

Provider Financial Monitoring System: Trust portal submission guide

March 2018

We support providers to give patients safe, high quality, compassionate care within local health systems that are financially sustainable.

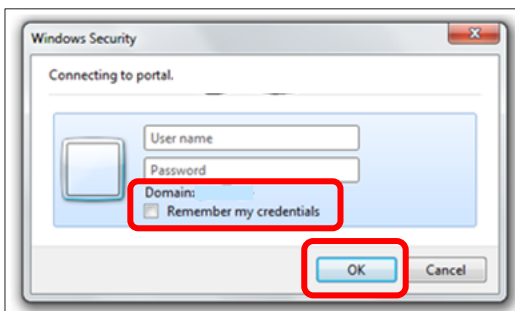
Contents

Logging into the Portal	2
Download a document.....	3
Submit a document	4
Part 1: Upload a document	4
Part 2: Submitting the document.....	5
Additional documents	6
Crib sheet.....	7

Logging into the Portal

To log into the portal, navigate to the URL for your trust. You will need to replace the default trust name which appears in the link with the 'MARSID' for your trust. The URL will therefore be the following:

<https://portal.improvement.nhs.uk/sites/MARSID/SitePages/Home.aspx>



When prompted, enter your **User name** and **Password**.

Tick the **Remember me** box to bypass this step in future.

Click **OK**

If you are a new user requiring log-in details should contact IT.Support@improvement.nhs.uk.

Quick Tip:

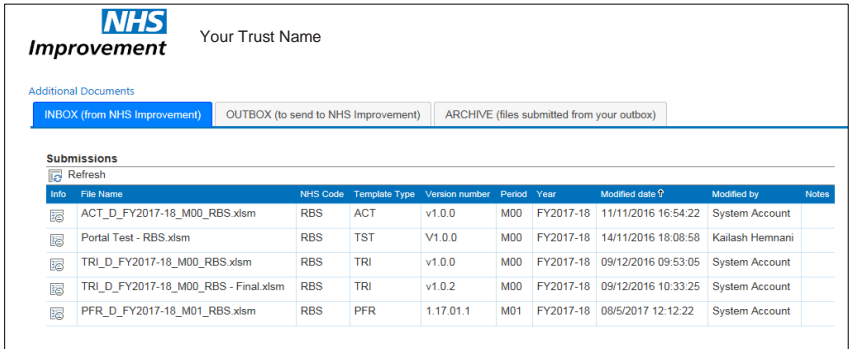
- Users from foundation trusts, with access to existing Monitor portals should use the same log-in credentials for both new (NHS Improvement) and existing (Monitor) portals.

When contacting IT Support, please note your request must include the following information in your email:

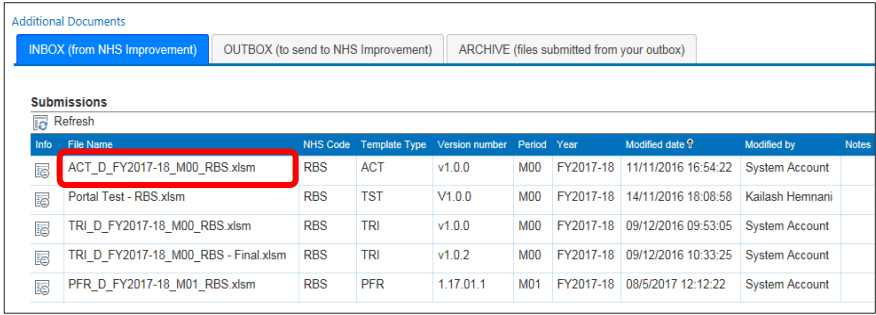
- your full name
- your email address (where a finance director contacts IT support on your behalf)
- your trust's name
- evidence your finance director has approved you as a new portal user (such as forwarding their email approving you in your email to IT support).

For any issues accessing the site, please contact IT.Support@improvement.nhs.uk.

Download a document



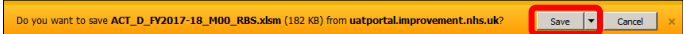
Once successfully logged in, the **Portal Home page** is displayed.



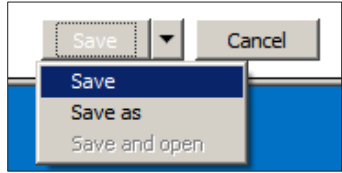
The **INBOX** tab is displayed showing the documents sent to the trust by NHS Improvement.

Click on the require document file name to download it.

