Portal - How to guide

A guide to explain how to do
different functions on the Portal

September 2019

Let's stop MS **together**

Portal - How to guide

The Supporter Care Team have produced this guide to take you through a step by step procedure for various Portal actions you may want to take.

If you are unable to follow any of the procedures, please email the Supporter Care Team at supportercare@mssociety.org.uk or give us a call on 0300 500 8084 (Monday-Friday, 9am-5pm).

You can also check the Portal Guidance document for the answers to the most frequent Portal questions. It is available for download once logged into the Portal on the top right hand side of the screen.

Download Guidance   My Account   Change Password   Logou

MS Society

Manage Groups   Members   Volunteers   Services & Activities

Please click on the name of the procedure you want to follow or go to the page given next to the procedure name.

1. How to re-set your login password (p.3-4)

2. How to view members' or contacts' details (p.5-6)

3. How to sort the member and contact list online (p.7-9)

4. How to download a member or contact list (p.10-13)

5. How to download labels (p.14-17)

6. How to sort your downloaded list alphabetically (p.18-19)

7. How to add a service or event (p.20-29)

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How to re-set your password

Please note – once starting this process, it needs to be completed within 24 hours or it will not work, so please make sure you have the time available to complete it in full before starting. It should take 5 minutes roughly.

1. Click on the following link to go to the Portal: https://portal.mssociety.org.uk

2. Click on "Forgot password?" (see arrow on screen-shot below)

MS Society Portal - Login

Welcome to the MS Society Portal. This site is only for volunteers of the MS Society.

Username or e-mail address *

Password *

Forgot password?

If you would like to access the Portal, please contact the system administrator or your local staff member.

Log in

3. This will take you to the screen shown below. Make sure you enter your email address in the box and press the "email new password" button.

User account / Request new password

MS Society Portal - Forgotten Password

If you have forgotten your password please enter your email address in the box below and a reset link will be sent to you shortly.

Username or e-mail address *

🔒 E-mail new password

4. You'll then receive an email asking you to click on a link to re-set your password (see example below). Please check your junk folder if you haven't received the email after a few minutes. You need to click on the link given in the email to re-set your password.

A request to reset the password for your account has been made at MS Society Portal.
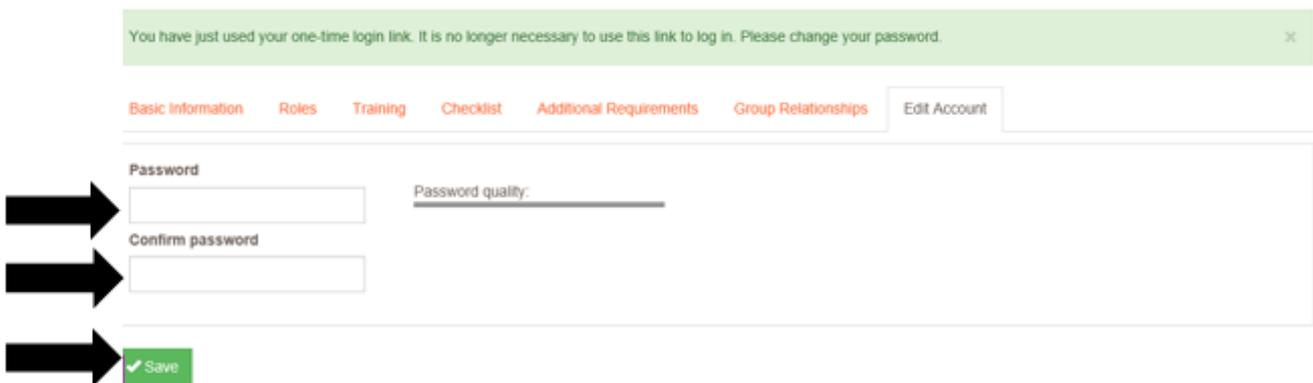
You may now log in by clicking this link or copying and pasting it to your browser:

https://portal.mssociety.org.uk/user/reset/34836/1551707256/jYRmDvxlbQOR...

This link can only be used once to log in and will lead you to a page where you can set your password. It expires after one day and nothing will happen if it's not used.

-- MS Society Portal team

5. Once you've clicked on the link, you'll be taken to the Portal and shown a message to say that you have successfully validated your email address and now have a one-time login which will expire in 24 hours. It says that the log in can be used only once and you should see an orange button which says "Log in". Click on this button.

6. You'll then be taken to the screen shown below. You need to enter the new password you want to use into the "Password" and "Confirm Password" boxes and then click "Save". As you're typing in your password, you'll see a box which tells you the password requirements (e.g. requires an uppercase character or numbers etc) so please ensure you take note of the guidance given in this box.

7. Once you've clicked "Save", you'll be logged into your account and will be on the "Manage Groups page" shown below. There should be a message in green at the top to say "the changes have been saved"

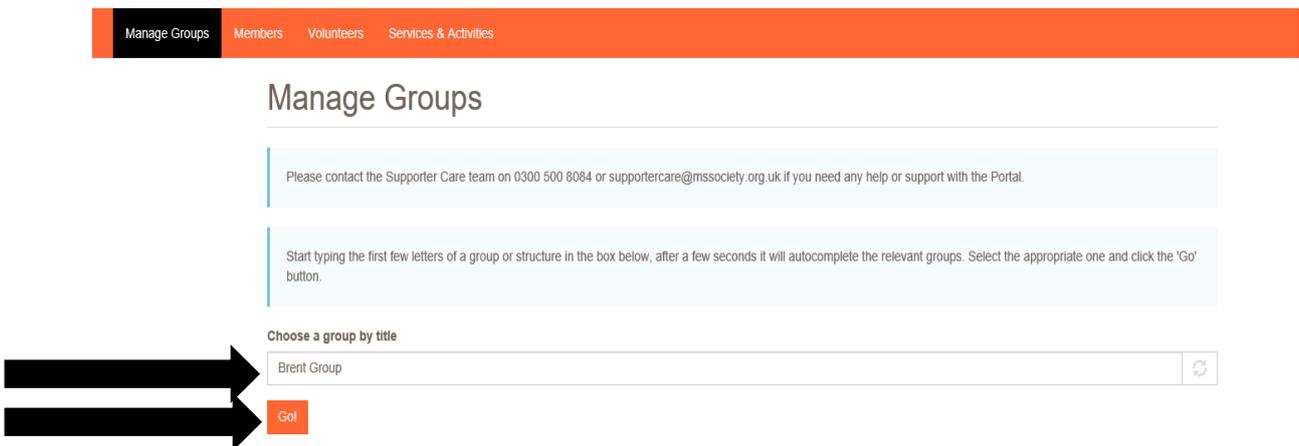8. Your password has now been successfully changed.

How to view members or contacts details

1. To start, go to the Portal (https://portal.mssociety.org.uk) and login. If you can't remember your password, please follow the "How to re-set your password" procedure.

2. Once you're logged into the Portal, you should be on the "Manage Groups" page. Enter the group name you're looking for (example used below of "Brent Group") and click "go".

3. Next click on the tab that says "List of Members and Contacts"
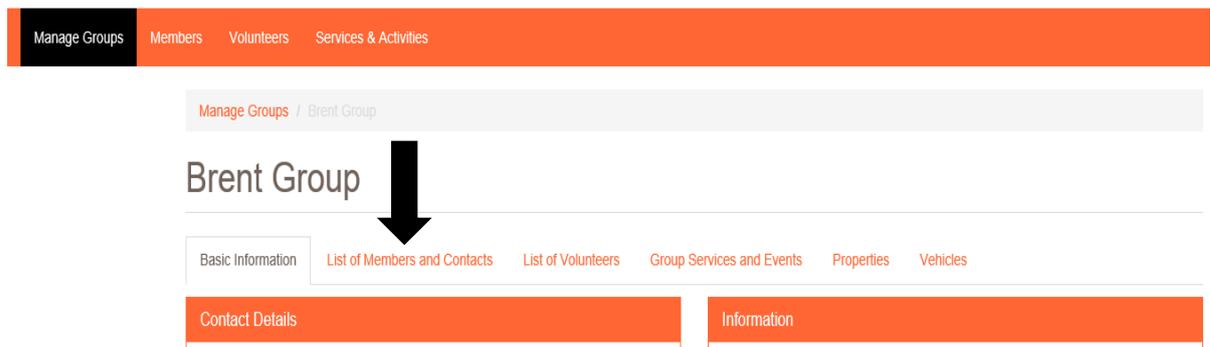
4. You will then see the list of members and contacts for that group. Please note that by default, the list will show both members and contacts with the newest members/contacts at the top and will show 10 members/contacts per page unless you change the view settings.

