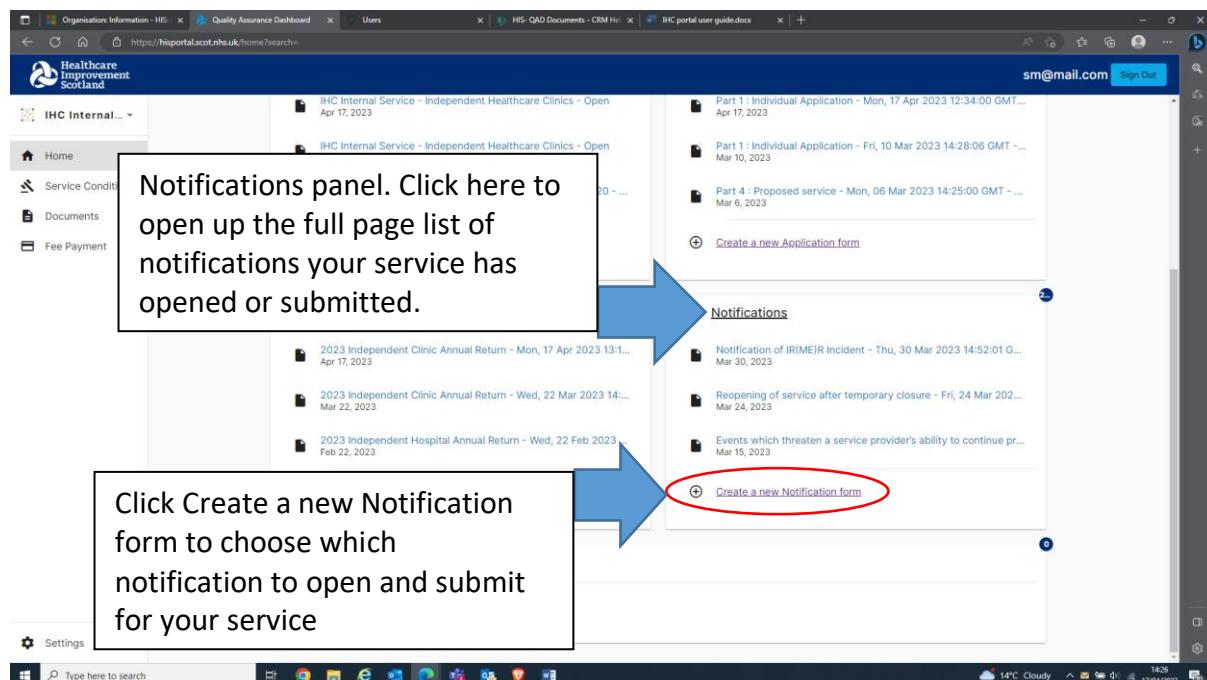
Upload

Your work auto-saves as you fill it in, so you can exit the form at any time and come back to it later.

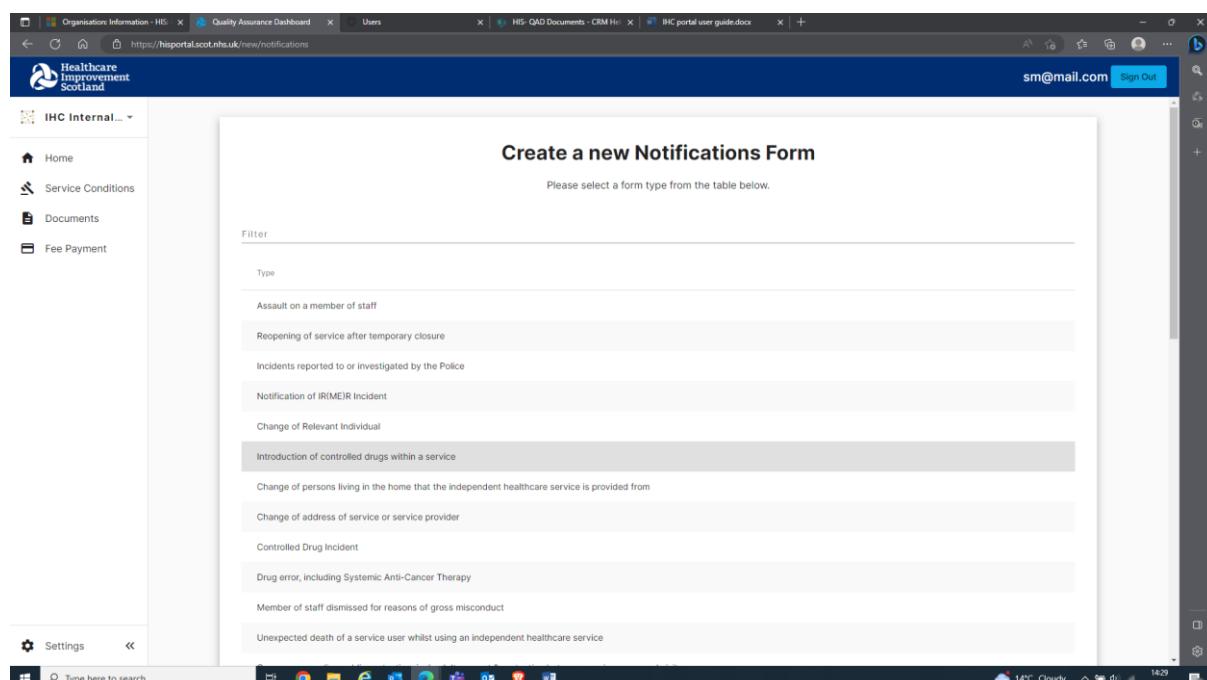
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## Notifications

