Contents

First registration

You will be sent an email with a link in to register. This will take you to the registration form
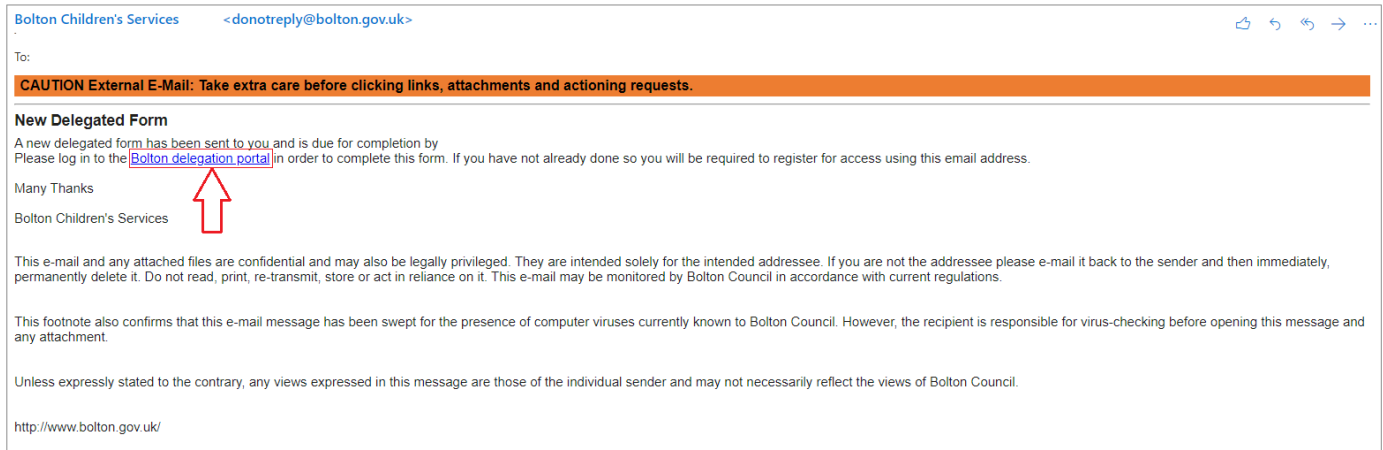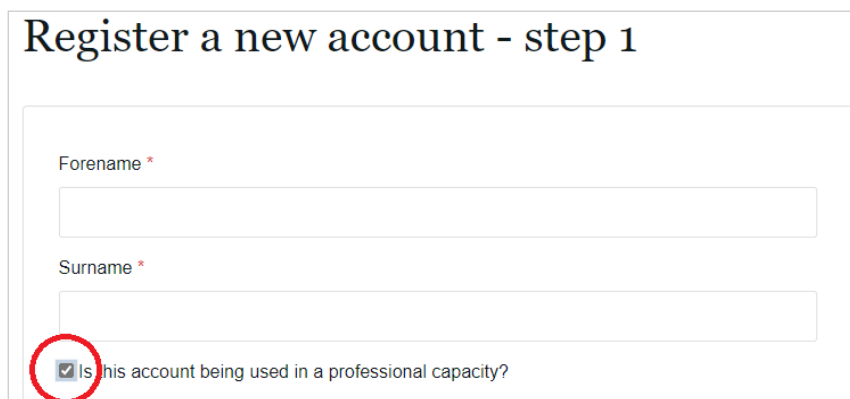

