

# 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.

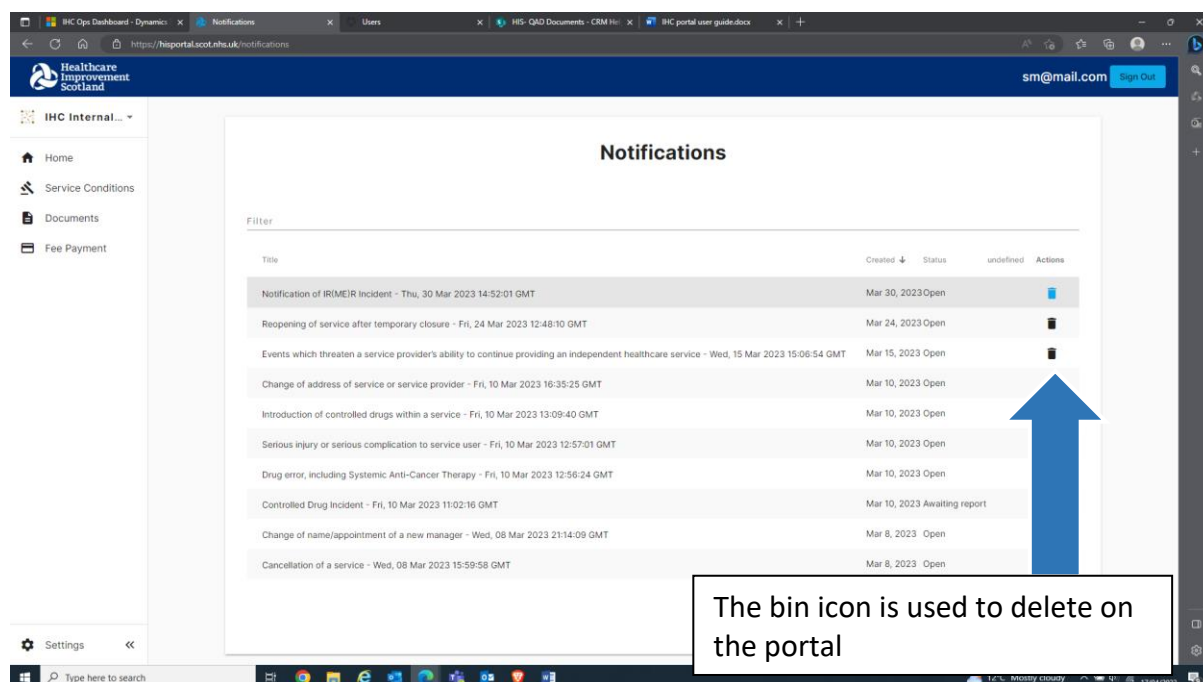
**NB: Your User ID is unique to you.** Please do not share your account with someone else. If someone else needs access to the portal, please contact us and we can set up a new user account:

Independent Healthcare Enquiry Line: 0131 623 4342  
[his.ihtregulation@nhs.scot](mailto:his.ihtregulation@nhs.scot)

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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.



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

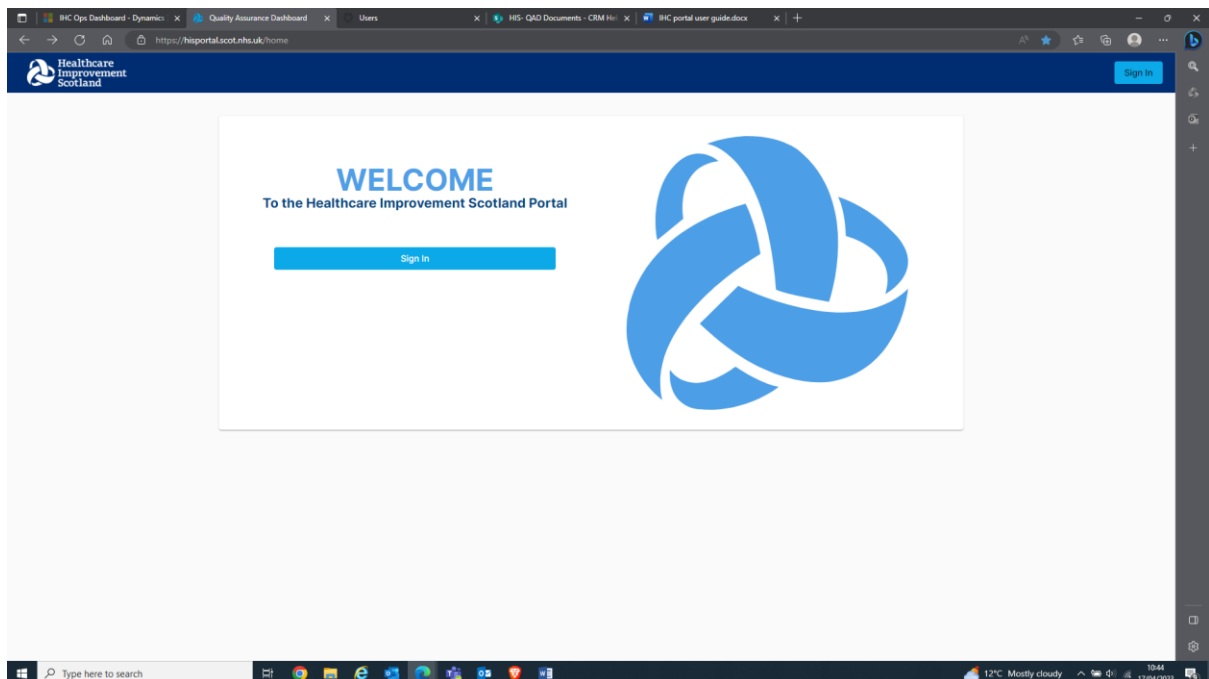
You cannot set up a portal profile yourself. If you are the service manager of a registered independent healthcare service, you will have been set up with a profile in our system and given permissions to access the portal for your service. If you are not the manager of the service and you think you should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

