



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

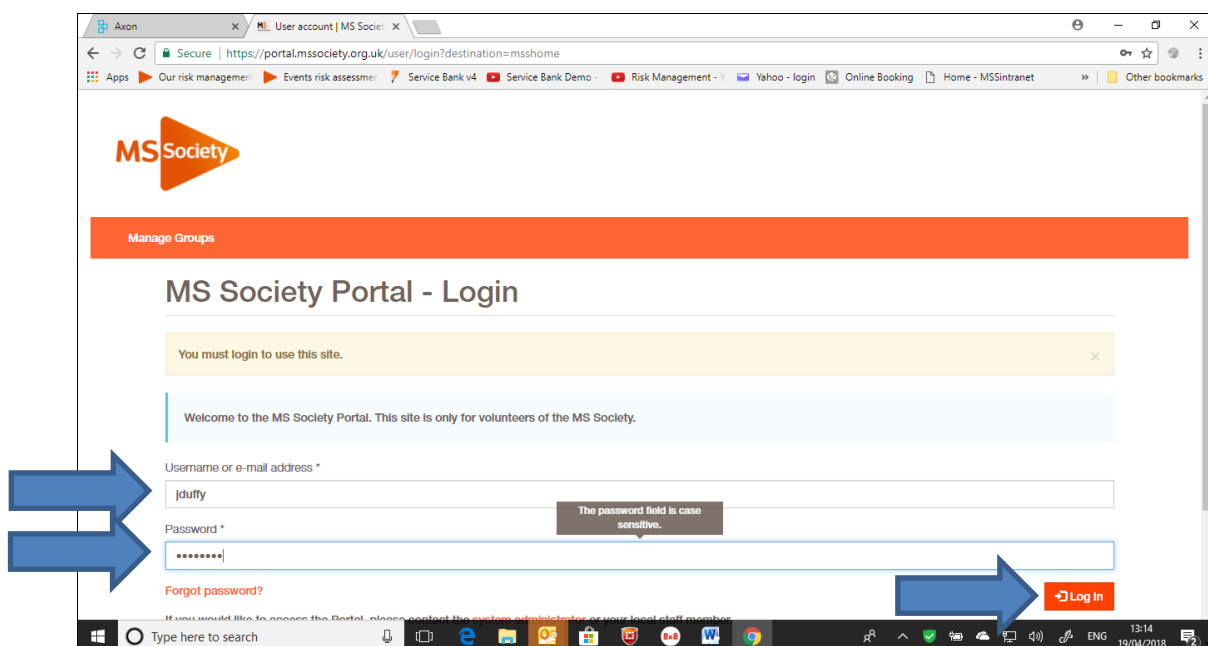
The portal can be accessed by using the following link:

<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

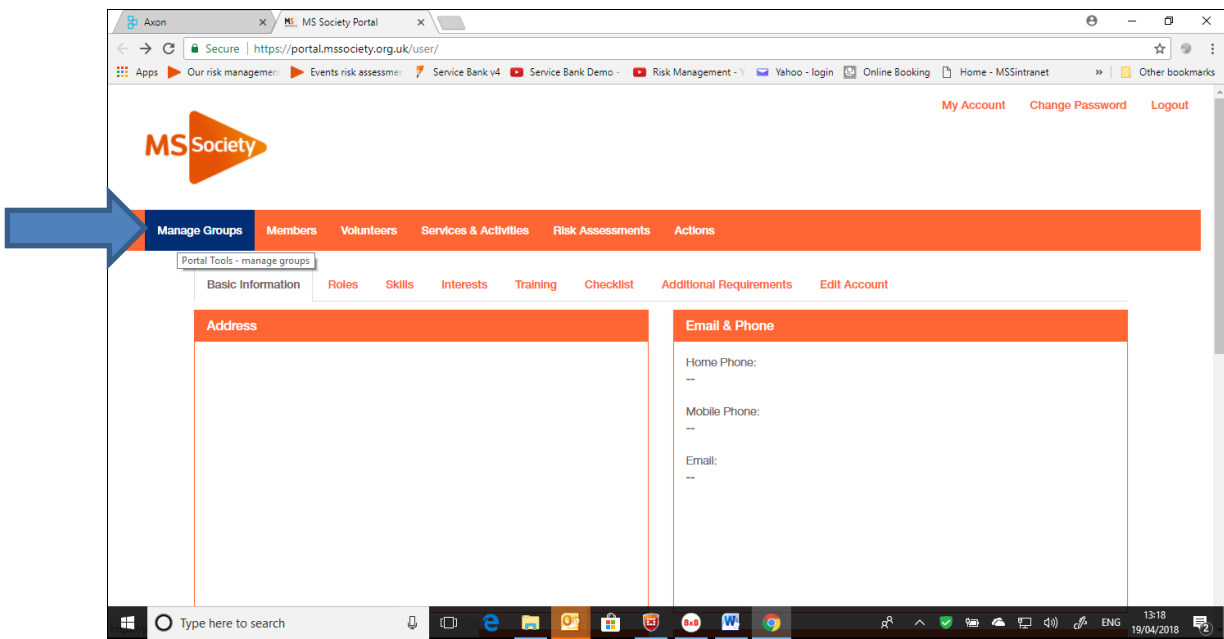
3. Setting yourself up

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.

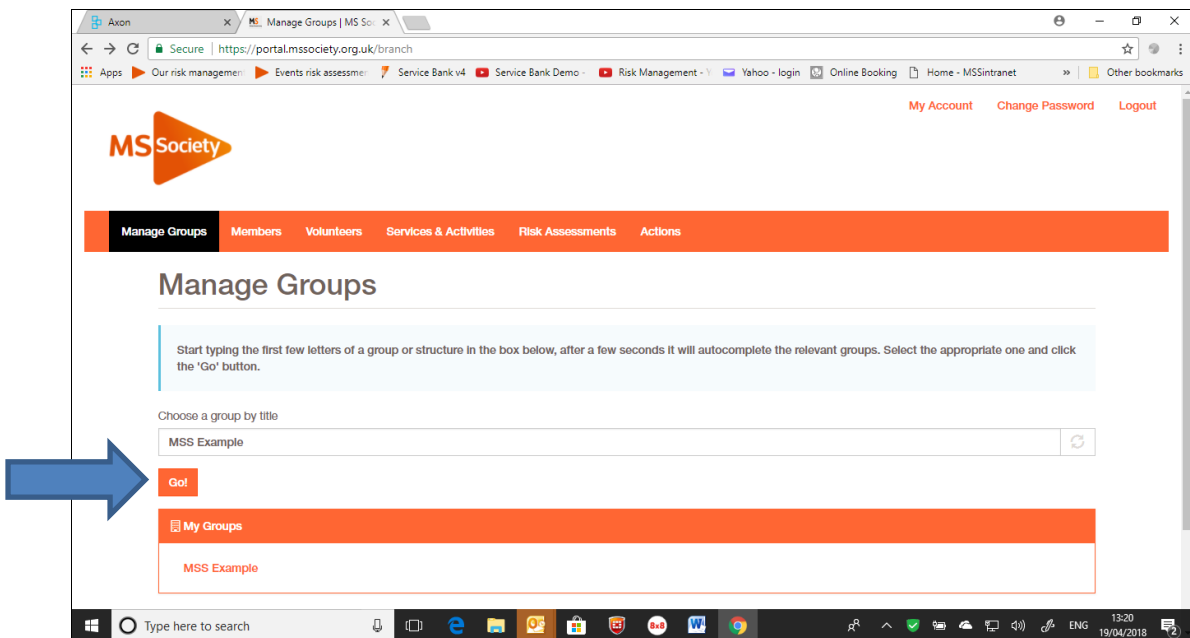


ERMS guidance

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.

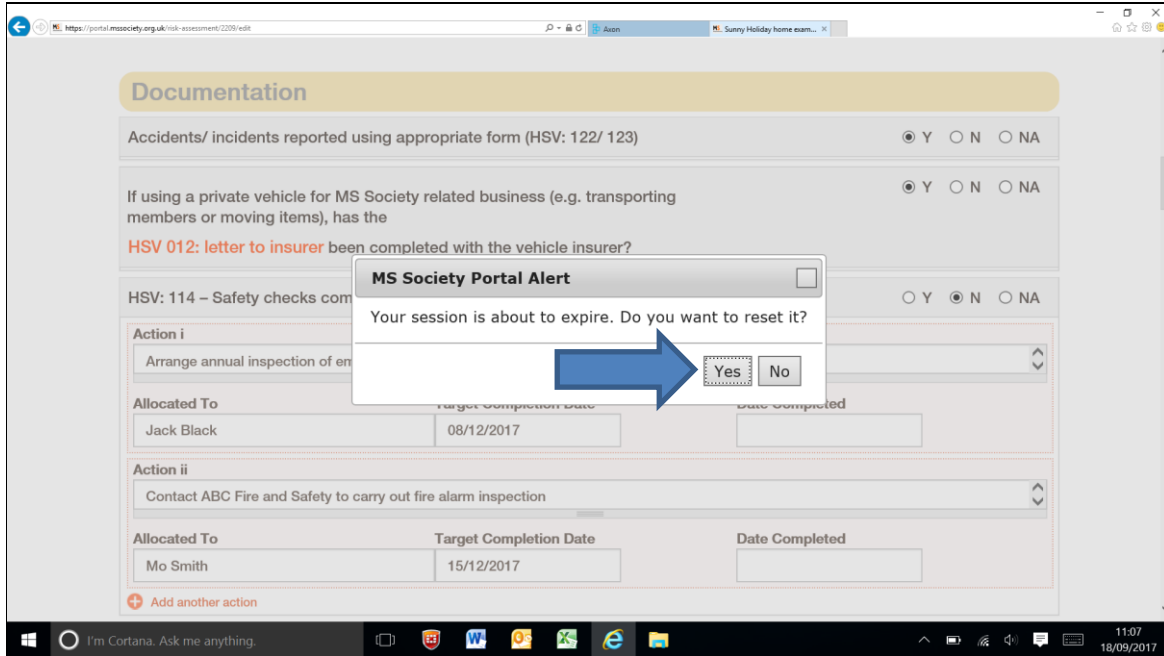


If you are a member of staff completing a risk assessment you will be able to find an area that is specifically for your team such as "England North Area". A full list of areas is show in Appendix II of this document.

ERMS guidance

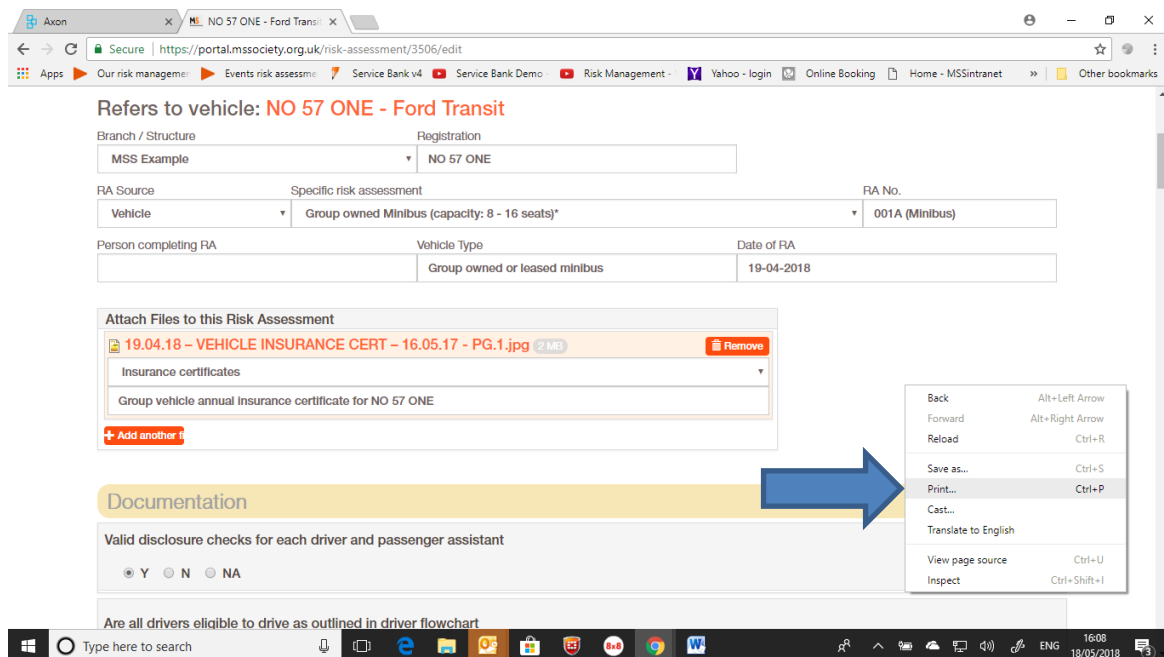
3.4. Timeout

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.