Brent Group Members and Contacts

| Basic Information | List of Members and Contacts | List of Volunteers | Group Services and Events | Properties | Vehicles |

Below is a list of all of the active members and contacts of this structure.
Displaying 1 - 10 of 75

Relationship to group

Members and contacts ▼

Items per page

10 ▼

Apply

First Name	Last Name	Email	Home Phone	Mobile	Membership Status	Membership Date Joined ▼	On group contact list?

If you would like to change to viewing just members or just contacts, please select the relevant option on "Relationship to group" and then click apply.

If you would like to view more members/contacts per page, then please select the relevant option on "Items per page" and press apply.

5. To show more details about the member/contact then shown on the list, please click "view" at the end of the row showing their details.

First Name	Last Name	Email	Home Phone	Mobile	Membership Status	Membership Date Joined ▼	On group contact list?	
Test	Member 2				Active	07/02/2019	No	View

You will then see a screen showing that individual member/contact's details (see example below). Please note where it says "Constituent ID" this is their unique reference number and, for members, the

Test Member 2

| Basic Information | Roles | Training | Checklist | Additional Requirements | Group Relationships |

Address

Address
England
NW2 6ND

Email & Phone

Home Phone:
—

Mobile Phone:
—

Email:
—

Membership Information

Constituent ID:
1022182

Group:
—

Date Joined:
07/02/2019

Status:
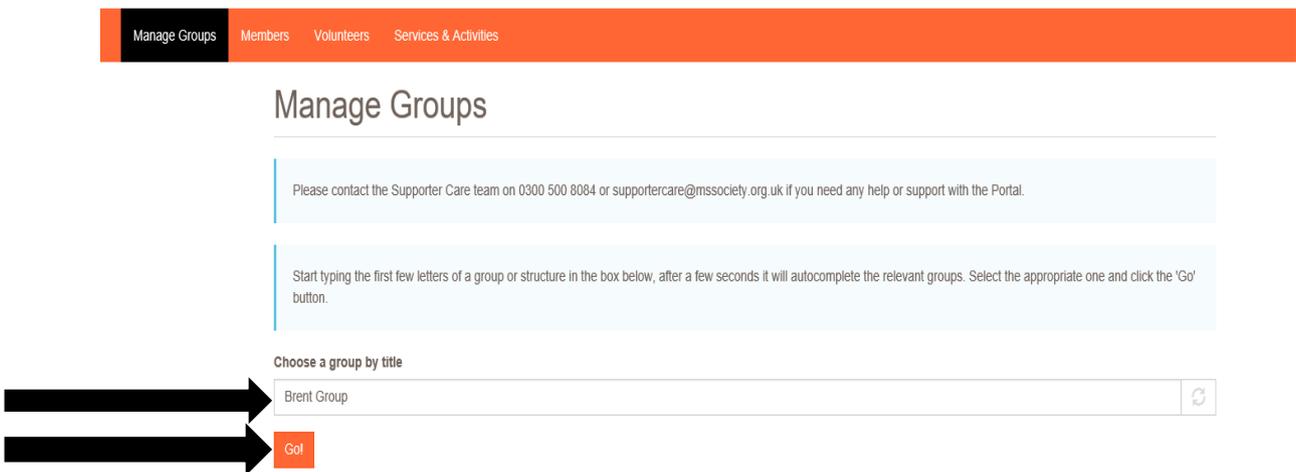Active

Date Renewed:

Emergency Contact

Emergency Phone:
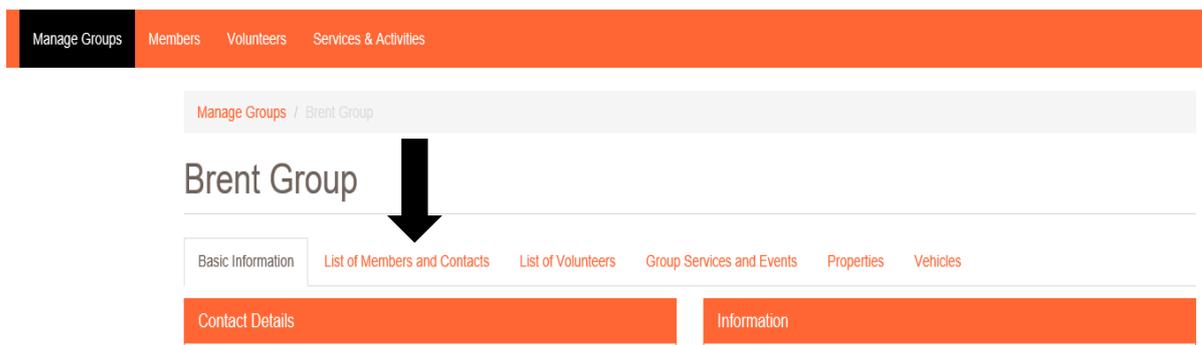—

Emergency Contact:
—

How to sort the member and contact list online

If you're viewing the membership/contact list online rather than downloading a copy, the list will automatically show the newest members or contacts at the top of the list. If you would like to change this, you can by sorting it in a variety of ways: alphabetically, by membership status, by date joined, by email or by if someone is on the contact list.

6. To start, go to the Portal (https://portal.mssociety.org.uk) and login. If you can't remember your password, please follow the "How to re-set your password" procedure.

7. Once you're logged in to the Portal, you should be on the "Manage Groups" page. Enter the group name you're looking for (example used below of "Brent Group") and click "Go".

| Manage Groups | Members | Volunteers | Services & Activities |

Manage Groups

Please contact the Supporter Care team on 0300 500 8084 or supportercare@mssociety.org.uk if you need any help or support with the Portal.

Start typing the first few letters of a group or structure in the box below, after a few seconds it will autocomplete the relevant groups. Select the appropriate one and click the 'Go' button.

Choose a group by title

Brent Group

Go!

8. Next click on the 2nd tab under the Group name that says "List of Members and Contacts"

| Manage Groups | Members | Volunteers | Services & Activities |

Manage Groups / Brent Group

Brent Group

| Basic Information | List of Members and Contacts | List of Volunteers | Group Services and Events | Properties | Vehicles |

Contact Details

Information

9. You'll then see the list of members and contacts. By default, the list will show both members and contacts with the newest members/contacts at the top and will show 10 members/contacts per page unless you change the view settings.

If you'd like to change to viewing just members or just contacts, please select the relevant option on "Relationship to group" and then click apply.

If you'd like to view more members/contacts per page, then please select the relevant option on "Items per page" and press apply.

Brent Group Members and Contacts

| Basic Information | List of Members and Contacts | List of Volunteers | Group Services and Events | Properties | Vehicles |

Below is a list of all of the active members and contacts of this structure.
Displaying 1 - 10 of 75

Relationship to group

Members and contacts ▾

Items per page

10 ▾

Apply

| First Name | Last Name | Email | Home Phone | Mobile | Membership Status | Membership Date Joined ▾ | On group contact list? |

10. If any column header is in orange, it means you can click on it to sort the list (see arrows on image on next page). You can sort in a variety of ways:

- Alphabetically - to sort the list alphabetically by last name, click on the word "Last Name" on the column header. Your list will then be sorted alphabetically A-Z by surname. If you click the word "last name" again, it will sort the list alphabetically but from Z-A. You can do the same if you want to sort the list alphabetically by first name by clicking the "First Name" column header.

- Membership Status - to group all lapsed members together, click on the "Membership Status" column header and your list will then be sorted by bringing all the lapsed members to the top of the list. If you click the word "membership status" again, it will bring the active members to the top of the list.

