

Guidance on eForms system update

Service accounts

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About this guidance

This guidance shows you what has changed on the eForms application and is written for those using a service provider account on eForms.

A service account relates to a single specific service. (As opposed to a service provider (or corporate) account, which relates to multiple services from the same provider).

This guidance assumes the reader has some prior knowledge of the eForms application and has basic computer skills allowing them to visit and use websites.

For more information on the requirements of registered services and what they need to report to the Care Inspectorate please visit the 'Professionals' area of our website.

Recommended settings

We recommend that you use a screen resolution of no less than 1280 x 1024. This will ensure that you have enough space available on your screen to benefit the most from the changes made to the site. Any settings below this may require you to reduce your browser's zoom setting in order to display everything on screen.

If you do not know how to set your resolution, you can find information about this on the following pages.

Windows users –

<https://www.wikihow.com/Change-the-Screen-Resolution-on-a-PC>

Apple users –

https://support.apple.com/kb/PH25175?locale=en_GB

The display on mobile devices or tablets is usually set and cannot be altered.

What has changed?

eForms now displays full screen.

You can now display eForms across your entire screen rather than being limited to the small window used by the old site. You can also choose to resize the window to any size you like, just the same as any other application on your computer.

eForms document layout

The eForms documents have had a facelift. They have a new toolbar with larger icons. They also have more display options for increasing text size, making them more accessible and easy to use. The content of the eForms however, remains exactly the same.

New features and a more intuitive design

eForms is now easier to navigate with more options for finding and displaying information. This means things are labelled more clearly and less time is spent searching for what you need. This includes allowing you to search, for example, for specific documents that a service or provider has submitted. It also includes new ways to view eForms documents by 'Case' view, where documents can be grouped when they relate to the same activity (such as an inspection).

Faster, more robust website

The eForms website has been optimised to work better with internet browsers. This means a quicker and better experience for you and less chance of hanging, freezing and errors.

Increased security

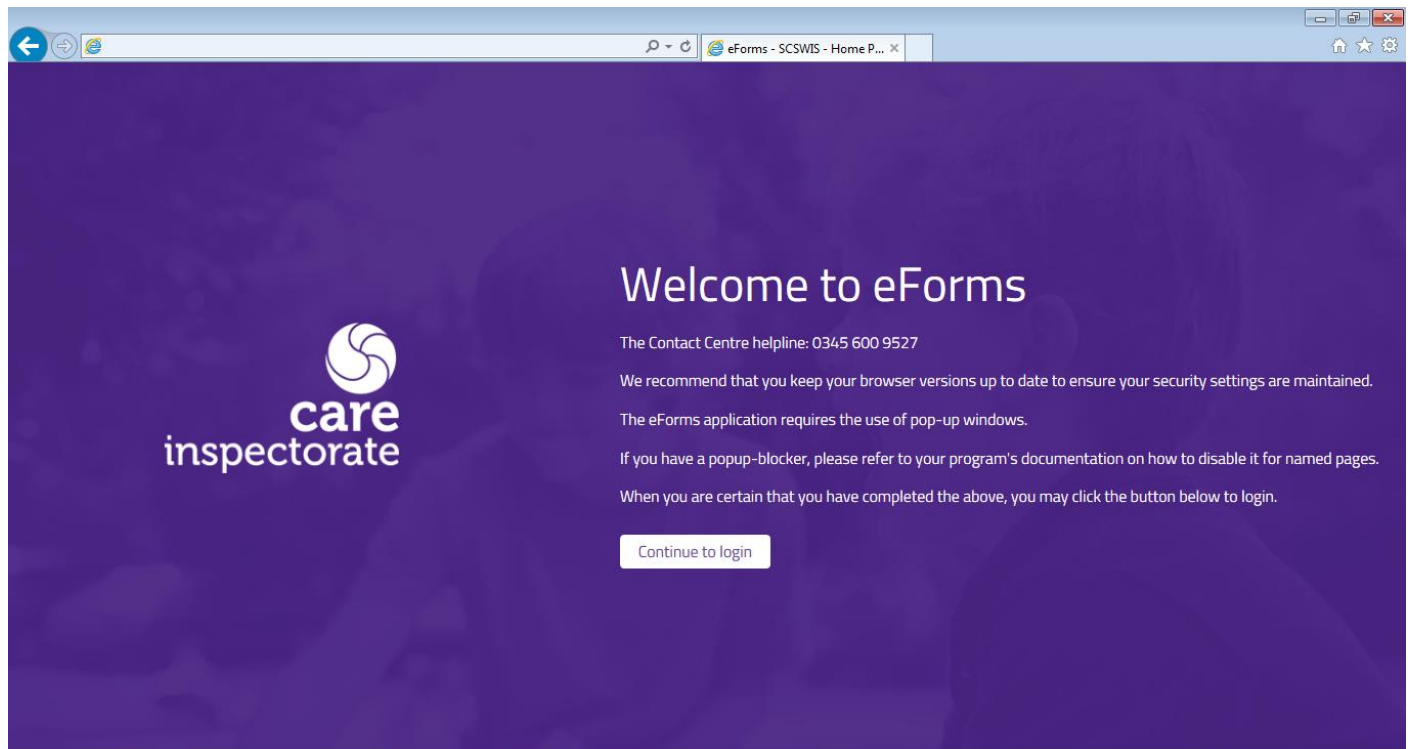
Security is always of paramount importance. We have updated the passwords used on accounts to be more robust and secure. If you log in and your password is deemed weak, you will be prompted to change it before being able to proceed. Changing your password is explained in the next section.