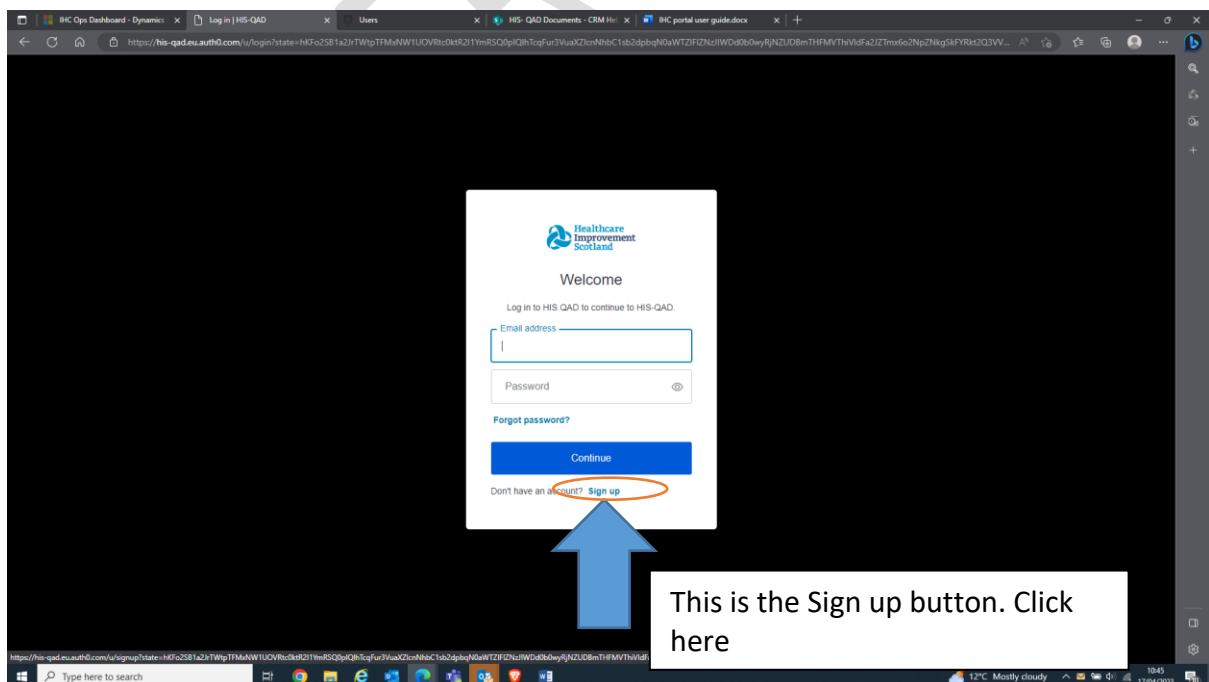
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## Setting a password for the first time

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.

