



# Using the Professional Portal – Guidance for Professionals

## Contents

Introduction .....	2
Accessing the Professional Portal.....	2
Registering.....	3
Logging in .....	5
Resetting your password .....	6
Logging out.....	8
Completing a form on the portal.....	8
Submitting a form.....	13
Accessing forms once they've been submitted (Recently Submitted Tasks) .....	13
Picking up and Reassigning forms between professionals (using 'Work Groups') .....	14
What are 'Work Groups'? .....	14
Accessing 'Work Group' tasks .....	15
Picking up and reassigning tasks within a 'Work Group' .....	15
How to get support.....	17



## Introduction

The Professional Portal is for 'external' professionals such as Educational settings, Health and other independent organisations/individuals.

It allows professionals to fill in 'forms' relating to children/young people they are working with and submit the forms securely to Bristol City Council's case management system, Liquidlogic. Submitted forms can then be viewed (as read only) by the relevant team/s, for example Children's Social Care, The HOPE Virtual School and SEND.

This guidance is designed to support 'external' professionals to access and use the Professional Portal.

**Note:** Educational settings may be familiar with Bristol City Council's Establishment Portal, which educational settings use for sharing information in relation to schools and attainment tracking. Please note that the Professional Portal is a separate portal with a different purpose (to provide information/contributions relating to individual children and young people) and will require separate login details/user account.

## Accessing the Professional Portal

The Professional Portal is a secure webpage which can be accessed anytime using the link below:

[Secure login - step 1 \(bristol.gov.uk\)](#)

When a form has been assigned to you on the Professional Portal, you will receive a notification email which also contains a link to the portal should you prefer to access it this way:

A new form has been delegated to you on the Professional Portal.

Please complete and submit this form by 21-Sep-2021.

[Log in](#) to the portal to complete the form. If you have not already done so you will be required to [register](#) for access using this email address.

Many thanks,

Bristol Children and Families Services



# Registering

In order to log into the Professional Portal, you first need to register and set up your account. You only need to do this once; once set up your Professional Portal account will give you access to all forms delegated to you, no matter what process or child they relate to.

1. Open the Professional Portal using one of the methods set out above. This will take you to the login page:

2. Click **Register for new account**:

3. Fill out the registration form, ticking the **Is this account being used in a professional capacity?** question. When entering your address you can use the address of your organisation rather than your individual address



4. Click **Next**:

### Register a new account - step 1

Forename \*  
Teacher

Surname \*  
Testing

Is this account being used in a professional capacity?

Role \*  
Designated Teacher

Organisation \*  
Academy of Achievement

Property name  
[Empty]

House no  
56

Street \*  
School Street

Area  
[Empty]

Town/City \*  
Bristol

County  
[Empty]

Postcode \*  
BS1 1AA

**Next** Cancel

5. On the following page you need to enter your **work email address** and set up/confirm your password, then click **Next**:

### Register a new account - step 2

Email address \*  
billyprofessional@organisation.com

Password \*  
.....

Confirm password \*  
.....

Back **Next** Cancel

**Password policy**  
Your password must follow the following requirements:

- It must be at least 8 characters long
- It must contain at least one letter
- It must contain at least one digit, and one special character
- It must contain at least one upper-case letter
- It must contain at least one numerical digit
- It must not contain any of the following characters: !, @, #, \$, %, ^, &, \*, (, ), =, +, ~, `

**Important:** the email address you enter must be your work email address, as this will identify you to the local authority as a Professional Portal user. If you use any other email address, for example a personal email, you will not be able to see any information when you log in and will not be sent any forms for completion on this account.



- Next you will be emailed an 8-digit code. Retrieve the code, enter it into 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 \*

7685 0798

Back Next Cancel

[Please send me a new code](#)

- Click **Continue** to complete the registration process
- You will now be able to log into the portal with the email address and password you set up.

## Logging in

Once you have registered on the portal you will be asked to log in each time to ensure the information on the portal is secure.

- Enter your email and password and click **Submit**:

### Secure login - step 1

New to Bristol Children and Families Services Portal? [Register for an account here](#) or use the button below. Already using Bristol Children and Families Services Portal? Sign in below.