- Date Joined - to sort the list by date joined as a member or contact, then you're in luck as the default setting for the Portal list will show newest members/contacts at the top automatically. To view the longest standing members/contacts at the top, then click on the "Membership Date Joined" column header and your list will then show the longest standing members at the top.

- Email - to sort the list by email, if you click on the "Email" column header then the list will show those individuals without an email at the top of the list and then move on to show the rest of the email addresses alphabetically A-Z. If you click the word "email" again, it will show the email addresses alphabetically Z-A and the list will end with those without an email address.

- If someone is on the contact list – to group together those who are on the contact list and those who are not, you'll need to click the "On group contact list?" column header. If you click it once, those not on the contact list will be at the top of the list and if you click it twice, those on the group contact list will be at the top.

First Name	Last Name ▲	Email	Home Phone	Mobile	Membership Status	Membership Date Joined	On group contact list?

How to download a membership or contact list

1. To start, go to the Portal (https://portal.mssociety.org.uk) and login. If you can't remember your password, please follow the "How to re-set your password" procedure.

2. Once you're logged into the Portal, you should be on the "Manage Groups" page. Enter the group name you're looking for (example used below of "Brent Group") and click "Go".
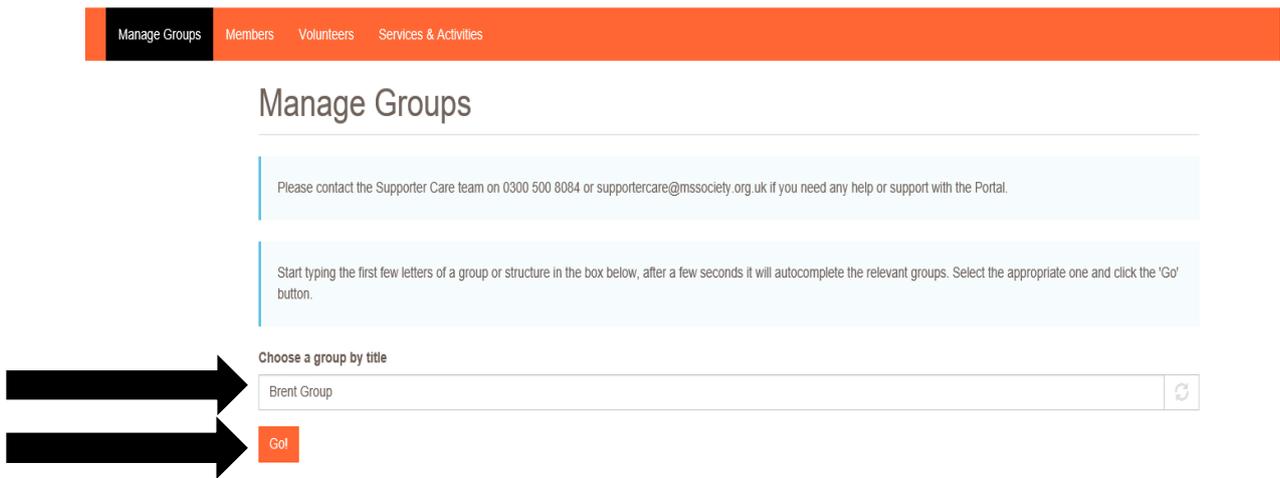
3. Next click on the tab that says "List of Members and Contacts"
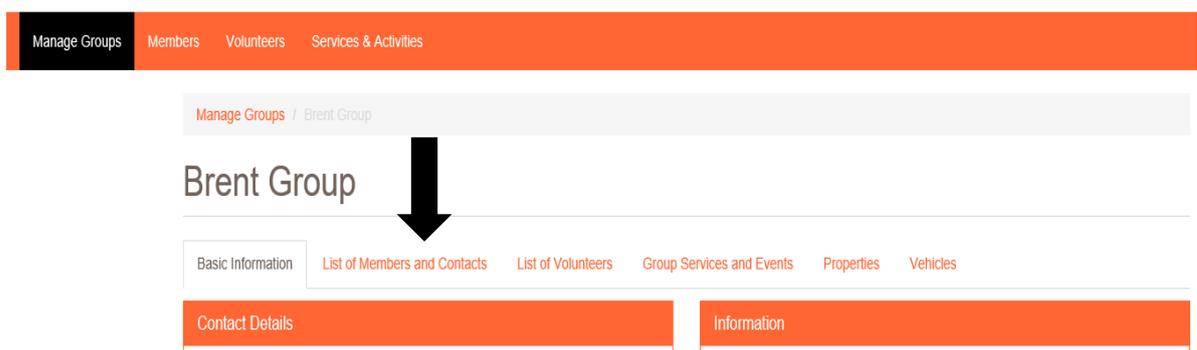
4. On the page this brings up, scroll down the page under the contact details shown for members until you see the word "Downloads" with the option for "Excel" or "Post labels".

5. Click on the "Excel" button.

6. You will then be taken to a new page where you can select what details you would like to download from a list of criteria (see image below). Please select the details you require for your list.

Members and Contacts Download

Please tick the boxes for the columns to include in this download.

Records to download
- ◉ Download members and contacts
- ○ Download members only
- ○ Download contacts only

Filter by email?
- ◉ Include all
- ○ Only include people we can email

- ☐ **Select / Unselect all**

Download Fields
- ☐ First name
- ☐ Surname
- ☐ Email
- ☐ Home phone
- ☐ Mobile phone
- ☐ Address line
- ☐ City
- ☐ Postcode
- ☐ Country
- ☐ Region
- ☐ Primary Addressee
- ☐ Primary Salutation
- ☐ Membership Status
- ☐ Date Joined
- ☐ Date Last Dropped
- ☐ Date Last Renewed
- ☐ On group contact list
- ☐ Additional Information
- ☐ Mail preferred

Records to download – Select here if on your list you want to see all members and contacts, just members or just contacts

Filter by email – Select here if you want to include everyone or only people we can email

Download fields –Select what details about the members/contacts your list will hold. Please make sure you select all the fields you would like to see on your list. If you do not select any fields, your list will be blank.

7. After selecting the criteria you want to download, continue down the page to the "Reason for download" box and enter the reason that you require the information.

Download format

Excel spreadsheet

Reason for download *

Details of members and contacts to send newsletter

8. Continue down the page to the password section (as shown below). You need to enter a password of your choosing. This password will be used to password protect the list you download, so you will need to remember this password to open the list of members/contacts which is created.

Password *

For data protection purposes please choose a password to apply to the download.
You will be prompted to enter this password each time you open the file.

9. Continue down the page to the acceptance criteria section. Ensure you read the criteria and then tick the box to confirm you have read it.

☑ **Acceptance criteria** - By ticking here I confirm that I am the authorised user of this account and that I will ensure that this personal information is used and stored legally and securely by:
- Always keeping the information encrypted with a password if stored on a computer
- Not sharing, swapping or selling the information with 3rd parties outside the group
- Only sharing with authorised committee members within the group
- Deleting any previous or out of date versions of the information.
- Only using the information for group related purposes
- Reporting any suspected loss or theft of the information immediately to the Supporter Care Centre on 0300 500 8084 *

10. After you've ticked the acceptance criteria box, click the orange download button at the bottom of the screen.
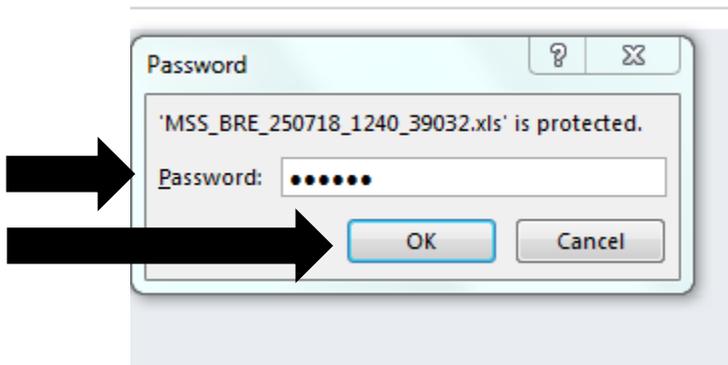
⊕ ⤓ Download

11. After a few moments, you will then see a pop up on your screen to either open or save the information. Please open or save the list. Please note that the pop up may look slightly different to the one below depending on what program you're using to access the internet.
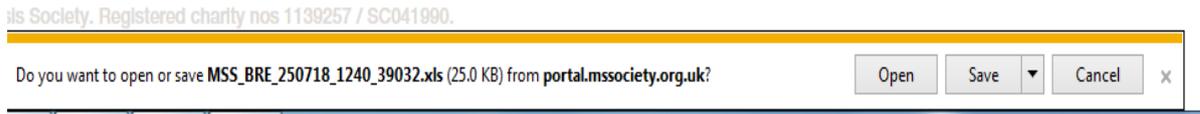
12. When opening the list, you will be asked for a password to open it. This is the password that you set in step 8. Please enter the password and press "ok".