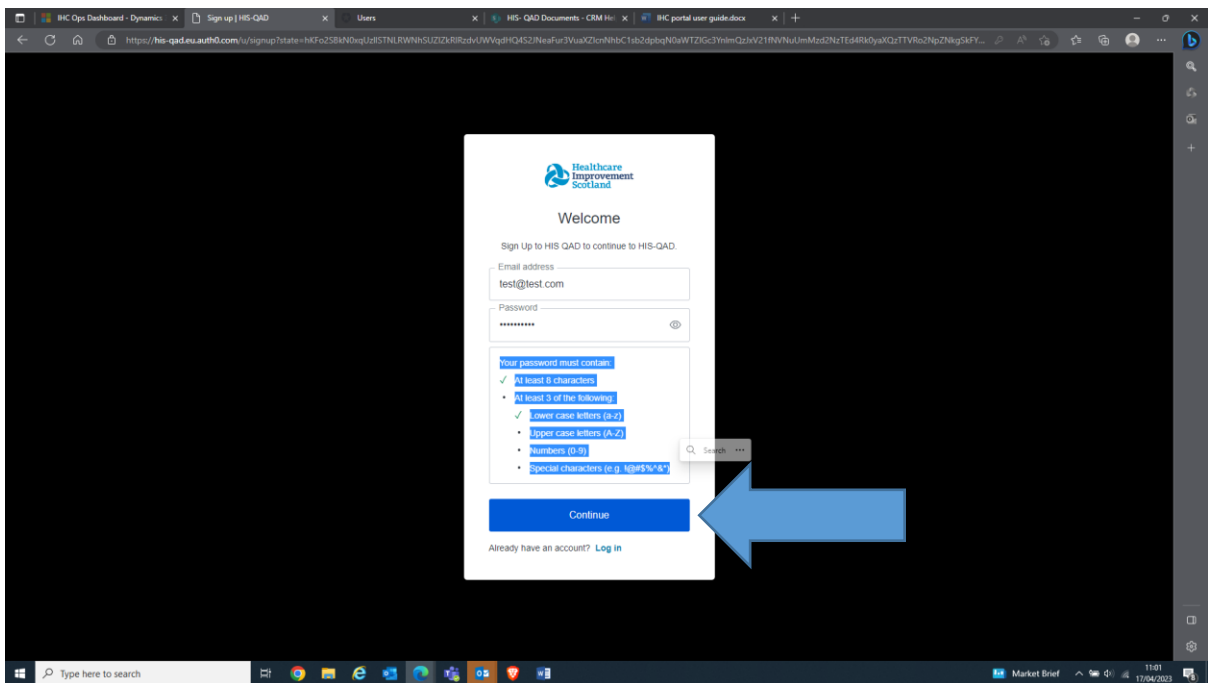


This will take you to the sign in page. Click on the 'Sign up' link underneath the blue 'Continue' bar.



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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’.

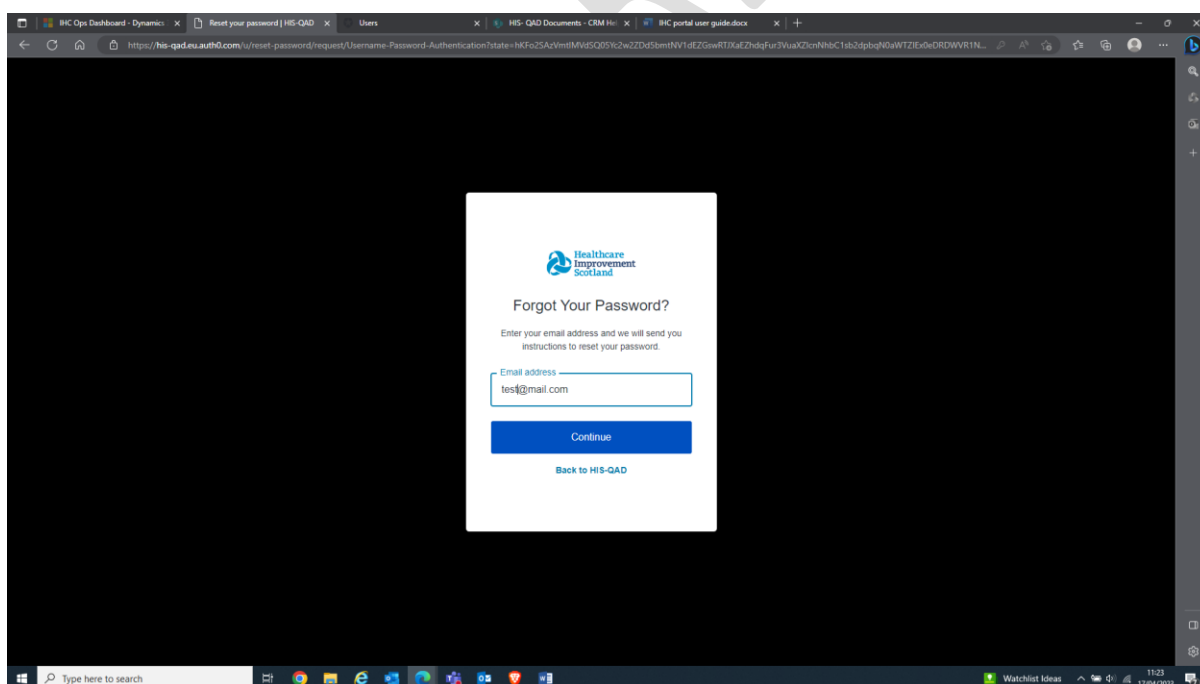
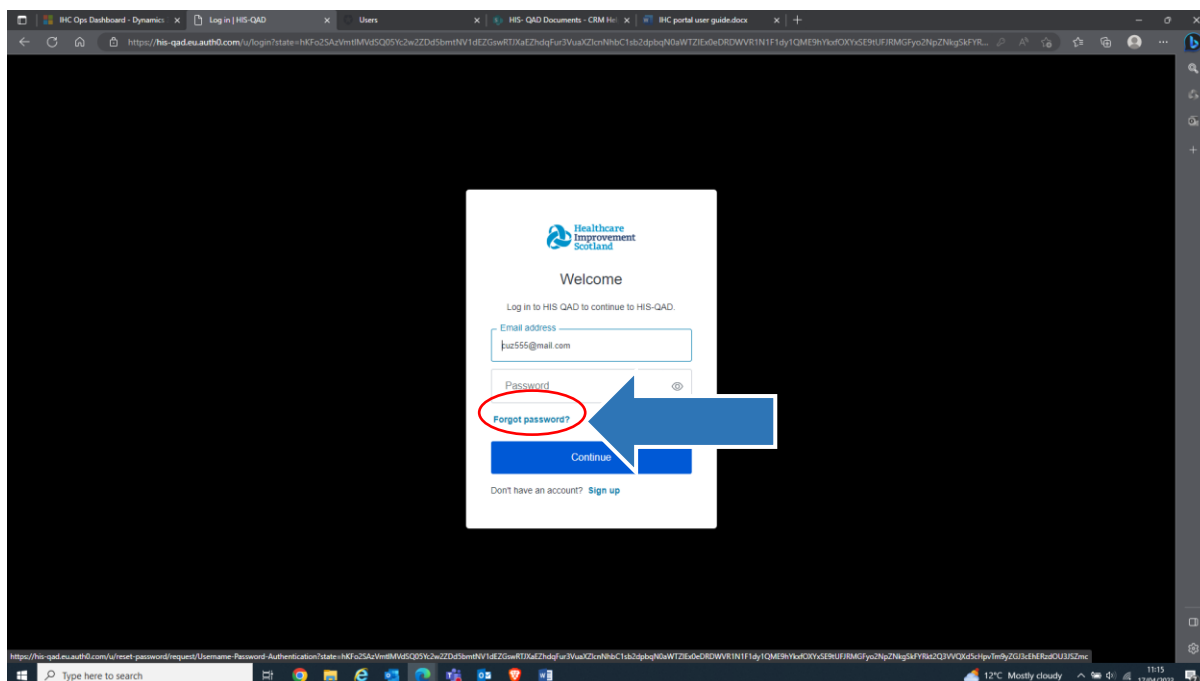