**Existing users**

Email  
teacher.tedling@mailinator.com

Password  
[Masked]

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

Submit Cancel

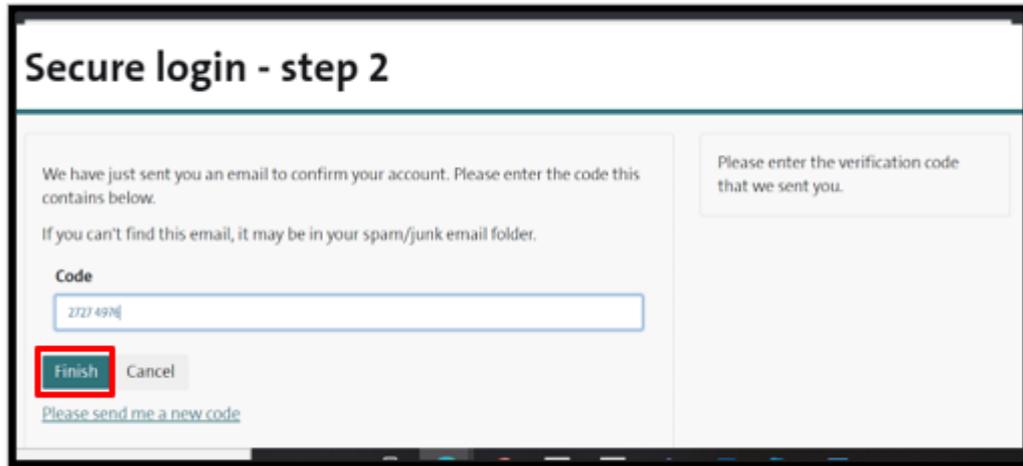
[Forgot my password?](#)

**New users**

If you're new to Bristol Children and Families Services Portal, sign up for an account here

[Register for new account](#)

- Enter the verification code sent to your email address, then click **Finish**:

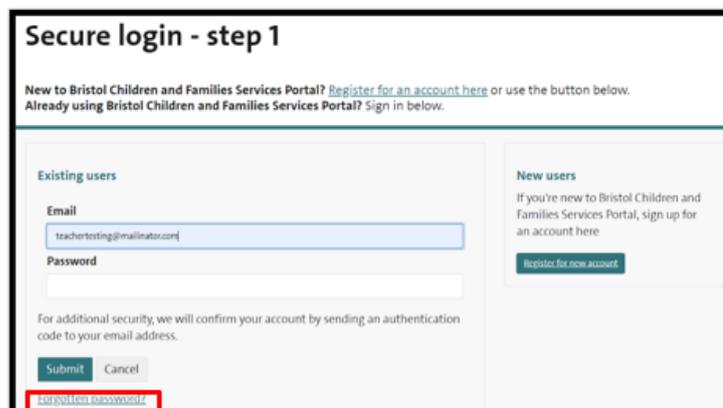


In line with enhanced data security policies, you will be emailed a different verification code each time you log in to the portal. The code will need to be entered within 10 minutes of receiving it. If you log in and do not enter the code within 10 minutes, you will be asked to log in again and will receive another code. If you don't receive the code in your Inbox please check your Junk/Spam folders.

## Resetting your password

If you have forgotten your password:

1. Click **Forgotten Password**.





2. Enter your email address and click **Next**.

A screenshot of the "Reset password - step 1" form. It has a title "Reset password - step 1" and a sub-header "Email". Below this is a text input field containing "teacheresting@mailinator.com". At the bottom left of the form is a "Next" button, which is highlighted with a red square, and a "Cancel" button to its right. Below the form is a message: "Please enter your email address and we will email you a code to allow you to reset your password."

3. Enter the verification code which will have been emailed to you. Click **Next**:

A screenshot of the "Reset password - step 2" form. It has a title "Reset password - step 2" and a sub-header "Code". The main text says: "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." Below this is a text input field containing "8214 7234". At the bottom left of the form is a "Next" button, highlighted with a red square, and a "Cancel" button to its right. Below the form is a message: "Please enter the verification code that we emailed to you"

4. Create a new password and click **Finish**:

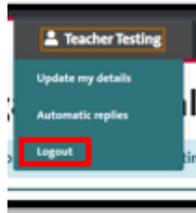
A screenshot of the "Reset password - step 3" form. It has a title "Reset password - step 3" and a sub-header "Please enter your new password". Below this are two text input fields: "Your new password" and "Confirm password", both containing masked characters (dots). At the bottom left of the form is a "Finish" button, highlighted with a red square, and a "Cancel" button to its right.

5. Click **OK** to return to the login page:

A screenshot of the "Password Reset Confirmation" dialog box. It has a title "Password Reset Confirmation" and a message: "Your password has been changed. Press OK to return to the login page." Below the message is an "OK" button, highlighted with a red square.

