# MS Society

# Guidance on setting up and completing risk assessments on the Portal

## 1. Introduction

The guidance enclosed is intended to help volunteers and staff to access and complete risk assessments on the portal. It does not cover every type of event run by the MS Society. Training sessions will be organised by the Health and Safety team over the next two years to provide more detail on given areas of work.

These notes are supported by a number of videos; a full list is available in Appendix I of this document.

## 2. Access to the portal

The portal can be accessed by using the following link:
https://portal.mssociety.org.uk/user/login?/destination=branch

Or by following the guidelines laid out in the video below: V1: Finding an existing group service on the Portal - 3 minutes
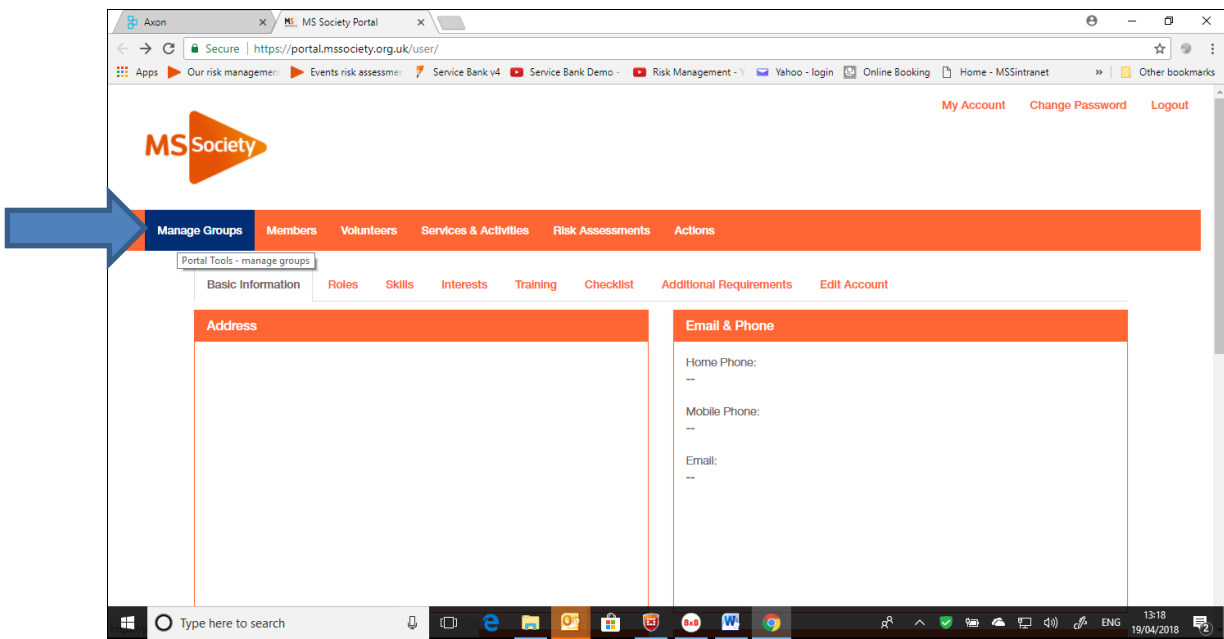
## 3. Setting yourself up

3.1.    The login page on the Portal is shown below. Enter your username and password and then select the "log in" button on the right.
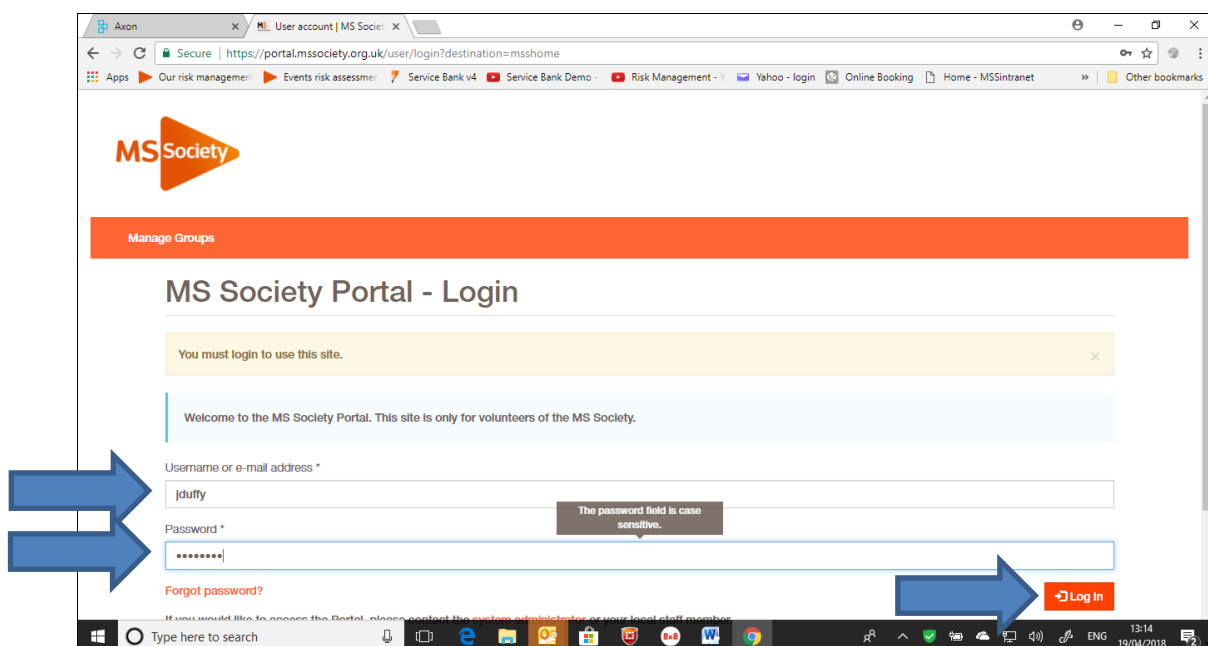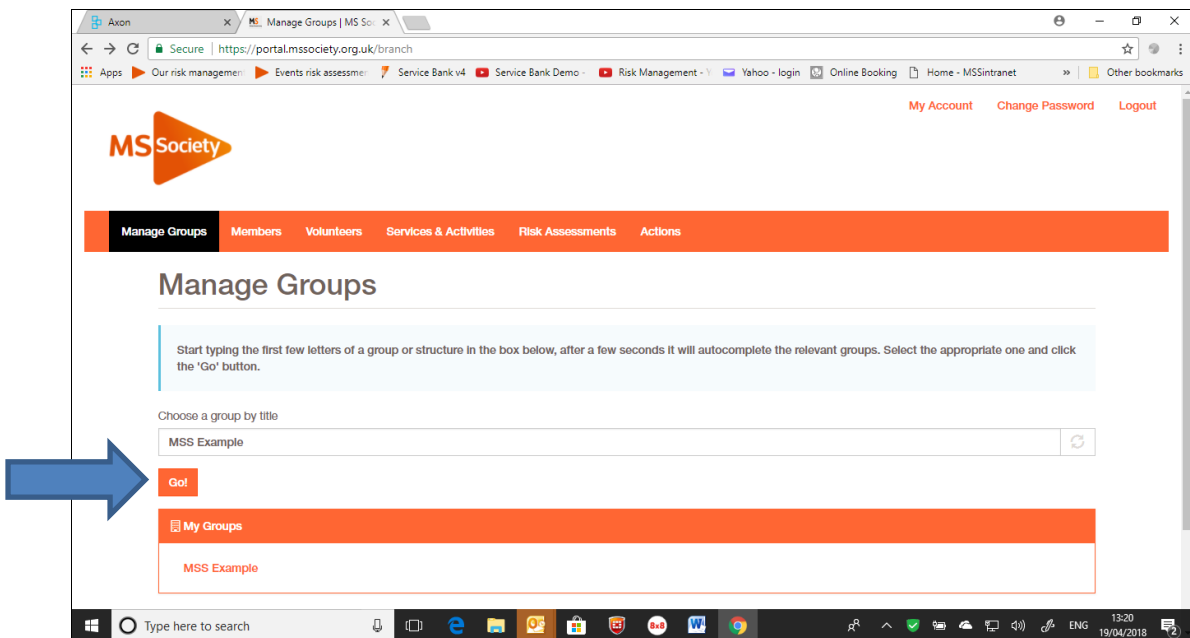
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3.2.    Next, select the "Manage Groups" tab in the orange bar as shown below.



3.3.    A new window will open and you will need to enter your group name, when the full name appears click onto it and press the "Go" button.



If you are a member of staff completing a risk assessment you will be able to find an area that is specifically for your team such as "England North Area". A full list of areas is show in Appendix II of this document.
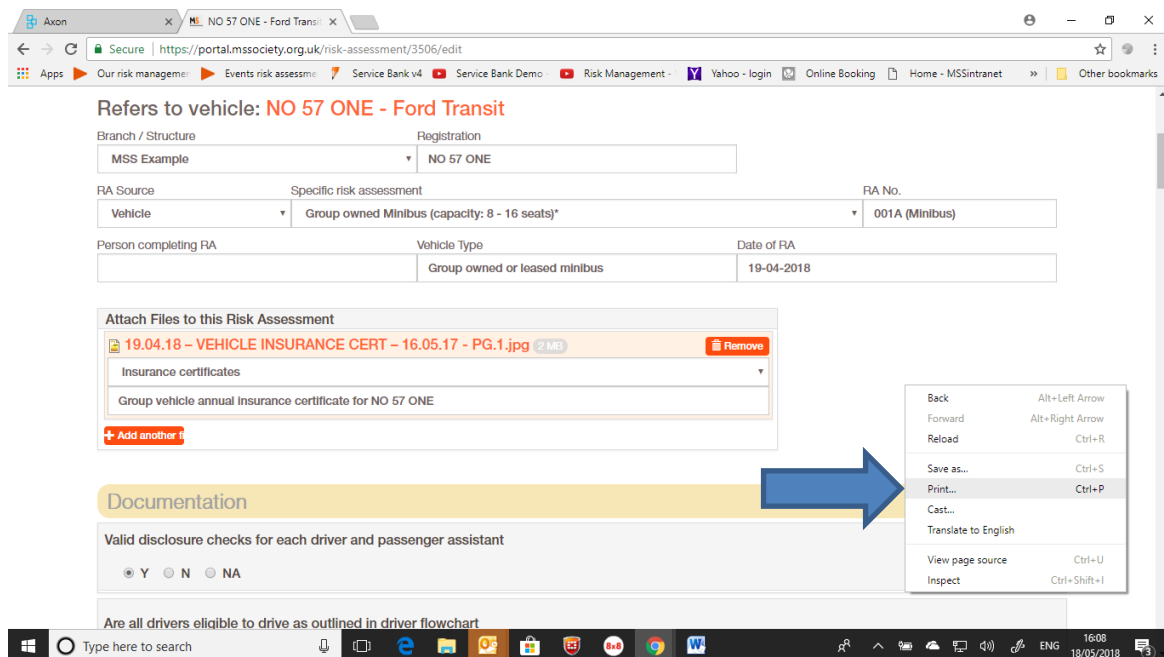
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## 3.4.    Timeout