13. Your data list will then open for you with the details you selected in step 6.

How to download labels

Please note, the labels on the Portal will download a PDF of labels designed to be printed on labels KF26051 by Q-Connect or L7160/J8160 by Avery.

1. To start, go to the Portal (https://portal.mssociety.org.uk) and login. If you can't remember your password, please follow the "How to re-set your password" procedure.

2. Once you're logged into the Portal, you should be on the "Manage Groups" page. Enter the group name you're looking for (example used below of "Brent Group") and click "Go".
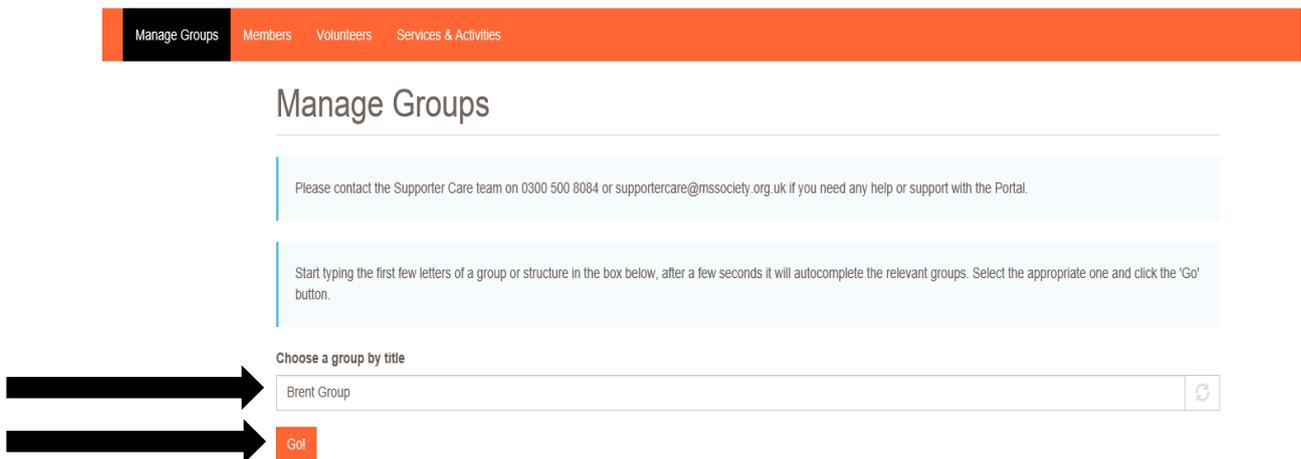
3. Next click on the tab that says "List of Members and Contacts"
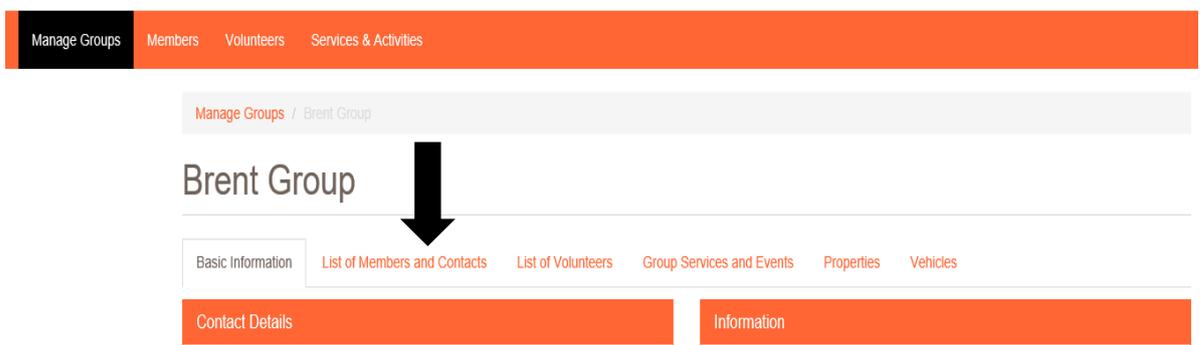
4. On the page this brings up, scroll down the page under the contact details shown for members until you see the word "Downloads" with the option for "Excel" or "Post labels".
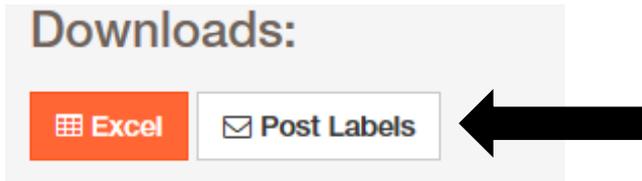
5. Click on the "Post labels" button.

6. You will then be taken to a new page where you can select who you want to download labels for (see image below). Please select the details you require for your labels.

Records to download –Select if on your labels you want to see all members and contacts, just members or just contacts

Filter by email – Select here if you want to include all or only people who don't have an email address or who prefer mail

7. After selecting the criteria you want to download, continue down the page to the "Reason for download" box and enter the reason that you require the information.

8. Continue down the page to the password section (as shown below). You need to enter a password of your choosing. This password will be used to password protect the labels you download, so you will need to remember this password to open the labels for members which is created.

Password *

For data protection purposes please choose a password to apply to the download.
You will be prompted to enter this password each time you open the file.

9. Continue down the page to the acceptance criteria section. Ensure you read the criteria and then tick the box to confirm you have read it.

☑ **Acceptance criteria** - By ticking here I confirm that I am the authorised user of this account and that I will ensure that this personal information is used and stored legally and securely by:
- Always keeping the information encrypted with a password if stored on a computer
- Not sharing, swapping or selling the information with 3rd parties outside the group
- Only sharing with authorised committee members within the group
- Deleting any previous or out of date versions of the information.
- Only using the information for group related purposes
- Reporting any suspected loss or theft of the information immediately to the Supporter Care Centre on 0300 500 8084 *

10. After you've ticked the acceptance criteria box, click the orange download button at the bottom of the screen.
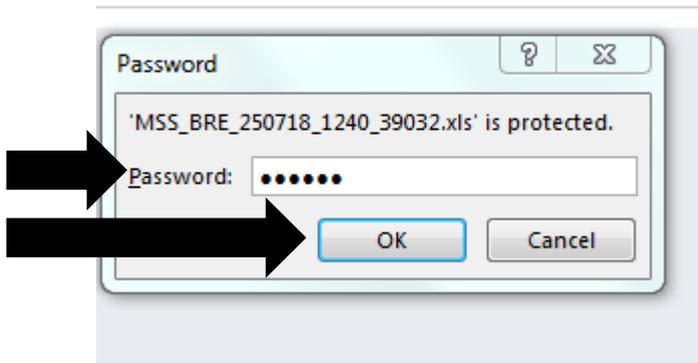
⊕ ⭳ Download

11. After a few moments, you'll then see a pop up on your screen to either open or save the information. Please open or save the labels. Please note that the pop up may look slightly different to the one below depending on what program you're using to access the internet.

sis Society. Registered charity nos 1139257 / SC041990.

Do you want to open or save **MSS_BRE_250718_1240_39032.xls** (25.0 KB) from **portal.mssociety.org.uk**?   Open | Save ▼ | Cancel | ✕

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12. When opening the labels, you'll be asked for a password to open it. This is the password that you set in step 8. Please enter the password and press "ok".


13.Your labels will then open for you with the details you selected in step 6.