This will trigger a verification email to be sent out to your email address. Open that email from your inbox (check your spam folder if it does not come through to your inbox) and this will verify your email address. Log in with your email address and password at the sign in page from then on.

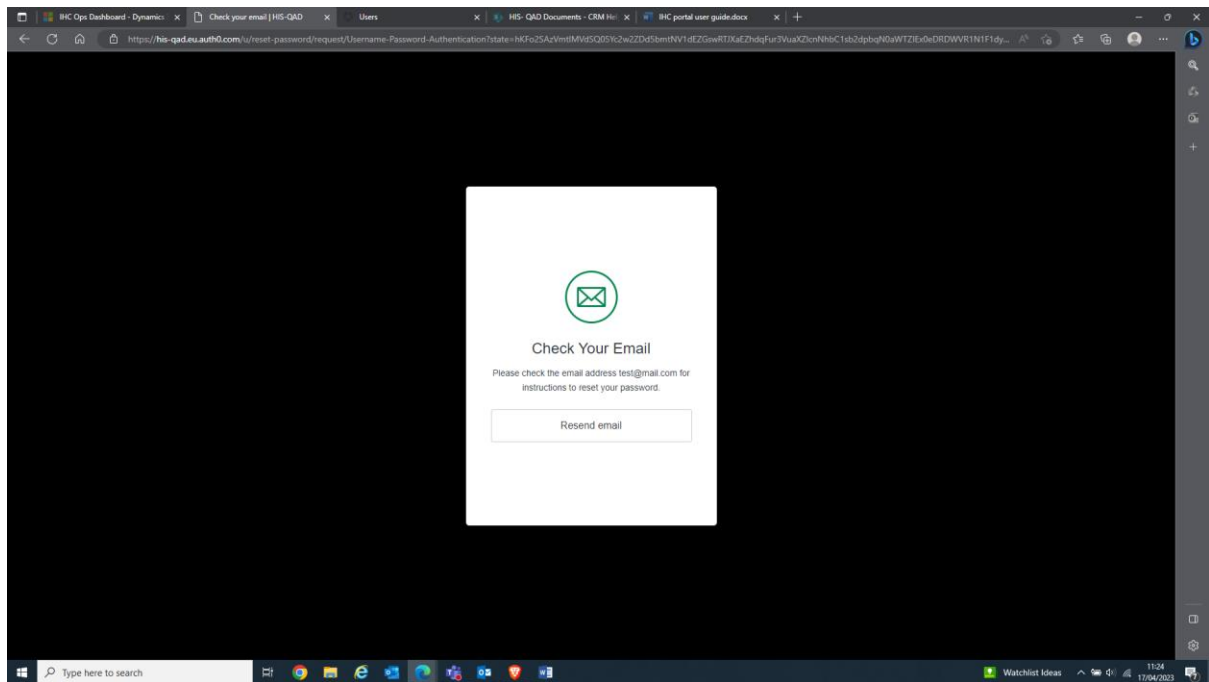
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## Forgotten Password