If at any point during the completion of the risk assessment a "session is about to expire" appears and you need more time to complete your task, select the "Yes" button. If you select "No" your information will not be saved.
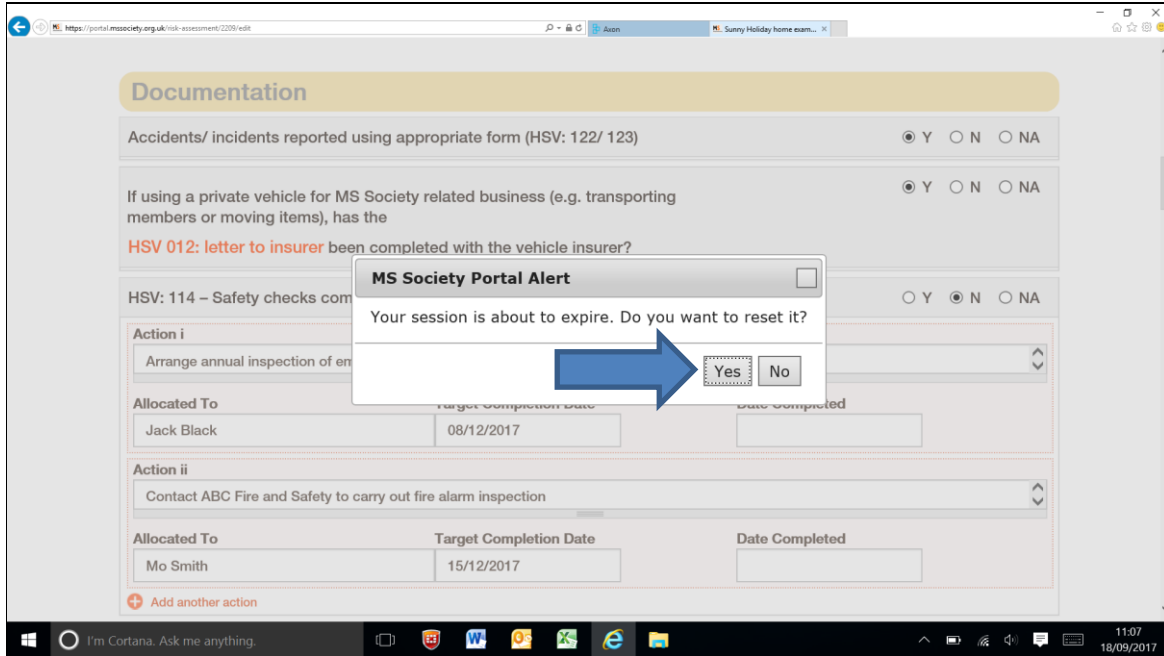


## 3.5.    Printing

To print the risk assessment; right click on the mouse while it hovers over the document and then select "Print" from the drop down box.
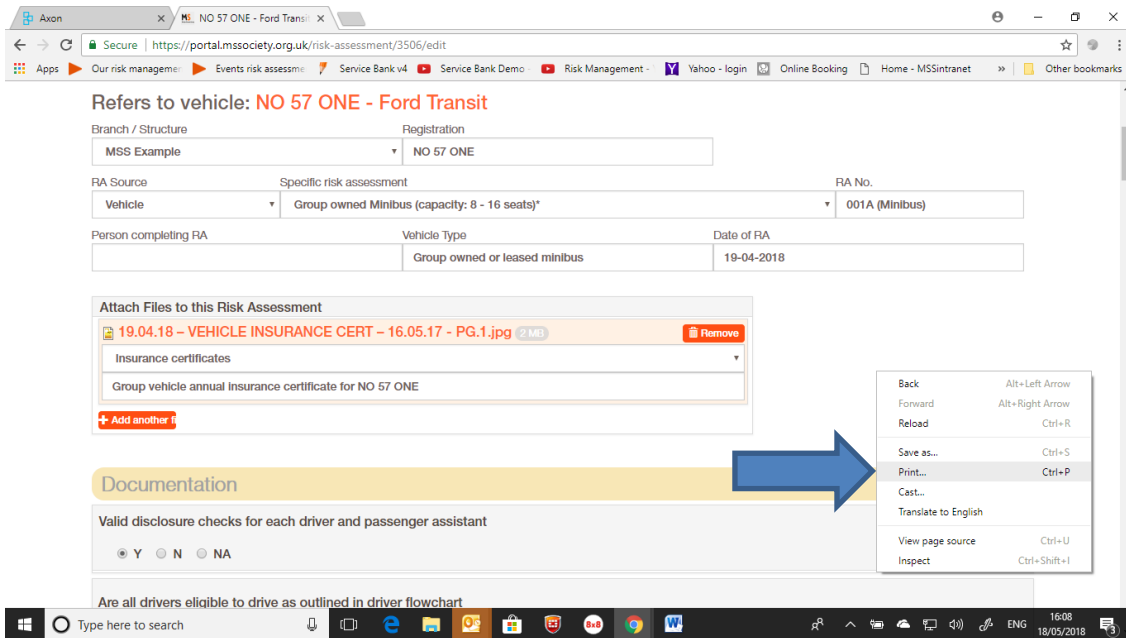


Use the print options as normal.

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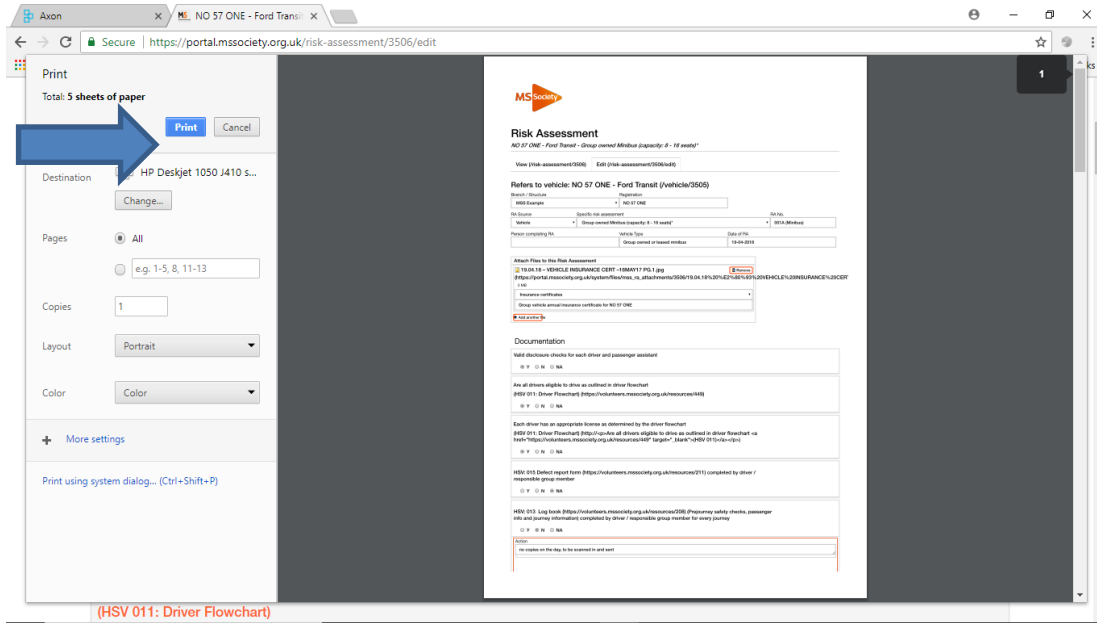


## 3.6. Saving

If it is helpful to save a copy of the risk assessment so the group can provide copies where volunteers have actions or where a venue or external organiser requests a copy. Right click on the mouse while it hovers over the document and then select "Print" from the drop down box.

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On the print page, select the "Change" button.
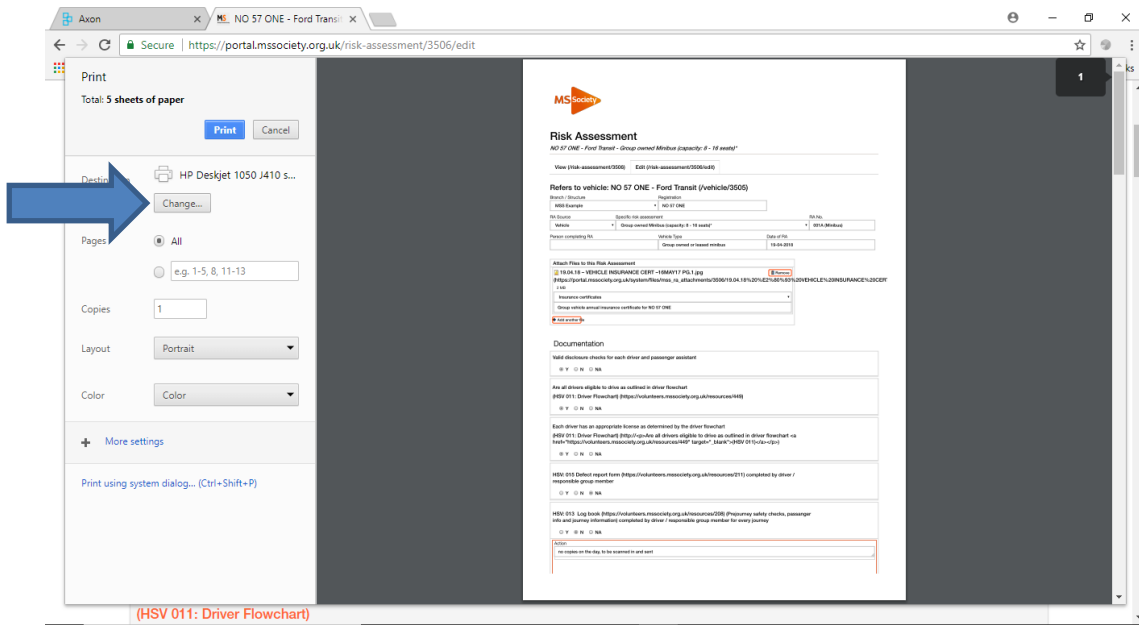


Select "Save as PDF" from the list, then follow the instructions for saving, labelling as appropriate.
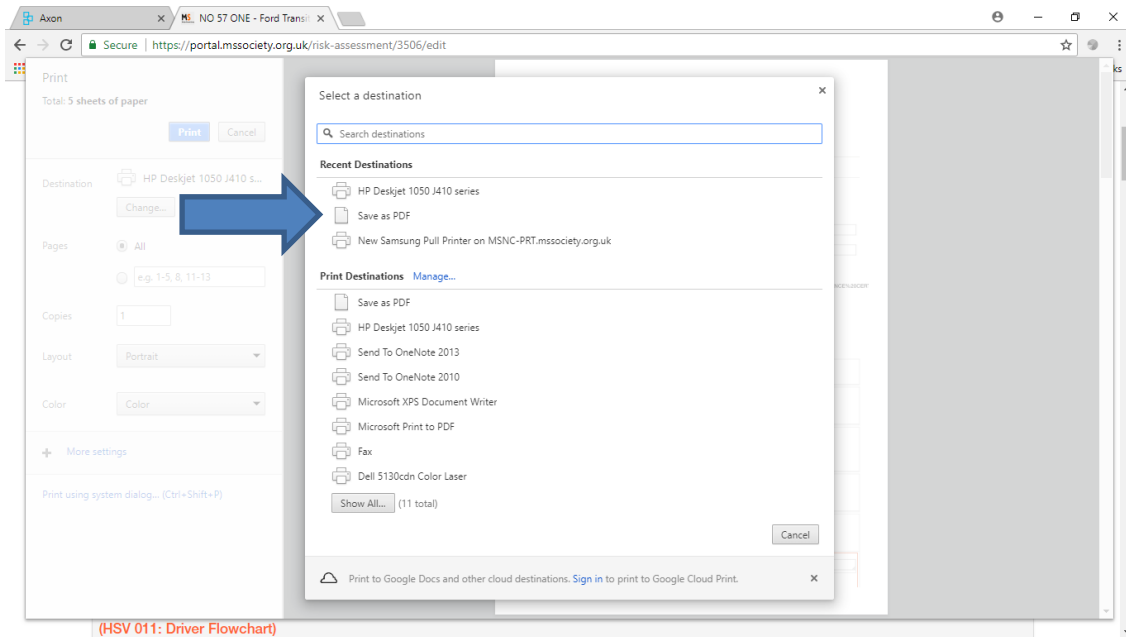
# 4. Creating a risk assessment

4.1.    Firstly you will choose a category depending what the risk assessment is for.

If you are setting up an event or fitness activity this falls under "Group Services and Events" for property or transport you will use "Properties" or "Vehicles".