How to sort the downloaded membership/contact list alphabetically

This procedure starts after you have already downloaded a list from the Portal. If you need to download a list first, please refer to the "How to download a membership or contact list" procedure.

1. Open the membership/contact list.

2. Once the spreadsheet opens, click on the column header you would like to sort by alphabetically, i.e. the box above either first name or surname (depending on what name you want to sort by). Once you've done this the whole column will highlighted. For the example below, I want to sort alphabetically by surname so I click the box "B" above the word surname.
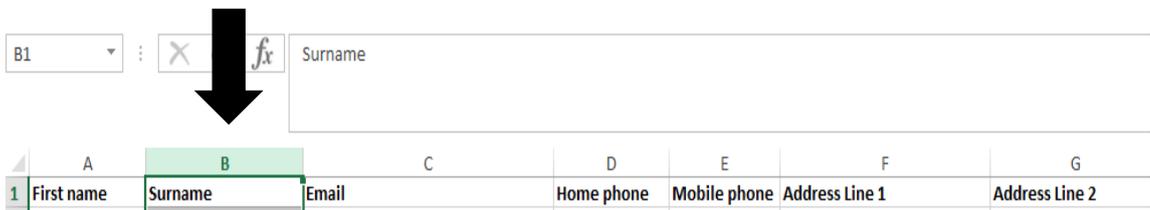

3. Once the column is highlighted, you'll need to sort the list. In the top right hand corner there is a button that says "sort and filter" (see arrow below). Click on this button.
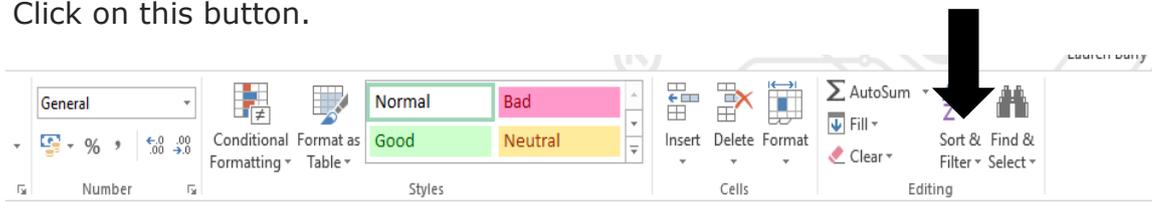
4. When you click on sort and filter, a small list should appear below it (see image below). To sort the list alphabetically, click on the "Sort A to Z"
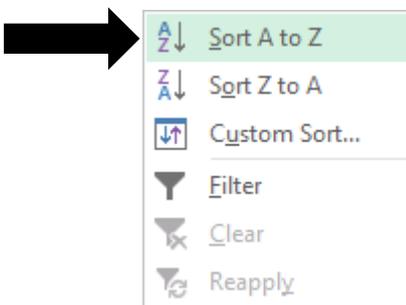
5. A pop up box should then appear. When it does, please select "Expand the selection", then "Sort".
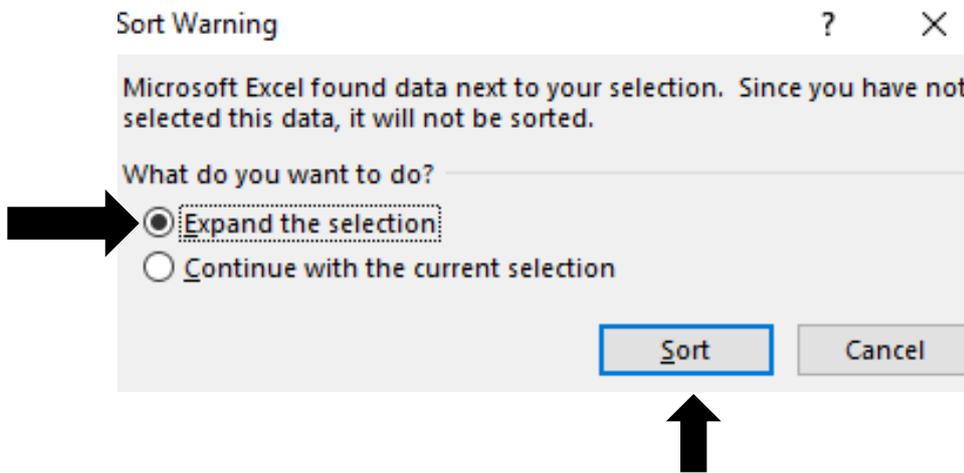
6. Your list will then be in alphabetical order.

Depending on which version of Excel you're using, the options to click to sort and filter your list may vary slightly. If the procedure given does not work for your version of Excel, or if you experience any difficulties when sorting the list alphabetically and so cannot follow the procedure above, please email the Supporter Care Team at supportercare@mssociety.org.uk or give us a call on 0300 500 8084 (Monday-Friday, 9am-5pm).

How to add an event or service

Please add your group's regular ongoing events (such as MS support or a regular social) and one-off events (such as a fundraising collection) to the Portal. By adding this information to the Portal, it pulls through to our main MS Society website so your group's services have more visibility meaning that people can search for your group and see what services and support you offer.

11. To start, go to the Portal (https://portal.mssociety.org.uk) and login. If you can't remember your password, please follow the "How to re-set your password" procedure.

12. Once you're logged into the Portal, you should be on the "Manage Groups" page. Enter the group name you're looking for (example used below of "Brent Group") and click "Go".
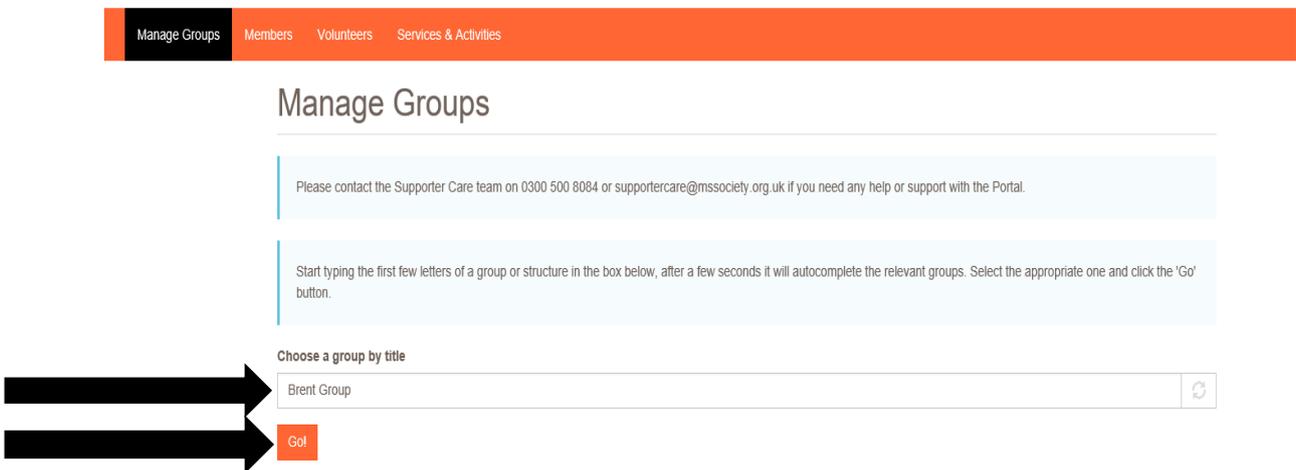
13. Next click on the tab that says "Group Services and Events"
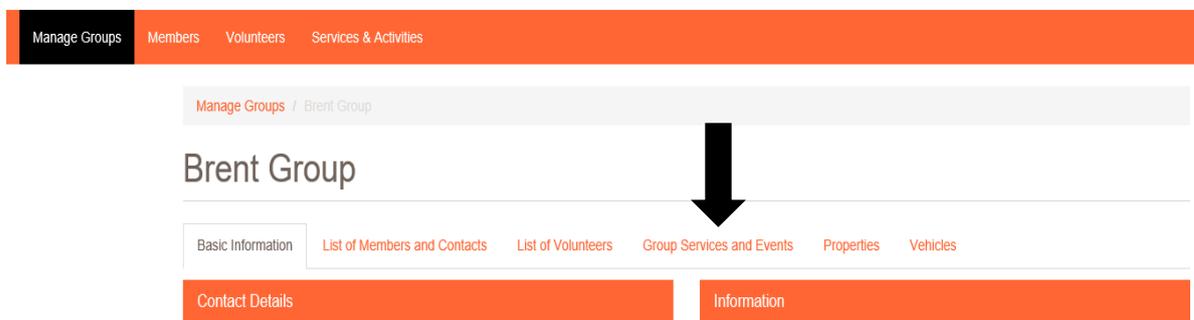
14. Click on "Add New Service"

Brent Group Services

| Basic Information | List of Members and Contacts | List of Volunteers | Group Services and Events | Properties | Vehicles |

Category

- Any -

Active

On

Add New Service   Reset

15. The screen shown below will appear. You'll need to fill in all the details of your event/service.

Create a new Service...

