Worcestershire Adults Portals Guide

Contents

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What is the Worcestershire Adults Portal?

The Worcestershire Adults Portal is a system used to allow users to submit referrals safely and securely. The portal's primary role is to receive enquiries and referrals into Adult Services

How the Portal Works

The user completes an online form and submits it to Adult Social Care. Users will be asked to register for a unique account which allows them to view submitted forms and receive feedback about their referrals.

The login credentials for the Worcestershire Adults Portal and the Worcestershire Children First Referral Portal are the same, you only need to register for one of the two.

Accessing the Portal

The portal will be accessed via the Worcestershire Adults Portal page on the website.

Follow the instructions on the webpages to access the relevant referral form for who you are and your referral needs.

[Worcestershire Adults Portal | Worcestershire County Council](#)

Register for an Account

When in a form you will be presented with the options to login or register.
New users to the portal will need to register for an account.

In order to progress with this form you must either log in or complete a simple registration for a new account. You can then continue to complete this form. This will enable you to track the form at a later date.

Login or Register

New users

If you're new to Worcestershire Portals, sign up for an account here

Register for new account

Click register for new account, all fields with a red star next to it are mandatory fields and need completing, those without a red star are optional.

If you are setting up <u>this account as a professional</u>, you will be asked for different details, tick the box next to "Is this account being used in a professional capacity?"

Resident Registration screen	Professional Registration Screen

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Click on Next to proceed after you have entered the required information

Email address – this will be your username, log in codes and referral feedback will be sent to this email address. **You must enter your email address correctly. If it is not entered correctly you will not receive log in codes**.

Password – follow the secure password guidance on the right side of the page. If your password does not meet the criteria you will be asked to amend it before you can proceed.
You will be sent a code to your email address; you should use this code to validate your new account.

Click on **Next** to continue to Step 3

You will receive an email with a verification code, enter the code in the email into the box on screen and click on **Next** to complete the registration process

If the code has not been received, please check your "junk" folder, failing that click on "Please send me a new code"

Register a new account - step 3

We have just sent you an email to confirm your email address. Please enter the code this contains below. Use the **back** button below if you would like to change your email address and try again or **Please send me a new code** if you need another one.

If you can't find this email, it may be in your spam/junk email folder.

Code *

[Back] [Next] [Cancel]

Please send me a new code

Completing a Referral

If you are accessing the portal through the Worcestershire Adults Portal page then you will be presented with the form ready to complete.

Worcestershire Adults Portal | Worcestershire County Council

If you are already on the Portal, click on Portal Home and then the relevant buttons to navigate through to the different options to launch the referral form.

The Form

The example below is for a Resident Referral however, the process is very similar for all different referral options.

The below screen is the start of all forms, When the below screen is presented, click on **Next**

Home / Adult Social Care / Portal Home /

1 How does this tool work?

2 Consent

3 Person Making Referral

4 Details of Person being referred

5 Current Situation

6 Supporting Documentation

7 Submit

How does this tool work?

Use the numbered menu items on the left or use the [Next →] and [← Previous] options to move through the pages.

Don't use the Browser 'Back' button

(?) Questions

You **DO NOT** need to answer every question, you need only complete what is relevant.

Select the option(s) that best suit your response

This symbol * indicates that the question is mandatory and must be answered in order to continue.
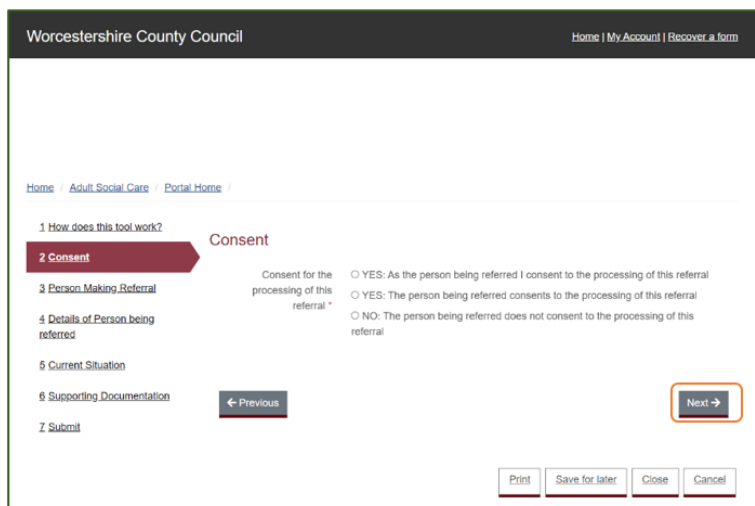
Save the Form

Use the [Save for Later] option to **Save** the form to return to at any time. (?)