Select the "Register for new account" button
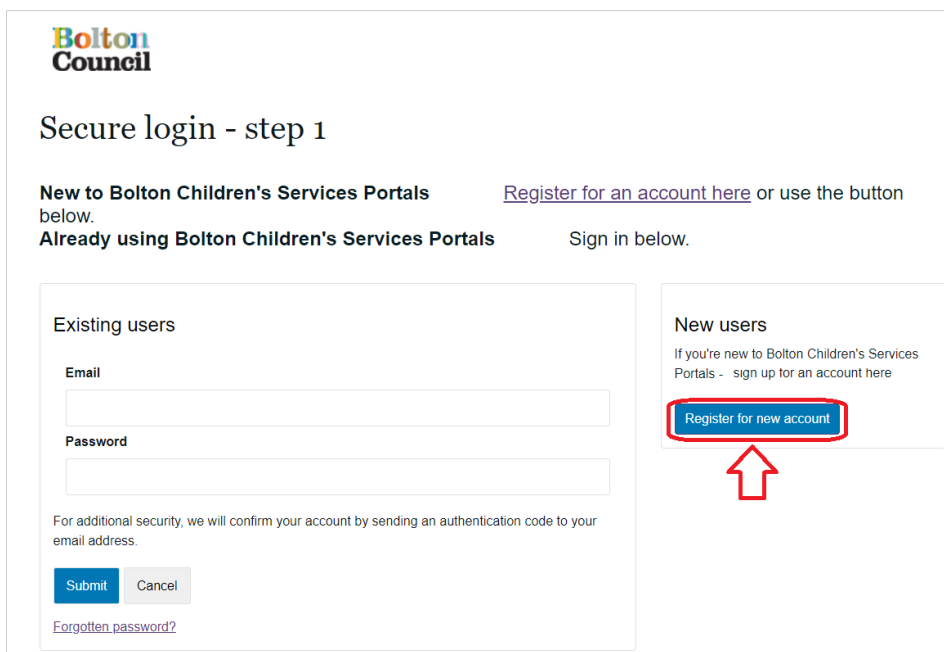
Fill in your first name and surname, then check the box to indicate the portal is being used in a professional Capacity

Bolton Delegation Portal User Guide for Schools

Enter your **role** within the school and your school's name in the **organisation** field. Enter the address of the school in the address fields. Please note all fields with an asterisk are mandatory. Then click *"Next"*

Role *

Designated Teacher

Organisation *

The High School

Property name

House no

Street *

High Street

Area

Town/City *

New Town

County

Postcode *

NT1 2DP

Next   Cancel

Next, enter your e-mail address (as used in school), and create a Password. Please note the Password policy. Then click *"Next"*

Register a new account - step 2

Email address *

Password *

Confirm password *

Back   Next   Cancel
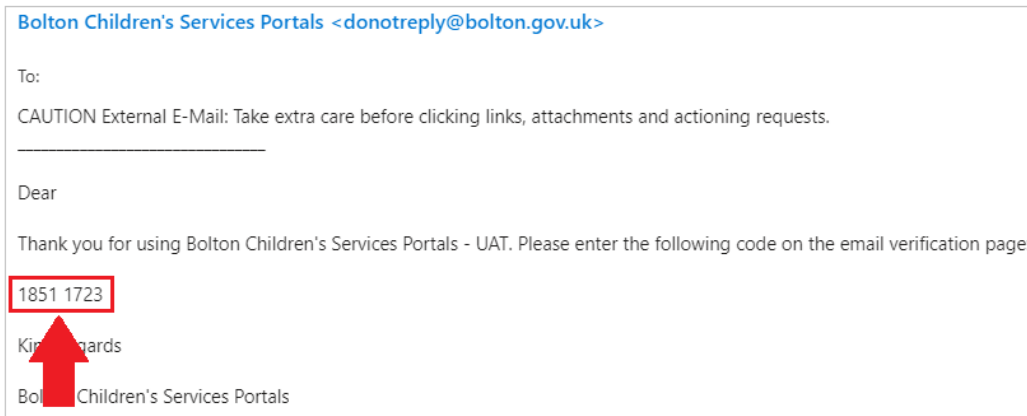
Password policy

Your password must meet the following requirements:

- It must be at least 15 characters long
- It must contain at least one letter
- It must contain only letters, digits, and special characters
- It must contain at least one upper-case letter
- It must contain at least one numerical digit
- It must contain at least one special character.
- It must be different to your current password
- It must be different to your previous password
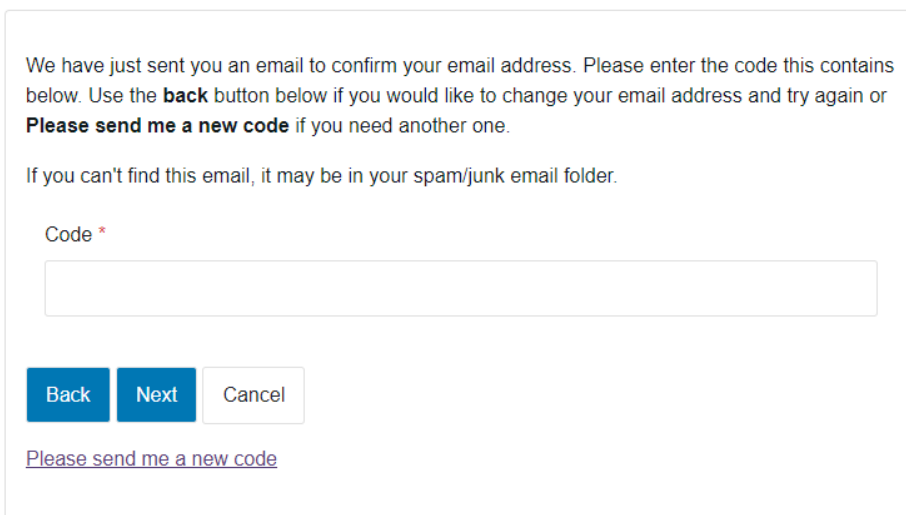
Click here to see the list of special characters:

You will be sent an email with a code

Bolton Children's Services Portals <donotreply@bolton.gov.uk>

To:

CAUTION External E-Mail: Take extra care before clicking links, attachments and actioning requests.
_____

Dear

Thank you for using Bolton Children's Services Portals - UAT. Please enter the following code on the email verification page:

1851 1723

Ki____gards

Bol___ Children's Services Portals

Copy and paste this code in the box provided and click *"Next"*

Register a new account - step 3

We have just sent you an email to confirm your email address. Please enter the code this contains below. Use the **back** button below if you would like to change your email address and try again or **Please send me a new code** if you need another one.

If you can't find this email, it may be in your spam/junk email folder.

Code *

[   ]

[Back] [Next] Cancel

Please send me a new code

NB: Please be aware that the verification code will expire after 10 minutes.

You are now a registered user.

Existing user login

If you already have a portal account, type your email and password into the existing user section and click ***"Submit"***

You will be sent an email with a code **NB: Please be aware that the verification code will expire after 10 minutes.**

Copy and paste this code in the box provided and select ***"Finish"***

Secure login - step 2

We have just sent you an email to confirm your account. Please enter the code this contains below.

If you can't find this email, it may be in your spam/junk email folder.

Code

Finish   Cancel

Please send me a new code

Please enter the verification code that we sent you.

Forgotten password

Click *"Forgotten Password"*

Secure login - step 1

New to Bolton Children's Services Portals   Register for an account here or use the button below.
Already using Bolton Children's Services Portals   Sign in below.

Existing users

Email

Password

For additional security, we will confirm your account by sending an authentication code to your email address.

Submit   Cancel

Forgotten password?

New users

If you're new to Bolton Children's Services Portals - sign up for an account here

Register for new account

Type in your email address

Reset password - step 1

Email

Next   Cancel

Please enter your email address and we will email you a code to allow you to reset your password.

You will be sent an email with a code

Put this code in the box provided and select **"Next"**

You will now be able to create a new password. Please note the Password Policy. Click **"Finish"** when you're happy with your new password.

Once your password has been reset you will see confirmation. Click **"ok"** to return to the log in page.

Password Reset Confirmation

Your password has been changed. Press OK to return to the login page.

OK

Portal Overview

Once you have successfully logged into the Bolton Delegation portal, you will land on a 'tasks' screen, which allows you to view tasks assigned to you, tasks which have been retracted from you and tasks you have completed.

Bolton Delegation Portal
Tasks

For information/user guides on how to use the delegation portal click **here**.

Please be aware that the portal will log you out after 15 minutes of inactivity. Please save your work as you go along.

The following forms have been delegated to you to complete.

