

# Clinic Portal Guidance - FAQs

## Introduction

The Clinic Portal allows clinics to submit, obtain and manage clinic information; and allows the HFEA to provide regulatory, guidance and performance information to clinics.

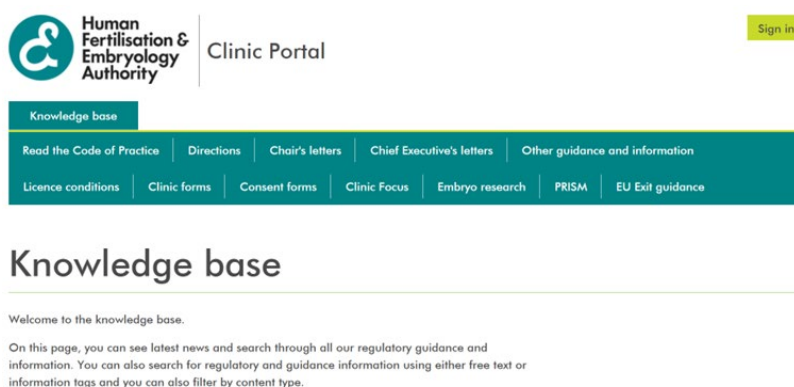
## Useful to know

- Save the Clinic Portal web address (URL) as a favourite/bookmark for ready access <https://portal.hfea.gov.uk>;
- Access to some areas of the Portal **is restricted**. Set-up users to have access to the clinic portal (password protected areas of the Portal where the clinic data appears): please review the **My Clinic/Clinic Portal user set-up** and the FAQs relevant sections;
- Please check, and if necessary amend, the information displayed in the **My Clinic/CaFC data (Choose A Fertility Clinic)**, as this information is about your clinic and is displayed on the HFEA's public CaFC website.

## Clinic Portal sections 'in a nutshell'

The Portal has six main areas. You should find the Portal easy to navigate and 'intuitive'. However, some information on each section is provided below as an overview.

### 1. Knowledge base



The screenshot shows the HFEA Clinic Portal interface. At the top left is the HFEA logo and name. To the right is the text 'Clinic Portal' and a 'Sign in' button. Below this is a navigation menu with 'Knowledge base' highlighted. The menu items are: Read the Code of Practice, Directions, Chair's letters, Chief Executive's letters, Other guidance and information, Licence conditions, Clinic forms, Consent forms, Clinic Focus, Embryo research, PRISM, and EU Exit guidance. Below the menu is the heading 'Knowledge base' and a welcome message: 'Welcome to the knowledge base. On this page, you can see latest news and search through all our regulatory guidance and information. You can also search for regulatory and guidance information using either free text or information tags and you can also filter by content type.'

**All users have access to this section.** You do not need to log in to view it. On this page, you can:

- See latest news and search through all our regulatory guidance and information;
- Search for regulatory and guidance information using either free text or information tags on this page;
- Filter the information by content type (e.g. CoP; Directions; Chair's Letters; Chief Executive's Letters; Other guidance and information; Licence conditions; Licence Conditions; Clinic forms; Consent forms; Clinic Focus etc.).

## 2. Dashboard

The dashboard is where you will find your clinic's performance data; a to-do list with upcoming tasks (critical tasks are shown with an explanation mark) and their due dates; your patient feedback results; and messages from the HFEA.

## 3. My Clinic

- The “**Clinic Portal user set-up**” tab allows extra users to be granted access to the password-protected areas of the Clinic Portal. Person responsible (PRs) or Administrators **should only set up extra users** when they wish them to have access to other information about the clinic.
- **PRs & licence holders (LHs) have access to all portal functionalities.** PRs and LHs are the only users that the HFEA set up for each clinic. Thereafter, PRs can set up other users to have access to the password-protected areas of Clinic Portal and/or can set up a user administrator to set up other users on their behalf.
- A number of different Clinic Portal user types have been devised based on the type of use users make of the portal. Users can have single or multiple roles (e.g. a single user may require a combination of 'general user', 'finance user' and 'EDI user' access). **PRs must not share their log-on details with other staff.** See FAQs below for further details on 'how to set up other users'.
- The ‘**CaFC data section**’ (Choose a Fertility Clinic data) is where you can enter details about your clinic that will be publicly be available via our Choose a Fertility Clinic website ([www.hfea.gov.uk](http://www.hfea.gov.uk)).