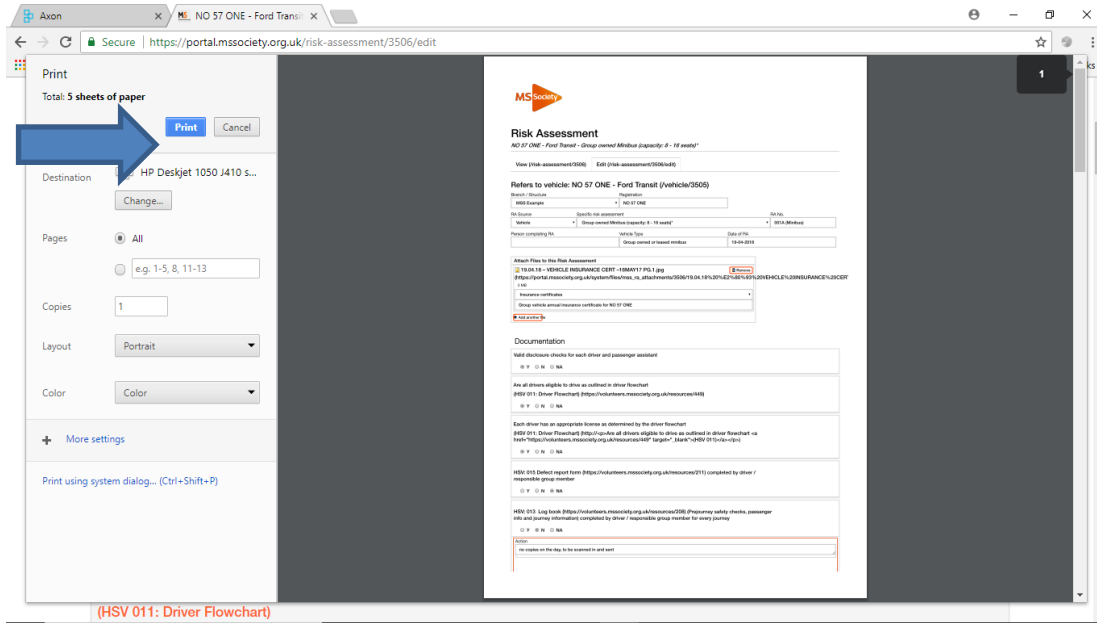
3.5. Printing

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.



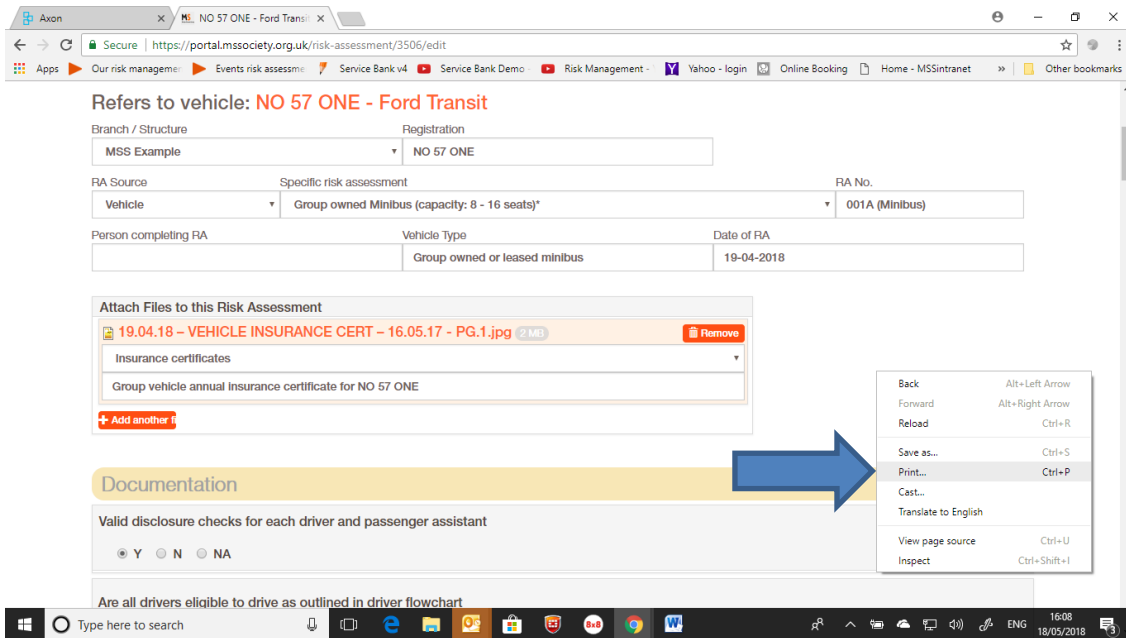
Use the print options as normal.

ERMS guidance



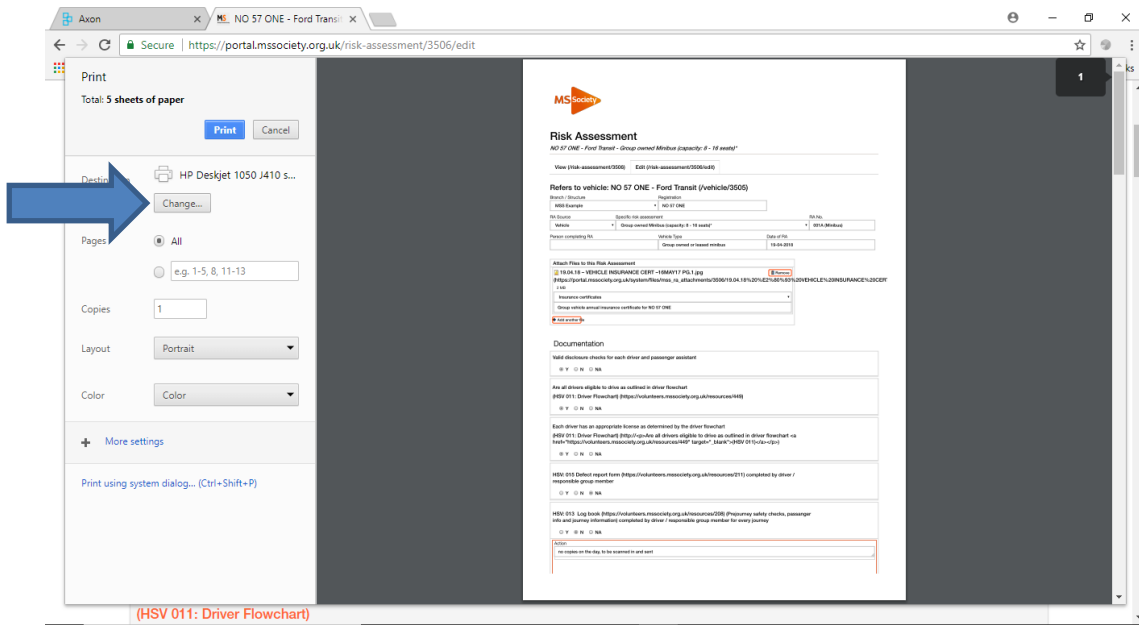
3.6. Saving

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.

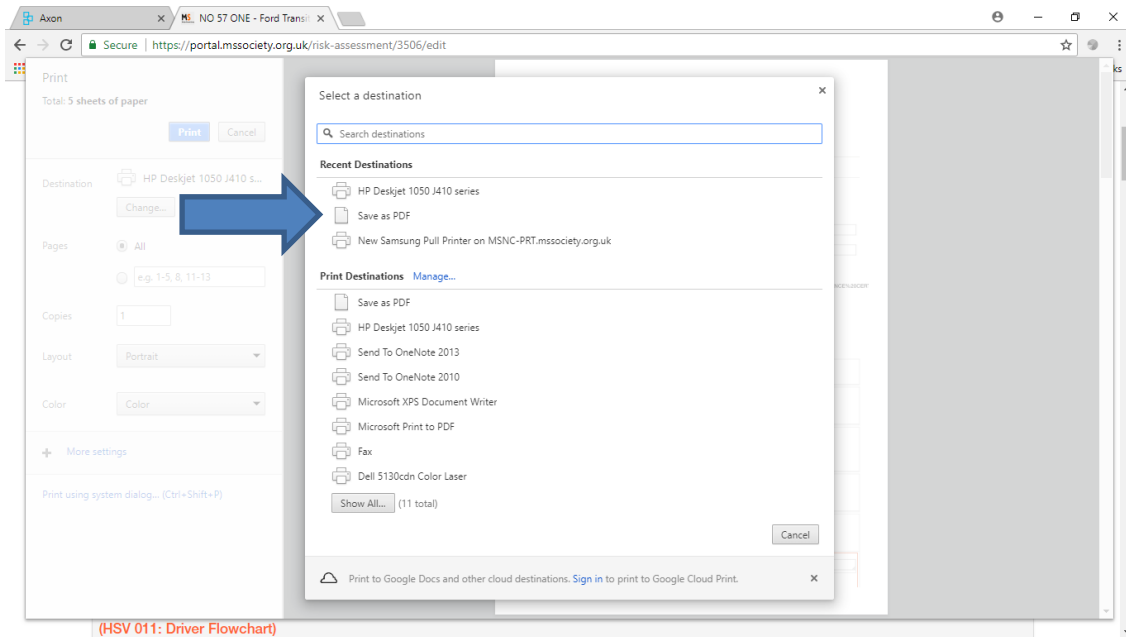


ERMS guidance

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



Select "Save as PDF" from the list, then follow the instructions for saving, labelling as appropriate.

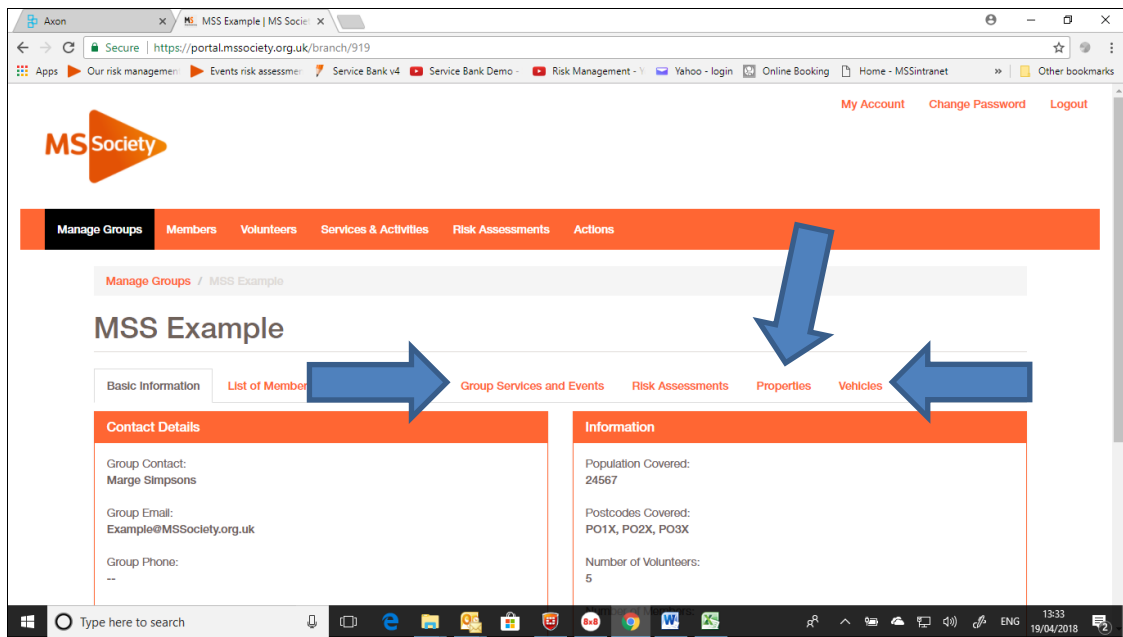


4. Creating a risk assessment

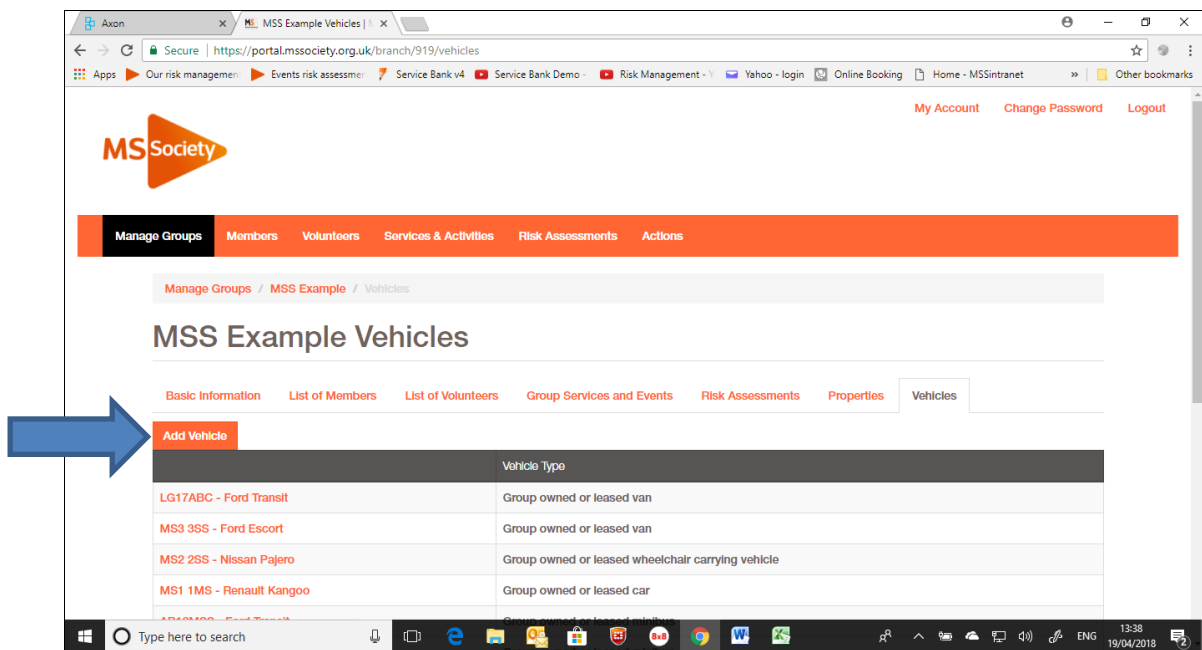
4.1. Firstly you will choose a category depending what the risk assessment is for.