Group / Structure

Brent Group

Title

Description

Type

Type

Course
On demand service
One off event
Regular Event/Service

Category

Advice
Arts, crafts, and music
Beauty therapies
Complementary therapies
Direct financial support / Grants
Emotional and psychological wellbeing
Exercise
Fundraising
Group volunteer meeting
Information
MS Support
Other services – please specify
Physiotherapy
Shop
Socials and support groups
Transport

a. Group/Structure – your Group's name should be populated here automatically (e.g. Brent Group).

b. Title – Enter the name of the service or event you're providing (e.g. Coffee Morning).

c. Description – This is your opportunity to describe what the service or event is about. Enter the details (e.g. Social event with tea, coffee and cakes with a chance to meet others affected by MS).

d. Type – Click on the arrow at the end of the type field and select the relevant option from the drop-down list (e.g. Regular Event/Service).

e. Category – Click on the arrow at the end of the Category field and select the relevant option from the drop-down list (e.g. Socials and support groups).

Depending on what options you have selected for "Type" and "Category", you will see new fields added for you to fill in.

If you selected any of the following Categories, proceed to step f (on page 6 of this document)

- Arts, Crafts and Music
- Beauty Therapies
- Direct Financial Support/Grants
- Group Volunteer Meeting (Please note that events/services of this category will not be pulled through to the website)
- MS Support
- Shop

For all other categories, please continue below.

Category

Advice

Please select...
Citizen's Advice (CAB) partnership
Other advice partnership

If you selected "Advice", click the small arrow on the "Advice" box and make sure to select the type of advice from the drop-down list in the next box.

Category

Complementary therapies

Please select...
Acupuncture
Aromatherapy
Massage, shiatsu and acupressure
Reflexology
Reiki

If you selected "Complementary therapies", click the small arrow on the "Complementary therapies" box and make sure to select the type of complementary therapy from the drop-down list in the next box.

Category

Emotional and psychological wellbeing

Please select...
Cognitive behavioural therapy
Counselling
Meditation and Relaxation
Mindfulness

If you selected "Emotional and psychological wellbeing", click the small arrow on the "emotional and psychological wellbeing" box and make sure to select the type of emotional and psychological wellbeing from the drop-down list in the next box.

Category

Exercise

Please select...
Cardio/ Aerobic and choreography
Mind and Body
Strengthening and co-ordination

If you selected "Exercise", click the small arrow on the "Exercise" box and make sure to select the type of exercise from the drop-down list in the next box.

Category

Fundraising

Please select...
Bucket Collections
Fundraising Events

If you selected "Fundraising", click the small arrow on the "Fundraising" box and make sure to select the type of fundraising from the drop-down list in the next box. Please note that if you select "Bucket Collections" on the dropdown then this event will not be pulled through to the website.

Category

Information

Please select...
Newly diagnosed
Information and Signposting
Information event
Self-management course

If you selected "Information", click the small arrow on the "Information" box and make sure to select the type of information from the drop-down list in the next box.

Category

Other services – please specify

Further Category Details

Please enter further details regarding this category.

If you selected "Other Services – please specify", make sure to detail what sort of service is being provided in the "further category details" box. Please note that events/services of this category will not be pulled through to the website.

Category

Physiotherapy

Please select...
Hydrotherapy
Physiotherapy Assessment
Physiotherapy treatment

If you selected "Physiotherapy", click the small arrow on the "Physiotherapy" box and make sure to select the type of physiotherapy from the drop-down list in the next box.

Category

Socials and support groups

Please select...
Social networks - virtual e.g. Facebook
Socials events
Support groups

If you selected "Socials and support groups", click the small arrow on the "Socials and support groups" box and make sure to select the type of social or support group from the drop-down list in the next box.

Category

Transport

Please select...
Transport service
Vehicle loaning

If you selected "Transport", click the small arrow on the "Transport" box and make sure to select the type of transport from the drop-down list in the next box.

f. Depending on what option you have selected for the service or event "Type" in step d, you will now see different boxes below the category field you've just filled in.

Course Details

If you selected "Course", provide the course details in the box.

On demand service availability

E.g. Phone number, is open from 9:00 AM to 17:00 PM

If you selected "On demand service", please provide any details about the availability of the service in the box.

One-off time & date
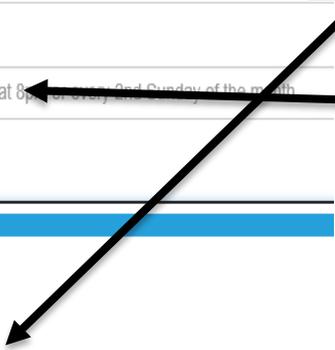
Date

E.g., 06/03/2019

Time

E.g., 04:04 pm

If you selected "One-Off Event", ensure you add the date and time of the event in the boxes shown opposite.

Frequency

Regular Time

for example, every Monday at 8~~pm or every 2nd Sunday of the month~~

Frequency

Annually
Twice a year
Three times a year
Quarterly
Every 2 months
Monthly
Every 2 weeks
Weekly
Twice a week
Three times a week

If you selected "Regular Event/Service", click the small arrow on the "Frequency" box and select how often the event happens from the drop-down list which will pop up (and shown opposite). Please also add details into the "Regular Time" field to show what days or times the service/event happens.

g. Continue by adding the location of the event/service in the address fields shown below. Ensure you enter a valid postcode as otherwise the event/service will not be shown on the website.

Location / Venue

Address 1

Address 2

Town/City

County

Postcode

h. You will then need to tick the relevant boxes below to provide more details on the accessibility of the venue. Tick all the boxes which apply.

When selecting the boxes to say there is an accessible toilet, level access or parking facilitied for disabled people, please ensure you read the notes related to them.

Venue Accessible

☐ ☒ Accessible internal environment

☐ ☒ Accessible toilet

☐ To answer 'yes', one of these features must exist. If the only access for people unable to walk is a lift, this cannot be a platform lift

"> ☒ Level access

☐ To answer 'yes', at least one disabled parking space exists in very close proximity to the venue entrance

"> ☒ Parking facilities for disabled people

☐ To answer 'yes', one of these features must exist. If the only access for people unable to walk is a lift, this cannot be a platform lift

"> ☒ Ramped access

☐ ☒ N/A – this service does not take place at a fixed venue

Other ways to access this service

☐ Home visits

☐ Online

☐ Telephone

You will also need to select from the options shown opposite if there are other ways to access your service/event.

i. You will now need to fill in some information about transport. Please select from the options shown below if there are transport options for people who want to access the service.

Are there transport options available for people who want to access this service e.g. local public transport, Dial- A-Ride, community transport, group transport?

○ Yes

○ No

◉ N/A

25

You also can use the two boxes shown below to enter any additional information about the event.

Transport Option Notes

Transport Option Notes box – this should be used to fill in any details about transport for the event which you've been unable to input so far.

Additional Notes

Additional Notes box – this should be used if there are any other notes about the service you wish to include (e.g. if it is being held in a specific room, which floor the room is on or if there is a particular entrance to the building it's being held in that needs to be used).

j. Contact details – Use this field to give the name and contact number of the person who can provide details of the service/event to enquirers. Please note this field may be made public so only use MS Society email addresses (rather than personal ones) and if a phone number is used, please make sure you have the permission of the person whose phone it is for their number to be shown on the website.