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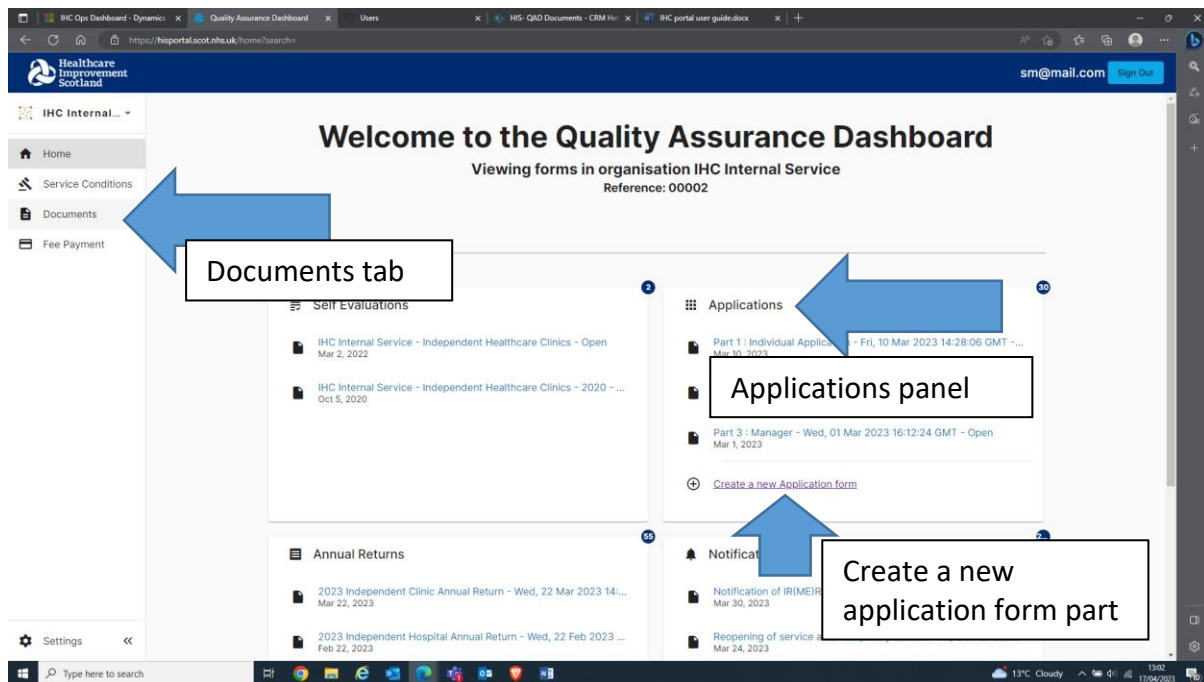
Once you have entered your email address and clicked 'Continue', you will receive an automatic email with a link to a page which will allow you to set a new password.

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.