Print the Form

Use the [Print] option to **Print** a copy of the form if required. (?)

[Next →]

[Print] [Save for later] [Close] [Cancel]

Please complete all required questions. Mandatory questions are signified by a red *

Please note: You won't be able to proceed through the form until all the Mandatory Questions are completed

If you try to proceed with a Mandatory Question unanswered the question will be highlighted to you

If you are not already logged into the Portal you will be asked to login or Register. Follow the **Logging into the Portal** or the **Register for an Account** steps within this guide.

If you are already logged in, your details will be presented instead of the login or Register section.
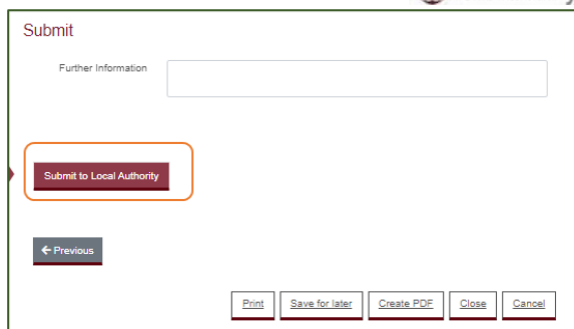
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Click on **Next** to Progress

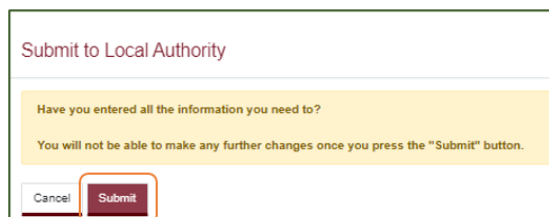Continue through the form completing all required questions and click on **Next** to progress through the screens.

You will be able to:

- Print: Prints the form in PDF format
- Save for Later: Forms are saved for 30 days and can be continued at a later date. See the guidance section **Accessing Previously Saved Referrals**
- Close: Close the referral, if logged in the changes will be saved, if not logged in, all changes will be lost.
- Cancel: Cancels the referral
- Upload/attached a document to the referral, see guidance section **Attaching / Uploading a document to support your Referral**

When all questions have been completed - Submit to the Local Authority

On clicking Submit to the Local Authority you will be presented with a screen to confirm

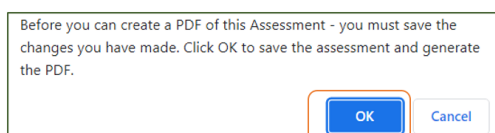# Creating a PDF of your Referral

You are able to create a PDF of your referral, this might be useful for your own records. You will be able to access previous referrals under Your Name (found top right of the Portal)

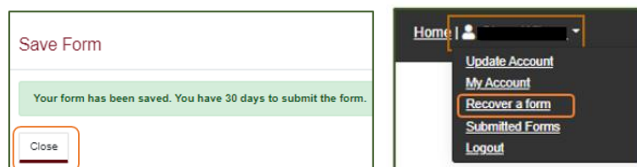During the Referral Process you will see a bar of options at the bottom of the screen.

Click on **Create PDF**

You will be prompted to save the assessment at the same time. **Click on OK**

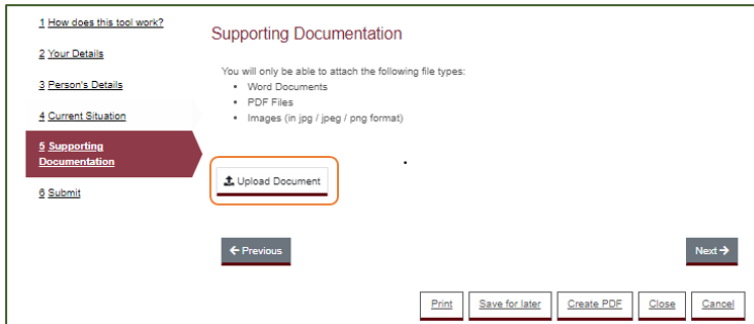You will see a message to confirm you have saved the form for 30 days.