How do I access eForms?

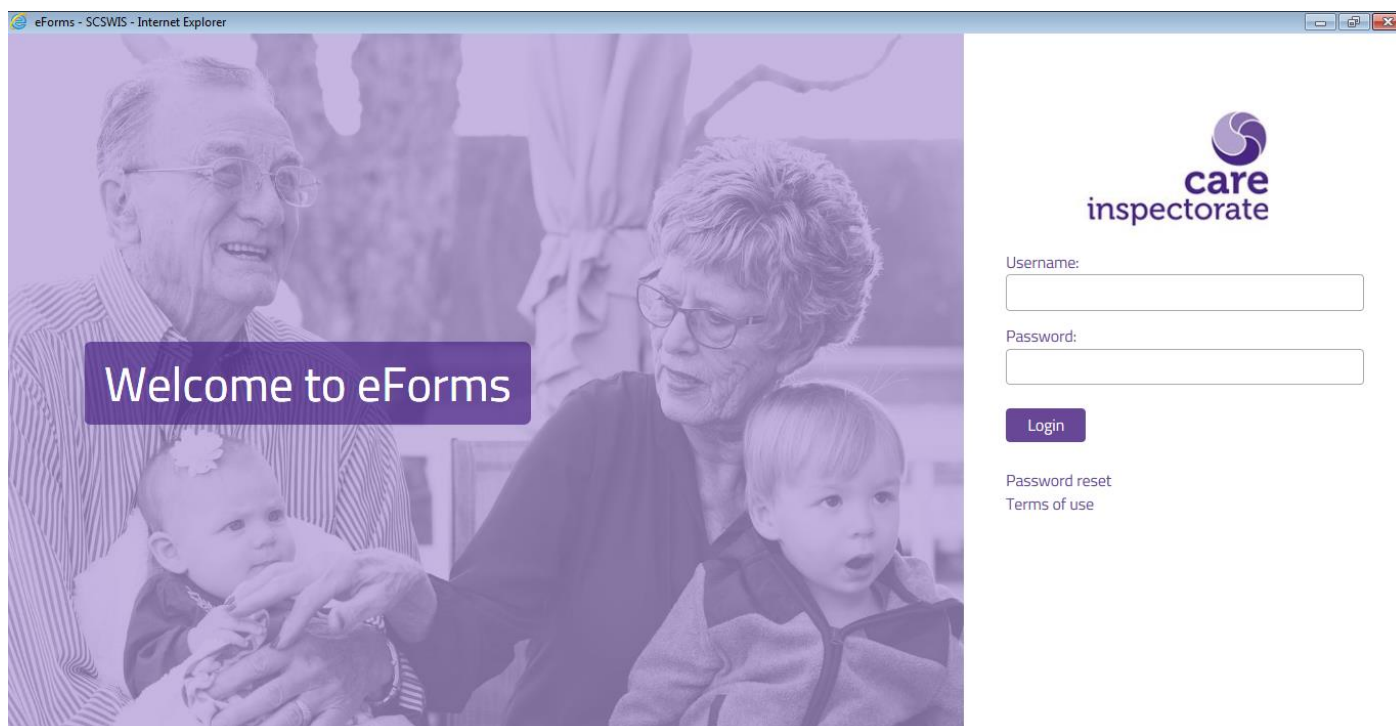
This has not changed; the address is still the same as it was before and will continue to work if you have it stored as a favourite.

<https://eforms.careinspectorate.com>

Visiting this will take you to the new homepage.



Click 'Continue to log in'. This will open as a new tab or window on your internet browser.



Username:

