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## Portal Form submission guidance

When you open a portal form, it may ask you to sign in, this is to confirm your identity. If you are unsure on how to do this please see the Sign in Processes section of this document

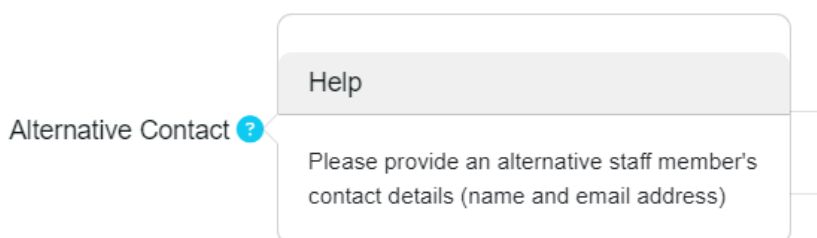
Please also note that the Portal will log you out after 15 minutes of inactivity. This is for security purposes, so please ensure that you save as you go along to avoid losing any work.

### Mandatory Fields

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

### Blue Question Marks

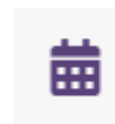
Blue Question marks are used to provide you with further information when completing the form.



An example is shown here, a question asking for alternative contact details – if you hover over the blue question mark, it provides additional details which may help you to complete the form.

### Date Fields

Where there is a date required on a form, you can enter the date 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 answered **Yes** to 'Does the child/young person have additional SEND needs? Then you will be asked more questions about these needs.

### Consolidated forms

It is recommended that when using the consolidated form, you split questions before answering, if you do not do this the form may not behave as expected

Select the '+' and '-' buttons to add and remove children required.

Select 'Confirm' to finalise the names of the children required in the form.

For consolidated children each question response provided can be for all children.

Or an individual response can be provided separately for each of the children

Select one of the children to duplicate the question, one for each child. The question is now duplicated.

To re-consolidate the duplicated question to provide a single response for all children, Hover on the '+ Include' button and select the child you wish to include to reconsolidate the children. The question is now re-consolidated for all children

## 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
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

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)
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

+ -

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.

## Print, save, close & submit

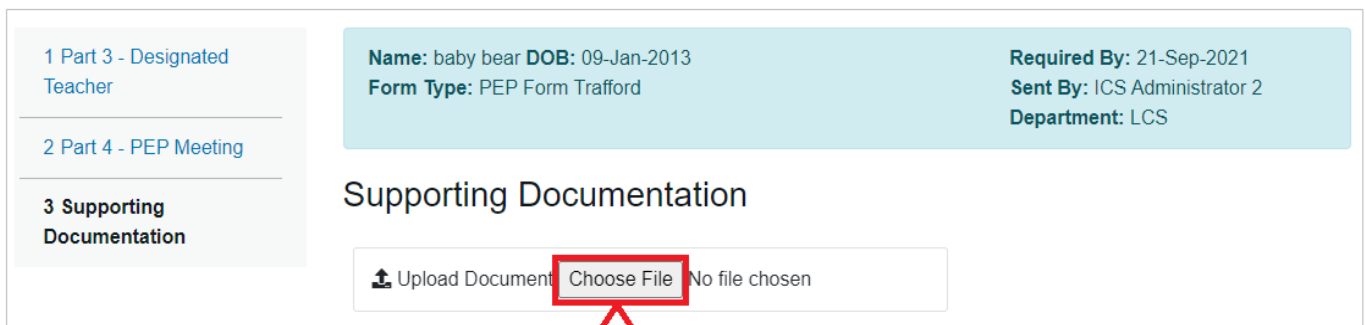
There are several menu items at the bottom of the page, these allow you to:

- 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**



## 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.



1 Part 3 - Designated Teacher

2 Part 4 - PEP Meeting

3 Supporting Documentation

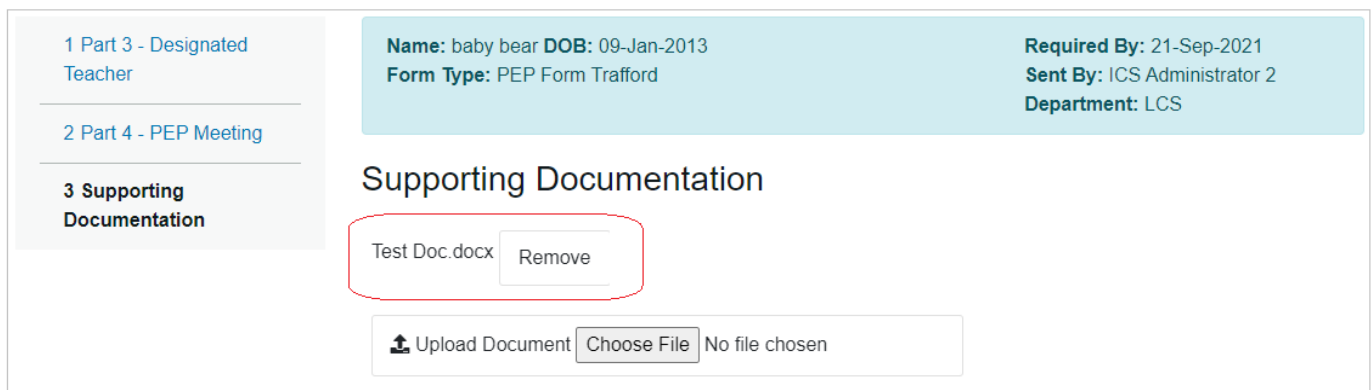
**Name:** baby bear **DOB:** 09-Jan-2013  
**Form Type:** PEP Form Trafford

**Required By:** 21-Sep-2021  
**Sent By:** ICS Administrator 2  
**Department:** LCS

### Supporting Documentation

Upload Document **Choose File** No file chosen

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.



1 Part 3 - Designated Teacher

2 Part 4 - PEP Meeting

3 Supporting Documentation

**Name:** baby bear **DOB:** 09-Jan-2013  
**Form Type:** PEP Form Trafford

**Required By:** 21-Sep-2021  
**Sent By:** ICS Administrator 2  
**Department:** LCS

### Supporting Documentation

Test Doc.docx Remove

Upload Document **Choose File** No file chosen

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

## Sign in process

### New users sign up


When you try to complete a form, you will be asked to sign in.

Select the “Register for new account” button

**New users**

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

**Register for new account**



Fill in your first name and surname, then check the box to indicate the portal is being used in a professional capacity

### Register a new account - step 1

Forename \*

Surname \*

  
 Is this account being used in a professional capacity?

Enter your **role** within your organisation and name of your organisation in the **organisation** field., enter the address of the organisation in the address fields.

Please note all fields with an asterisk are mandatory. Then click “**Next**”

Role \*

Organisation \*

Property name

House no

Street \*

Area

Town/City \*

County

Postcode \*

**Next** Cancel

Enter your e-mail address (this should be your work email **not a personal email**) and create a Password.

Please note the Password policy. Then click **“Next”**

## Register a new account - step 2

<p>Email address *</p> <input type="text"/>	<h3>Password policy</h3> <p>Your password must meet the following requirements:</p> <ul style="list-style-type: none"><li>• It must be at least 15 characters long</li><li>• It must contain at least one letter</li><li>• It must contain only letters, digits, and special characters</li><li>• It must contain at least one upper-case letter</li><li>• It must contain at least one numerical digit</li><li>• It must contain at least one special character.</li><li>• It must be different to your current password</li><li>• It must be different to your previous password</li></ul> <p><a href="#">Click here to see the list of special characters.</a></p>
<p>Password *</p> <input type="password"/>	
<p>Confirm password *</p> <input type="password"/>	
<p><a href="#">Back</a> <a href="#">Next</a> <a href="#">Cancel</a></p>	

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**

Kind regards

Bolton 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.

Directorate of Childrens Services

**Bolton Blackrod Farnworth Horwich Kearsley Little Lever South Turton Westhoughton ...all in the family**

## Existing user login

If you already have an account, type your email and password into the existing user section and click **“Submit”**

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.

[Forgotten password?](#)

New users

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



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

Your custom code for Bolton Children's Services Portals

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 Please enter the following code on the login verification page:

**5591 3944**

Kind regards

Bolton Children's Services Portals



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

[Please send me a new code](#)

## Forgotten password

Click **“Forgotten Password”**

For additional security, we will confirm your account email address.

[Forgotten password?](#) 

Type in your email address

## Reset password - step 1

Email

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

Please verify your email address

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 Please enter the following code on the email verification page:

**4218 8514**

Kind regards

Bolton Children's Services Portals

Put this code in the box provided and select **“Next”**

## Reset password - step 2

We've just sent you an email to confirm your email address. Please enter the code in this email below.

If you can't find an email, it may be in your Spam/Junk email folder or the email address provided is not registered with us.

Code

Please enter the verification code that we emailed to you



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