In this example we are going to complete a transport risk assessment – so we will click on the "Vehicles" tab.
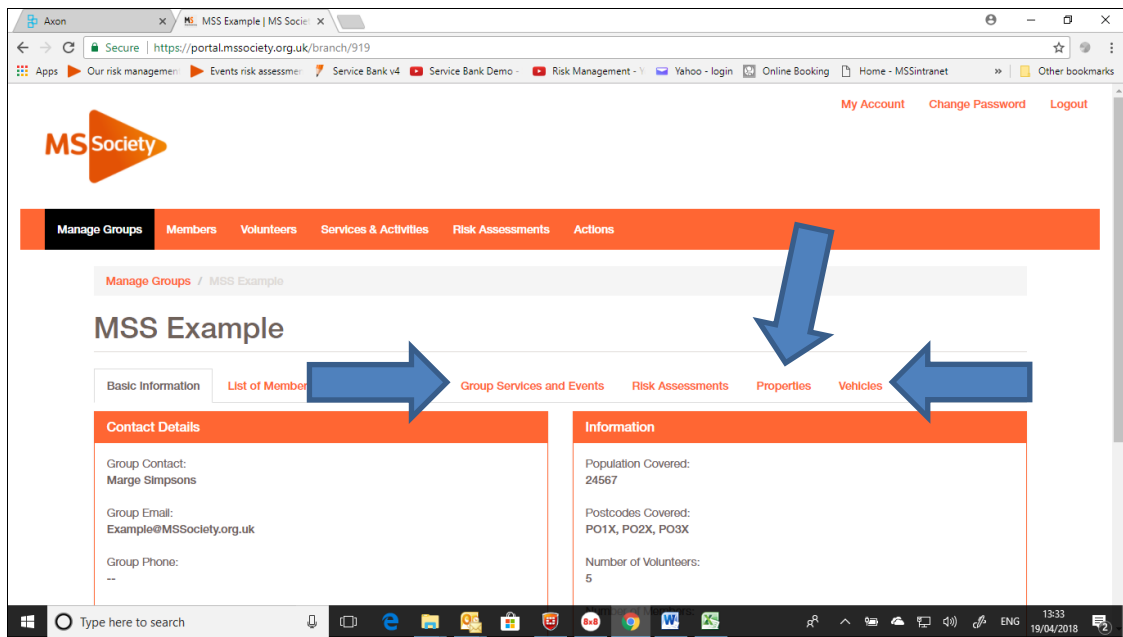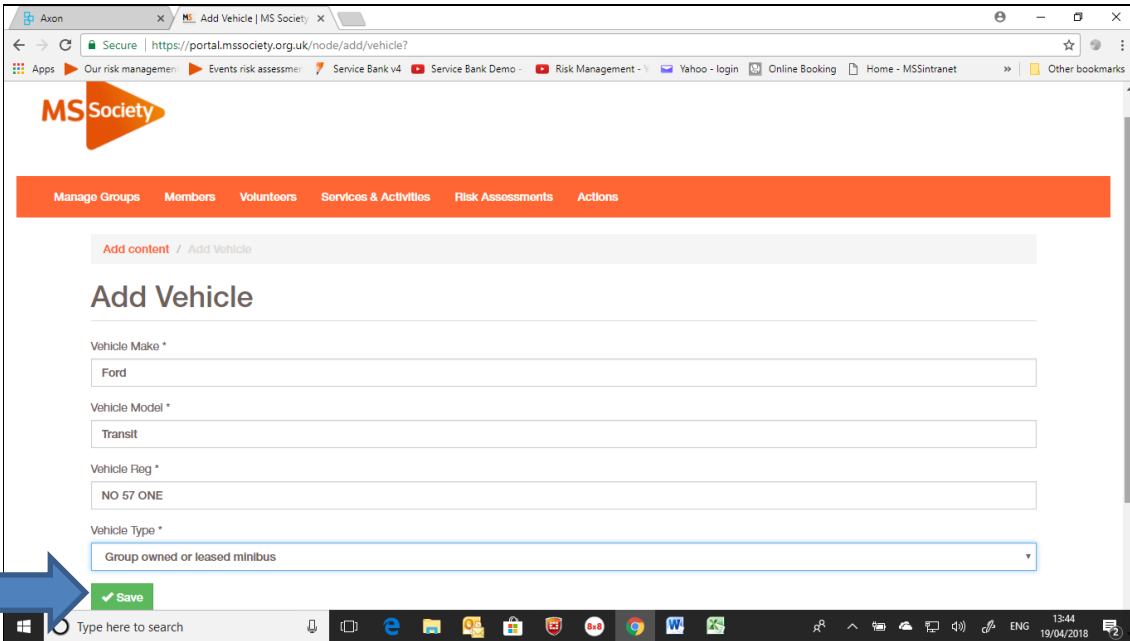


4.2.    This will take you to a new window, click on the "Add Vehicle" button
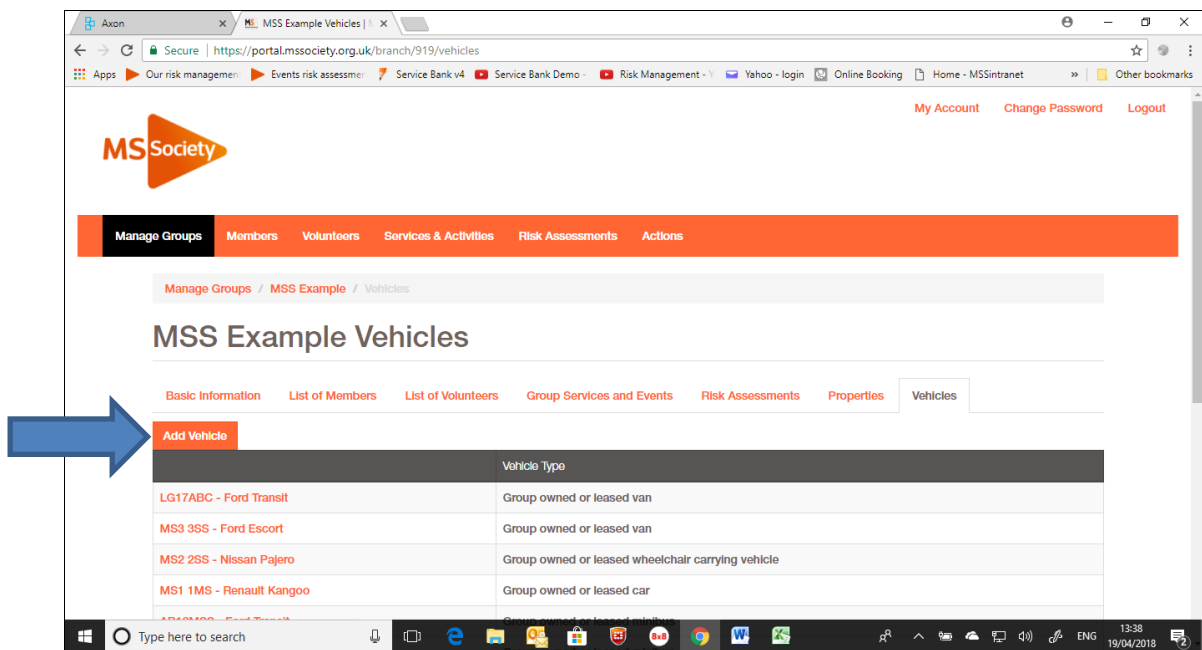
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4.3. For your vehicle enter the details as per the example below. Once complete, press the green "Save" button
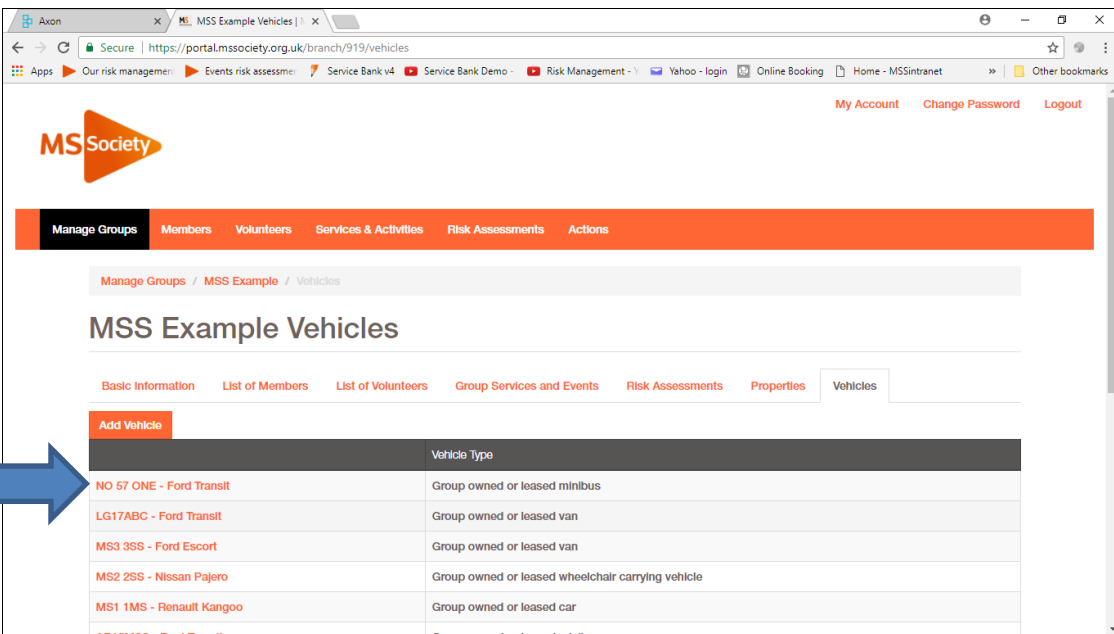


4.4. You will be taken back to the window where the group vehicles are listed as shown below.



You should then click on the file you wish to open in this case NO 57 ONE.

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4.5.    The next window will provide you with a summary of the vehicle details you have entered as shown below. To begin your risk assessment click on the "Create a Risk Assessment" button
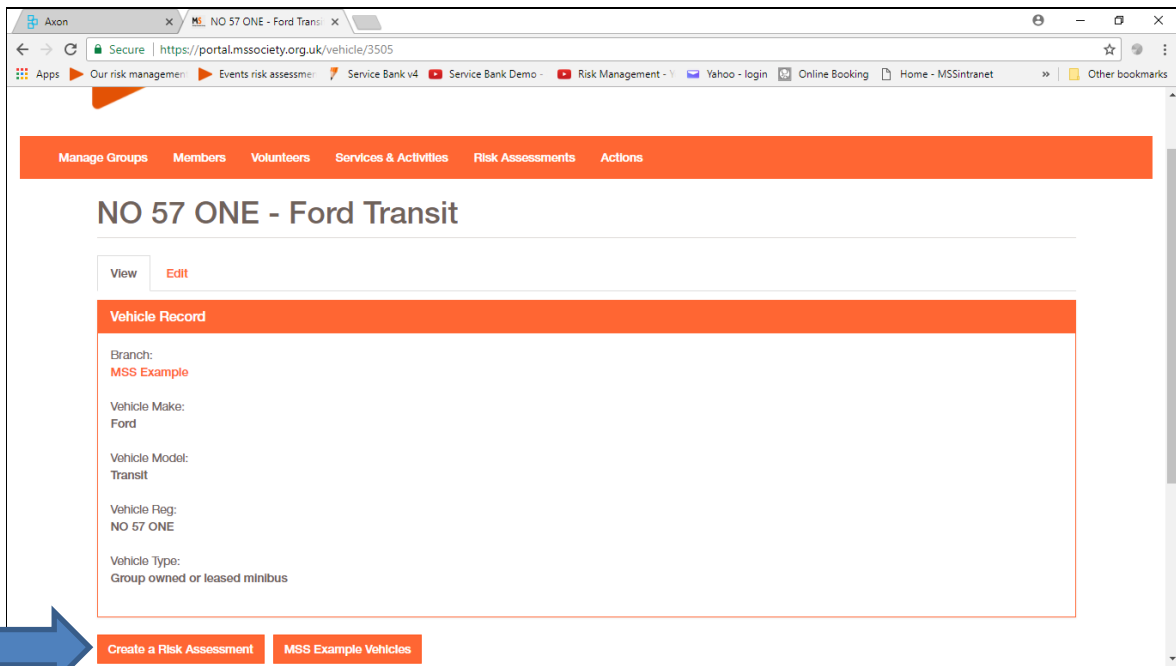