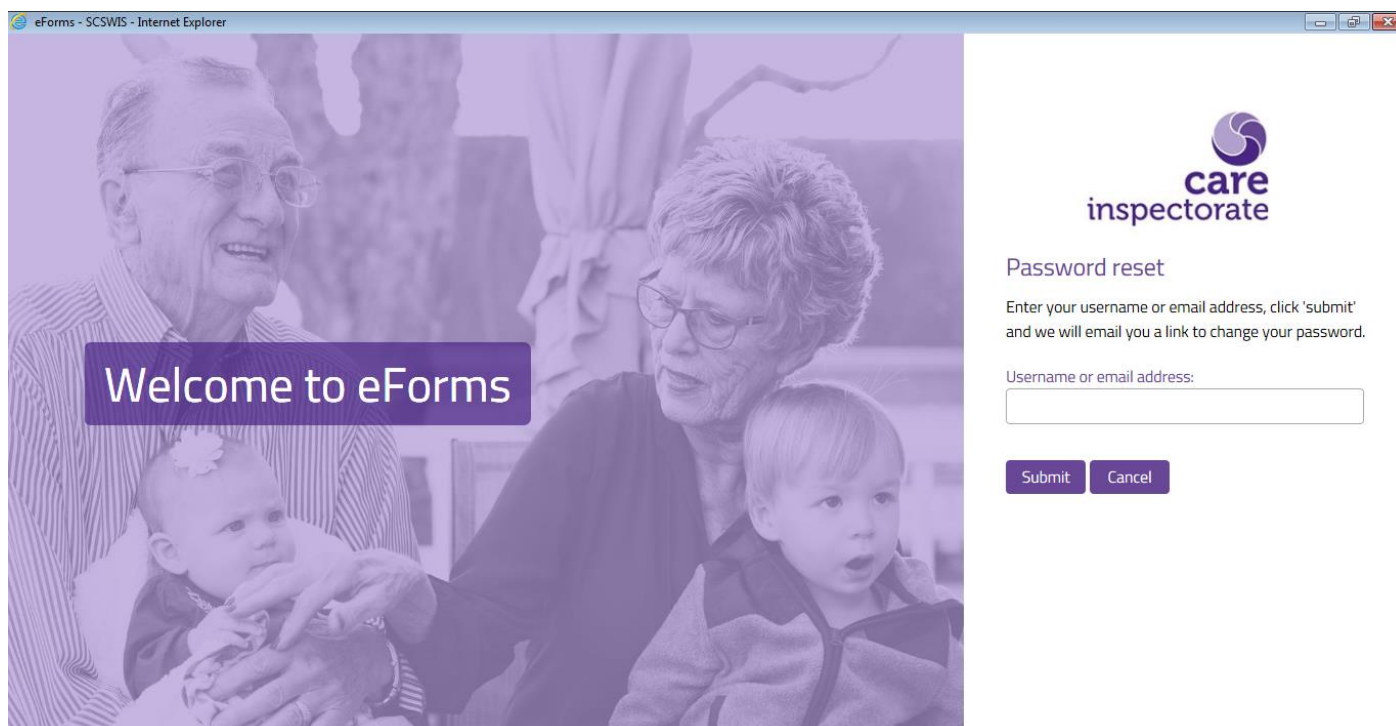
Password:

Login

Password reset

Terms of use

If you do not remember your password click on the 'Password reset' link.



care inspectorate

Password reset

Enter your username or email address, click 'submit' and we will email you a link to change your password.

Username or email address:

Submit Cancel

Enter the username of the account you wish to reset the password for. An email will be sent to the address we have on record for that account.

If you enter an email address, please note that we will only send an email to addresses we have on record for existing accounts.

The email we send will contain a link, which will allow you to change your password.

If you attempt to log in and your password is deemed as weak (you will have a prompt on screen informing you of this) you will have to follow this process to change your password to a more secure one before you can try logging in again.

How do I use the new site?

The site consists of sections that appear as tabs or a drop-down menu at the top of the screen after you log in:

Home

Documents

Notifications

News

Billpay

Users

Inspector Photos

Alerts

Account Settings

The dropdown option shows as the following icon



Clicking on this will give you a drop-down list of all the tabs

The 'Home' tab

This is the first section you will see after you log in.

The screenshot shows the eForms - SCSWIS - Internet Explorer browser window. The navigation bar at the top is purple and contains the following tabs: Home (highlighted with a red box), Documents, Notifications, News, BillPay, Users, and Inspector Photos. To the right of the tabs is a notification bell icon and a dropdown arrow. Below the navigation bar is a large banner image featuring two children. The text "Welcome to eForms" is overlaid on the left side of the banner, and the "care inspectorate" logo is on the right. Below the banner, there are two main sections: "Information" and "Inbox". The "Information" section contains three colored boxes: a purple box for "PASSWORD RESET" (6 January 2016), a green box for "Death of a Service User Notification" (10 June 2014), and a blue box for "New self assessment for childminders - please submit by 14 November 2014". The "Inbox" section contains a list of notifications: "Service Status Notifications: Notificat..." (23 Aug 2017), "Inspection Documents: Inspection Re..." (22 Oct 2015), and "SCSWIS Inspection Letters: Draft Insp..." (13 Oct 2015). At the bottom of the page, there is a footer bar with the text "Inspector: Annemarie McGinn" and "eForms".

There are two main parts of the 'Home' tab

The **Information** part (bottom left corner)

This section displays all the latest news relating to eForms.

Click on any of the items and you will be taken to the 'News' tab, the item you clicked will be displayed (The 'News' tab is also accessible at the top of the page).

There is also a 'See more...' option within this section, which will also take you to the 'News' tab

Title	Date
PASSWORD RESET	06 Jan 2016
Death of a Service User Notification	10 Jun 2014
New self assessment for childminders - please submit by 14 Nov...	15 Jan 2014
NEW - Hints & Tips	15 Jun 2012
Providers can now register new services online	22 Mar 2011

PASSWORD RESET

6 January 2016

We have changed our password policy to encourage our users to select robust and secure passwords.