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.

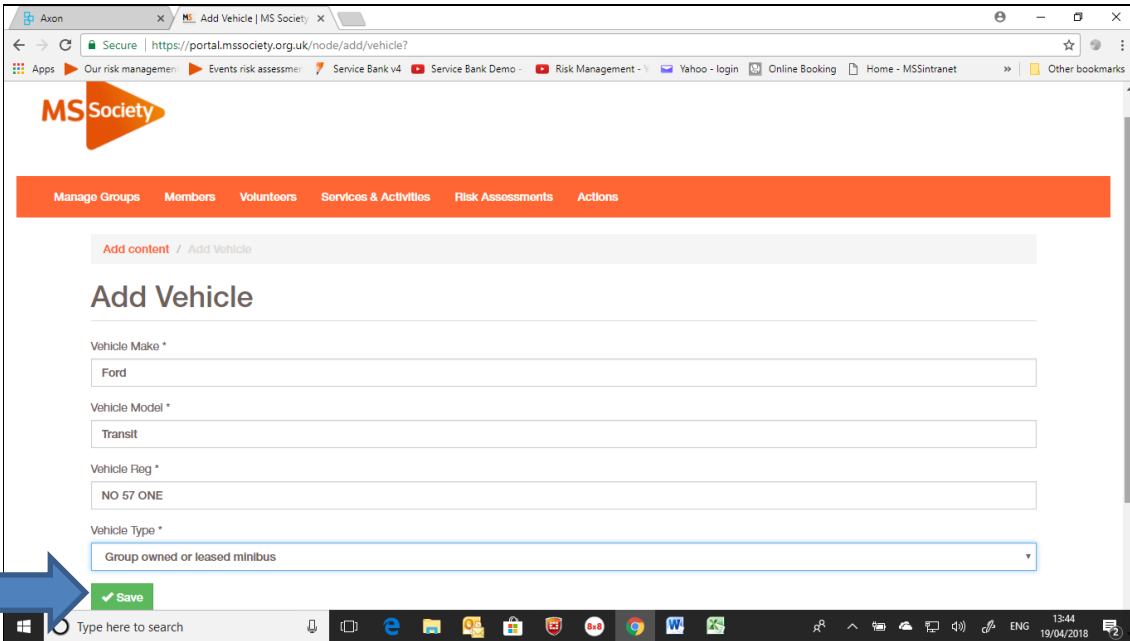


4.2. This will take you to a new window, click on the "Add Vehicle" button



ERMS guidance

- 4.3. For your vehicle enter the details as per the example below. Once complete, press the green "Save" button

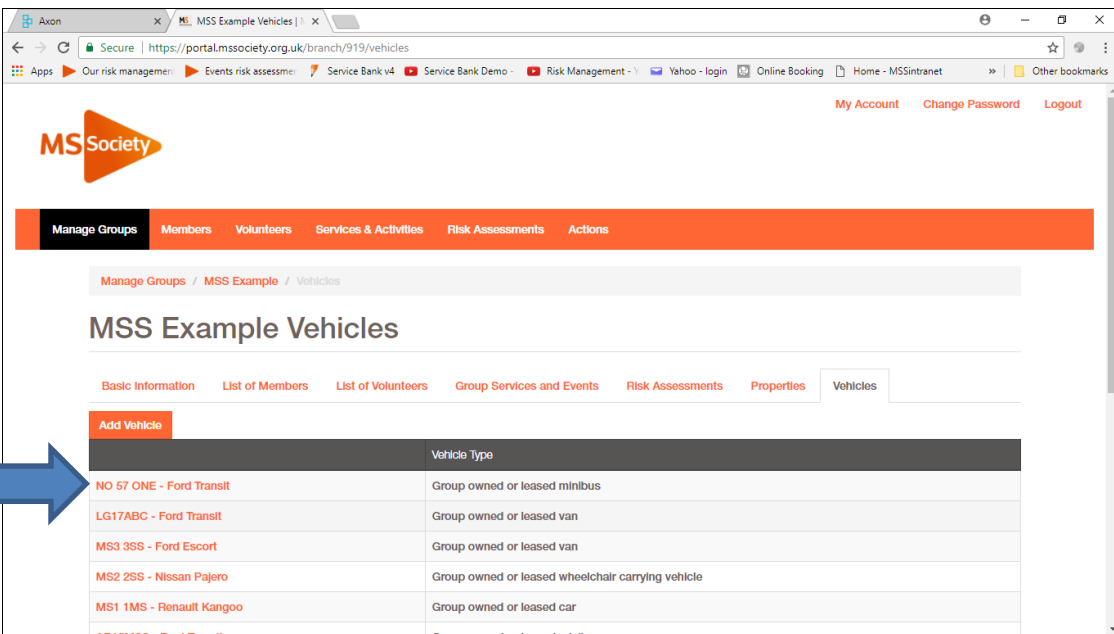


The screenshot shows a web browser window with the URL <https://portal.mssociety.org.uk/node/add/vehicle?>. The page title is "Add Vehicle". The form contains the following fields:

- Vehicle Make *
Ford
- Vehicle Model *
Transit
- Vehicle Reg *
NO 57 ONE
- Vehicle Type *
Group owned or leased minibus

A green "Save" button is located at the bottom left of the form, with a blue arrow pointing to it.

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



The screenshot shows a web browser window with the URL <https://portal.mssociety.org.uk/branch/919/vehicles>. The page title is "MSS Example Vehicles". The table below lists the vehicles:

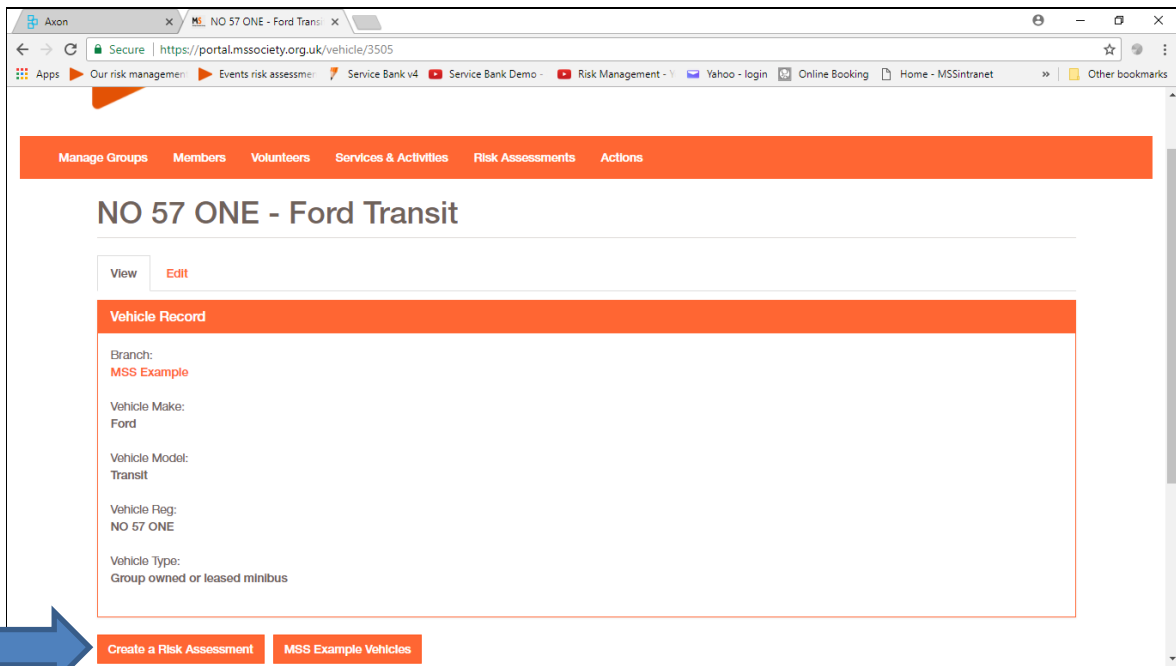
Registration	Make & Model	Vehicle Type
NO 57 ONE	Ford Transit	Group owned or leased minibus
LG17ABC	Ford Transit	Group owned or leased van
MS3 3SS	Ford Escort	Group owned or leased van
MS2 2SS	Nissan Pajero	Group owned or leased wheelchair carrying vehicle
MS1 1MS	Renault Kangoo	Group owned or leased car

A blue arrow points to the first row of the table.

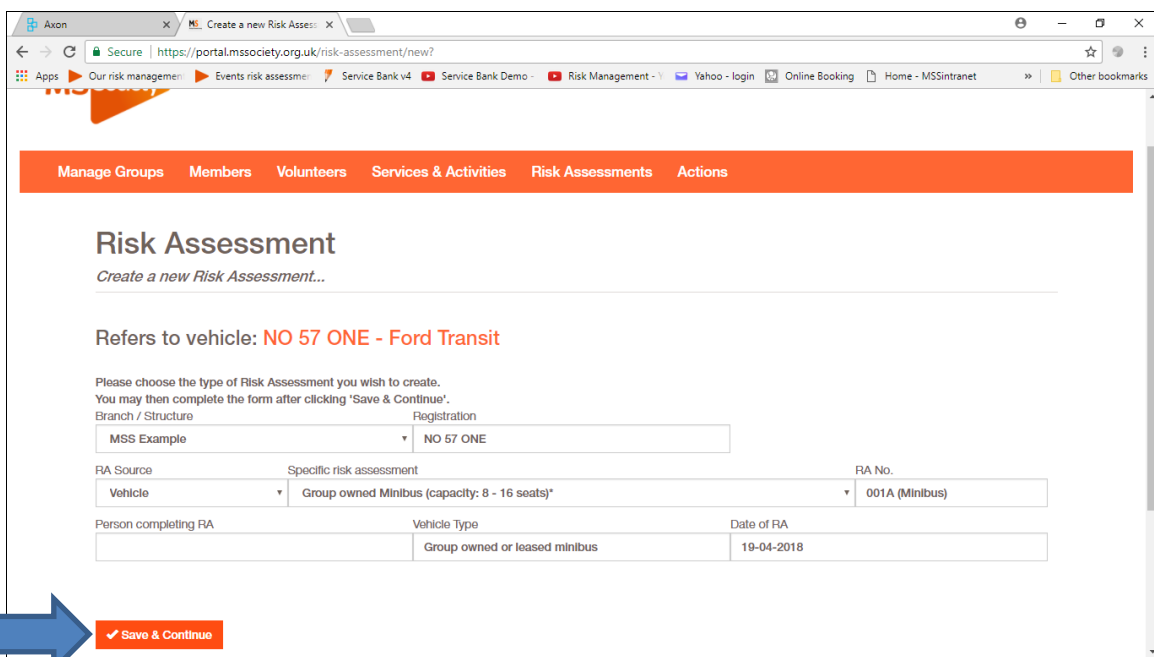
You should then click on the file you wish to open in this case NO 57 ONE.

ERMS guidance

- 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



ERMS guidance

4.7. You will now be taken to the risk assessment section as in the example set out below.

Risk Assessment
*NO 57 ONE - Ford Transit - Group owned Minibus (capacity: 8 - 16 seats)**

[View](#) [Edit](#)

Refers to vehicle: **NO 57 ONE - Ford Transit**

Branch / Structure: MSS Example Registration: NO 57 ONE

RA Source: Vehicle Specific risk assessment: Group owned Minibus (capacity: 8 - 16 seats)* RA No.: 001A (Minibus)

Person completing RA: Vehicle Type: Group owned or leased minibus Date of RA: 19-04-2018

Attach Files to this Risk Assessment
[+ Add a file](#)

Documentation

Valid disclosure checks for each driver and passenger assistant
 Y N NA

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.

Documentation

Valid disclosure checks for each driver and passenger assistant
 Y N NA

Are all drivers eligible to drive as outlined in driver flowchart
(HSV 011: Driver Flowchart)
 Y N NA

Each driver has an appropriate license as determined by the driver flowchart
(HSV 011: Driver Flowchart)
 Y N NA

HSV: 015 Defect report form completed by driver / responsible group member
 Y N NA

HSV: 013 Log book (Prejourney safety checks, passenger info and journey information) completed by driver / responsible group member for every journey
 Y N NA

ERMS guidance

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.

The screenshot shows a web browser window with the URL <https://portal.mssociety.org.uk/risk-assessment/3506/edit>. The main content area displays a question: "HSV: 014 – Monthly safety checklist completed by driver / responsible group member or competent mechanic completes 12 week inspection." Below the question are three radio buttons: "Y", "N", and "NA". The "N" option is selected. Below the radio buttons is a task box for "Action I" with the following details:

Action	Allocated To	Target Completion Date	Date Completed
New driver made aware that the monthly checklist must be completed as well as the daily one - copies for May 2018 to be uploaded	John Smith	31/05/2018	

Below the task box is a red button labeled "Add another action". Below the task box are two more questions: "HSV: 021 – Vehicle emergency procedure card displayed in vehicle" and "Valid MOT in place and uploaded to risk assessment", both with "Y" selected. At the bottom, there is a section for "Blank copies of following forms kept in vehicle:" with a list of forms: "HSV: 122 - Accident reporting form", "HSV: 123 - Incident reporting form", and "HSV: 015 - Transport defect report form".