4.6.    You will then be asked to provide basic information regarding the type of vehicle. Drop down boxes along with free text areas will help you complete this section. Once finished you should press the orange "Save and Continue" button
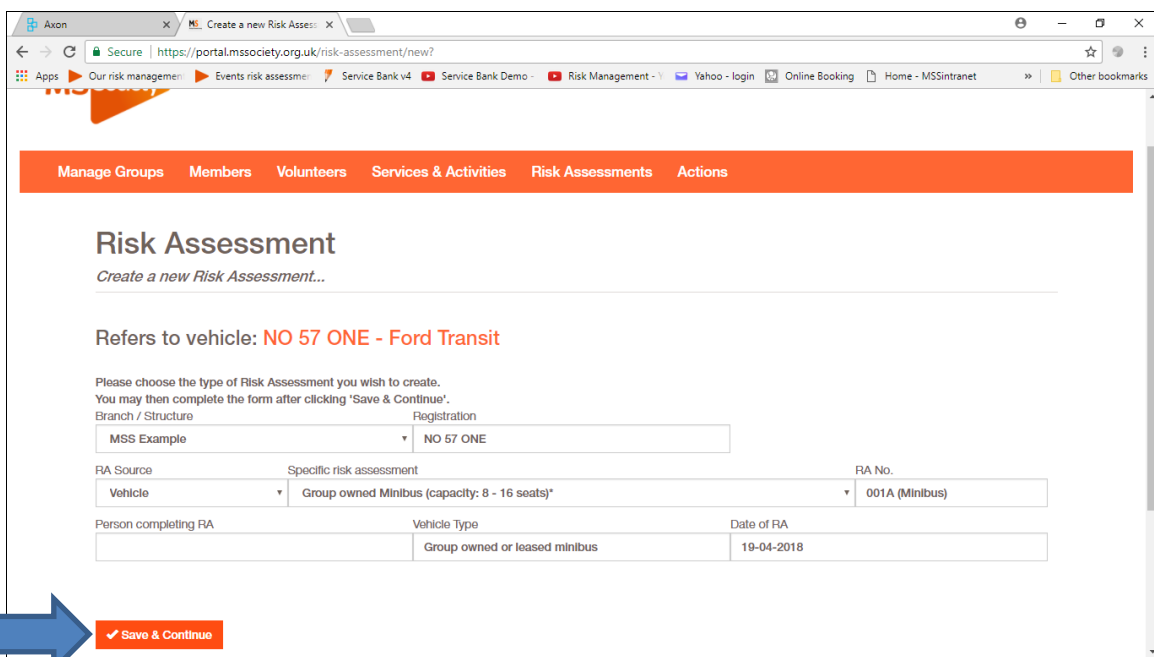
4.7. You will now be taken to the risk assessment section as in the example set out below.



4.8. The risk assessment process works in the same way as the paper based system. You should answer each question "Y/ N/ NA" as appropriate. If the answer is "Y" or "NA" you will move immediately onto the next appropriate question.

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4.9.    If you answer "N" to a question, a task box will open up below and details of the action required, who the action is allocated to and the target date for completion will need to be entered.



Where actions are allocated to a number of individuals, they must be informed and the person completing the risk assessment must update each action on completion.

4.10.   If more than one action is needed, click on the "Add another Action" button and another task box will open – see Action II below.



This is to ensure that different actions can be allocated to different individuals and that each action can be signed off on completion without being affected by other outstanding actions.

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4.11. You can save your risk assessment at any point by scrolling to the bottom of the screen and clicking on the orange "Save" button.
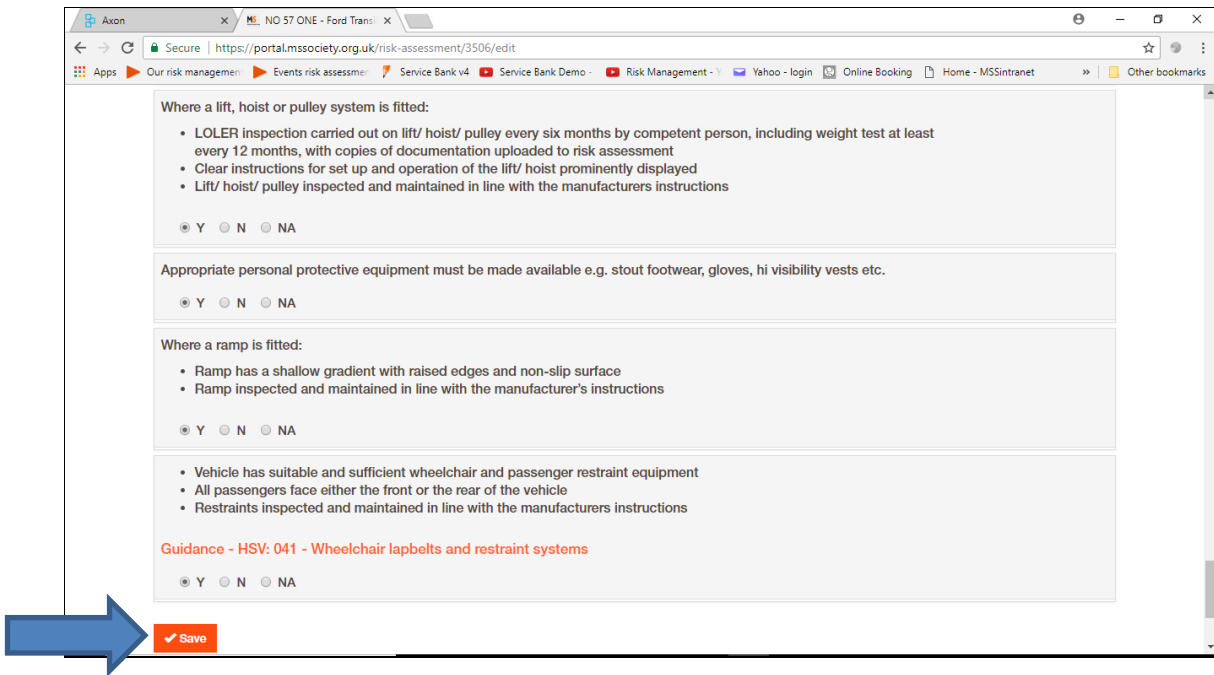


4.12. Once saved you will automatically return to the main screen showing a copy of the risk assessment together with any outstanding actions.
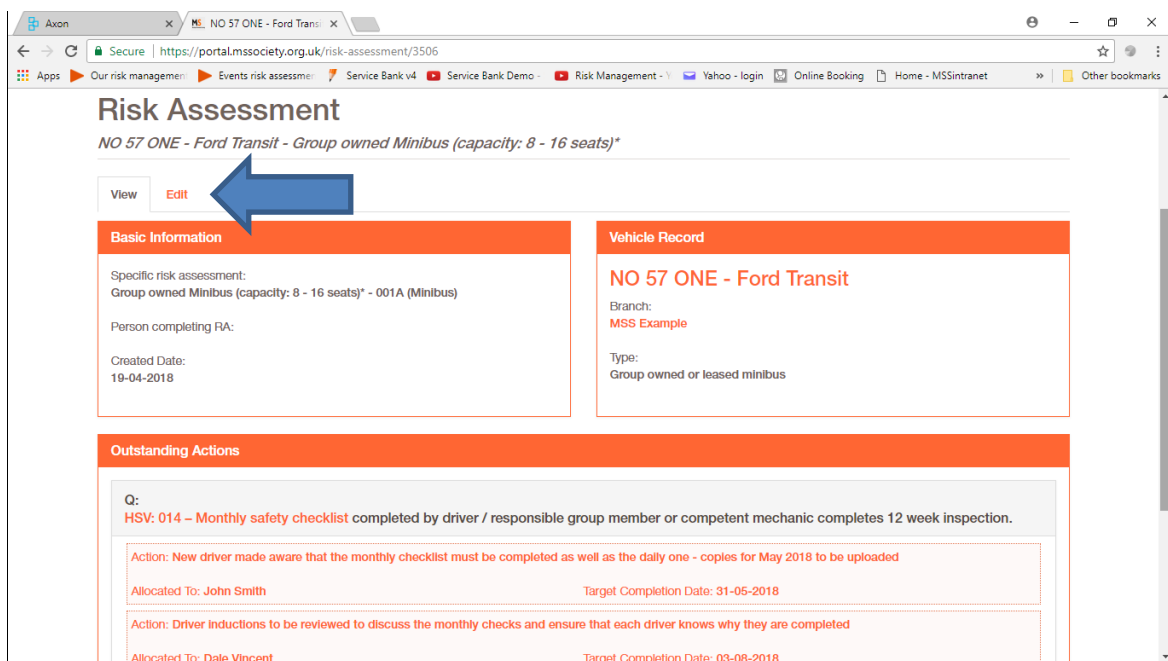


To carry on working on the risk assessment, click on the "Edit" tab. You will be taken back to the window shown in 4.7 where you will be able to continue the process.

In addition to these notes the following videos are available to give further guidance:
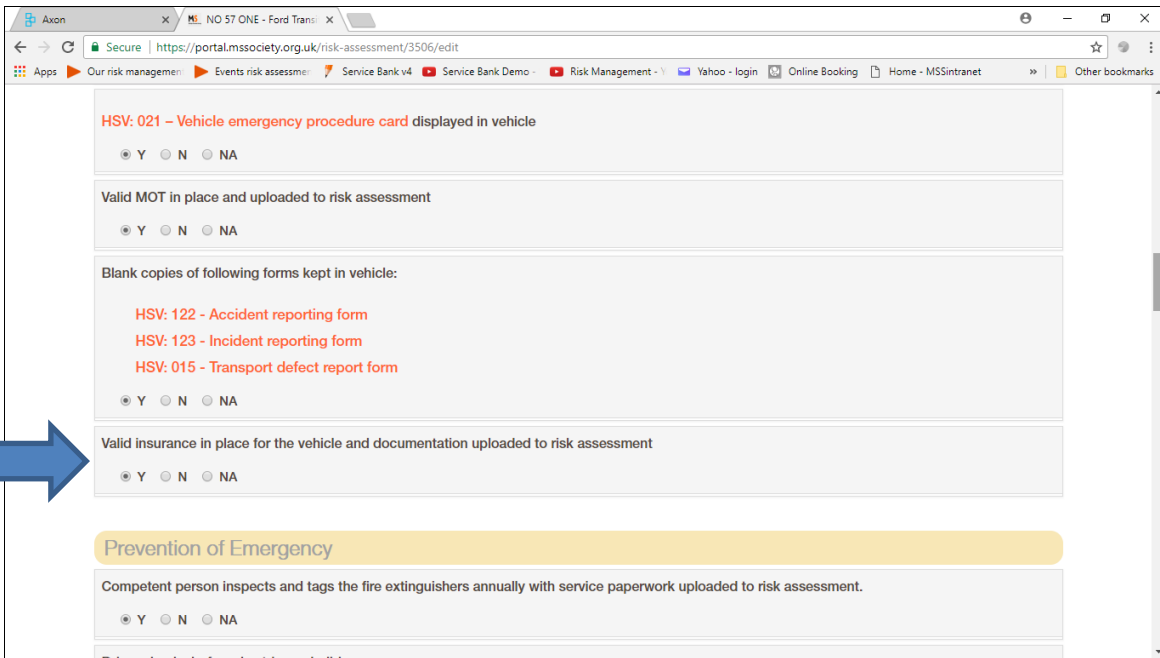
V2: Creating a risk assessment - 6 minutes

V3: Completing actions within a risk assessment  - 2 minutes

V6: Editing a risk assessment - 4 minutes

# 5. Uploading documents

5.1.    You will then need to upload documents as part of the risk assessment and to evidence completed actions e.g. vehicle insurance as shown below.