We encourage you to keep the information up to date, as it is viewed by patients who access our CaFC pages. Please check and update the details available on this page with information including your opening hours; clinic facilities, treatments and services you offer etc.

- Under the “**About your clinic**” tab is where you can find key contact information, the names of the PR and Licence holder (pre-populated by HFEA). On this page, you can update your preferred contact details, organisation type, data submission system and the specialist staff you employ at the clinic. **Please update regularly** (see FAQs below on ‘**how to update**’).

The organisation type refers to the legal or ownership status of the clinic and not the type of patients treated. If you are unsure which is the correct organisation type to select, please check with your Clinic's Licence Holder/Company Secretary/Management Team.

**We no longer require clinics to maintain a staff list;** and instead, we ask that you provide more general information about the number of full-time staff equivalents in certain roles in the staff complement by role section of the ‘**About your clinic**’ tab.

## 4. Licencing and authorisation

On this page you can access information about:

- Licences you currently hold and the status of other applications;
- Authorisations and annual returns (e.g. IUI);
- Committee and panel minutes of decisions;

- Historical applications, authorisations and annual returns;
- Submit new applications, authorisation requests and annual returns.

## 5. Performance & compliance

In this section, you can view: Clinical governance information about alerts and the management of incidents, complaints, whistleblowing, management of centres causing concern.

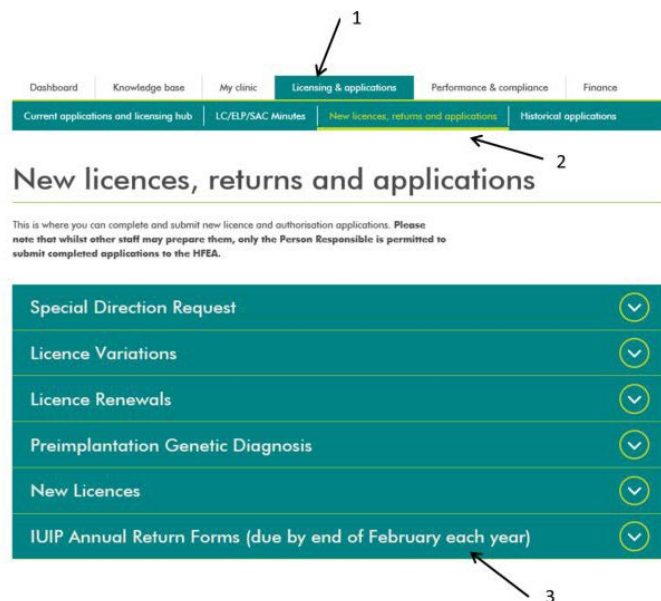
## 6. Finance

In this section, you can view your latest invoices and invoice statements. You can also provide purchase number information and update your billing address and Finance contact details.