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.

The screenshot shows the same web browser window as above. The "Add another action" button has been clicked, and a second task box for "Action II" has been added below "Action I". The details for "Action II" are:

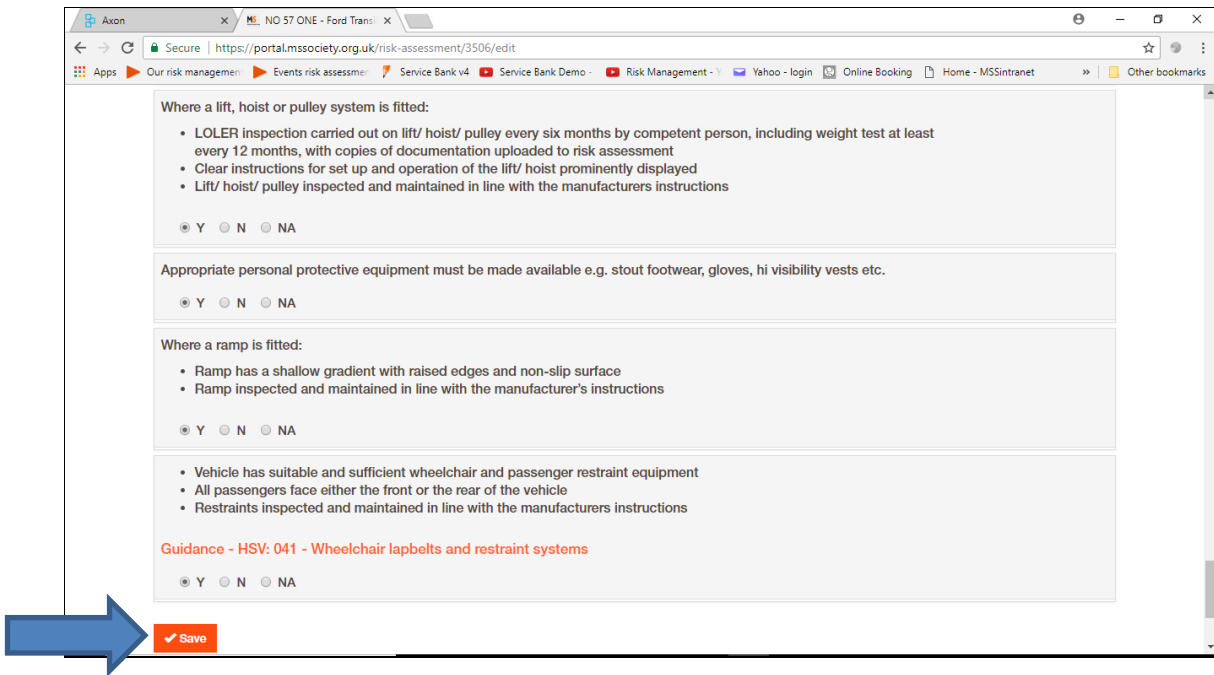
Action	Allocated To	Target Completion Date	Date Completed
Driver inductions to be reviewed to discuss the monthly checks and ensure that each driver knows why they are completed	Dale Vincent	03/08/2018	

The "Add another action" button is still visible below "Action II". The rest of the interface, including the questions and form lists, remains the same as in the previous screenshot.

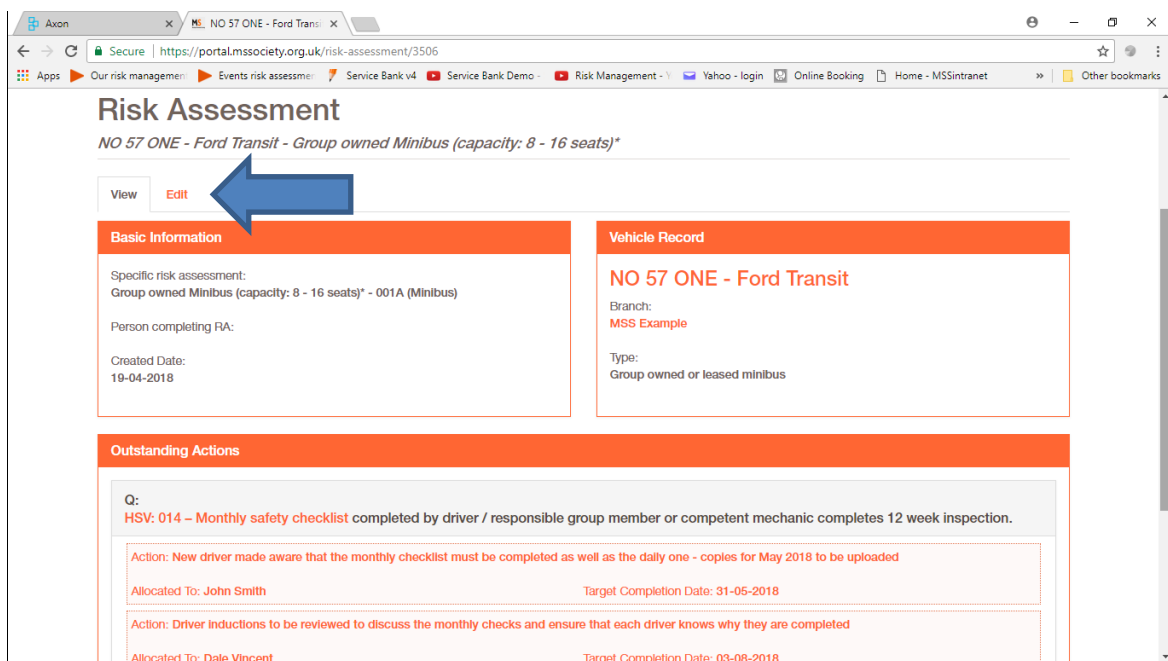
This is to ensure that different actions can be allocated to different individuals and that each action can be signed off on completion without being affected by other outstanding actions.

ERMS guidance

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:

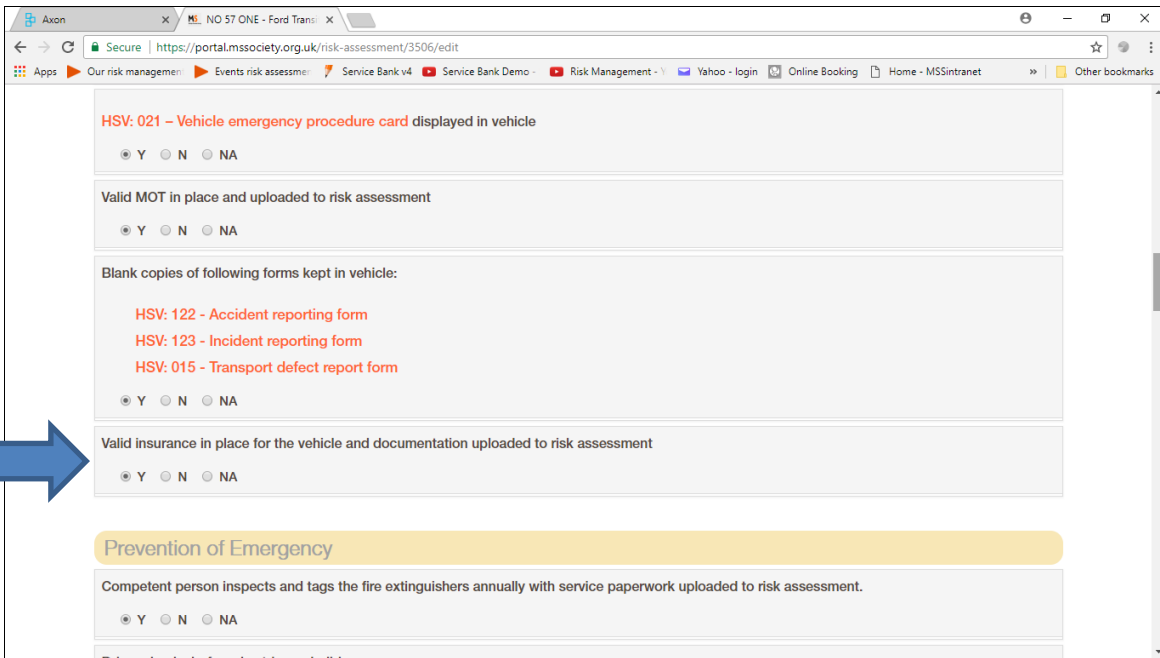
V2: Creating a risk assessment - 6 minutes

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.

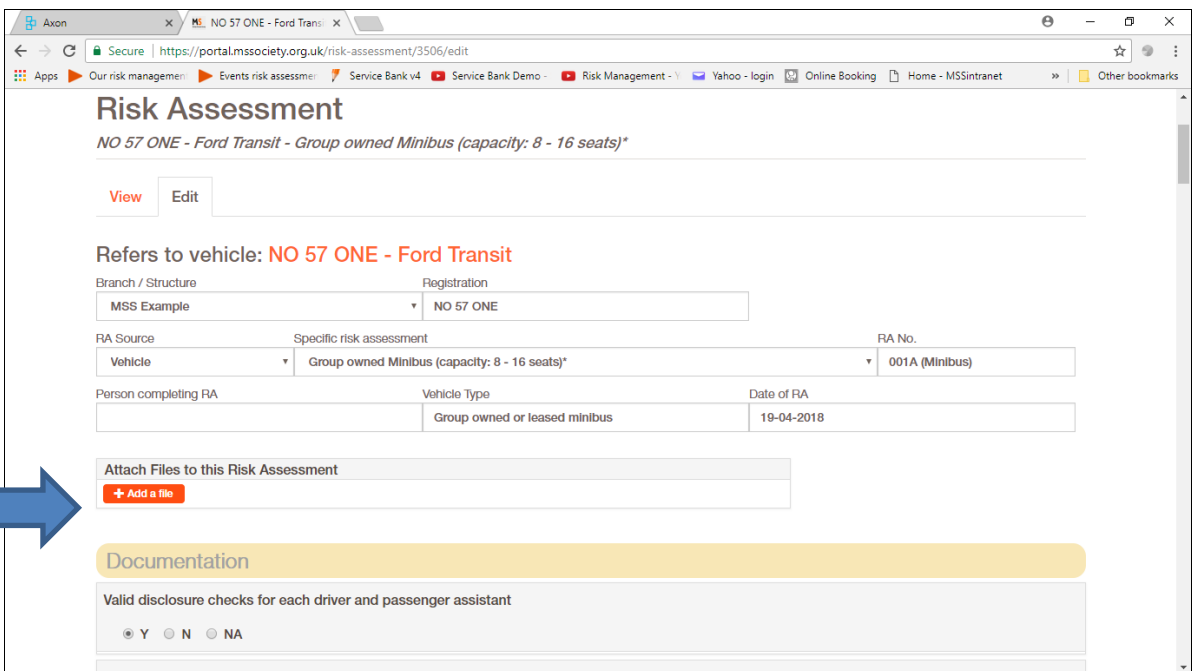


A screenshot of a web browser displaying a risk assessment form. The browser address bar shows 'https://portal.mssociety.org.uk/risk-assessment/3506/edit'. The form contains several sections with radio button options (Y, N, NA):

- HSV: 021 – Vehicle emergency procedure card displayed in vehicle
- Valid MOT in place and uploaded to risk assessment
- Blank copies of following forms kept in vehicle:
 - HSV: 122 - Accident reporting form
 - HSV: 123 - Incident reporting form
 - HSV: 015 - Transport defect report form
- Valid insurance in place for the vehicle and documentation uploaded to risk assessment

A blue arrow points to the 'Valid insurance in place for the vehicle and documentation uploaded to risk assessment' section. Below this is a yellow header for 'Prevention of Emergency' and a section for 'Competent person inspects and tags the fire extinguishers annually with service paperwork uploaded to risk assessment.'.

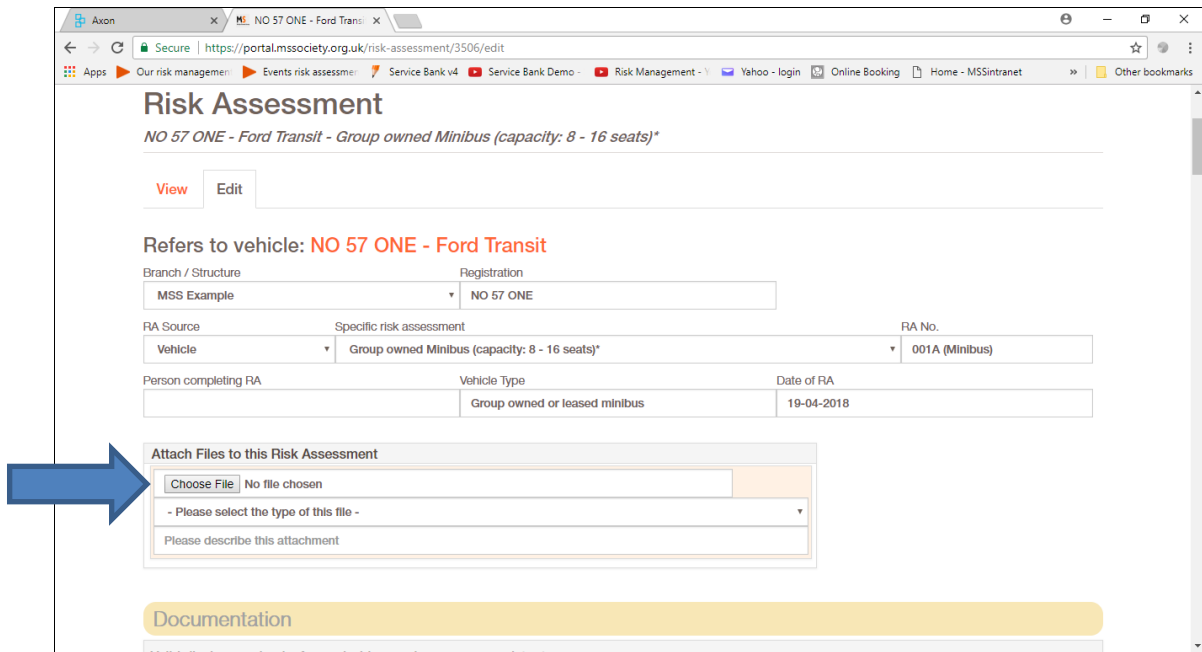
5.2. Scroll to the top of the page and click on the “Add a file” button.