5.2.    Scroll to the top of the page and click on the "Add a file" button.

5.3.   Click on the "Choose file" box and search for the document you have saved on your computer.
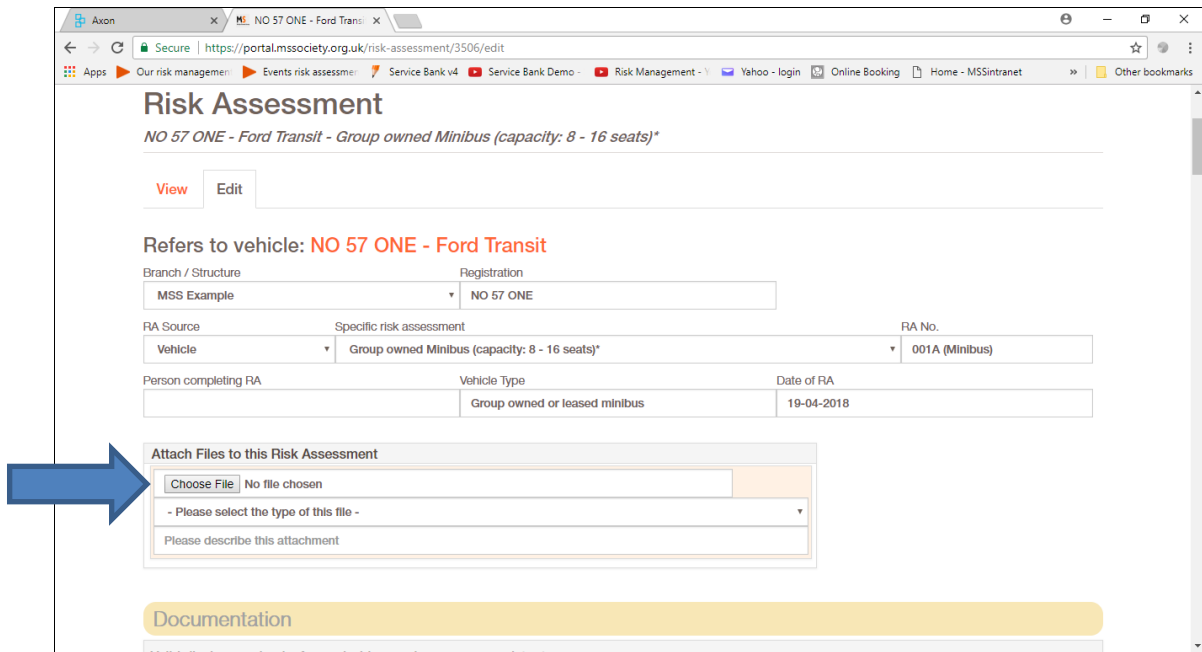


5.4.   Once you have found the relevant document on your computer highlight it and click on the "Open" button.
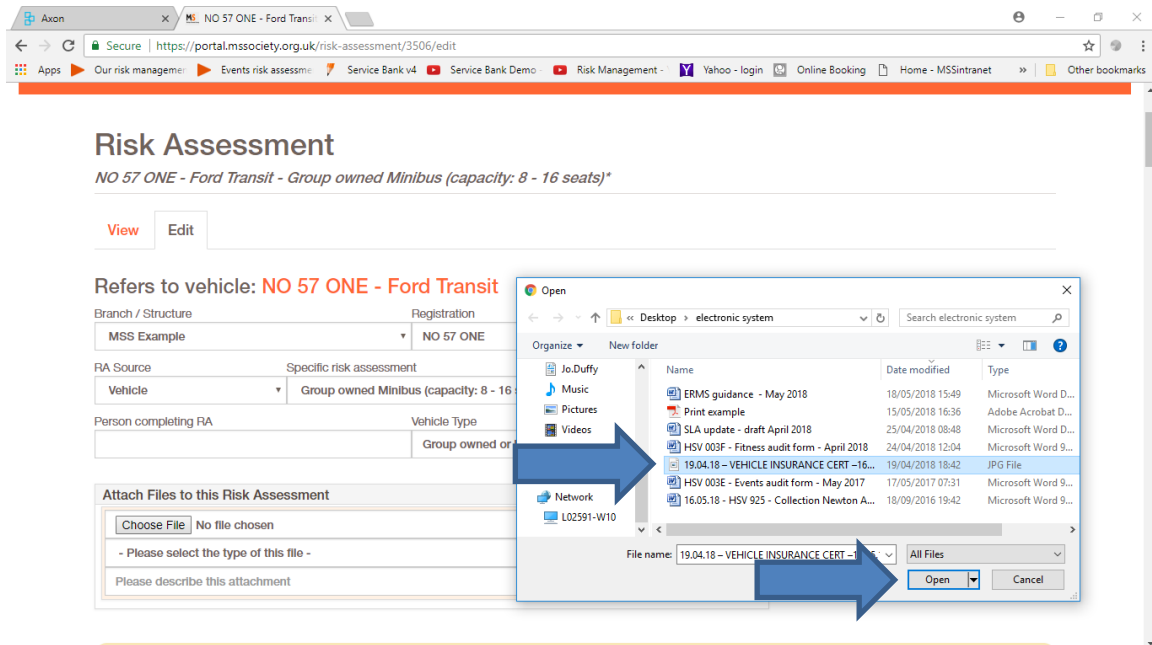
5.5. You will now see the document you have uploaded as shown in the window below.



5.6. Select from the drop-down box below a category which is relevant to the form you are uploading as shown below and click on it.

5.7. Add a quick description to explain what the document is in the box underneath.



When uploading documents on your computer, label them so that you and others can recognise them in the future e.g. 19.04.18 – VEHICLE INSURANCE CERT – 16.05.17 - PG.1 (Date document uploaded – type of document – date of document issue page number)

5.8. Once all the risk assessment questions have been answered, any outstanding actions noted and relevant documents uploaded remember to scroll to the bottom of the screen and clicking on the orange "Save" button.

5.9.    This will return you to the main screen which will give you an overview of the vehicle, a list of documents you have uploaded and any outstanding actions.



In addition to these notes the following videos are available to give further guidance:

V3: Completing actions within a risk assessment  - 2 minutes

V4: Uploading supporting documents to risk assessments - 2 minutes

V5: Finding supporting documents on the volunteer website - 3 minutes

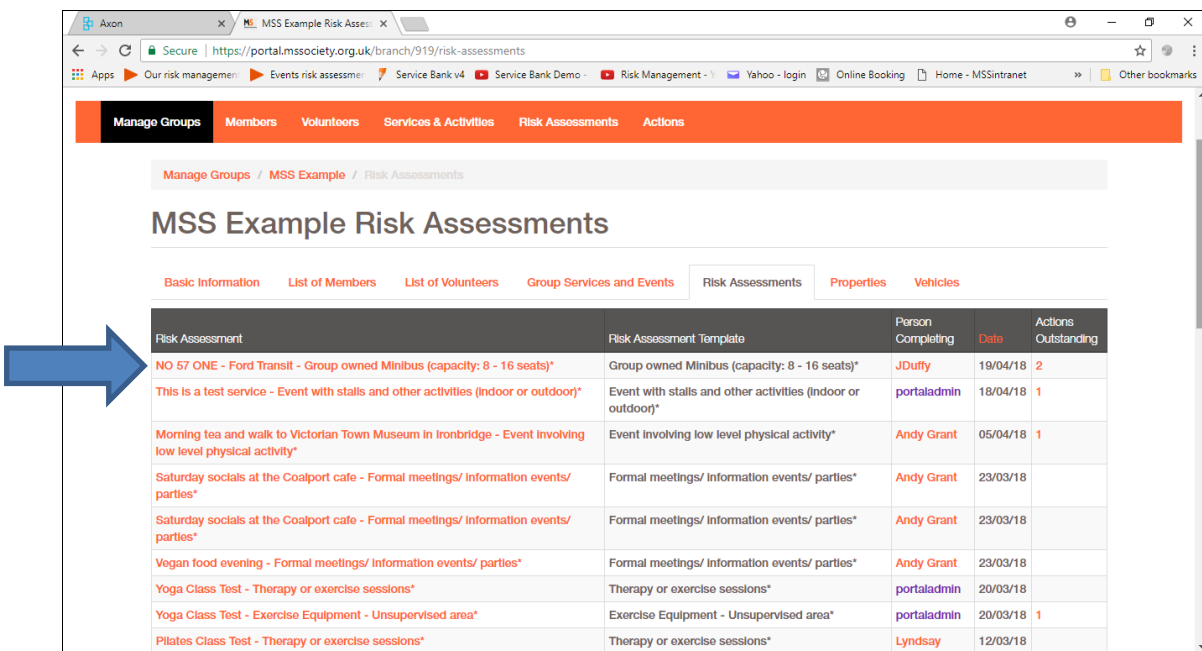V6: Editing a risk assessment - 4 minutes

V7: Opening uploaded files within a risk assessment  - 4 minutes

# 6. Updating your risk assessments

6.1.    If you wish to update the outstanding actions on your risk assessment go to your group's main page and click on the "risk assessments" tab.
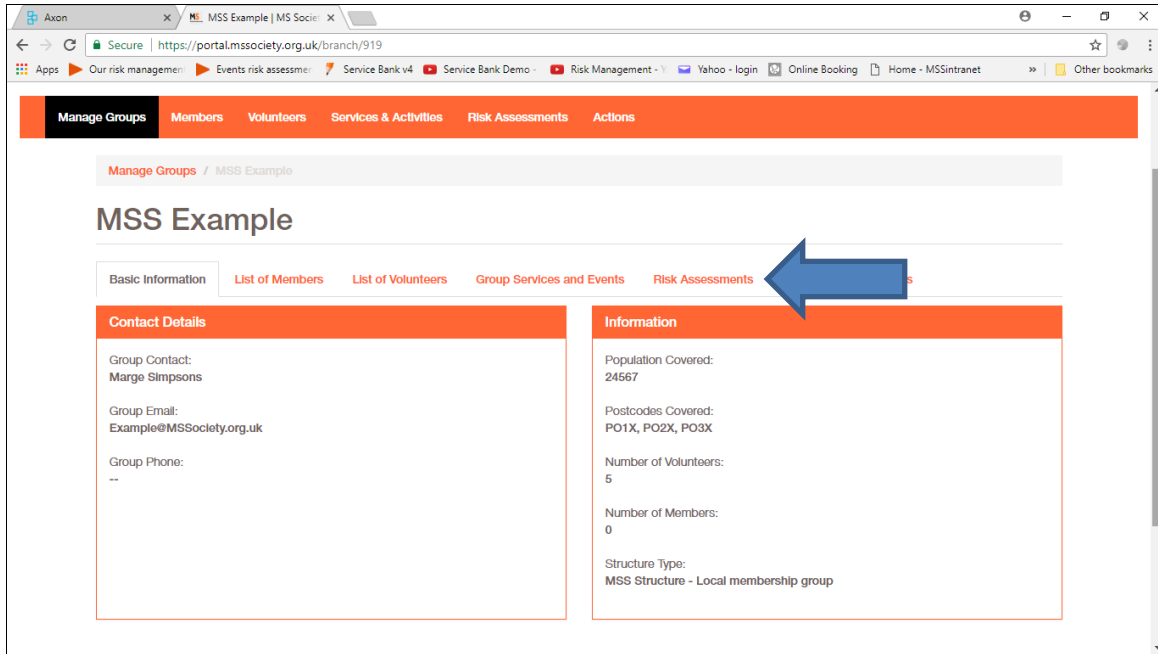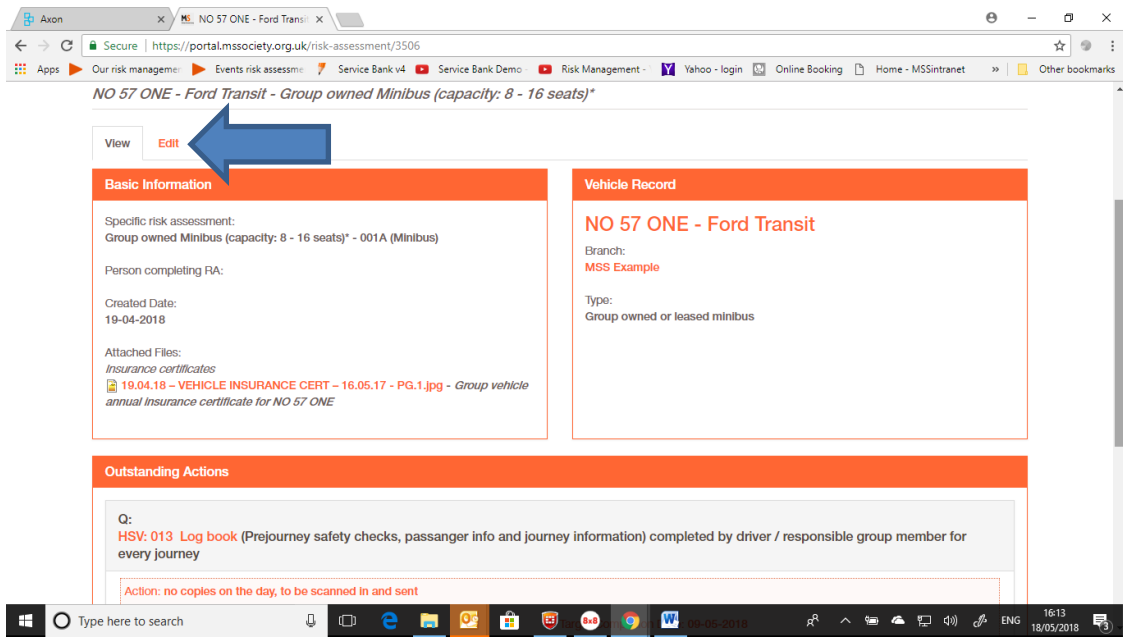