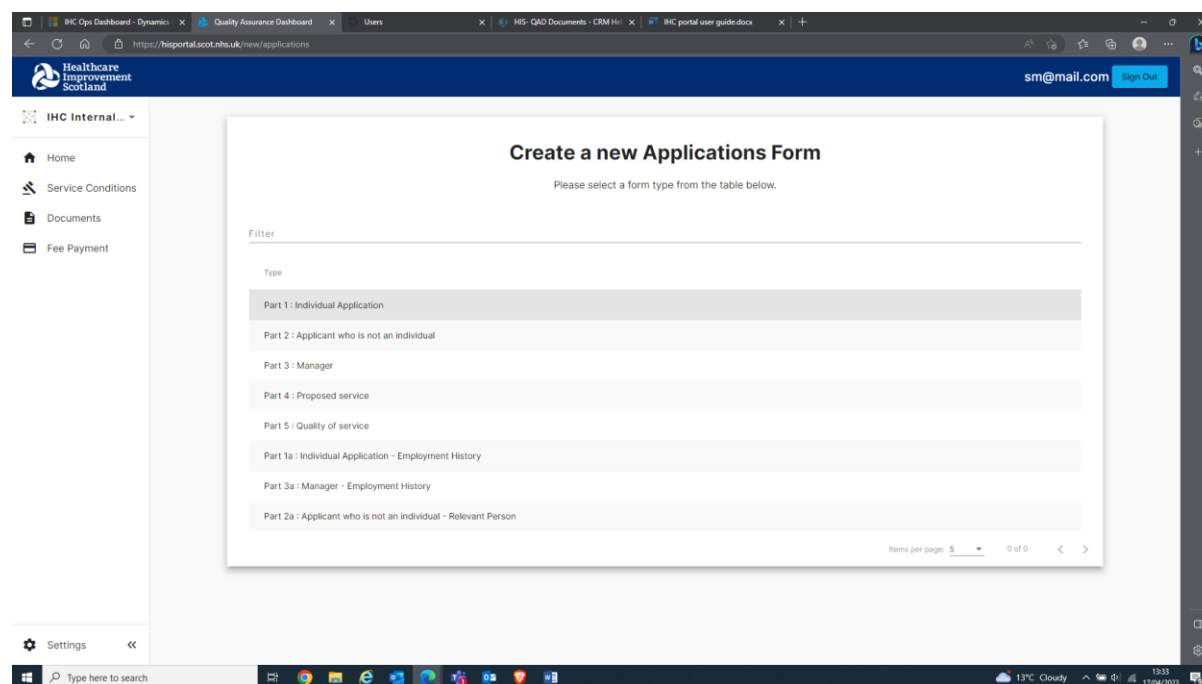


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To start a new application part, click on 'Create a new Application form' at the bottom of that panel. This will then take you to the list of application parts to open and complete, as below.

**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.ihceregulation@nhs.scot](mailto:his.ihceregulation@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.

The screenshot displays the IHC Portal User Guide interface. The top navigation bar includes links for 'IHC Ops Dashboard - Dynamics', 'Part 1: Individual Application', 'Users', 'HIS-QAD Documents - CRM Hi', and 'IHC portal user guide-docs'. The main content area is titled 'Part 1: Individual Application - Mon, 17 Apr 2023 12:34:00 GMT' and 'Last Saved: Just now'. The form is divided into a sidebar on the left and a main content area. The sidebar contains links for 'Home', 'Service Conditions', 'Documents', 'Fee Payment', and 'Settings'. The main content area is titled 'Individual Application - Your Details' and includes a form with the following fields: Title, First Name, Last Name, Previous Names(s), Address, Postcode, Telephone, Fax, and Mobile. A right-hand panel contains sections for 'Individual Application - Owner Of The Service', 'Individual Application - Manager's Details', 'Individual Application - Medical Declaration', and 'Employment History'.

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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Click the Submit button after the form is completed.

You can also upload documents for each part here.

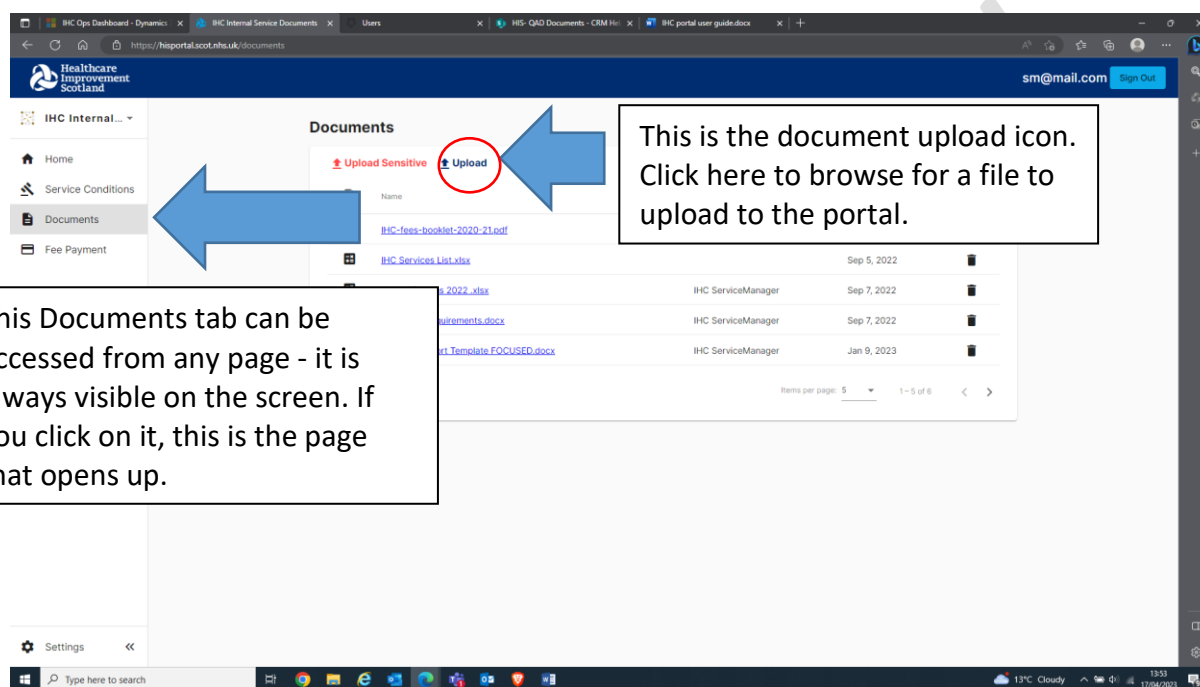
When submitting your application form, please note that the submit button will not submit all parts of the form. It only sends the part of the form that is active at the time. You should review each part of the form and submit it when you are content it has been fully completed.