## Logging out

Once you have finished using the portal, please remember to log out by hovering over your name and clicking **Logout**:



Please don't close the internet browser without 'Logging out' as this will not end your session.

**Note:** for security purposes the portal will automatically log you out after 30 minutes of inactivity.

## Completing a form on the portal

1. When a form has been sent to you for completion on the portal, you will usually receive an email notification such as the one below:

A new form has been delegated to you on the Professional Portal.

Please complete and submit this form by 21-Sep-2021.

[Log in](#) to the portal to complete the form. If you have not already done so you will be required to [register](#) for access using this email address.

Many thanks,

Bristol Children and Families Services

**Note:** the only time you would not receive an email directly is if your organisation has provided us with a generic email address for notifications to be sent to instead, for example a 'duty' or 'admin' inbox. This is often where the organisation may need to 'triage' the forms and assign them to the correct individual to complete within the portal e.g. in cases where Bristol City Council may not know which individual should complete the form in advance.

2. Use the link provided in the email (or go directly to the Professional Portal webpage if you have saved it to your favourites).
3. Enter your login details as detailed in the section above.
4. Once logged in, you will be taken straight to the **Tasks to complete** page where any forms assigned to you will be displayed:



# Professional Portal - tasks to complete

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 EHC Needs Assessment Contributions	Gabriel Example	05-Sep-2021	<a href="#">Re-Assign</a>

5. Click on the relevant form in order to view and/or complete it:

# Professional Portal - tasks to complete

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 EHC Needs Assessment Contributions	Gabriel Example	05-Sep-2021	<a href="#">Re-Assign</a>

6. The form will open up:



## Professional Portal

- 1 Other Professional/Service**
- 2 Professional Contribution to EHCNA
- 3 Attach supporting documents

**Name:** Gabriel Example **DOB:** 26-Apr-2008 **Required By:** 05-Sep-2021  
**Form Type:** EHC Needs Assessment Contributions **Sent By:** Chloe [redacted]  
**Department:** EHM  
**Telephone:** 074 [redacted]  
**Address:** EHM

**Other Professional/Service**  
Child/Young Person Key Information

First name:

Last name:

Preferred name:

Preferred pronoun:   
e.g. They/She/He

The view of the form will be slightly different depending on which form you have been sent. Forms with only one page will display full-width, whereas forms with several pages will display 'tabs' on the left-hand side which you can click on to navigate the form and fill out each section:

## Professional Portal

- 1 Other Professional/Service**
- 2 Professional Contribution to EHCNA
- 3 Attach supporting documents

**Name:** Gabriel Exan  
**Form Type:** EHC Need

**Other Profession**  
Child/Young Person

First nam

In this instance you will also be provided with **Next** and **Previous** buttons at the bottom of the form to prevent you from having to scroll up and down whilst filling out the form:

← Previous

Next →

[Print](#) [PDF](#) [Close](#) [Save](#) [Submit Contribution](#)



7. Work through the form to answer the questions. Remember to **Save** the form regularly to ensure your work is not lost if you are logged out of the portal. The **Save** button is found at the bottom of the form:



8. There may be a variety of question types depending on the form you are working on. These include:

- **Open text boxes** where you can free-type/paste information into the box. The boxes will expand as you enter more information
- **Date fields** where you will be given a calendar icon to select the date:

Date contribution submitted to SEND:

- **Radio buttons** and **picklists**
- **Tables** where you will be asked to fill out several columns of information. When filling out a table you can add/delete rows using the '+' and '-' icons provided:

What Special Educational Needs have you identified?

Special Educational Needs category	Need (B) <i>and severity of need</i>	Impact <i>and how does this affect the child/young person?</i>
Communication & Interaction	Need..	Impact..

Full screen

You can also click **Full Screen** if you want to view the table full-width as you fill it in:

What Special Educational Needs have you identified?

Special Educational Needs category	Need (B) <i>and severity of need</i>	Impact <i>and how does this affect the child/young person?</i>
Communication & Interaction	Need..	Impact..

Full screen

- **Read only text boxes.** These boxes display information which was populated before the form was sent to you and cannot be amended – this is represented by a grey background:

**Here and Now**

Hi I'm Gabriel and I communicate with others by speaking to them but I listen to people using my cochlear implants and lip reading.  
 I like school and my teacher Mrs Hanson really helps me. My favourite lessons are Maths, History and PE as I really like playing football. I don't like it when the classroom gets very noisy and I don't like it when changes happen that I'm not ready for -it makes me very anxious. I like my visual timetable, it really helps me and I am trying very hard to improve my handwriting.