If you need to submit a notification, navigate to the Notifications panel on the home page. You can create a new notification form to complete by clicking the 'Create a new Notification form' button at the bottom of that panel.

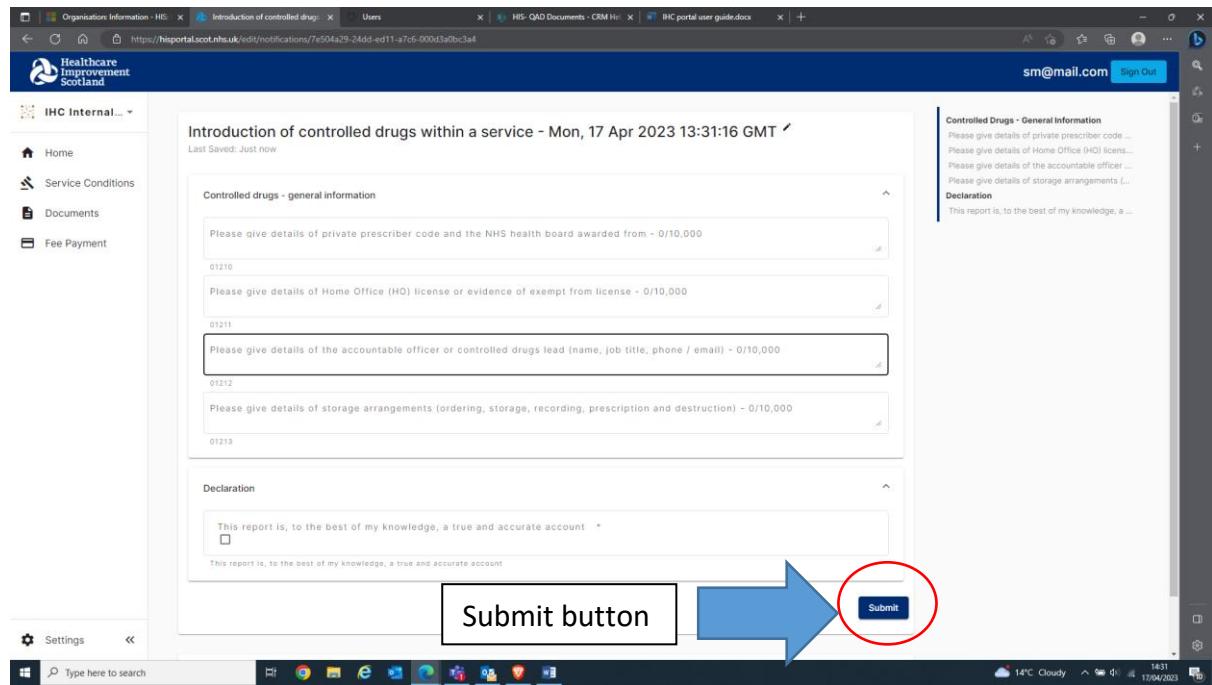


Then select the appropriate notification from the list.



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Documents associated with your notification can be uploaded below the notification. Once you have completed all the sections of the notification and uploaded any associated documents, submit the form using the submit button at the bottom of the form.



The screenshot shows a Microsoft Edge browser window with the following tabs open:

- Organisations Information - IHC
- Introduction of controlled drug...
- Users
- HIS-QAD Documents - CRM Help
- IHC portal user guide.docx

The main content area displays the 'Introduction of controlled drugs within a service' form, last saved on Mon, 17 Apr 2023 13:31:16 GMT. The form includes sections for 'Controlled drugs - general information' and 'Declaration'. The 'Controlled Drugs - General Information' section contains fields for prescriber code, Home Office license, accountable officer, and storage arrangements, each with a placeholder value of '0/10,000'. The 'Declaration' section contains a checkbox for a true and accurate account, with a note below it. A large blue arrow points from a box labeled 'Submit button' to a red circle around the 'Submit' button in the bottom right corner of the declaration section.

Your work auto-saves as you fill the form in so you can exit the form at any time and come back to it later.

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