You will be able to access the saved form by click on Your Name found in the top right corner of the portal

Attaching / Uploading a document to support your Referral

Supporting documentation can be attached to referrals.

Within each of the referral forms, before submitting to the Local Authority there will be an opportunity to attach supporting documentation

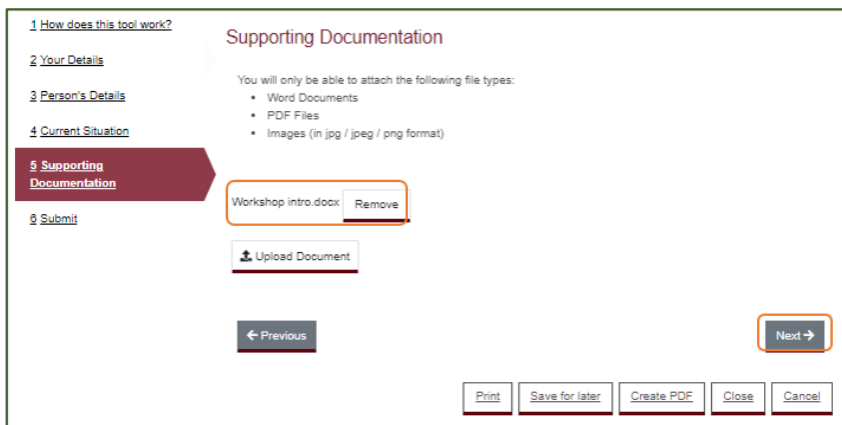Click on **Upload Document**

You will be presented with the File Browser to locate the file to attach
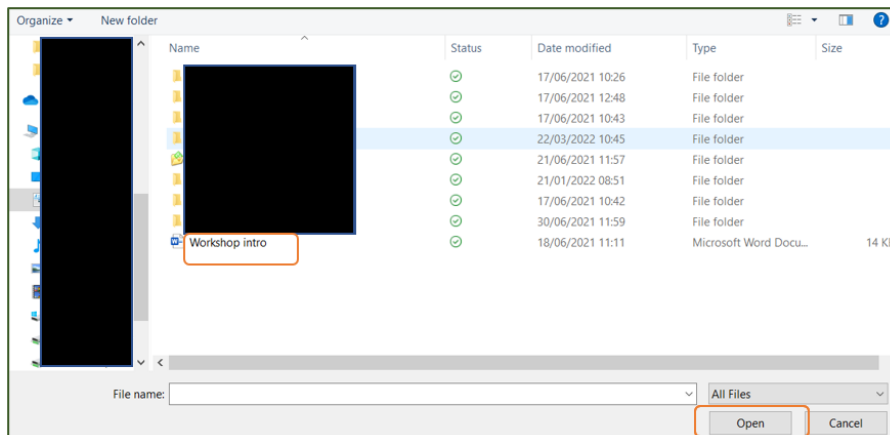
Locate your file and click on Open

You will know the file has attached correctly by it appearing within the Referral form

If the document doesn't attach please try again.

Attached other documents or click on **Next** to progress through the Referral form
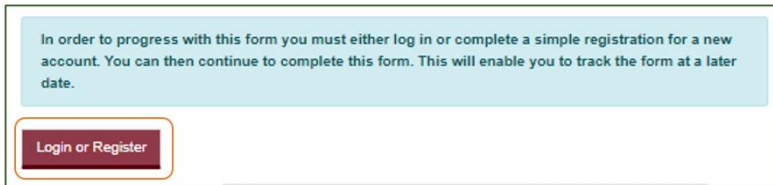
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Logging into the Portal

There are two ways to navigate to the login screen:

Option1 Accessing Login Screen via a Form

When you are completing a referral form and presented with the below message asking to **Login or Register.**