6.2.    You will then see a list of risk assessments that have been completed for the group. Click on the one that you wish to open, in this case NO 57 ONE.
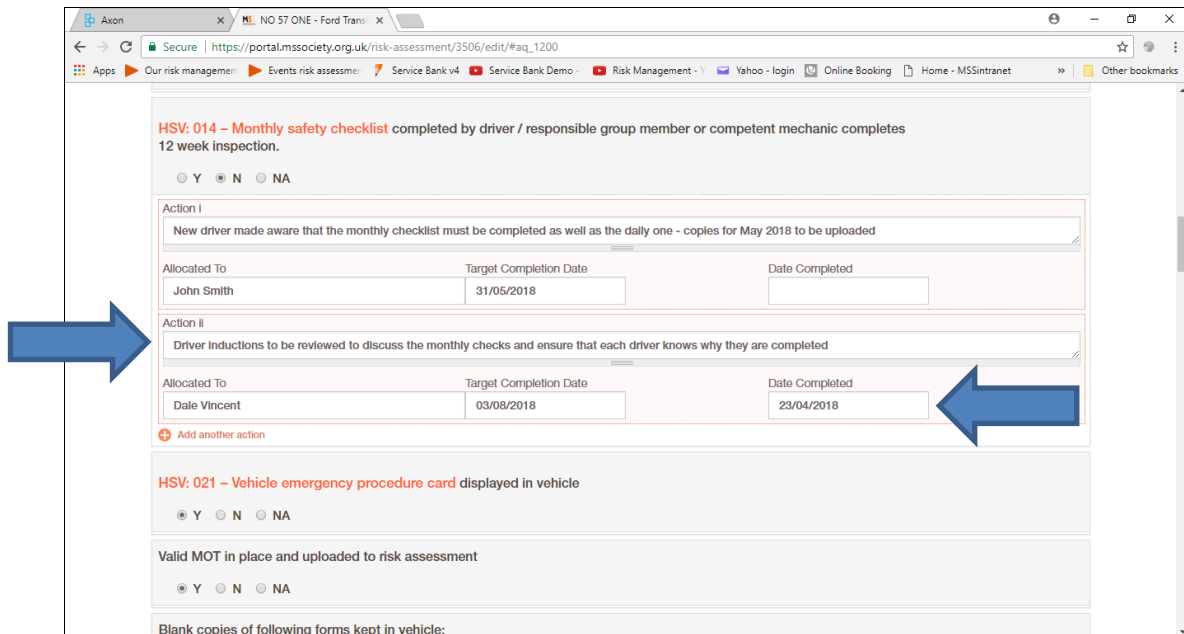
6.3.    To open the risk assessment, click on the "Edit" tab.



6.4.    Update the outstanding actions by uploading the relevant documents – in this case updated induction forms (following the guidance in section 5) as evidence. Enter the date completed and scroll to the bottom of the screen and click on the orange "Save" button.

6.5. The outstanding action is no longer visible on the main page as shown below – see section 4.12 for window showing both actions.
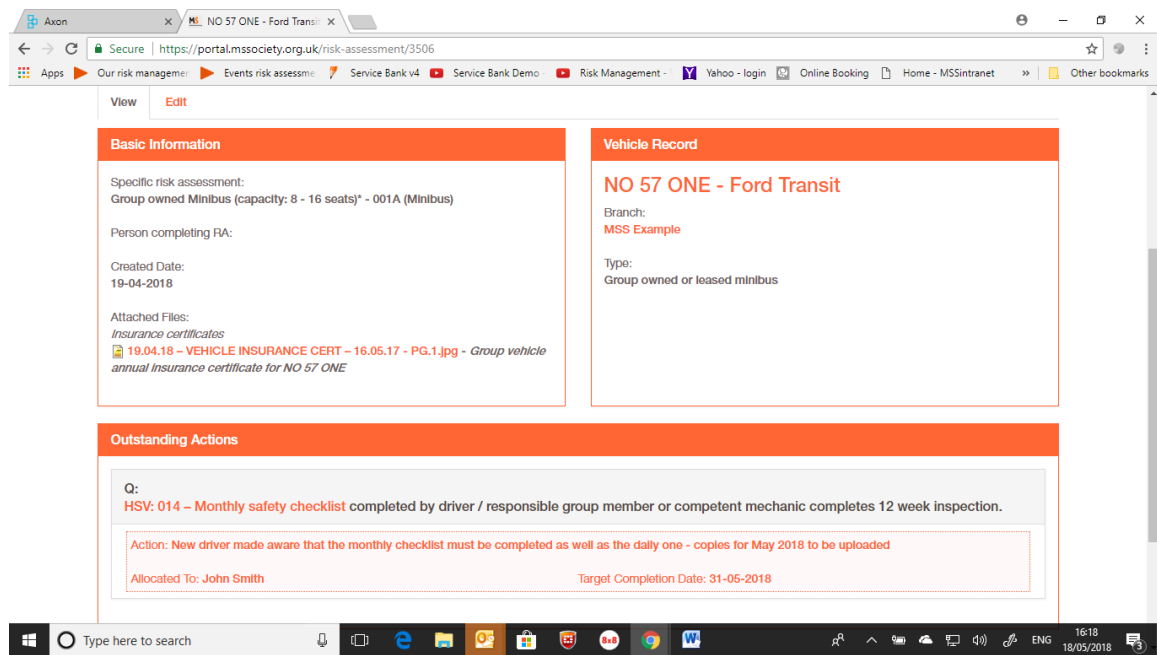


In addition to these notes the following videos are available to give further guidance:

V3: Completing actions within a risk assessment  - 2 minutes

V4: Uploading supporting documents to risk assessments - 2 minutes
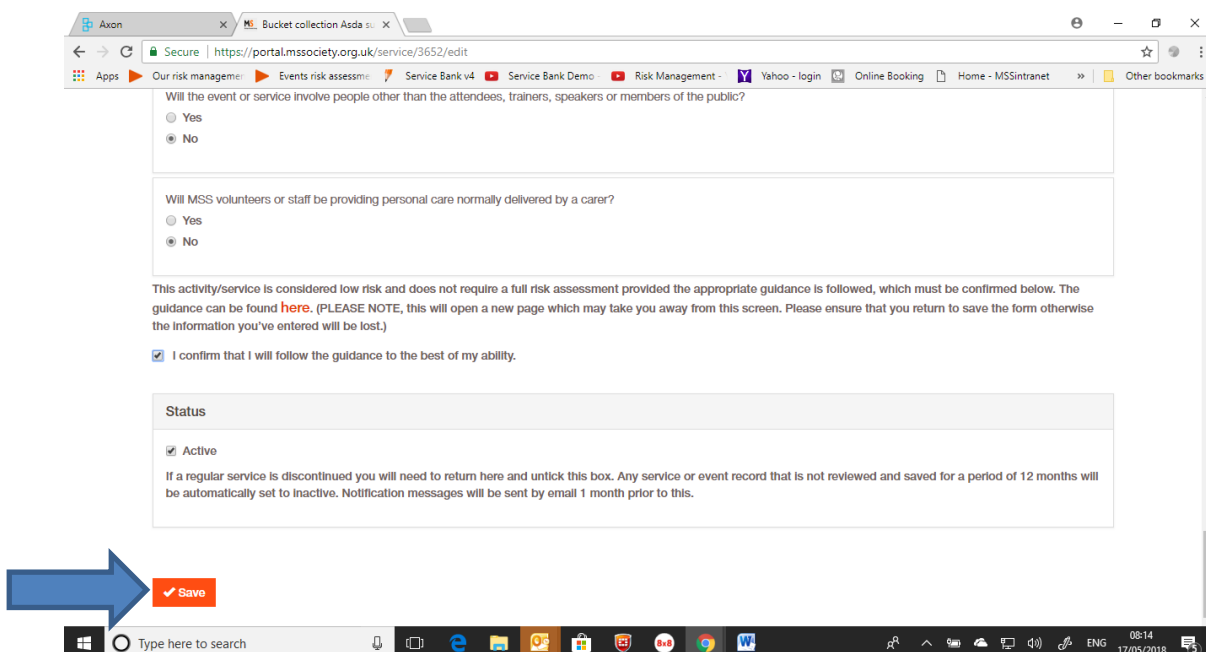
V7: Opening uploaded files within a risk assessment  - 4 minutes

## 7. Guidance documents for low risk events

7.1.   Enter the service as normal. The answers you provide to the health and safety questions will determine whether an activity is high risk or low risk. The example below which is a bucket collection in a local Asda will be logged as low risk.
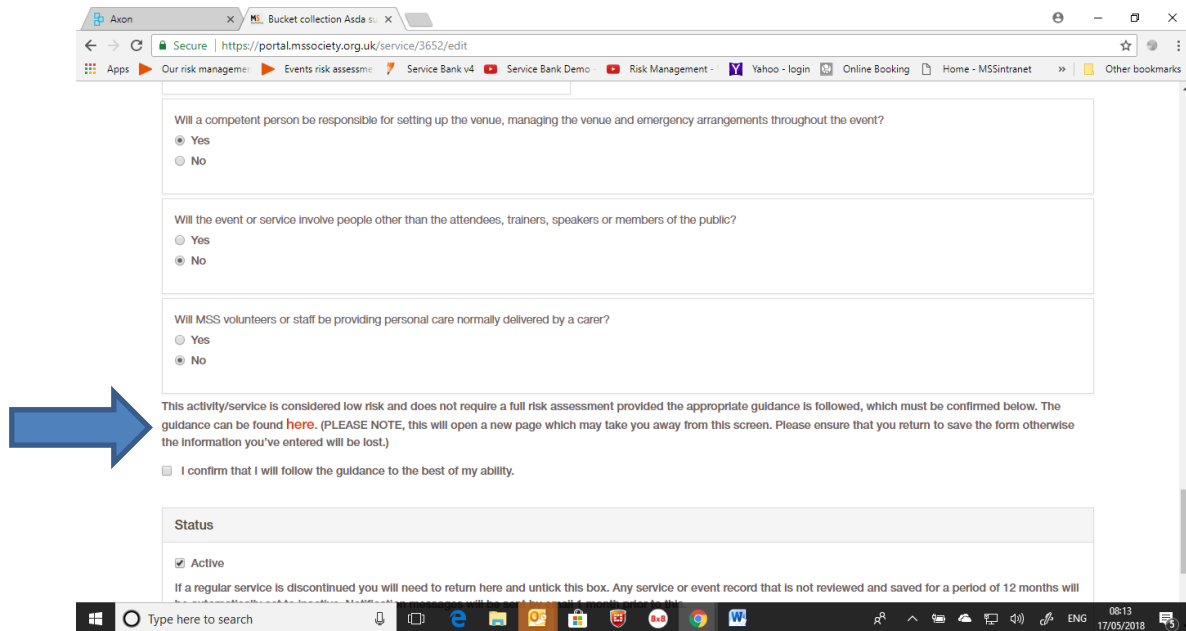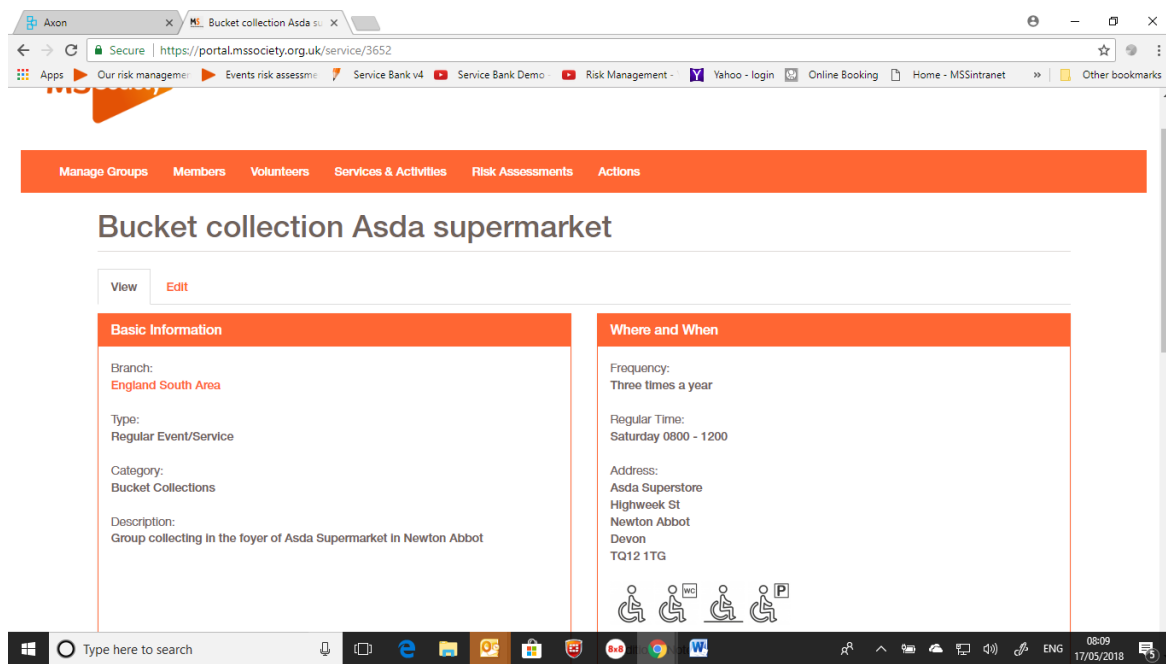