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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**).

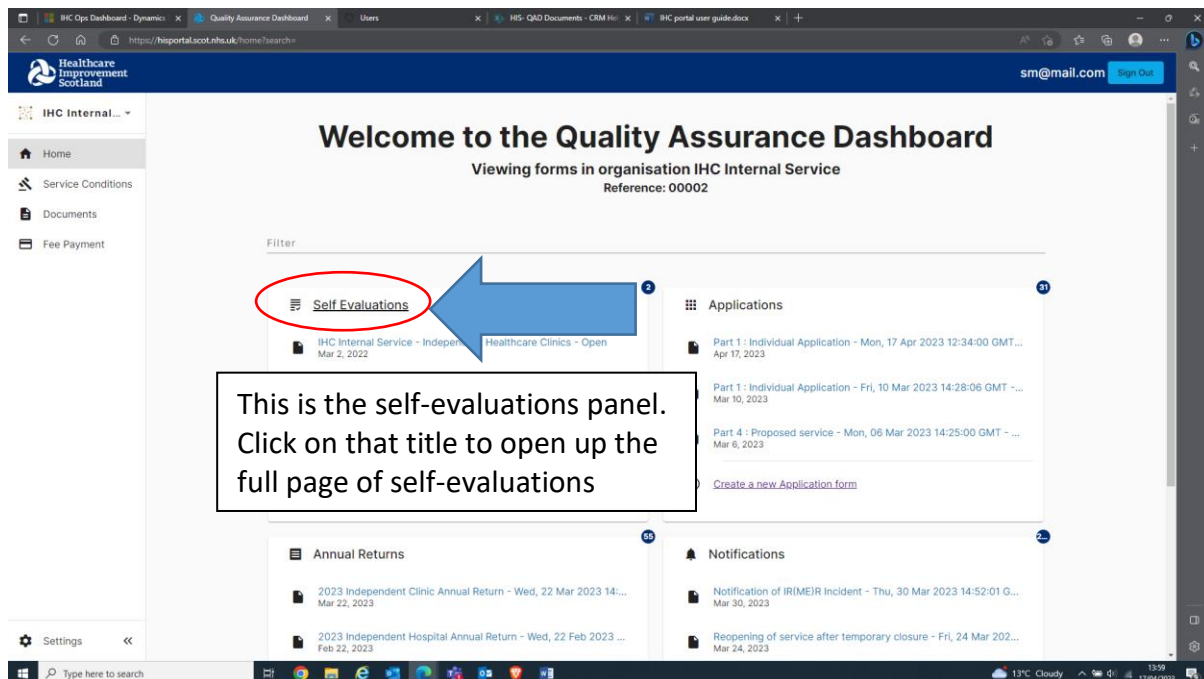
However, you can also use the Documents tab on the left hand side of the screen to upload any documents at any time.



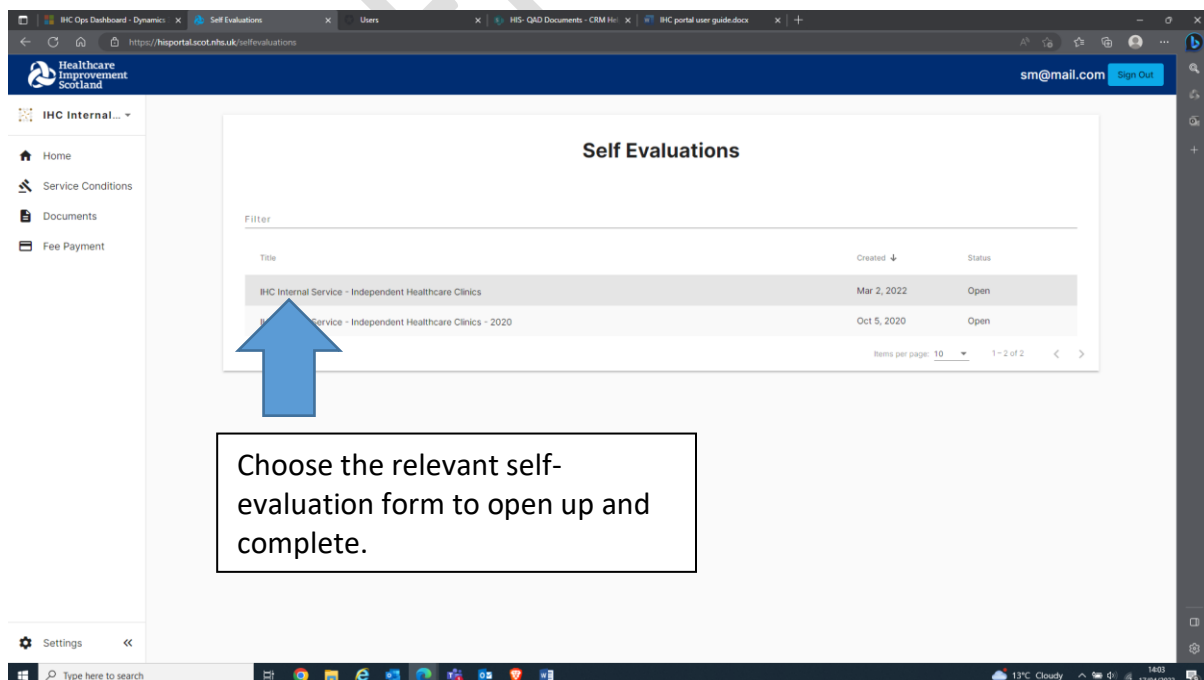
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## Self-evaluation