9. Mandatory questions are displayed with a red asterix:

Date Assessment Completed \*

This means the question has to be completed and if you try to progress through the form/submit it without completing these fields it will redirect you to the question and highlight it as below:

Date Assessment Completed \*    
This field is required.

10. On some forms you will have a tab at the bottom called **Attach supporting documents** where you can attach files to be submitted along with your completed form:

### Professional Portal

- 1 Other Professional/Service
- 2 Professional Contribution to EHCNA
- 3 **Attach supporting documents**

**Name:** Gabriel Example **DOB:** 26-Apr-2008 **Required By:** 05-Sep-2021  
**Form Type:** EHC Needs Assessment Contributions **Sent By:** Chloe [redacted]  
**Department:** EHM **Telephone:** 074 [redacted]  
**Address:** EHM

**Attach supporting documents**

Upload Document Choose File No file chosen

If you have attached the wrong file by mistake it can be removed by clicking the **Remove** button:

**Attach supporting documents**

Picture.PNG Remove

Upload Document Choose File No file chosen

**Note:** the accepted file types are: Word (doc & docx), PDF, JPG, PNG. The maximum file size is 10MB.

11. As you work through the form you can **Save** and **Close** at any time using the buttons at the bottom of the page. Once saved the form can be accessed again



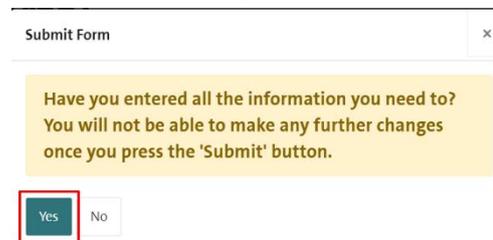
any time from your **Tasks to complete** page – you don't have to complete the form all in one go. It is good practice to save regularly.

## Submitting a form

1. Once you are ready to send your form back to Bristol City Council, scroll to the bottom of the page and click **Submit Contribution**:



2. Click **Yes** on the pop-up (unless you do need to make further changes):



**Note:** if you wish to PDF your form before submitting you can click the **PDF** button before submitting:



You will also have an opportunity to access and download submitted forms on your Professional Portal account.

## Accessing forms once they've been submitted (Recently Submitted Tasks)

Once you have submitted a form you will be able to access and download it for **30 days** after submission:

1. Navigate to the **Recently Submitted Tasks** tab:



2. Click on the form you wish to view and it will automatically download:



Currently Assigned Tasks

Recently Retracted Tasks

Recently Submitted Tasks

Recently Submitted Forms (Last 30 Days)

Form Type	Name	Date Submitted
EHC Needs Assessment Contributions	Gabriel Example	03-Sep-2021 13:12

## Picking up and Reassigning forms between professionals (using 'Work Groups')

### What are 'Work Groups'?

The Professional Portal allows professionals to be added to 'Work Groups', which are set up and maintained by Bristol City Council. Being part of a group means multiple professionals can have access to forms and the ability to pickup/reassign tasks between others within the group. It also means that Bristol City Council can assign tasks to the group, as opposed to an individual professional, if they do not know which individual should complete the form. Many professionals using the portal will be set up this way, for example health services.

Groups are particularly useful for bigger organisations where it could be one of many professionals who need to complete a form. It allows for a 'triage' process within that organisation, for example an administrator may review new forms sent to the organisation's group and reassign them to the relevant professional for completion. Some services may also wish to reassign completed forms to a manager for review before it is submitted. In addition, if a form has been sent to a professional who is away from work, others will have the access to 'pickup' the form and complete it on their behalf.



## Accessing 'Work Group' tasks

If you are part of a group and that group has been sent a form for completion (or it has been reassigned there by another professional), the form will be visible in **Tasks Assigned to your Work Groups**:

Tasks Assigned to your Work Groups				
Work Group	Form Type	Name	Due Date	Comments
Example Professional Portal Group	EHC Needs Assessment Contributions	Example Child	29-Apr-2022	<a href="#">Pickup</a>

All professionals who are part of this group will see this view of the group tasks on their professional portal accounts. If someone picks up the form it will disappear from **Tasks Assigned to your Work Groups** and be assigned to the individual who picked it up.