Currently Assigned Tasks	Recently Retracted Tasks	Recently Submitted Tasks

Task List

	Form Type	Name	Due Date	Comments
1	PEP Form	baby bear	21-Sep-2021	

Currently Assigned Tasks

Within this tab, any task (form) that has been assigned to you from the Local Authority will be displayed. You will see the name of the Form i.e., PEP form, the name of the student the form is in relation to, the due date of when the form needs to be completed by you and any comments which may have been recorded by the LA. Click anywhere on the task line to open the form.

Recently Retracted Tasks

Within this tab, you will see any form that had previously been assigned to you but has since been retracted. The form may get retracted by the LA for any reason. You will not be able to access this form once retracted.

Recently Submitted Tasks

Once you have completed and submitted a form it will move from the Currently Assigned Tasks tab to the Recently Submitted Tasks tab. You will have read only access to the form in this tab for 120 days.

Portal Form overview

When you have been delegated a form from the Local Authority you will receive an e-mail, which will prompt you to log into the Portal (see above for further details). The E-mail does **not** contain personal information, however, once logged into the Portal the students name will be displayed on the **Currently Assigned Task.** You will have one task per child, therefore you will need to complete a separate form for each child, even if they are in a sibling group.

Click on the task line, to open the form.

In this example, we will be using the PEP form, however, this guidance can be used for any form delegated to you via the Bolton Delegation Portal.

Once the form is open, the students' details are displayed in read only at the top of the page, along with the form name, due date, and name & department of the worker who sent the form to you.


Please also note that the Portal will log you out after 15 minutes of inactivity. This is for security purposes, so please ensure that you save as you go along to avoid losing any work.

Mandatory Fields

A mandatory question is denoted by a red asterisk, you can not move onto the next part of the form, or submit the form if all mandatory questions have not been filled.

Date Fields

Where there is a date required on a form, you can enter the dame manually in the format of DD-MM-YYYY or you can use the Calander icon displayed next to the question 📅

Drop Down fields

Some questions may have a defined set of answers, such as LA of School, Religion, Ethnicity etc… In these cases a drop down field will be displayed. Clicking in the answer box, will provide all options, you can start to type the answer to get to the chosen answer quicker.

Radio Buttons

Radio buttons are used on a form when only once specific answer is required, and which may then be used to determine the next appropriate question, for example if you answer **Yes** to 'Does the child/young person have additional SEND needs? Then you will be asked more questions about these needs.

Tables

Where there is a table of questions, you have the option to make the table **Full Screen.** This is recommended to give you the best view of the questions being asked and will make completing the table easier.

Previous schools

Use the + button to add more rows

Previous school name	Dates attended	Reason for leaving previous school	Type of provi

Full screen   +   −

You can also add more rows to a table to enter more information. To do this click on the plus symbol below the table.

Previous school name	Dates attended	Reason for leaving previous school	Type of provision (Previous school)
			▼
			▼

+ −

To remove a line, click on the minus symbol below the table. **Please note when removing a line, it will always remove the Bottom row.**

To close full screen, click **Close** at the bottom on the page.

Moving to the next page

You can only move the next page once all mandatory fields have been complete. To move on, either click **Next** at the bottom of the page, or click on the page from the menu at the top left of the page.

1 Part 3 - Designated Teacher

2 Part 4 - PEP Meeting

3 Supporting Documentation

Print, save, close & submit

There are a number of menu items at the bottom of the page, these allow you to:

- print the form, click **Print.**
- Export the form as a PDF copy, click **PDF**
- Close the form, click **Close** (ensure you save changes before closing)
- Save the Form, click **Save**
- Submit the form, click **Submit Contribution**

Print   PDF   Close   Save   Submit Contribution

Submitting supporting documentation

It is possible to upload supporting documentation to submit alongside the form. Where this is possible, you will see a section on the form titled **Supporting Documentation.** From this page click **Choose File** to locate the document you wish to upload from your computer.

Search and select the document to upload, once it has been uploaded, the name of the file will appear in the Supporting Documentation page, along with the option to remove the file.

Once you have uploaded the document, when you submit the form, the document will also be submitted.