We do not send password reminder emails. If your password is not working or you have forgotten your password, you will need to reset it.

RESETTING YOUR PASSWORD:

Click on the 'Password reset' link on the login page. This is situated below the Username/Password input boxes

Enter your username or email address and click on the [Submit] button. An email will be sent to your registered email address

Check your emails within 10 minutes - you should receive an 'eForms password reset' email. When you receive this email, click on the link it contains and enter a new password (you may use your existing password if it is 8 characters or more)

The system will show you how strong your password is

You can improve this by including numbers and standard keyboard characters other than the alphabet

Your password must be at least 8 characters long

Your password will be case-sensitive, you will need to remember which letters you enter in upper-case and which you enter in lower-case

Inspector: Annemarie McGinn

eForms

When you visit this tab, you will see all news events listed in date order.

Click on an item on the list to see the information about it.

The **Inbox** part (bottom right corner)

This lists the most recent eForms documents received by the service and copies of any e-shots that have been sent to the service.

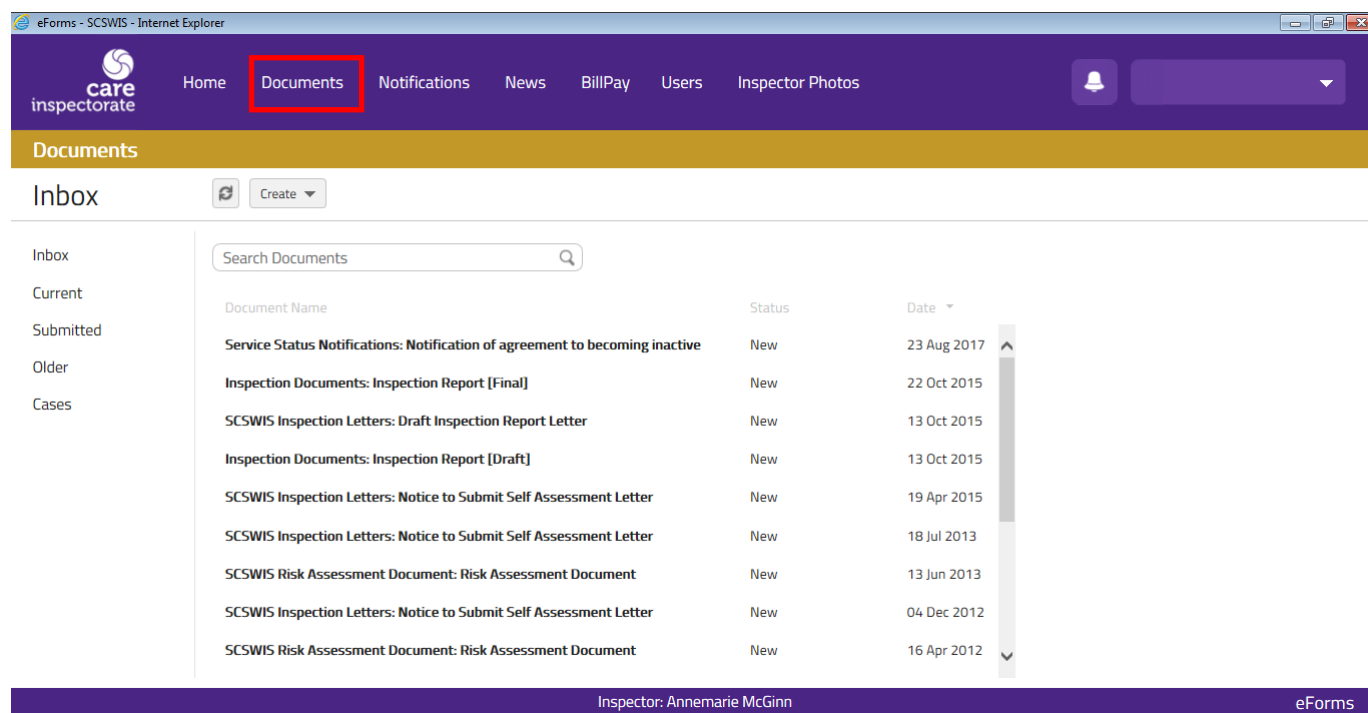
The documents shown are only ones submitted by the Care Inspectorate. For example, a draft inspection report.

You can click on the name of any documents in the list and that document will open. There is also a 'Show all' option that will take you to the full list of the 'Inbox'. This is described more fully in the next section.

The 'Documents' tab

When you click on this tab, you can access all existing eForms documents across all services you have registered with us.

This section is where you can access all your existing eForms documents.