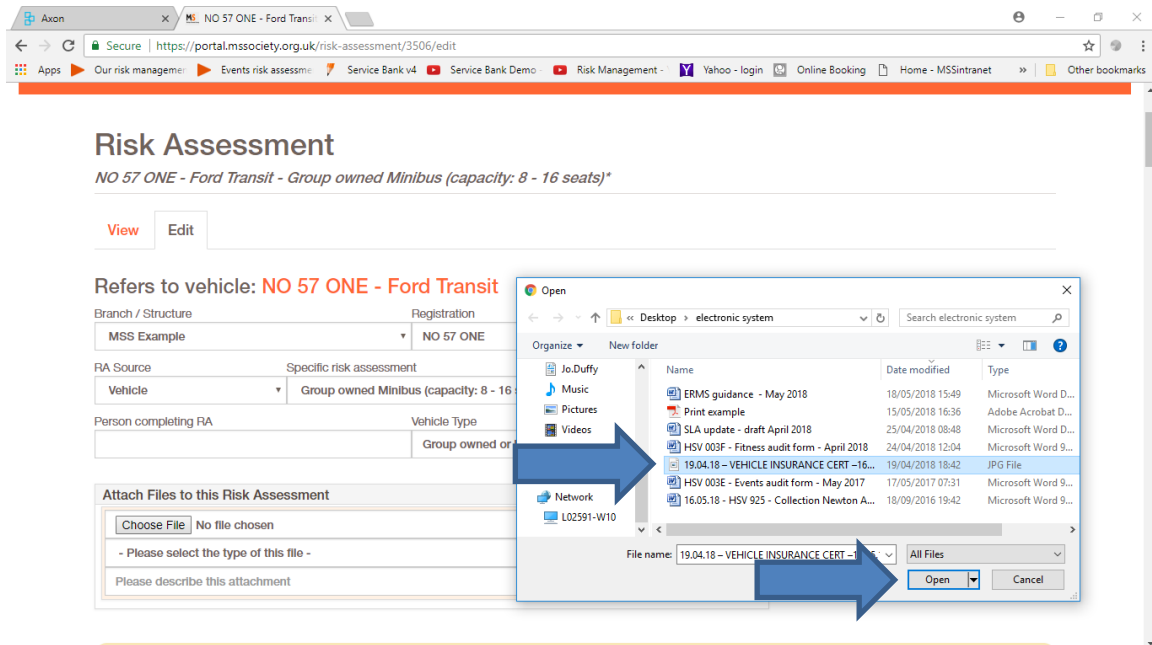
A screenshot of the top of a risk assessment form. The browser address bar shows 'https://portal.mssociety.org.uk/risk-assessment/3506/edit'. The form title is 'Risk Assessment' and the vehicle is 'NO 57 ONE - Ford Transit - Group owned Minibus (capacity: 8 - 16 seats)*'. There are 'View' and 'Edit' buttons. The form includes fields for 'Branch / Structure' (MSS Example), 'Registration' (NO 57 ONE), 'RA Source' (Vehicle), 'Specific risk assessment' (Group owned Minibus (capacity: 8 - 16 seats)*), 'RA No.' (001A (Minibus)), 'Person completing RA', 'Vehicle Type' (Group owned or leased minibus), and 'Date of RA' (19-04-2018). A blue arrow points to the 'Attach Files to this Risk Assessment' section, which contains a red '+ Add a file' button. Below this is a yellow header for 'Documentation' and a section for 'Valid disclosure checks for each driver and passenger assistant'.

ERMS guidance

- 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.



ERMS guidance

5.5. You will now see the document you have uploaded as shown in the window below.

Risk Assessment
*NO 57 ONE - Ford Transit - Group owned Minibus (capacity: 8 - 16 seats)**

[View](#) [Edit](#)

Refers to vehicle: NO 57 ONE - Ford Transit

Branch / Structure: MSS Example Registration: NO 57 ONE

RA Source: Vehicle Specific risk assessment: Group owned Minibus (capacity: 8 - 16 seats)* RA No.: 001A (Minibus)

Person completing RA: Vehicle Type: Group owned or leased minibus Date of RA: 19-04-2018

Attach Files to this Risk Assessment

Choose File | 19.04.18 - VEHICLE INSURANCE CERT - 16.05.17 - PG.1.jpg

- Please select the type of this file -

Please describe this attachment

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.

- Please select the type of this file -

- Asbestos reports
- Attendance registers
- Defect report forms
- Fire documentation
- First aid documentation (including appointed person checklists)
- Fitness providers certification (including HSV: 743/ 744/ 745/ 746)
- Gazebo checklists
- Induction forms
- Insurance certificates
- Legionnaire disease risk assessment and report
- Lifting operations and lifting equipment regulations (LOLER) documentation
- Personal Emergency Evacuation Plan summary sheets
- Safety checklists
- Service level agreements
- Supporter Information

- Please select the type of this file -

Please describe this attachment

[+ Add another](#)

Documentation

ERMS guidance

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

Risk Assessment
*NO 57 ONE - Ford Transit - Group owned Minibus (capacity: 8 - 16 seats)**

[View](#) [Edit](#)

Refers to vehicle: NO 57 ONE - Ford Transit

Branch / Structure	Registration
MSS Example	NO 57 ONE

RA Source	Specific risk assessment	RA No.
Vehicle	Group owned Minibus (capacity: 8 - 16 seats)*	001A (Minibus)

Person completing RA	Vehicle Type	Date of RA
	Group owned or leased minibus	19-04-2018

Attach Files to this Risk Assessment

- 19.04.18 - VEHICLE INSURANCE CERT - 16.05.17 - PG.1.jpg (2 MB) [Remove](#)

Insurance certificates

Group vehicle annual insurance certificate for NO 57 ONE

[+ Add another file](#)

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.

131E, G19 and G20)

HSV: 132D – Contractors induction Y N NA

Welfare

All MS Society properties must have: Y N NA

- Appropriate lavatory and washing facilities with hot and cold running water available
- If no mixer tap suitable warning signs displayed for hot water
- Supply of safe drinking water available
- Fridge temperature maintained at 5oC or below
- High level of cleanliness and hygiene are maintained
- Appropriate floor coverings are used

• Items used most often stored to hand Y N NA

• Heavier items stored at low level

[Save](#)

ERMS guidance

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.

The screenshot shows a web browser window displaying the ERMS portal. The URL is <https://portal.mssociety.org.uk/risk-assessment/3506>. The page has a navigation bar with links like 'Our risk management', 'Events risk assessment', 'Service Bank v4', 'Service Bank Demo', 'Risk Management', 'Yahoo - login', 'Online Booking', 'Home - MSSintranet', and 'Other bookmarks'. The main content area is titled 'View Edit' and contains three sections:

- Basic Information:** Specific risk assessment: Group owned Minibus (capacity: 8 - 16 seats)* - 001A (Minibus). Person completing RA: Created Date: 19-04-2018. Attached Files: *Insurance certificates* (19.04.18 - VEHICLE INSURANCE CERT - 16.05.17 - PG.1.jpg - Group vehicle annual insurance certificate for NO 57 ONE).
- Vehicle Record:** NO 57 ONE - Ford Transit. Branch: MSS Example. Type: Group owned or leased minibus.
- Outstanding Actions:** Q: HSV: 013 Log book (Prejourney safety checks, passenger info and journey information) completed by driver / responsible group member for every journey. Action: no copies on the day, to be scanned in and sent. Allocated To: jo bloggs. Target Completion Date: 09-05-2018.

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

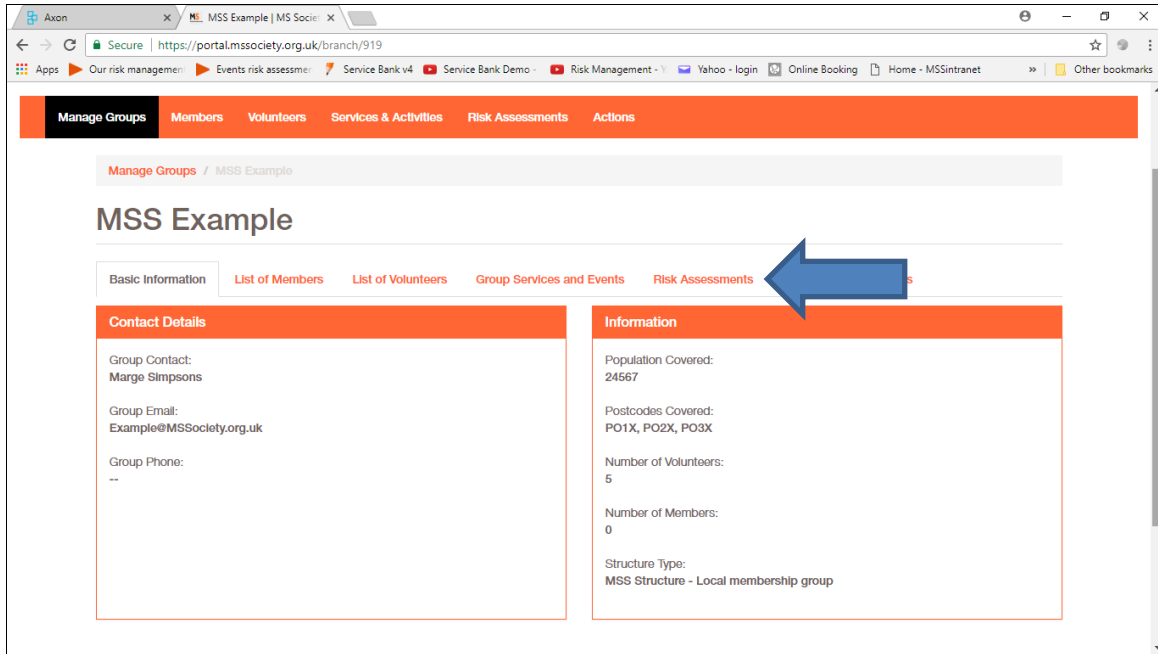
V5: Finding supporting documents on the volunteer website - 3 minutes

V6: Editing a risk assessment - 4 minutes

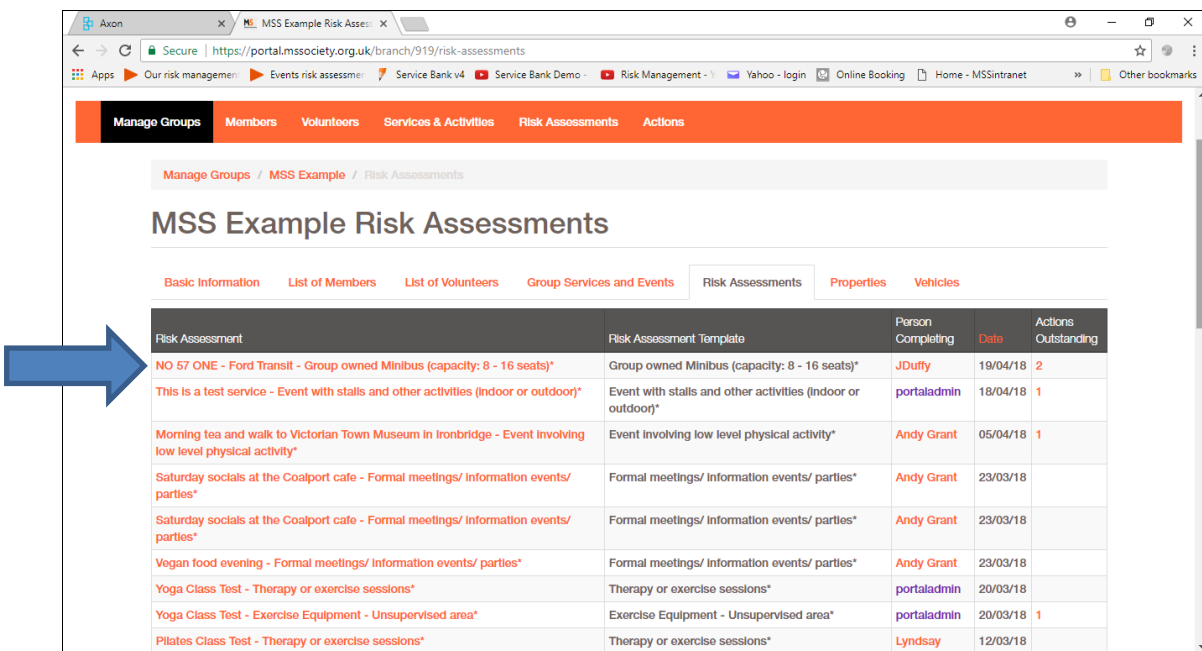
V7: Opening uploaded files within a risk assessment - 4 minutes

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.