 Click on **Login or Register**, this will take you to the Login Page

Option2 via My Account

When you enter the portal website you will see buttons appear on the top right, Home, My Account and Recover a form. Click on **My Account** to present the Login page
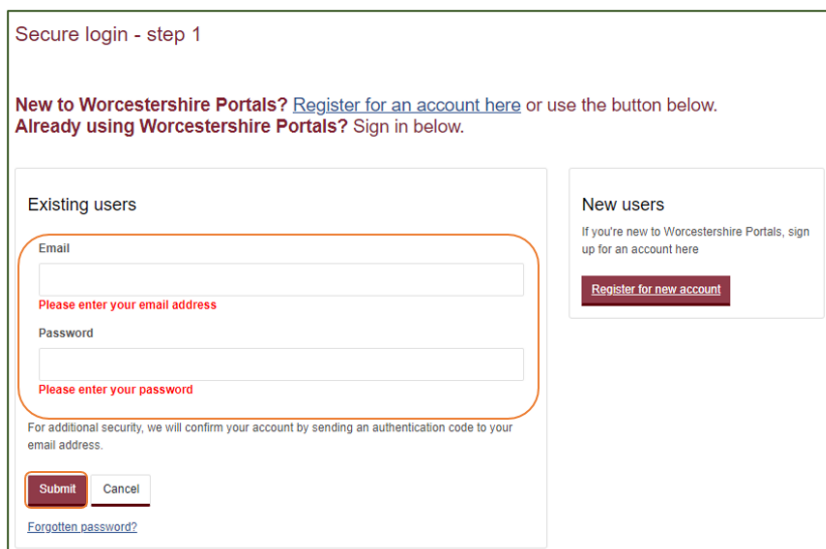

Login Screen

The login page is presented

Enter your email address used in registration and your password, then click on **Submit**

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You will now receive an email with a verification code, enter the code found in the email into the box provided on screen

Click on **Finish** to complete the login

My Account Route > You will be presented with your **Account Dashboard**

Via a Form Route > You will be returned to where you left off in the form.

Portal Account Dashboard

You will be presented with a message asking to Apply to Manage an Account.

This is for a part of the Portal that is not yet being launched. So please ignore this message.

To Access Previous Portal Activity click on the arrow next to your name in the top right corner of your screen.

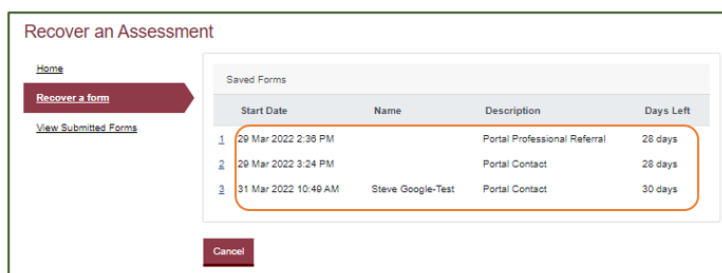Version: 2   Last Updated: May 2023
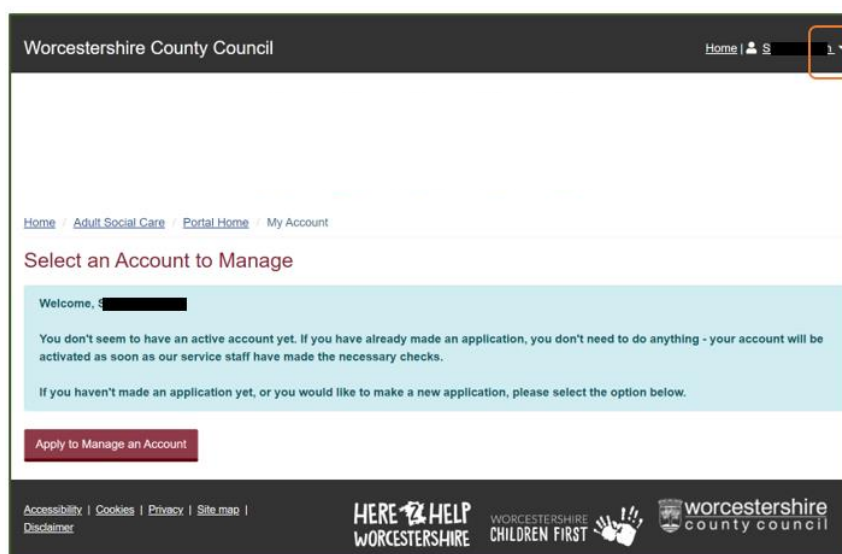
Accessing Previously Saved Referrals

Referral forms can be saved and returned to later, they are saved for 30 days.