The screenshot shows the 'eForms - SCSWIS - Internet Explorer' interface. The top navigation bar includes links for Home, Documents (highlighted with a red box), Notifications, News, BillPay, Users, and Inspector Photos. Below the navigation bar, the 'Documents' section is active, showing an 'Inbox' folder. A search bar labeled 'Search Documents' is present. The document list is as follows:

Document Name	Status	Date
Service Status Notifications: Notification of agreement to becoming inactive	New	23 Aug 2017
Inspection Documents: Inspection Report [Final]	New	22 Oct 2015
SCSWIS Inspection Letters: Draft Inspection Report Letter	New	13 Oct 2015
Inspection Documents: Inspection Report [Draft]	New	13 Oct 2015
SCSWIS Inspection Letters: Notice to Submit Self Assessment Letter	New	19 Apr 2015
SCSWIS Inspection Letters: Notice to Submit Self Assessment Letter	New	18 Jul 2013
SCSWIS Risk Assessment Document: Risk Assessment Document	New	13 Jun 2013
SCSWIS Inspection Letters: Notice to Submit Self Assessment Letter	New	04 Dec 2012
SCSWIS Risk Assessment Document: Risk Assessment Document	New	16 Apr 2012

The bottom of the screen shows the user 'Inspector: Annemarie McGinn' and the 'eForms' logo.

On the left side of the screen, there is a list of folders.

Inbox

When clicked, this will list all documents submitted by the Care Inspectorate to the service. For example, certificates of registration or inspection reports.

Current

Clicking on this will show all documents that have been created by the service that have not yet been submitted.

Submitted

This will display a list of all previously submitted documents. Either by the service or by the Care Inspectorate.

Older

This section will display all documents that have expired. For example, documents that were not completed by a deadline (an annual return). These documents cannot be accessed or submitted.

Cases

In this section, you will see a list of folders (see image below).

Document Name	Status	Date
Annual Returns		05 Jan 2018
Service Notification Case		04 Dec 2017
Service Notifications 2011-2012		04 Dec 2017
Annual Returns		05 Jan 2017
Annual Returns		06 Jan 2016
Inspection Case (Full inspection)		29 Sep 2015
Inspection Documents: Inspection Report [Draft]	Completed	13 Oct 2015
Inspection Documents: Error Response Form	Completed	13 Oct 2015
SCSWIS Inspection Letters: Draft Inspection Report Letter	Completed	13 Oct 2015
Inspection Documents: Inspection Report [Final]	Completed	22 Oct 2015
Annual Returns		06 Jan 2015

Each of these folders relates to a case. Cases are created when there are eForms documents associated with each other.

An example of this would be an inspection case – a case for inspection will show all documents related to an individual inspection. This makes it easier to find the documents related to this case. It will show the draft report, error response form, action plan (where applicable), the final report and any other documents created that relate to that inspection. (Previously, they could all appear in the **Inbox, Current or Submitted** views in different locations in the list due to them being made available at different times.)

Each case can be expanded by clicking on the name of the case in the list.

All cases when expanded will display all associated documents to the case selected. You can open the documents by clicking on their name.

Submitted, completed, expired and in-progress documents will show in a case's folder.

Additional Features on the 'Documents' tab

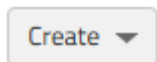
Each section when opened can be sorted by clicking on the document name, status or date columns.

Each section (except 'Cases') has a search bar at the top which you can use to search the list for a specific document or service.

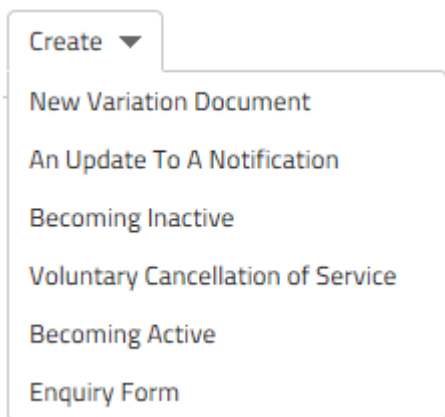
You can also scroll down the lists.

Clicking on a document's name in the list will open it.

Above the list of documents in each section is a 'Create' icon.



Clicking on the 'Create' icon expands to show the following options.



This is where you can create the following types of documents (please note: not all options will be available to all service types at all times).

Option to create: New Variation Document

This generates a variation form and allows you to complete it.