7.2.   Tick the confirmation box and scroll to the bottom of the page and press the orange "Save" button.
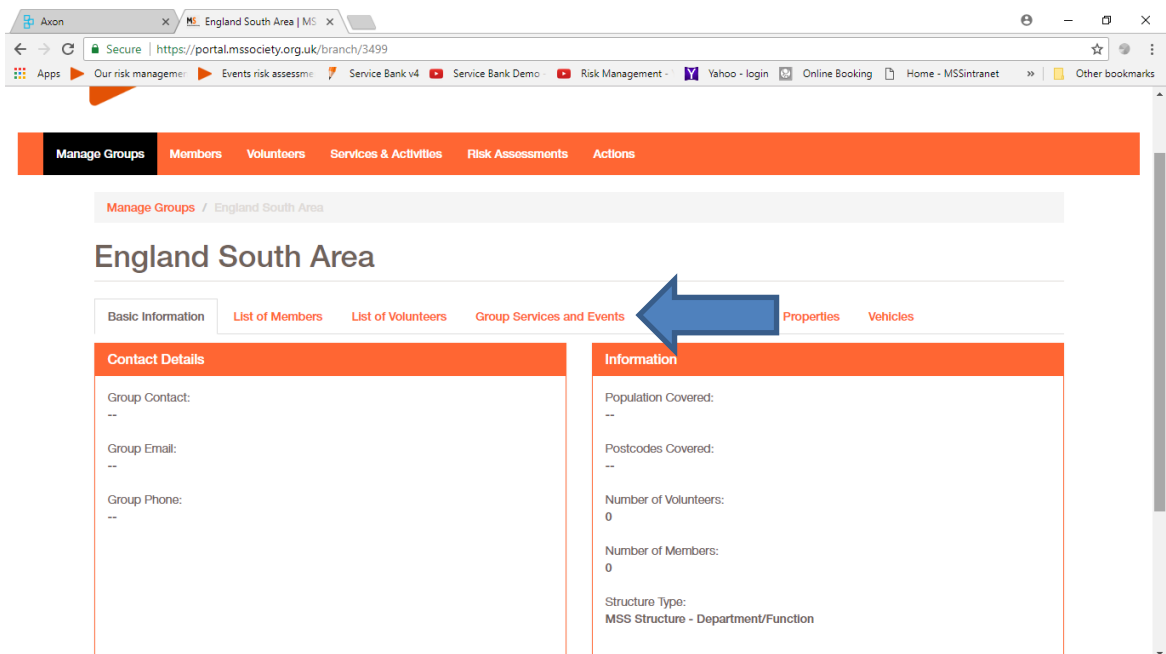
ERMS guidance

7.3.    You will then be taken back to the main page for the service.



7.4.    Once you have completed the relevant guidance document go back to your group area on the Portal. To find the event you will need to click on the "Group services and events" tag.
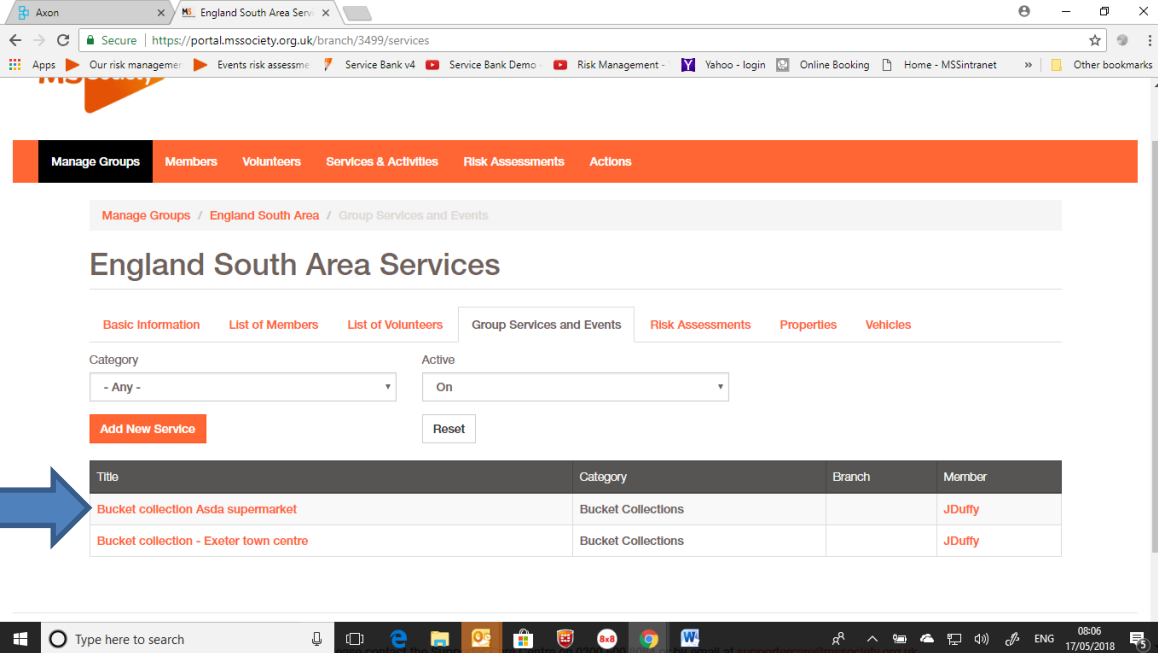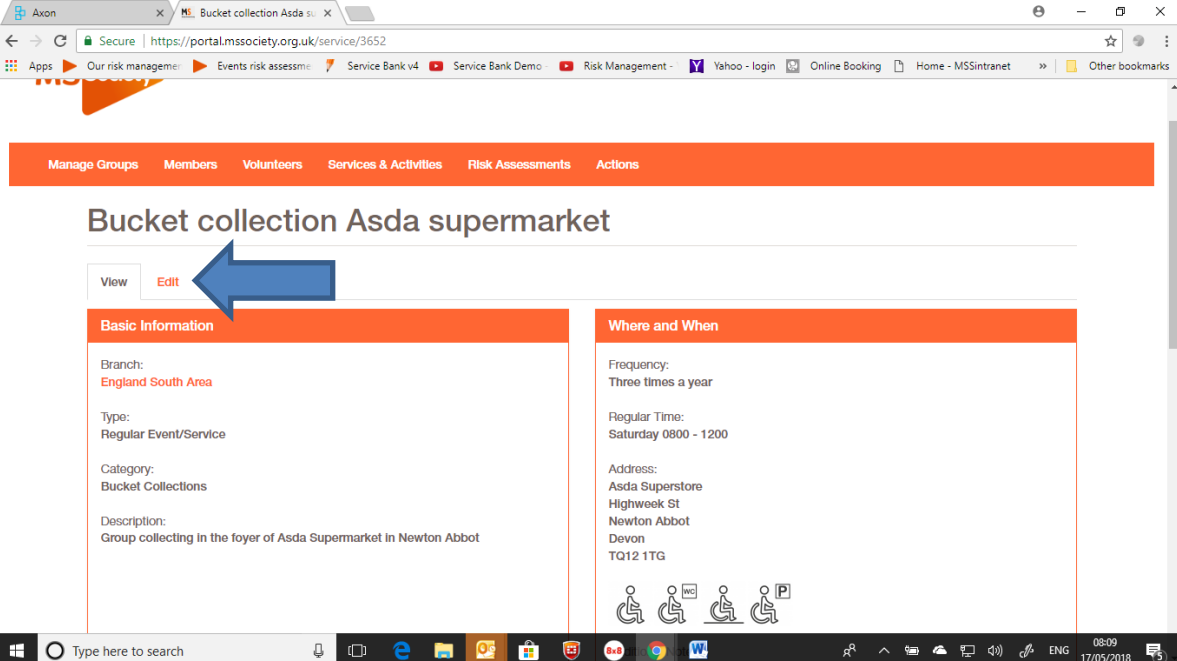
7.5.  Find the relevant activity – in this case "Bucket collection Asda supermarket" and click on it.