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



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.



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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).

The screenshot shows the Healthcare Improvement Scotland portal homepage. The 'Annual Returns' panel is highlighted with a blue arrow. A text box points to the panel title, stating: 'Annual return panel. Click the title to open up the full list of annual returns for your service'. Another text box points to the 'Create a new Annual Return form' link at the bottom of the panel, stating: 'Click on Create a new Annual Return form to choose the relevant annual return for your service to complete'.

The screenshot shows the 'Create a new Annual Returns Form' page. A text box points to the table of form types, stating: 'Choose the relevant annual return form for your service'. The table lists two options: '2023 Independent Clinic Annual Return' and '2023 Independent Hospital Annual Return'.

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The screenshot shows the '2023 Independent Clinic Annual Return - Provider Details' form. The form includes several sections with questions and input fields:

- 00938**: What is the correct name of the provider organisation? \*
- 00939**: Is this correctly displayed on the current certificate of registration? (Yes/No radio buttons)
- 00940**: What is the registered address of the provider organisation (inc postcode)? - 0/10,000 \*
- 00941**: Is this correctly displayed on the current certificate of registration? (Yes/No radio buttons)
- 00942**: What is the current legal status of the provider organisation? \*
- 00943**: Has the legal status of the provider organisation changed since the date of registration? (Yes/No radio buttons)
- 00944**: If yes, have you submitted the 'Change of legal entity' notification to Healthcare Improvement Scotland? (Yes/No radio buttons)
- 00945**: 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? \*

On the right side, there is a '2023 Independent Clinic Annual Return - Service Details' section with questions about the service provided.

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.

This screenshot shows the bottom of the form with the 'Submit' button and the 'Upload' button. A blue arrow points from the 'Submit' button to the 'Upload' button. A text box with an arrow points to the 'Upload' button, stating 'Upload documents here for this form'. Another text box with an arrow points to the 'Submit' button, stating 'Submit button'.

The 'Upload' button is located in the 'Documents attached to 2023 Independent Clinic Annual Return - Mon, 17 Apr 2023 13:15:01 GMT' section. The 'Submit' button is located at the bottom right of the form.

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.

Notifications panel. Click here to open up the full page list of notifications your service has opened or submitted.

Click Create a new Notification form to choose which notification to open and submit for your service

Then select the appropriate notification from the list.

Create a new Notifications Form

Please select a form type from the table below.

Filter

Type
Assault on a member of staff
Reopening of service after temporary closure
Incidents reported to or investigated by the Police
Notification of IR(ME)R Incident
Change of Relevant Individual
Introduction of controlled drugs within a service
Change of persons living in the home that the independent healthcare service is provided from
Change of address of service or service provider
Controlled Drug Incident
Drug error, including Systemic Anti-Cancer Therapy
Member of staff dismissed for reasons of gross misconduct
Unexpected death of a service user whilst using an independent healthcare service

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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 web browser window with the URL <https://hisportal.scot.nhs.uk/edit/notifications/7c594a29-24dd-ed11-a7c6-000d3a0bc3d4>. The page title is 'Introduction of controlled drugs within a service - Mon, 17 Apr 2023 13:31:16 GMT'. The form is titled 'Controlled drugs - general information' and contains several text input fields with placeholder text: 'Please give details of private prescriber code and the NHS health board awarded from - 0/10,000', 'Please give details of Home Office (HO) license or evidence of exempt from license - 0/10,000', 'Please give details of the accountable officer or controlled drugs lead (name, job title, phone / email) - 0/10,000', and 'Please give details of storage arrangements (ordering, storage, recording, prescription and destruction) - 0/10,000'. There is also a 'Declaration' section with a checkbox and the text 'This report is, to the best of my knowledge, a true and accurate account'. A blue arrow points from a 'Submit button' label to the 'Submit' button at the bottom right of the form.

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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