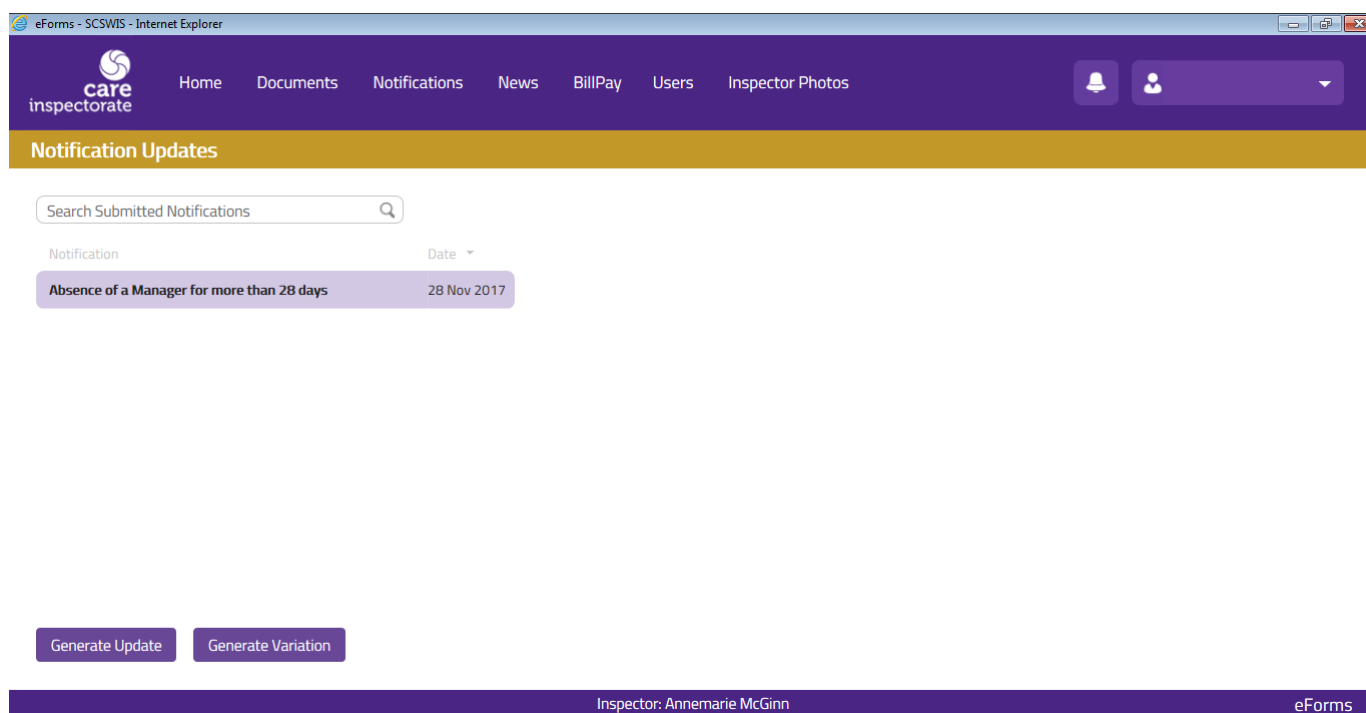
Option to create: An Update To A Notification

Once clicked. Click on the notification you wish to update and it will highlight.

Select 'Generate Update' to create an update to the notification and the document will load on screen for you to fill out.

Or, select 'Generate Variation' to create a variation form in relation to the original notification, the document will load on screen for you to fill out.

These documents when exited or submitted will be available in the folders found in the 'Documents' tab thereafter.



Option to create: Becoming Inactive

This creates the Becoming Inactive notification. This can be used to keep a service registered with the Care Inspectorate but marked as an inactive service.

Option to create: Voluntary Cancellation of Service

This creates a voluntary cancellation eForm for cancelling registered services

Option to create: Becoming Active

This will be available to inactive services to notify the Care Inspectorate when the service intends to become active again.