If you are part of several groups, you will see all tasks assigned to any of your groups here. You will be able to identify which group it is assigned to by looking at the **Work Group** column:

Tasks Assigned to your Work Groups				
Work Group	Form Type	Name	Due Date	Comments
Example Professional Portal Group	EHC Needs Assessment Contributions	Example Child	29-Apr-2022	<a href="#">Pickup</a>

If there are no tasks assigned to the group/s you are part of, the **Tasks assigned to your Work Groups** section will disappear on your portal view. It will reappear if/when a new task is assigned to a group you're part of.

## Picking up and reassigning tasks within a 'Work Group'

1. If you need to pickup a task from your Work Group, click on the **Pickup** button:

Tasks Assigned to your Work Groups				
Work Group	Form Type	Name	Due Date	Comments
EHC Contributions - Secondary School	EHC Needs Assessment Contributions	Gabriel Example	24-Sep-2021	<a href="#">Pickup</a>

2. This will assign the form to you and the form will open up on the screen. Saving and closing will take you back to your tasks lists, and from there you will see the form is assigned to you and is no longer in the group tasks area:



Task List			
Form Type	Name	Due Date	Comments
1 EHC Needs Assessment Contributions	Gabriel Example	24-Sep-2021	Re-Assign

This means that you are currently the 'owner' of the task and it cannot be viewed by others in your group unless it is reassigned to them, or they pick it up from you.

- To reassign the form directly to someone else, or back to a work group, click the **Re-Assign** button:

Task List			
Form Type	Name	Due Date	Comments
1 EHC Needs Assessment Contributions	Gabriel Example	24-Sep-2021	Re-Assign

- Select the Work Group or individual professional you wish to send the form to:

Choose Professional to Re-Assign to

Please select a work group or user. Only groups you manage and users within groups you manage can be selected.

Work Groups you Manage

Work Group	Email	
Example Professional Portal Group		Select Group

Users within the Work Groups you Manage

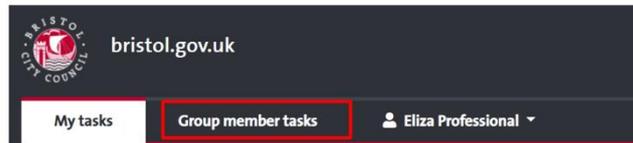
Name	Email	
Dave Professional	daveprofessional@mailinator.com	Select User
Don Professional	donprofessional@mailinator.com	Select User
Example Professional	exampleprofessional2@mailinator.com	Select User

- Click **OK**

The form will no longer be assigned to you and will be sent either to the work group, where it can be picked up by someone else, or straight to an individual's task list depending on your selection.



6. If you need to pick up and/or reassign a task that is currently assigned to another individual in your group, navigate to **Group member tasks**:



### Professional Portal - tasks to complet

7. Here you can **Re-Assign** the form either to yourself, another individual in the group or a work group:

Tasks Picked-up from Work Groups you Manage				
Professional	Form Type	Name	Due Date	Comments
Don Professional	EHC Needs Assessment Contributions	Example Child	29-Apr-2022	<input type="button" value="Re-Assign"/>

**Note:** It is not advisable to do this other than in extenuating circumstances (unless the worker has agreed for you to reassign their form) as it may cause confusion. This feature is useful if the form is assigned to someone who is off work and therefore it needs to be reassigned to another worker for completion.

## How to get support

This section explains how to get support around using the Professional Portal:

- If you have a **practice question** (e.g. relating to the content of a form) please contact the case worker relevant to the form you are trying to complete.
- If you are experiencing a **technical issue** (e.g. problems with registering for an account, logging in, password reset problems, unable to find a form etc.) please contact [LCS.Helpdesk@bristol.gov.uk](mailto:LCS.Helpdesk@bristol.gov.uk)

When contacting about a technical issue please include:

- Your name
- Your phone number and email
- Name of your organisation/establishment
- Full description of the issue, preferably with the day/time you experienced it



- Screenshots (if possible)
  
- If you have one of the following issues please also contact [LCS.Helpdesk@bristol.gov.uk](mailto:LCS.Helpdesk@bristol.gov.uk):
  - Your work email address has changed
  - You have moved to another organisation
  - You have changed roles within your organisation and need access to a different/additional 'group'
  - You want us to set up a new 'group' for your organisation
  - You are leaving your role and no longer need access to the portal
  - You wish us to remove someone from your organisation's 'group'