You can access a Previously Saved Referrals by clicking on your name found top right of the screen and then **Recover a form**
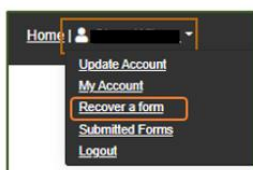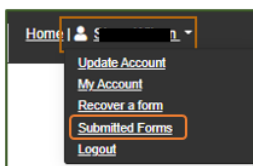

Saved forms will appear in a list, click on the form to open and progress.
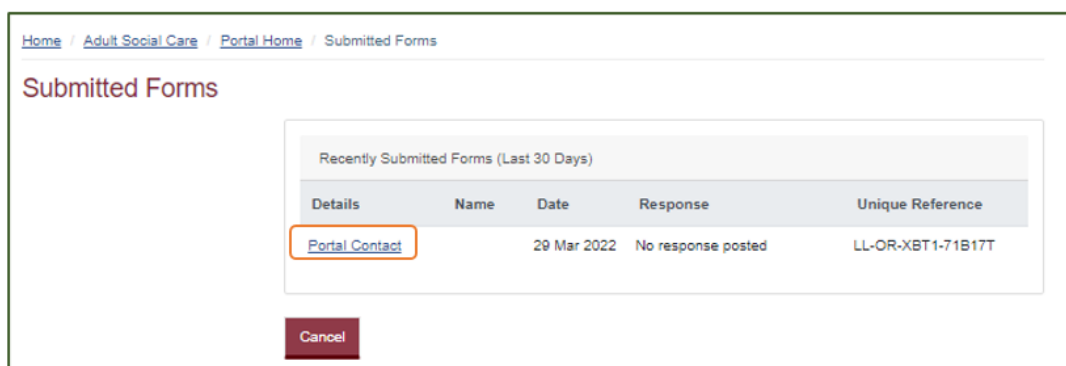

Viewing Previously Submitted Referrals

Once you have submitted a Referral, you can return and view it.

You can access a Previously Submitted Referral by clicking on your name found top right of the screen and then **Submitted Forms**

Previously completed Referrals will appear in a list, click on the form to open as a PDF to view the content.

Forgotten Passwords

Within the login screen click on **Forgotten password?**

Enter your email address used to register then click on **Next**

You will now receive an email with a verification code, enter the code found in the email into the box provided on screen

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Reset password - step 2

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

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

Code

[   ]

[Next] Cancel

Please enter the verification code that we emailed to you

Choose a new password and confirm, then click on **Finish**

Reset password - step 3

Please enter your new password

Your new password

[   ]

Confirm password

[   ]

[Finish] Cancel

Password Policy

Your password must meet the following requirements:

- It must be at least 15 characters long
- It must contain at least one letter
- It must contain only letters, digits, and special characters
- It must contain at least one upper-case letter
- It must contain at least one numerical digit
- It must be different to your current password
- It must be different to your previous password

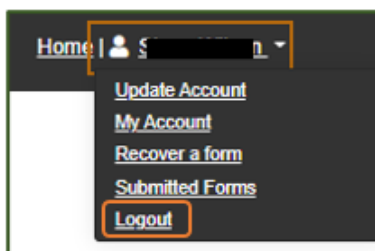Click here to see the list of special characters:

Password Reset Confirmation

Your password has been changed. Press OK to return to the login page.

[OK]

Click **OK** to completed password reset.

Logging out

Click on your name on the top right and then Logout

Home | 👤 S_____n ▾

Update Account
My Account
Recover a form
Submitted Forms
Logout

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Additional Support

If you need further support or have technical difficulties, please get in touch with the support team who would be happy to help you further.

Email: WorcestershireAdultsPortalSupport@worcestershire.gov.uk