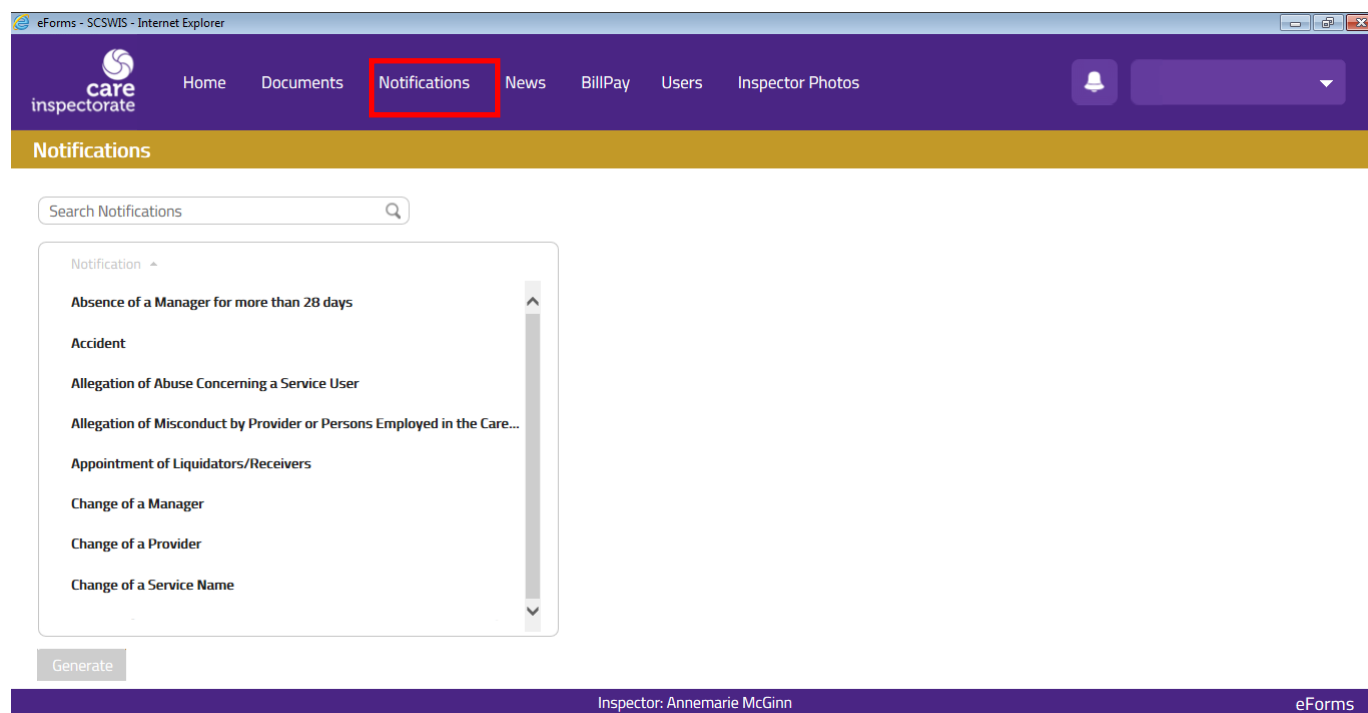
Option to create: Enquiry Form

This creates an eForm that is used to request support from our contact centre when it is submitted.

The 'Notifications' tab

This section is where you can create any notifications that are needed.

Click on the 'Notifications' tab at the top of the screen and you will be supplied with a list of the notifications you can create.

The screenshot shows a web browser window titled "eForms - SCSWIS - Internet Explorer". The page has a purple header with the "care inspectorate" logo on the left and navigation links: "Home", "Documents", "Notifications" (highlighted with a red box), "News", "BillPay", "Users", and "Inspector Photos". On the right of the header is a bell icon and a dropdown menu. Below the header is a yellow banner with the word "Notifications". The main content area has a search bar labeled "Search Notifications" with a magnifying glass icon. Below the search bar is a list of notification types: "Absence of a Manager for more than 28 days", "Accident", "Allegation of Abuse Concerning a Service User", "Allegation of Misconduct by Provider or Persons Employed in the Care...", "Appointment of Liquidators/Receivers", "Change of a Manager", "Change of a Provider", and "Change of a Service Name". A "Generate" button is located at the bottom left of the list. The footer of the page is purple and contains the text "Inspector: Annemarie McGinn" on the left and "eForms" on the right.

Simply click on the document in the list you wish to generate a notification for and it will highlight on screen.

Then click the 'Generate' button at the bottom of the screen.

You will then be taken into the document where the notification can be filled out, saved and submitted.

Once a notification is generated, it will in show under 'Case' as described earlier in this guidance under the header **The 'Documents' tab** (please note that the section it appears in depends on whether it is submitted or not).

The 'News' tab

This section displays all the latest news relating to eForms.

The 'Billpay' tab

This tab is a link to allow you to pay continuation fees online.

Once clicked, it will open a new internet browser tab and take you to the Billpay website.

The 'Users' tab

This section allows you to create up to 10 additional accounts to allow access to the eForms site for your service.

This feature is only available when logging in using the main service account issued to the manager of the service.

To create an account click on 'Add User'. You then need to supply the required information.

The screenshot shows the 'eForms - SCSWIS - Internet Explorer' window. The top navigation bar is purple with the 'care inspectorate' logo and links for Home, Documents, Notifications, News, BillPay, Users (highlighted with a red box), and Inspector Photos. Below this is a yellow 'Users' header. The main form area has a table with columns 'Name' and 'Active'. To the right of the table are input fields for 'Username:' (containing '123123testuser'), 'Full Name:' (containing 'A Person'), and 'Email:' (containing 'aperson@email.com' with a clear button). Below these are checkboxes for 'Active:' (checked) and 'Scottish Government Only User:' (unchecked). At the bottom left are 'Add user' and 'Save' buttons. The footer is purple with 'Inspector: Annemarie McGinn' and 'eForms'.

Create a username.

Enter the individual's full name.

Provide a valid and working email address.

Ensure 'Active' is ticked. If it is not ticked, the account is not active and cannot be used thereafter.

The option for 'Scottish Government Only User' relates to the Scottish Government Census form available to some service types.

Ticking this box means that the account selected cannot access any other eForms except for the Census. They will not be able to submit notifications, view reports or generate other eForms documents.

If your service does not complete the Census or you do not wish to restrict the user, leave this box unticked.

Once the above is complete, clicking 'Save' will send an email to the address provided.

This email will have a link for that individual to create their password and activate their account.

Once the password is created, they will be able to begin using their account right away.

Once you have created additional accounts, these will display in the list on the left.

You can manage these accounts by clicking on the name of the individual in the list.

You will be able to deactivate, change, or delete the account.

You will also be able to change the email address, username and name associated with the account if you need to, by updating the information on screen and pressing 'Save'.

To delete, simply select the user in the list and click on the 'Delete User' button.