Contact Details

Activity Restrictions

Please enter any restrictions on attendance e.g. Women only, Referral required. Please note that this field may be made public.

k. Activity Restrictions – Use this field to enter any restrictions on attendance. Please note this field may be made public.

l. Click the small arrow on the "target audience" box and select who the audience of the event/service is from the drop-down list which will pop up (and shown below).

Target Audience

Target Audience

People with MS
Families and carers
People with MS, families and carers
Everyone

m. Click the small arrow on the "funding" box and select what funding the event/service is receiving from the drop-down list which will pop up (and shown below).

Funding

Funding

Fully funded by MS Society
Fully funded by MS Society Group, there are no fees or suggested donations for individuals attending
Fully funded by external funding sources, there are no fees or suggested donations for individuals attending
The service does not cost the MS Society group any money, there are no fees or suggested donations for individuals attending
The service is fully funded by charging the individuals attending
Partly funded by MS Society Group and partly by external funding sources, there is also a fee for individuals attending
The service does not cost the MS Society group any money, the group charges individuals attending for refreshments only
Partly funded by the MS Society Group, there is also a fee for individuals attending
Partly funded by MS Society Group and partly by external funding sources, there are no fees or suggested donations for individuals attending
Partly funded by the MS Society Group, there is a suggested donation for individuals attending
The service is fully funded by the donations of the individuals attending

n. Enter into the "Service Cost" box what the cost of the service/event is

Service Cost

Delivered by

o. Click the small arrow on the "delivered by" box and select who is delivering the service/event from the drop-down list which will pop up (and shown below).

Delivered by

MS Society Staff
Professionals
Volunteers
Professionals and volunteers

p. Fill in how many people you expect to use the service/attend the event during the year
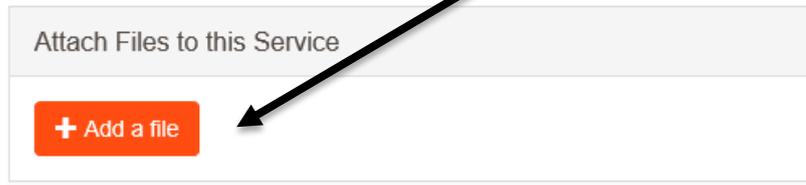
Number of individuals you expect to use the service/activity during the year

Date service last discussed at a group meeting

E.g., 07/03/2019

**q.** Enter the date the service was last discussed at a group meeting.

r. Attach any necessary risk assessment or SLA files for the event in this section. This field should not be used for any other files (e.g. pictures or newsletter).

Attach Files to this Service

+ Add a file

s. You're almost finished – just a few more steps! This last section will assess the level of risk of this activity and may prompt you to complete a risk assessment if it's deemed a higher risk activity. Make sure you select if there will be a competent person responsible for setting up the venue, managing the venue and emergency arrangements.
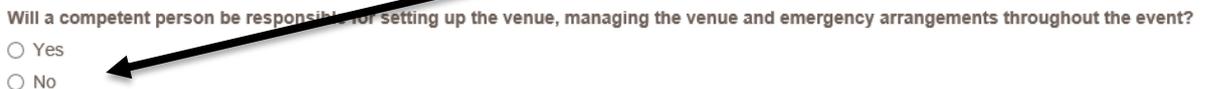
Will a competent person be responsible for setting up the venue, managing the venue and emergency arrangements throughout the event?

○ Yes
○ No

t. Select if the service/event will involve people other than the attendees, trainers, speakers or members of the public.
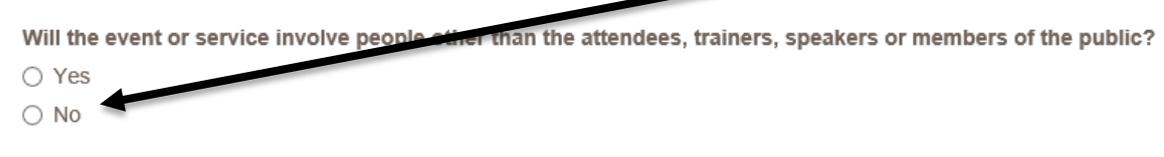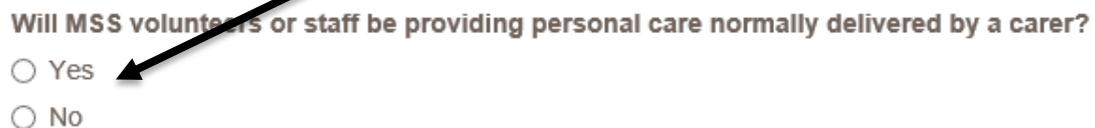
Will the event or service involve people other than the attendees, trainers, speakers or members of the public?

○ Yes
○ No

u. Select if volunteers or staff will be providing personal care usually delivered by a carer?

Will MSS volunteers or staff be providing personal care normally delivered by a carer?

○ Yes
○ No

v. You may need to tick the box shown below with regards to a completing a risk assessment. If this box has appeared for you, please ensure you follow the guidance given before ticking the confirmation box shown below.

This activity/service is considered low risk and does not require a full risk assessment provided the appropriate guidance is followed, which must be confirmed below. The guidance can be found here. (PLEASE NOTE, this will open a new page which may take you away from this screen. Please ensure that you return to save the form otherwise the information you've entered will be lost.)

☐ I confirm that I will follow the guidance to the best of my ability.

w. You will see the box below about the activity status – make sure this box is ticked to say the event is active. If, at some point in the future, the event will no longer be running, you'll need to return to this point and untick the box. This will make the service inactive and stop it pulling through on our website under the services for your group.
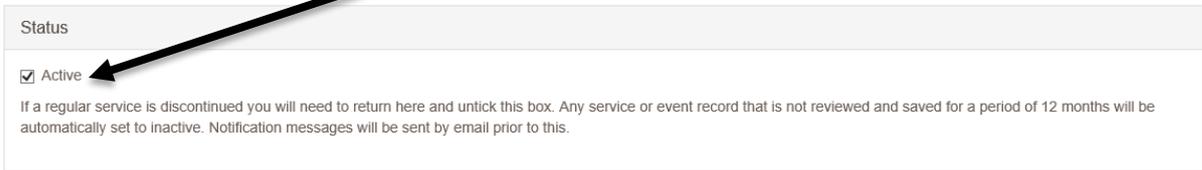
x. Lastly, press save!

6. You will then be taken to a confirmation screen which shows your event details.

How to amend an event or service

1. To start, go to the Portal here (https://portal.mssociety.org.uk) and login. If you can't remember your password, please follow the "How to re-set your password" procedure.

2. Once you're logged into the Portal, you should be on the "Manage Groups" page. Enter the group name you're looking for (example used below of "Brent Group") and click "Go".

3. Next click on the tab that says "Group Services and Events"

4. You should then see a list of events or services that you/another member of your group has already created for your group (see example on following page). You need to click on the title of the service/event you wish to change. If you do not see the service/event you wish to amend, go to the "why does my service/event not appear?" section of this document.

Brent Group Services

| Basic Information | List of Members and Contacts | List of Volunteers | Group Services and Events | Properties | Vehicles |

Category

- Any - ▾

Active

On ▾

[Add New Service] [Reset]

Title	Category	Group	Member
MS Support - Brent Group	MS Support		Fotini Angelidou
Canal Boat Trip	Socials events		Jo Webber
Theatre Outing to 'One Flew Over The Cuckoo's Nest'	Socials events		Jo Webber
Cake Break 2018	Fundraising Events		Anna Zastryzna
Monthly Pub Lunch	Socials events		Anna Zastryzna
Theatre Outing to 'Calamity Jane'	Socials events		Anna Zastryzna

5. You will then see the event summary page. Just under the event title and before the "Basic Information" box, you should see a small "View" button and a small "Edit" button as shown on the image below. Please click on the "Edit" button. If you do not have the "Edit" button, please contact the Supporter Care Team on 0300 500 8084 or supportercare@mssociety.org.uk

| View | Edit |

Basic Information

Group:

6. You will now see all the event details shown in the same format as when the event was originally added. You will then need to click into the section you wish to amend and make the necessary change.