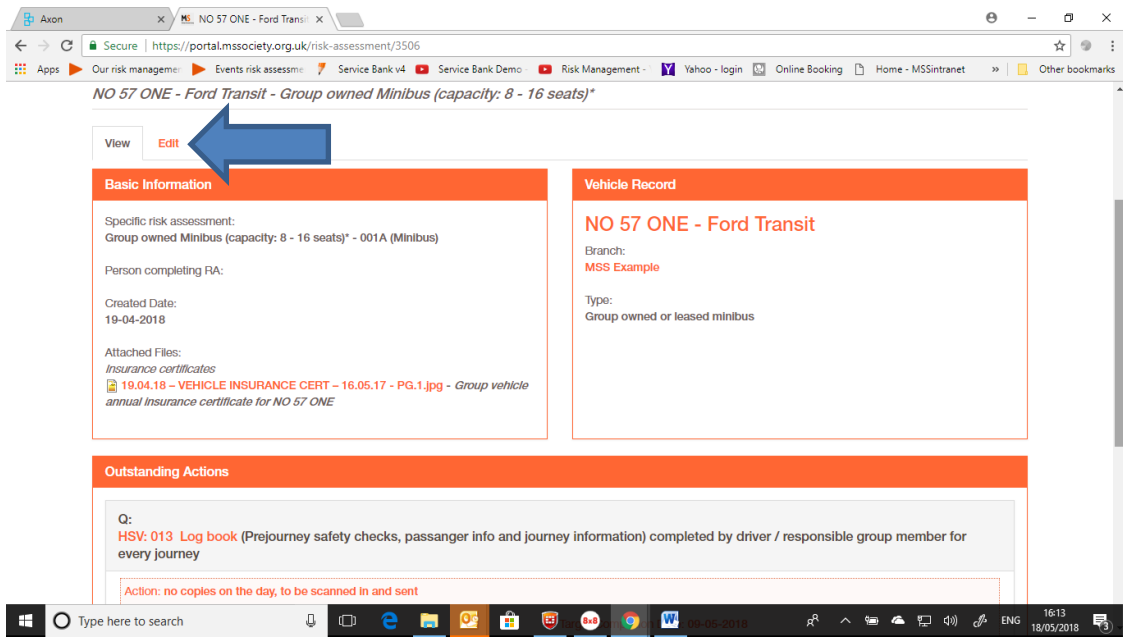


6.2. You will then see a list of risk assessments that have been completed for the group. Click on the one that you wish to open, in this case NO 57 ONE.

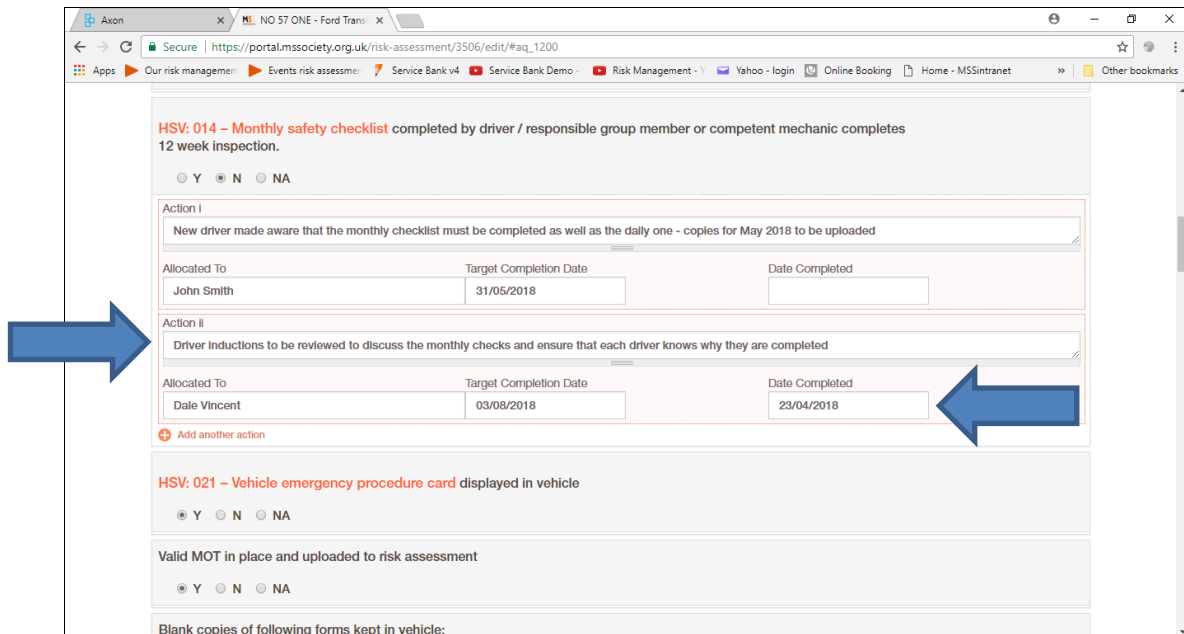


ERMS guidance

6.3. To open the risk assessment, click on the "Edit" tab.

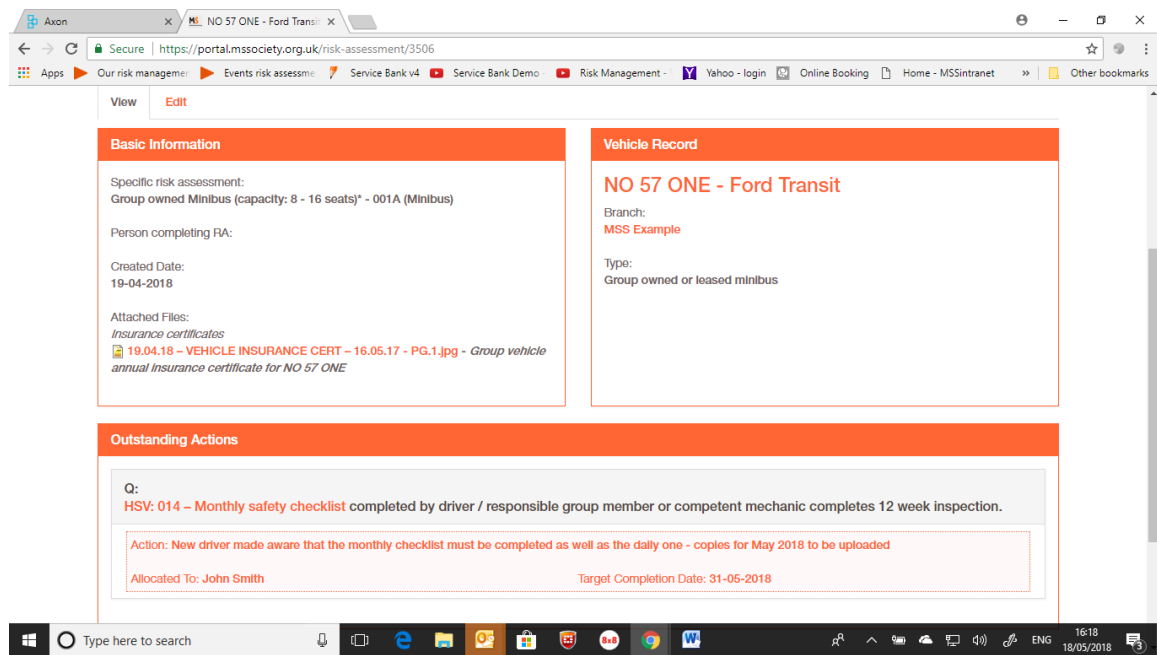


6.4. Update the outstanding actions by uploading the relevant documents – in this case updated induction forms (following the guidance in section 5) as evidence. Enter the date completed and scroll to the bottom of the screen and click on the orange "Save" button.



ERMS guidance

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:

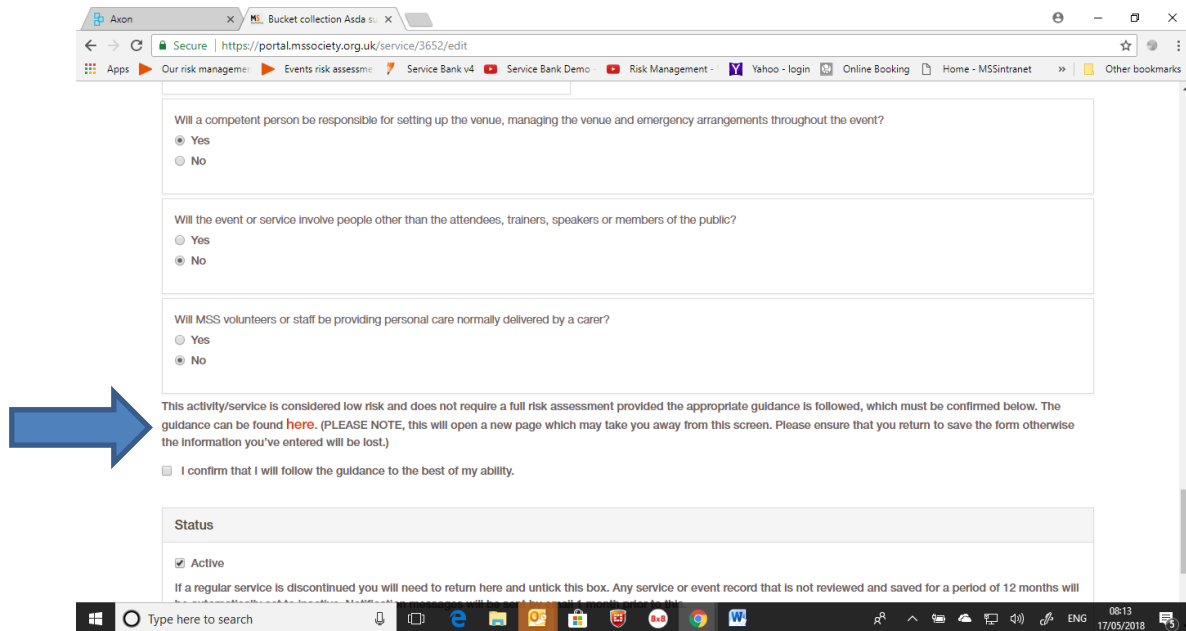
V3: Completing actions within a risk assessment - 2 minutes

V4: Uploading supporting documents to risk assessments - 2 minutes

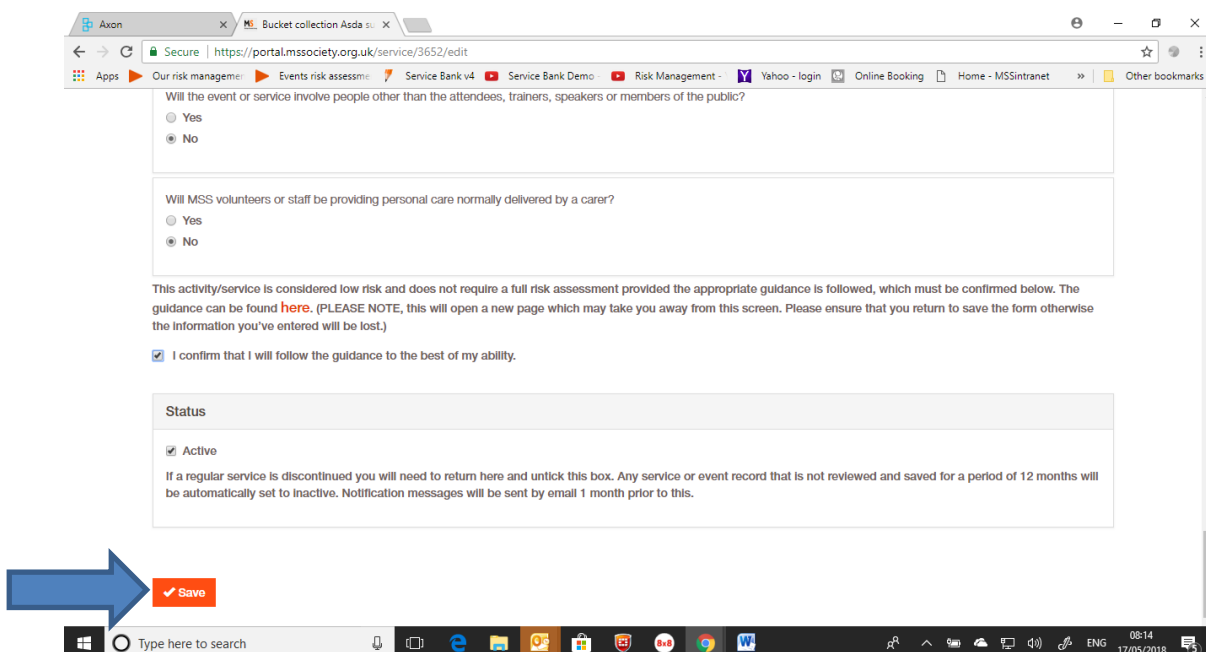
V7: Opening uploaded files within a risk assessment - 4 minutes

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.