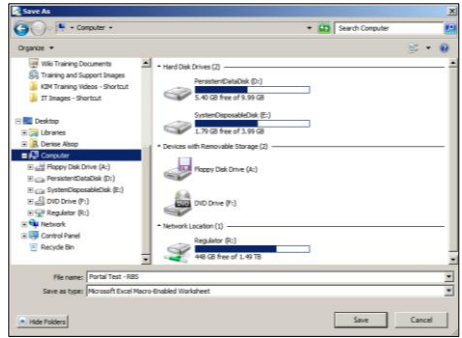
A prompt to save the document on to your own system is displayed at the bottom of the page.



Click on **Save** to store the document in the Downloads folder on your computer.



Alternatively click the drop-down arrow and select **Save as**

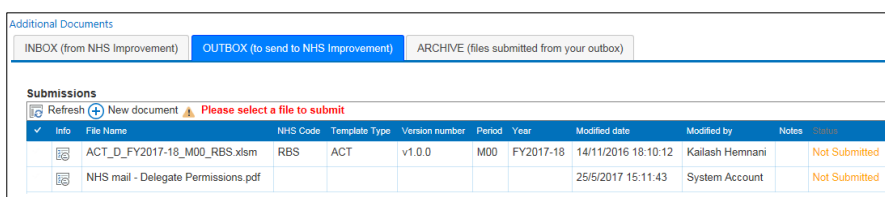


Then select the location for the document to be saved.

If the document from NHS Improvement is a form to complete, you will now be able to open it and fill it in, ready to submit back to NHS Improvement by the submission deadline (where applicable).

Submit a document

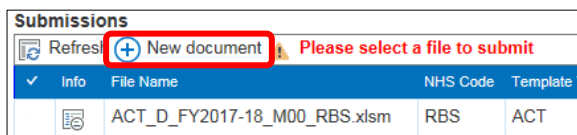
The document submission process is a two part procedure.



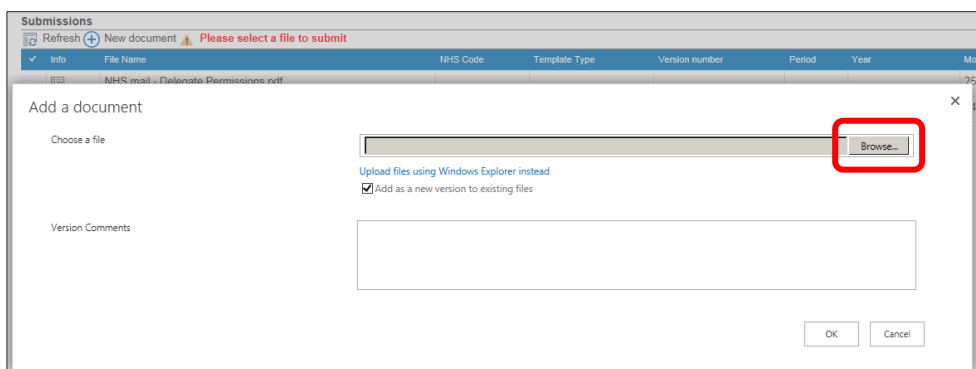
Click on the **OUTBOX** tab to send the document to NHS Improvement.

Part 1

Upload a document



Click on **New document** and wait for a new window to open.



Click on **Browse** to find the document to be submitted.

Once the document is added in the 'choose a file' field, click **Ok**.

Info	File Name	NHS Code	Template Type	Version number	Period	Year	Modified date	Modified by	Notes
<input type="checkbox"/>	ACT_D_FY2017-18_M00_RBS.xlsm	RBS	ACT	v1.0.0	M00	FY2017-18	14/11/2016 18:10:12	Denise Alsop	Not Submitted
<input type="checkbox"/>	Portal Test - RBS.xlsm	RBS	TST	V1.0.0	M00	FY2017-18	31/5/2017 16:27:46	Denise Alsop	Not Submitted
<input type="checkbox"/>	NHS mail - Delegate Permissions.pdf						25/5/2017 15:11:43	System Account	Not Submitted

The document will be displayed in the OUTBOX, waiting to be submitted.

Part 2

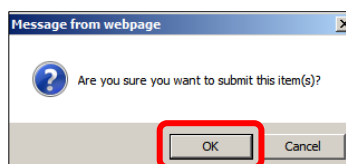
Submitting the document

Info	File Name	NHS Code
<input type="checkbox"/>	ACT_D_FY2017-18_M00_RBS.xlsm	RBS
<input checked="" type="checkbox"/>	Portal Test - RBS.xlsm	RBS
<input type="checkbox"/>	NHS mail - Delegate Permissions.pdf	

Select the document to be submitted by clicking in the **Tick** box of the document.