7. Once you have made the change, you need to scroll to the bottom of the page and click the save button.

✔ Save

Depending on the details of your activity, you may see a box to tick (example shown below) with regards to a risk assessment. If this box has appeared for you, please ensure you follow the guidance given before ticking the confirmation box shown below. After this has been ticked, you can then press save as mentioned above.

This activity/service is considered low risk and does not require a full risk assessment provided the appropriate guidance is followed, which must be confirmed below. The guidance can be found here. (PLEASE NOTE, this will open a new page which may take you away from this screen. Please ensure that you return to save the form otherwise the information you've entered will be lost.)

☐ I confirm that I will follow the guidance to the best of my ability.

8. You will then go back to the event confirmation screen and your event has been amended.

Why does my service/event not appear?

If you can't locate your service/event on the Portal (step 4), this may be due to your Portal settings. You should see some drop-down boxes above the "new service" button. Look at the one which says "Active (field_active)".

The Portal is set by default to show only services/events which have been marked as active. If your service/event has been marked as inactive, please change the drop-down list to either "off" or "any" to see a full list of all the services/events that have been added to the Portal for your group.


Once you have located your service/event, please return to step 4.

How to remove an event or service

You may want to make a service inactive (so it is removed from your group page on our website) if it was a one off event or if it's an event or activity that is no longer running.

1. To start, go to the Portal (https://portal.mssociety.org.uk) and login. If you can't remember your password, please follow the "How to re-set your password" procedure.

2. Once you're logged into the Portal, you should be on the "Manage Groups" page. Enter the group name you're looking for (example used below of "Brent Group") and click "Go".
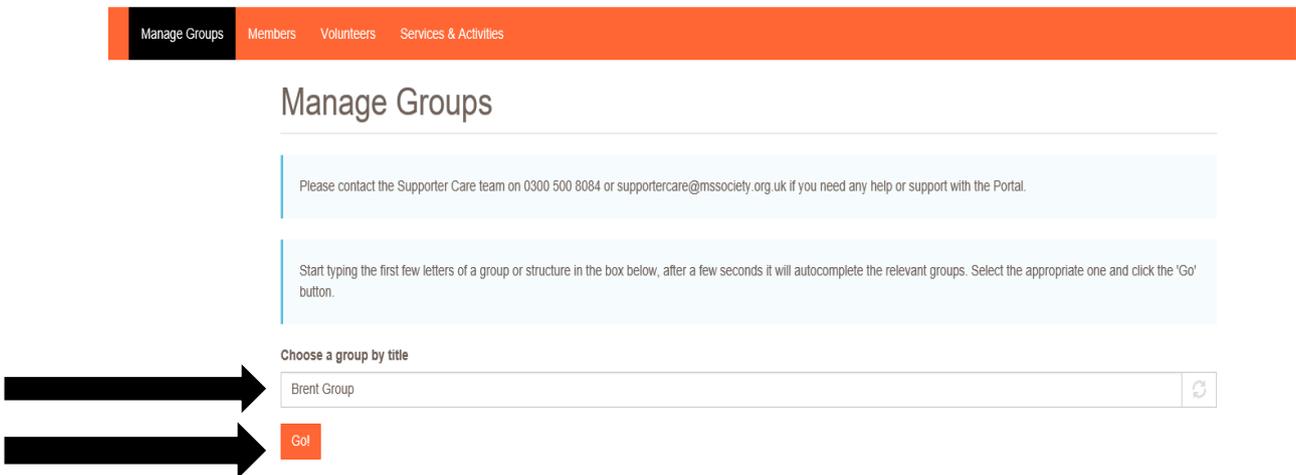
3. Next click on the tab that says "Group Services and Events"

4. You should then see a list of events or services the group provides already on the Portal (see example on following page). You need to click on the title of the service/event you wish to make inactive/remove from the Portal so it is not shown on the MS Society website and visible to the public. If you cannot see

the service/event you're looking for on this list, please go to the "Why does my service/event not appear" section of this document.
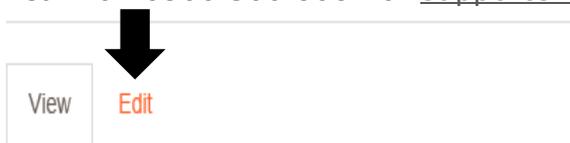

5. You will then see the event summary page. Just under the event title and before the "Basic Information" box, you should see a small "View" button and a small "Edit" button as shown on the image below. Please click on the "Edit" button. If you cannot see the "Edit" button, please contact the Supporter Care Team on 0300 500 8084 or supportercare@mssociety.org.uk

6. You will now see all the event details shown in the same format as when the service/event was originally added. You need to scroll to the bottom of the page until you see the status box shown below:
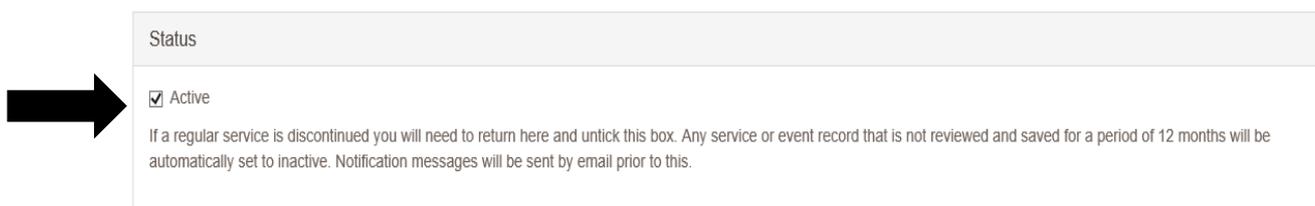
This box is usually ticked to show the service/event is "active". If the event/service is in the past or no longer happening, you need to untick the box. This then means the event/service is inactive.

7. Once you have made the change, you need to scroll to the bottom of the page and click the save button.

➡️ ✔ Save

Depending on the details of your activity, you may see a box to tick (example shown below) with regards to a risk assessment. If this box has appeared for you, please ensure you follow the guidance given before ticking the confirmation box shown below. After this has been ticked, you can then press save as mentioned above.

This activity/service is considered low risk and does not require a full risk assessment provided the appropriate guidance is followed, which must be confirmed below. The guidance can be found here. (PLEASE NOTE, this will open a new page which may take you away from this screen. Please ensure that you return to save the form otherwise the information you've entered will be lost.)

➡️ ☐ I confirm that I will follow the guidance to the best of my ability.

8. You will then go back to the event confirmation screen and your event has been amended to being inactive. This means if your event/service was shown on the website before, it will not appear there from the next day.

Why does my service/event not appear?
If you cannot locate your service/event on the Portal (step 4), this may be due to your Portal settings. You should see some drop-down boxes above the "New Service" button. Look at the one which says "Active (field_active)".

Services

Category	Group / Structure	Active (field_active)
- Any -	Brent Group	On

New Service   Reset

➡️

The Portal is set by default to show only services/events which have been marked as active. If your services/event has been marked as inactive, please change the drop-down list to either "off" or "any" to see a full list of all the services/events that have been added to the Portal for your group.

Active (field_active)

➡️
- Any -
Off
On
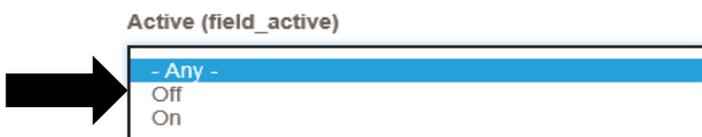
If you were wanting to mark the service/event as inactive (the reason for following this procedure) and it did not show until you changed your settings, it means the service/event has already been set to inactive! If you would like to double check, please return to step 4 and follow the procedure until the end.

We're the MS Society.
Our community is here for you
through the highs, lows and
everything in between.
We understand what life's like with MS.

Together, we are strong enough to stop MS.

mssociety.org.uk

Contact us

MS National Centre 020 8438 0700
info@mssociety.org.uk

MS Helpline Freephone 0808 800 8000 (weekdays 9am-9pm)
helpline@mssociety.org.uk

Online
mssociety.org.uk
facebook.com/MSSociety
twitter.com/mssocietyuk

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►Let's stop MS together