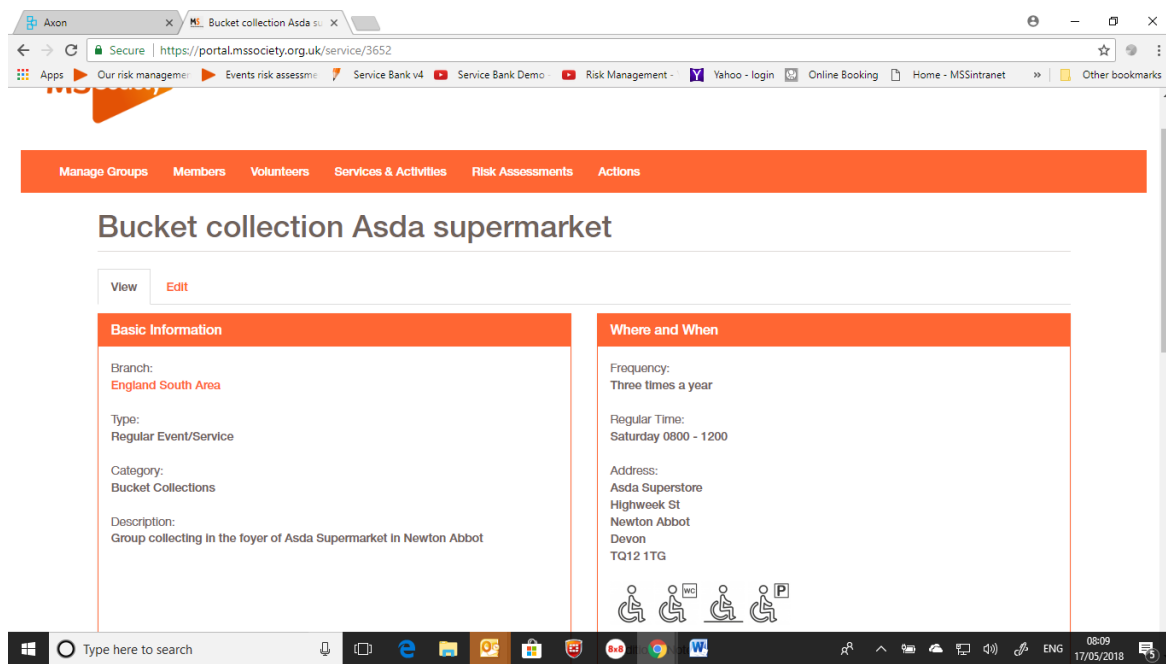


- 7.2. Tick the confirmation box and scroll to the bottom of the page and press the orange "Save" button.



ERMS guidance

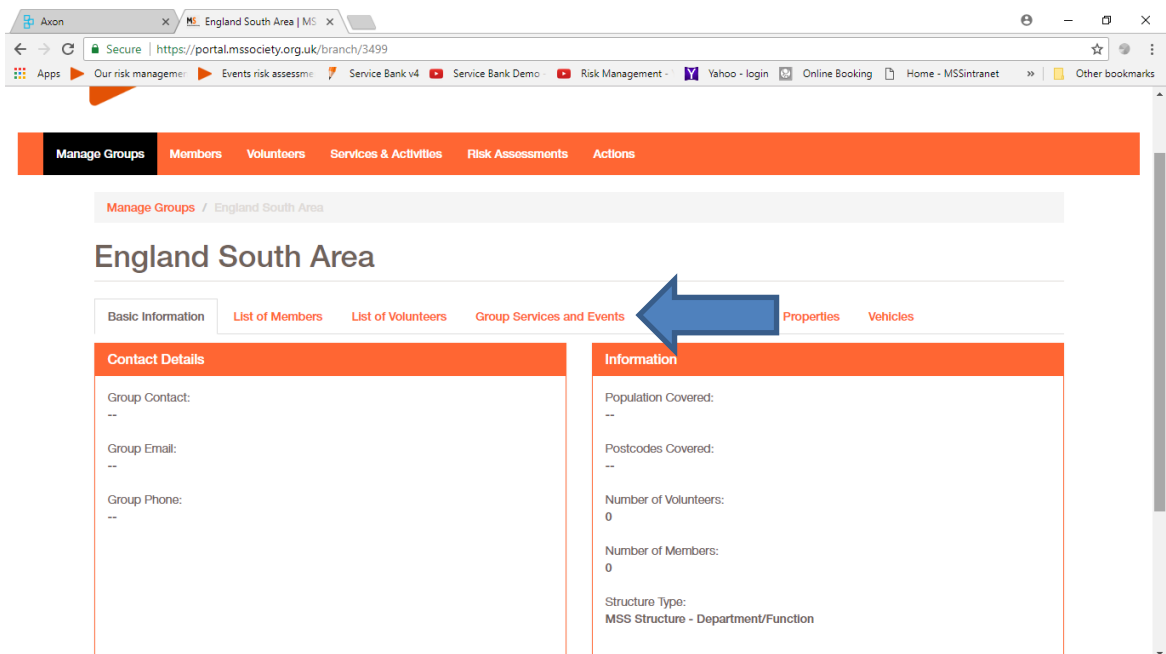
7.3. You will then be taken back to the main page for the service.



The screenshot shows a web browser window displaying the ERMS portal. The address bar shows the URL <https://portal.mssociety.org.uk/service/3652>. The page title is "Bucket collection Asda supermarket". The navigation menu includes "Manage Groups", "Members", "Volunteers", "Services & Activities", "Risk Assessments", and "Actions". The main content area is divided into two columns: "Basic Information" and "Where and When".

Basic Information	Where and When
Branch: England South Area	Frequency: Three times a year
Type: Regular Event/Service	Regular Time: Saturday 0800 - 1200
Category: Bucket Collections	Address: Asda Superstore Highweek St Newton Abbot Devon TQ12 1TG
Description: Group collecting in the foyer of Asda Supermarket in Newton Abbot	

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.

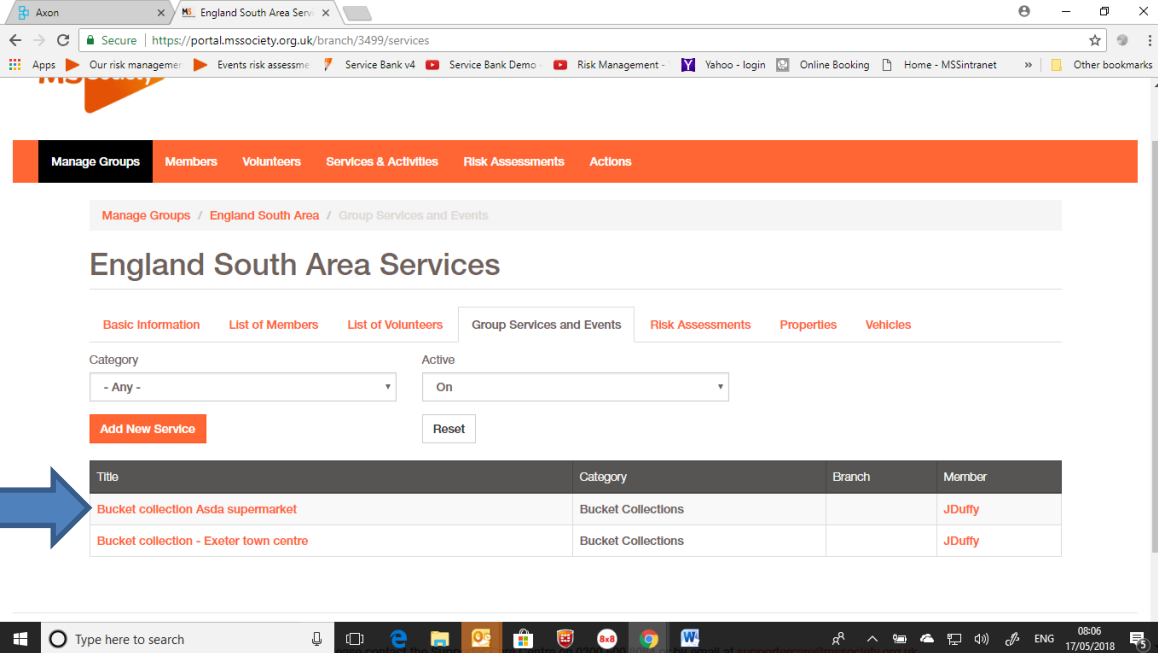


The screenshot shows a web browser window displaying the ERMS portal. The address bar shows the URL <https://portal.mssociety.org.uk/branch/3499>. The page title is "England South Area". The navigation menu includes "Manage Groups", "Members", "Volunteers", "Services & Activities", "Risk Assessments", and "Actions". The main content area is divided into two columns: "Contact Details" and "Information". A blue arrow points to the "Group Services and Events" tag in the navigation menu.

Contact Details	Information
Group Contact: --	Population Covered: --
Group Email: --	Postcodes Covered: --
Group Phone: --	Number of Volunteers: 0
	Number of Members: 0
	Structure Type: MSS Structure - Department/Function

ERMS guidance

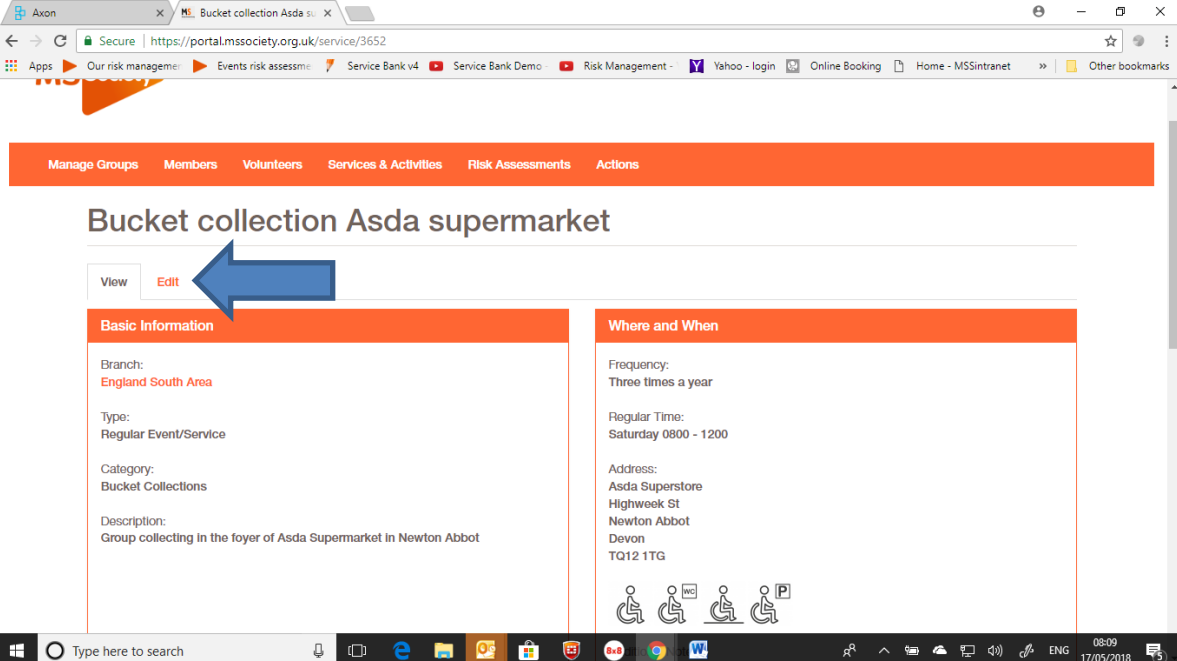
7.5. Find the relevant activity – in this case “Bucket collection Asda supermarket” and click on it.



The screenshot shows a web browser window with the URL <https://portal.msssociety.org.uk/branch/3499/services>. The page title is "England South Area Services". The navigation menu includes "Manage Groups", "Members", "Volunteers", "Services & Activities", "Risk Assessments", and "Actions". The "Group Services and Events" tab is selected. Below the navigation, there are filters for "Category" (set to "- Any -") and "Active" (set to "On"). There are buttons for "Add New Service" and "Reset". A table lists services with columns for Title, Category, Branch, and Member. A blue arrow points to the first row: "Bucket collection Asda supermarket", which is categorized under "Bucket Collections" and assigned to member "JDuffy".

Title	Category	Branch	Member
Bucket collection Asda supermarket	Bucket Collections		JDuffy
Bucket collection - Exeter town centre	Bucket Collections		JDuffy

7.6. On the main page, click on the “Edit” tab.



The screenshot shows the "Bucket collection Asda supermarket" service details page. The URL is <https://portal.msssociety.org.uk/service/3652>. The navigation menu is the same as in the previous screenshot. The "View" and "Edit" tabs are visible, with a blue arrow pointing to the "Edit" tab. The page is divided into two main sections: "Basic Information" and "Where and When".