If you wish to change an account to a different member of staff, we recommend that you delete the account and create a new one rather than changing the details.

The 'Inspector Photos' tab

When opened, this section produces a list of all our inspection staff and provides an image of them so you know who to expect before any planned visit. All our staff carry photographic ID that they bring with them on visits and inspections.

The 'Alerts' icon

This is indicated by the following icon on the toolbar.



When you have an alert, there will be a number displayed on this icon. Clicking on it will display a drop-down list of documents with unread messages.

Clicking from the document in the list will open it and allow you to view and respond to the messages.

Messages within the documents works as before. There is a messages option on the toolbar within relevant documents.

The 'Account Settings' icon

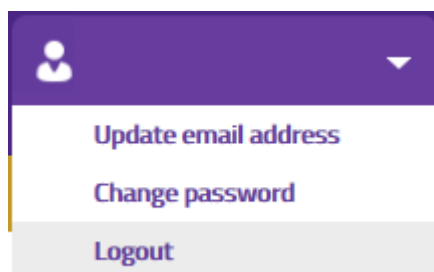
This section is in the top-right corner of the screen and is indicated by the following icon.



If you are using the main service account, the name of the registered manager will appear.

If you are logged in using an account created as described under the header **The 'Users' tab**, the name of that user will appear.

Clicking on the name offers three options.



Option to: Update email address

Updates the email address for the account being used.

Option to: Change password

Changes the password for the account being used.

Option to: Log out

Logs out of the eForms website.

Changes we have made within eForms documents

This section outlines the changes within the documents themselves.

The forms are still filled out in the same way as before.

The pages of the forms are listed down the left side of the screen. Clicking on the titles of the pages will take you to that page. If there is no list it means the document only has one page.

We have introduced a new toolbar to the eForms documents. It has larger, clearer icons. Every eForms document will have the same options at the top of the screen. Documents that are submitted will have fewer options as some are not needed on these (like a submit button for example) but the options will do the same things regardless of the eForm being used.

eForms - SCSWIS - Internet Explorer

care inspectorate

Home SCSWIS Notifications: Incident

Navigation Document Attachments Options View Help

Back Next Save Save & Exit Submit Attachments Print Export to PDF Repopulate Zoom Help

Important Information
Guidance Notes
Notification
Declaration

Existing Conditions
If the conditions of registration of your service have required you to notify the Care Commission of specific events, or changes, within your service, you must continue to notify SCSWIS of these events or changes. Failure to do so will mean you are in breach of your conditions of registration with SCSWIS.

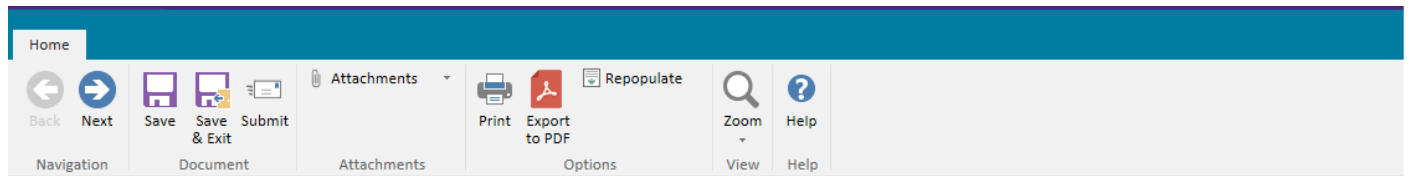
Where the subject of your notification will result in changes to the service's conditions of registration, you must complete and submit a formal application for variation of conditions of registration. This can be done using the eforms system. Please note that a three month notice period is required for such applications, which need to be approved by us before the changes can take effect.

Sensitive Information
Before you submit your notification, please can you check that you have not included any sensitive personal information which is additional or irrelevant to the questions being asked. Failure to do so may mean that you are in breach of the Data Protection Act 1998. If you require advice on what information should be submitted then you should contact your SCSWIS Inspector.

IMPORTANT NOTE:
If you are a child minding service and this is your operating address, please DO NOT use this notification. Instead you should submit a Variation application.

Inspector: Annemarie McGinn eForms

The toolbar options work as follows.



Back moves the document back one page. It will be greyed out if the document is on the first page

Next moves the document forward one page. It will grey out if you are on the last page of a form or if the page only has one page.

Save saves the form and keeps it open to carry on working.

Save & Exit saves the form and exits back to the last tab you had open when you entered the form.

Submit submits the form. The form will check that all mandatory fields are filled out before proceeding. If it is not complete, the areas that are not will be highlighted in place of the toolbar.

Attachments allows you to attach documents to the eForm you are working on.

Print sends the document to your printer.

Export to PDF converts the document to be a PDF to allow you to save it on your own computer.

Repopulate returns a document back to its original state where there is information already in the form when it is opened. This will overwrite any changes you have made to the document.

Zoom this allows you to have larger or smaller text, providing greater accessibility.

Help provides additional information about the document you are using.

If you have any issues with the site please call our contact centre on 0345 600 9527.

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