7.6.  On the main page, click on the "Edit" tab.

7.7.    Scroll down and click on the "Add a file" button.
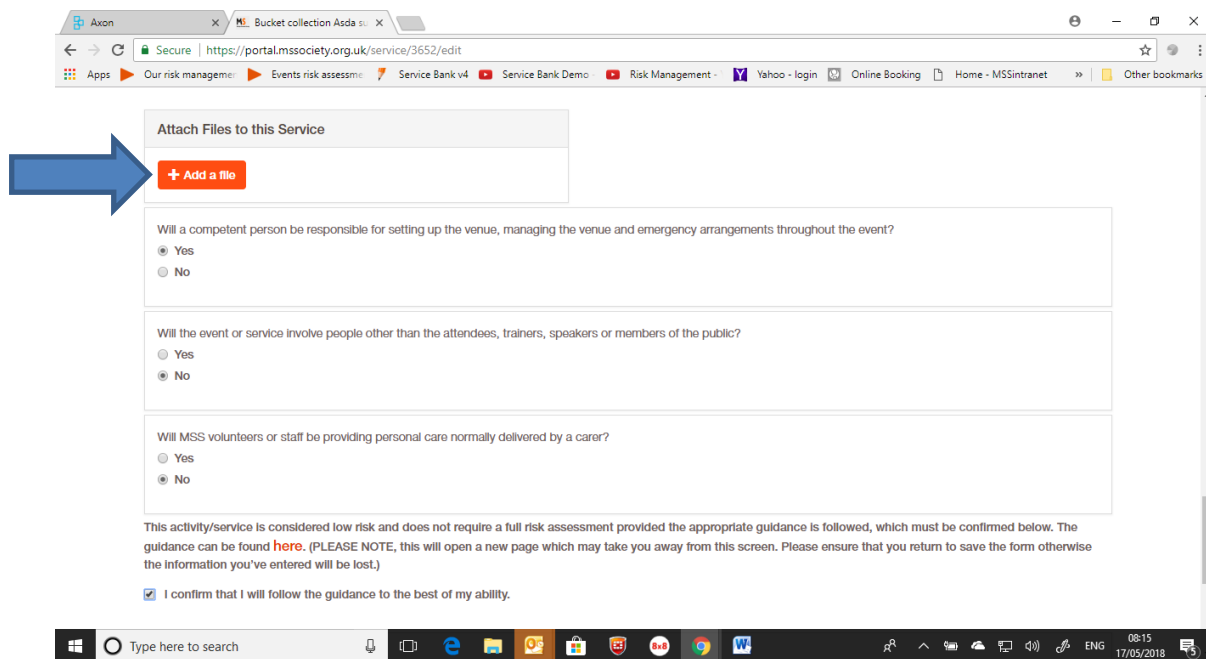


7.8.    Click on the "Choose File" button.
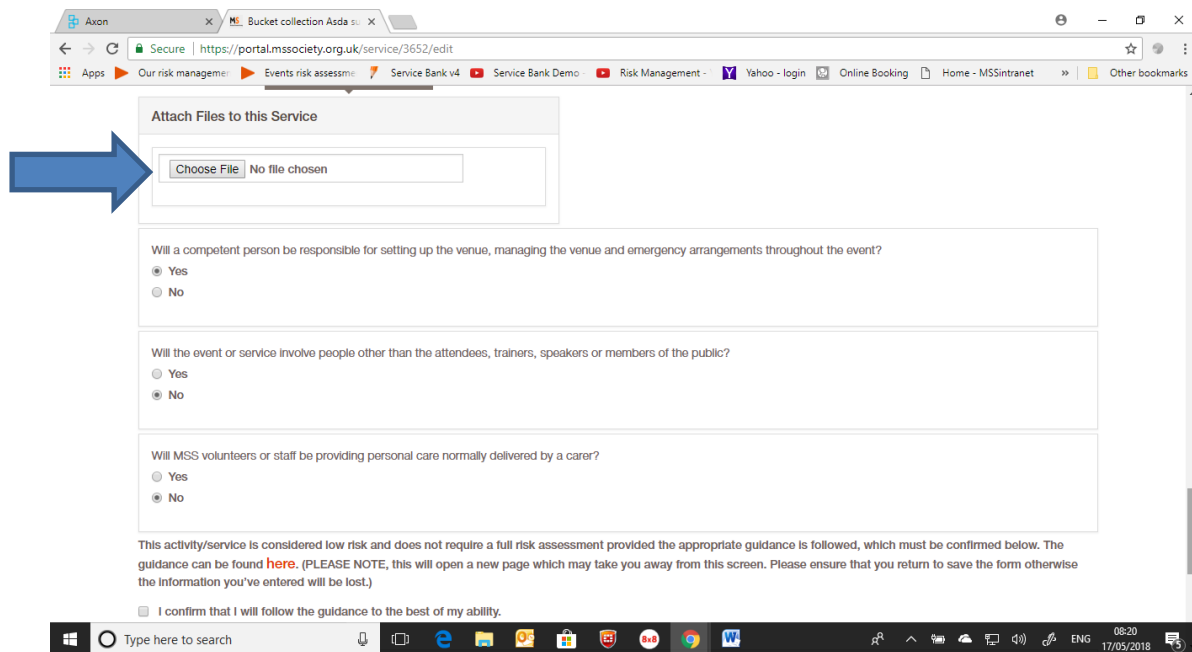
7.9.  Once you have found the relevant document on your computer, highlight it and click on the "Open" button.
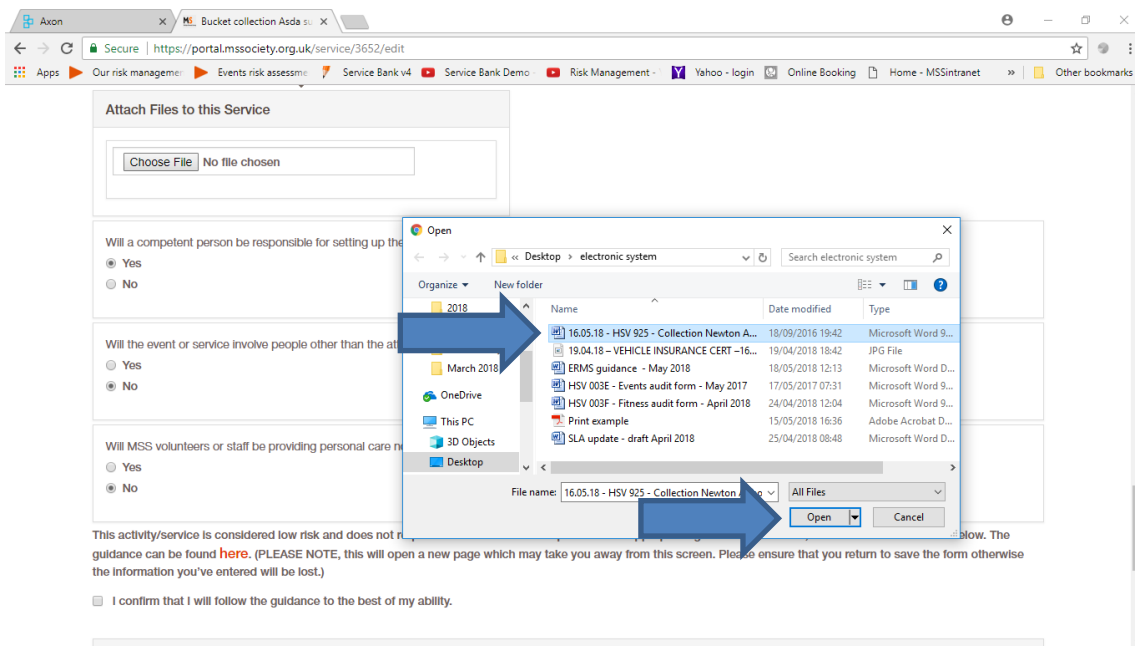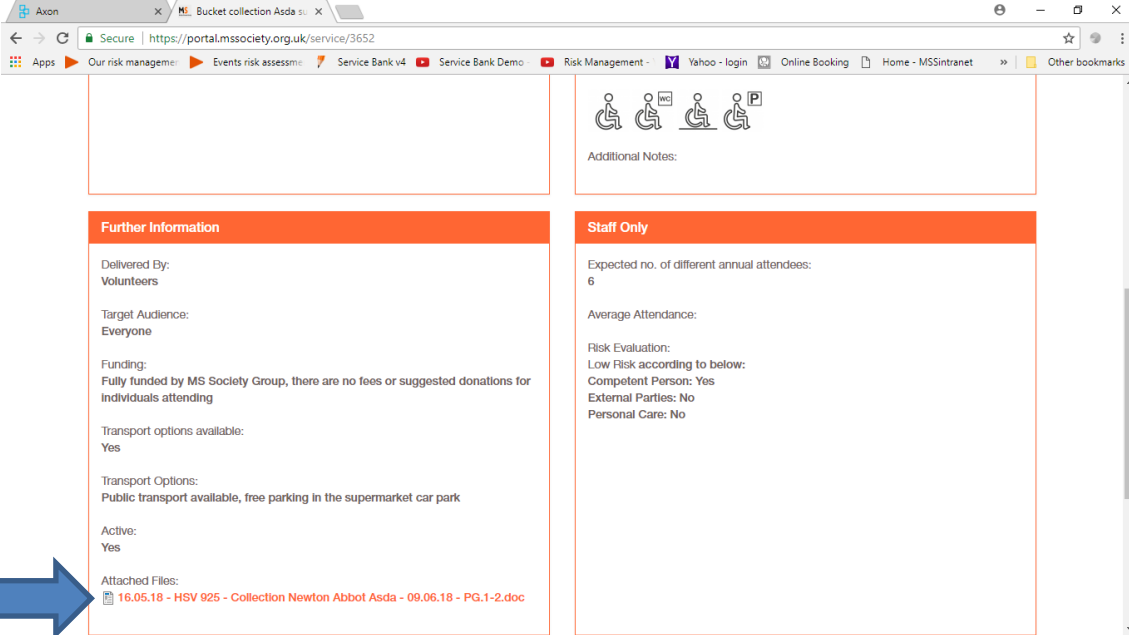


7.10.  The guidance document will be uploaded as shown below. Scroll to the bottom of the screen and click on the "Save" button.
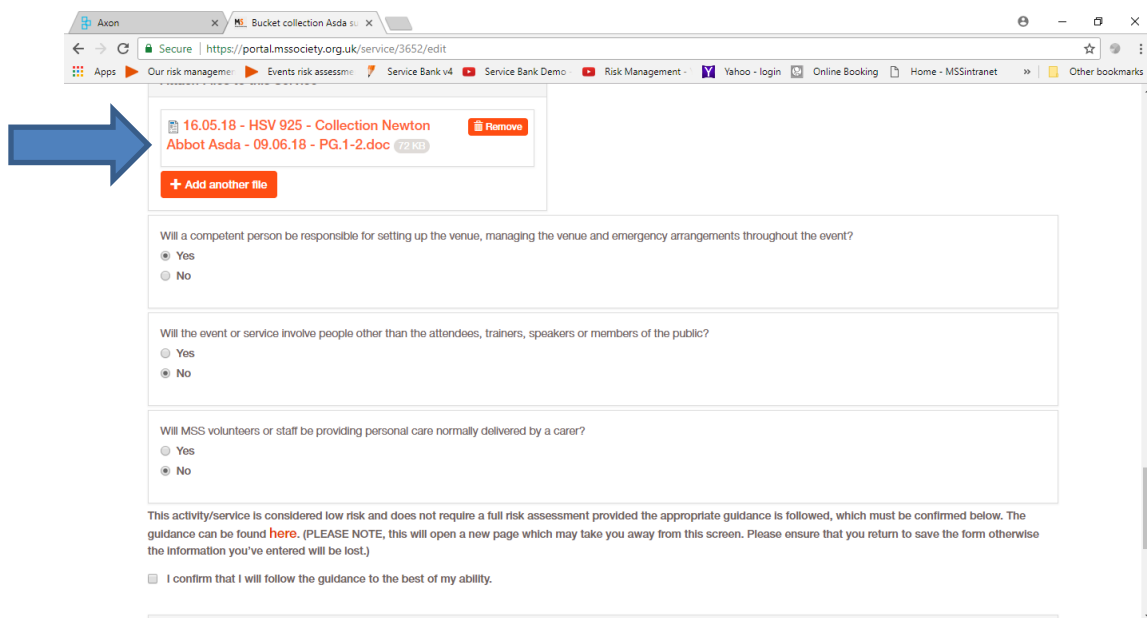


When uploading documents on your computer, label them so that you and others can recognise them in the future e.g. 16.05.18 – HSV 925 – Collection Newton Abbot Asda – 09.06.18 - PG1-2 (Date document uploaded – number of document - type of document – date of activity - page number)

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7.11. The attached document will then be shown on the main page of activity.

# Appendix I - Video links for the Health and Safety section of the portal

## How to complete a risk assessment

This section has 7 video's that can be used as a series to show how the whole process works or individually as reminders for a particular section.

V1: Finding an existing group service on the Portal - 3 minutes

V2: Creating a risk assessment - 6 minutes

V3: Completing actions within a risk assessment - 2 minutes

V4: Uploading supporting documents to risk assessments - 2 minutes

V5: Finding supporting documents on the volunteer website - 3 minutes

V6: Editing a risk assessment - 4 minutes

V7: Opening uploaded files within a risk assessment - 4 minutes

## Other useful videos

This section has 4 video's that provide guidance on particular tasks.

Do I need to use and complete a guidance document or complete a risk assessment for my event? - 6 minutes

How to find the how to add a service video on website - 1 minute

Finding the online accident report form and completing it - 6 minutes

Completing an incident report form online - 3 minutes

# Appendix II – Staff areas on the Portal

## 1. Staff areas on the Portal

These areas will be open to all staff for storing the risk assessment they complete for events where volunteers and/ or staff attend

- Administration
- Asian MS
- Communication and Campaigns
- Conferences
- Digital
- Fundraising
- Information, Advice and Support
- Information and Education
- Local Networks
  - o England Central Area
  - o England South Area
  - o England North Area
- Mutual Support
- Nation Offices
- Regional External Relations Officer
- Self Management
- Volunteering