Basic Information

- Branch: England South Area
- Type: Regular Event/Service
- Category: Bucket Collections
- Description: Group collecting in the foyer of Asda Supermarket in Newton Abbot

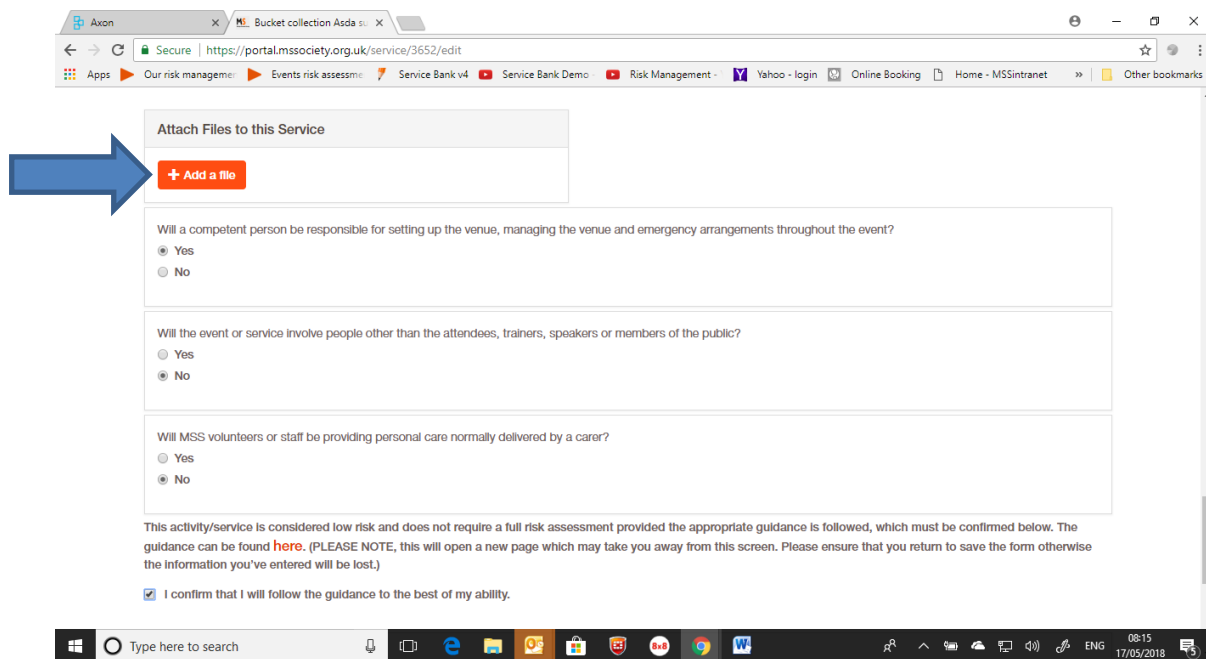
Where and When

- Frequency: Three times a year
- Regular Time: Saturday 0800 - 1200
- Address: Asda Superstore, Highweek St, Newton Abbot, Devon, TQ12 1TG

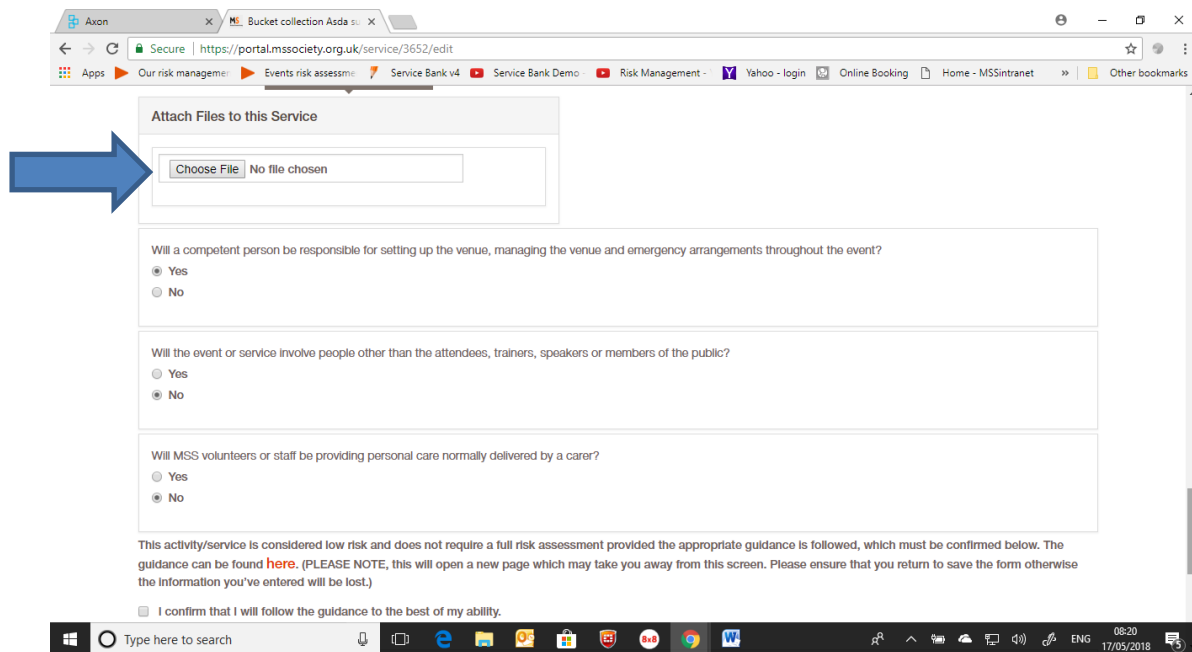
Accessibility icons for wheelchair access, hearing aid, and parking are shown at the bottom of the page.

ERMS guidance

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

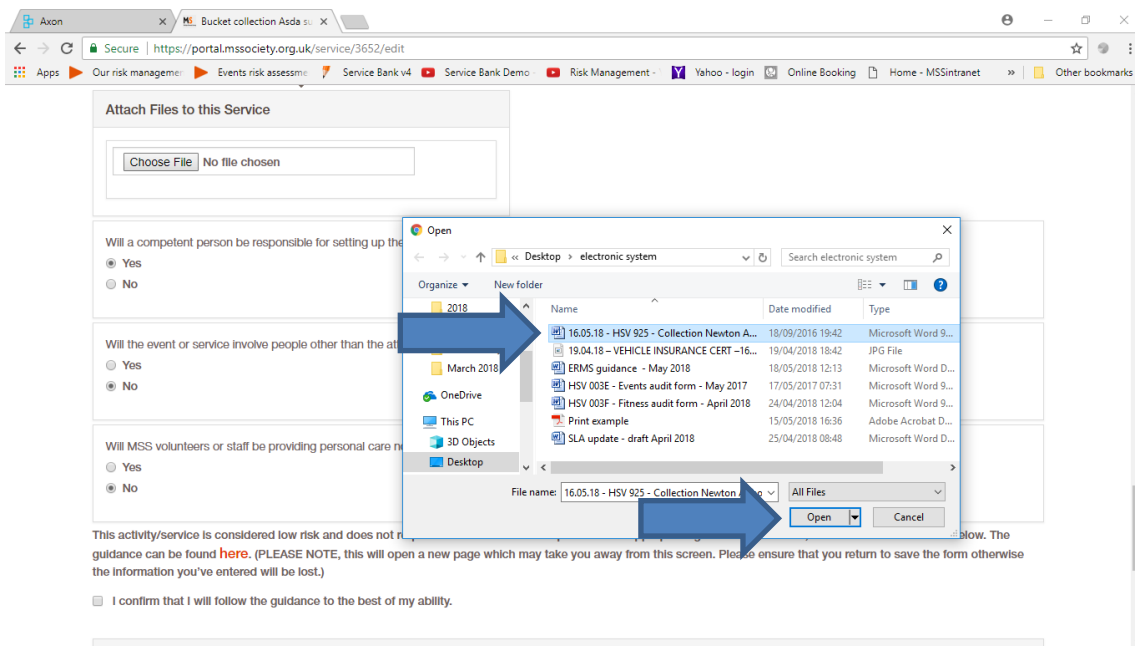


7.8. Click on the "Choose File" button.

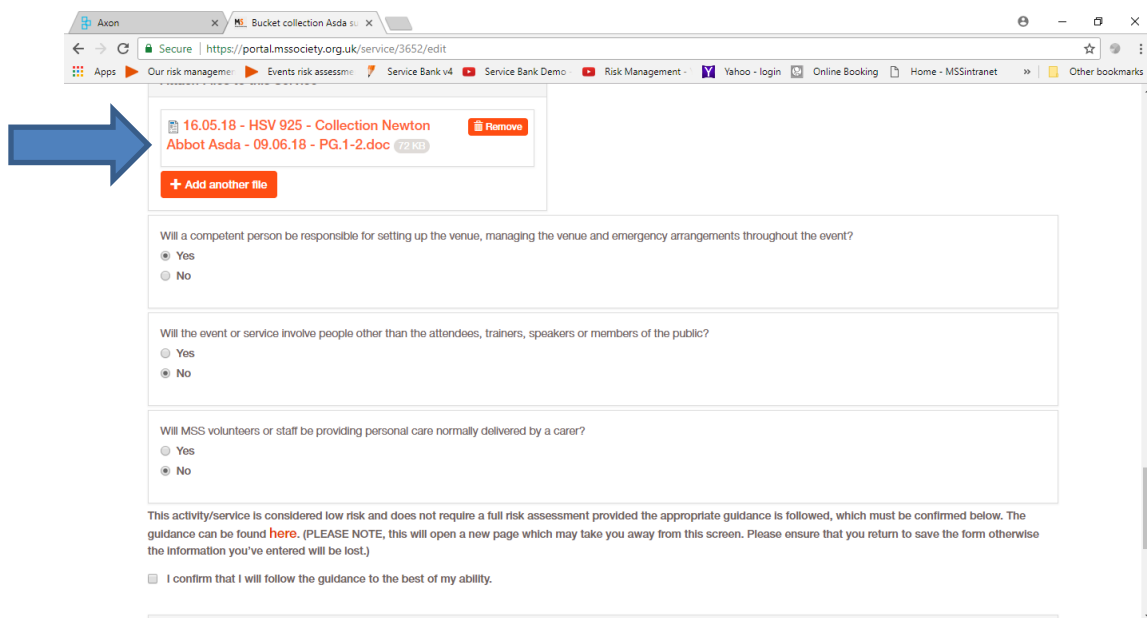


ERMS guidance

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



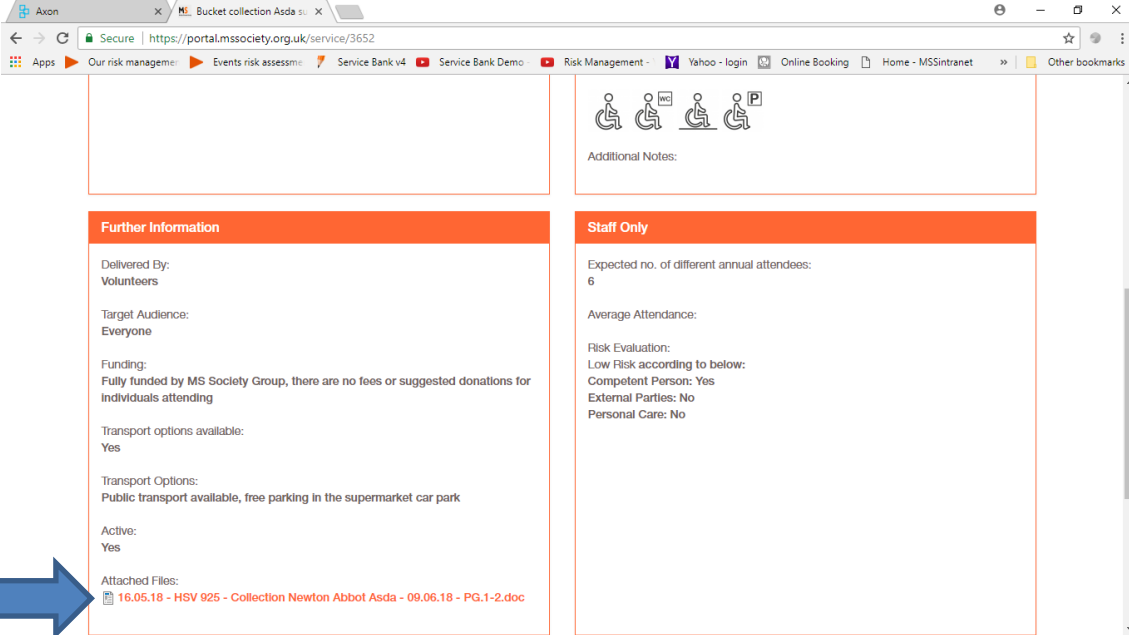
7.10. The guidance document will be uploaded as shown below. Scroll to the bottom of the screen and click on the "Save" button.



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)

ERMS guidance

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



The screenshot shows a web browser window with the URL <https://portal.mssociety.org.uk/service/3652>. The page is divided into several sections:

- Additional Notes:** Contains accessibility icons (wheelchair, hearing aid, and a person with a white cane).
- Further Information:** Contains the following details:
 - Delivered By: **Volunteers**
 - Target Audience: **Everyone**
 - Funding: **Fully funded by MS Society Group, there are no fees or suggested donations for individuals attending**
 - Transport options available: **Yes**
 - Transport Options: **Public transport available, free parking in the supermarket car park**
 - Active: **Yes**
 - Attached Files: **16.05.18 - HSV 925 - Collection Newton Abbot Asda - 09.06.18 - PG.1-2.doc**
- Staff Only:** Contains the following details:
 - Expected no. of different annual attendees: **6**
 - Average Attendance:
 - Risk Evaluation: **Low Risk according to below:**
 - Competent Person: **Yes**
 - External Parties: **No**
 - Personal Care: **No**

A blue arrow points to the 'Attached Files' section in the 'Further Information' box.

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
 - England Central Area
 - England South Area
 - England North Area
- Mutual Support
- Nation Offices
- Regional External Relations Officer
- Self Management
- Volunteering