Info	File Name	NHS Code	Ter
<input checked="" type="checkbox"/>	ACT_D_FY2017-18_M00_RTV.xlsm	RTV	AC
<input type="checkbox"/>	Test file.xlsm	RBS	AC
<input type="checkbox"/>	Portal Test - RBS.xlsm	RBS	TS

Once the required document has been selected, click on **Submit document(s)**.



Click **OK**.

Wait a few seconds for the action to complete. If there is a fail notification, please read it.

Quick Tip:

- If you still have a related query, please contact either the relevant NHS Improvement team for the required the submission you are trying to make, or IT.Support@improvement.nhs.uk.

When a document has been successfully submitted, it will move from **OUTBOX** to **ARCHIVE**. The document submission is now complete.

The screenshot shows the 'Additional Documents' interface with three tabs: 'INBOX (from NHS Improvement)', 'OUTBOX (to send to NHS Improvement)', and 'ARCHIVE (files submitted from your outbox)'. The 'ARCHIVE' tab is selected. Below the tabs, there is a 'Financial Year' section with a checked box for 'FY2017-18'. A 'Submissions' section contains a table with the following data:

File Name	NHS Code	Template Type	Version number	Period	Year	S Number	Submitted date	Modified by	Notes
ACT_D_FY2017-18_M00_RBS*1*1.xlsm	RBS	ACT	v1.0.0	M00	FY2017-18	1	31/5/2017 18:05:08	System Account	
PFR_D_FY2017-18_M01_RBS*1.xlsm	RBS	PFR	1.17.01.1	M01	FY2017-18	1	10/5/2017 15:24:24	Kailash Hemnani	
Portal Test - RBS*1.xlsm	RBS	TST	V1.0.0	M00	FY2017-18	1	14/11/2016 18:17:03	Rachel Marsh	
ACT_D_FY2017-18_M00_RBS*2.xlsm	RBS	ACT	v1.0.0	M00	FY2017-18	2	11/11/2016 17:17:27	Timmy Antonio	

To check your document has been submitted, click on the **ARCHIVE** tab to view the document.

If you can see the document listed, it has been submitted.

Additional documents

This area will contain supplementary documentation provided by NHS Improvement, e.g. user guides.

The screenshot shows the 'Additional Documents' tab highlighted with a red box. Below it are the 'INBOX (from NHS Improvement)' and 'OUTBOX' tabs, and a 'Financial Year' section with an unchecked box.

To view additional documents, click the option at the top of the screen.

The screenshot shows the 'Team Site' interface. The 'Documents' section is highlighted with a red box and contains the following items:

- new document or drag files here
- Trust_Portal_Submission_Guide #
- 16.12.07 PFMS IT WkGrp AGENDA #
- Single Oversight Framework published 30 September 2016 #

The **Team Site** page will now be displayed. Click the document(s) you wish to view.

Crib sheet

1. Cannot access portal

- If you get an error message saying that your password is incorrect when you are trying to log into your trust portal, email IT.Support@improvement.nhs.uk with the subject line '**PFMS – Password**' requesting assistance.

2. Cannot access URL

If you have issues accessing the URL, there are several options you can try:

- Ensuring you have an 's' after 'http:' in the URL (i.e. 'https').
- Using a different browser, Internet Explorer, Chrome, or Firefox; for every browser used it should be the most up-to-date version
- Adding the URL to the list of 'trusted sites' in your internet browser's security settings
- Checking if there's a firewall setting that needs changing to allow you to access the URL - this will need to go via your IT team.

3. Unable to upload/submit documents

- When trying to upload/submit your documents on your portal, if you get an error message or the document just will not upload/submit, email ITSupport@improvement.nhs.uk with the subject line '**PFMS – Loading**' requesting assistance.

For any assistance please contact either the NHS Improvement team requested the submission you are using your portal for, or ITSupport@improvement.nhs.uk.

Contact us:

NHS Improvement

Wellington House
133-155 Waterloo Road
London
SE1 8UG

0300 123 2257

enquiries@improvement.nhs.uk

improvement.nhs.uk

Follow us on Twitter [@NHSImprovement](https://twitter.com/NHSImprovement)

This publication can be made available in a number of other formats on request.