# Frequently asked questions (FAQs)

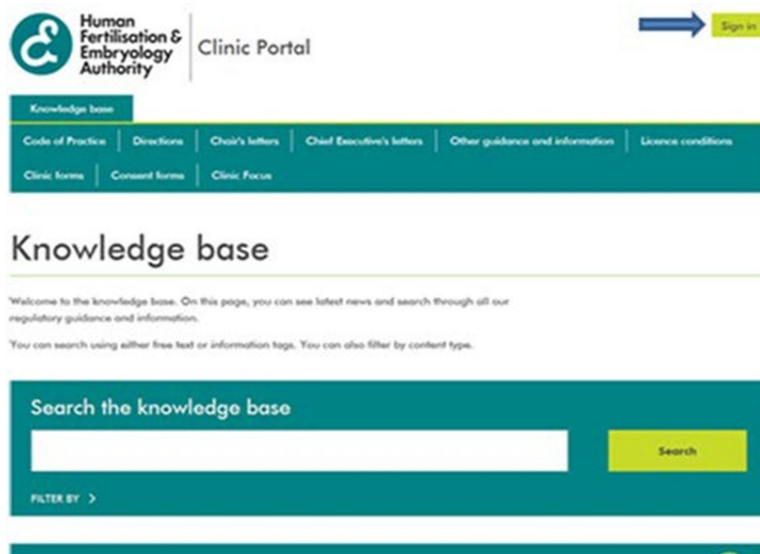
## 1. IUI Returns - *Where to submit my IUI Return?*

Please select **Licensing & applications > New licences, returns and applications >** the application is then at the bottom of the page. *Gentle reminder that IUI return applications are due by end of February each year for the data of the previous year (January to December).*

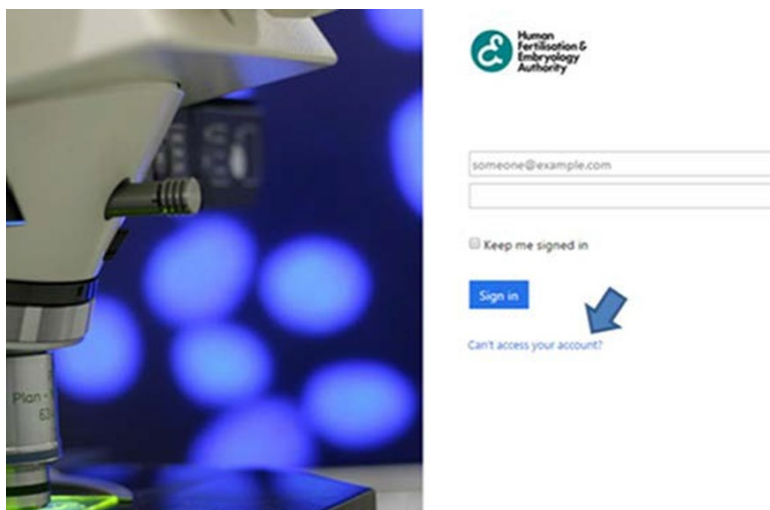


## 2. Forgotten your password?

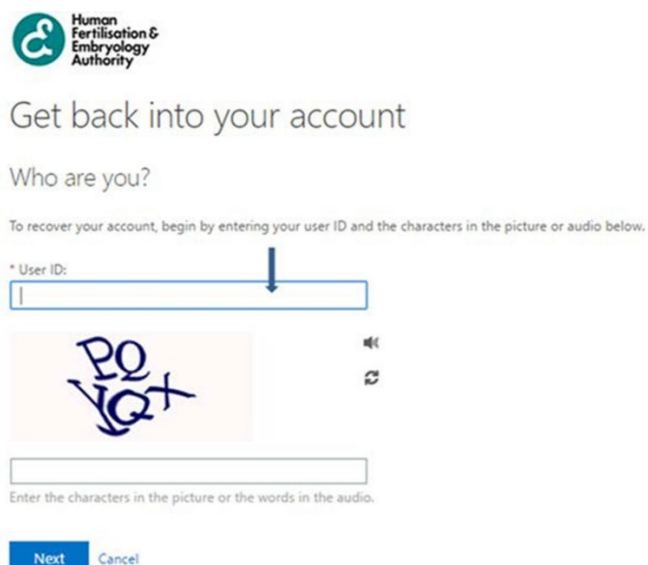
If you know your username but have forgotten your password, please follow the quick and easy steps below and you can reset your own password:



Please click on 'sign in'. You will then arrive at the following page:



Please click 'Can't access your account?' you will then arrive at the following page:



Please enter your user ID which is generally 'firstname.surname'.0xxx (your centre number)

### 3. You have not got a login name or/and a User ID?

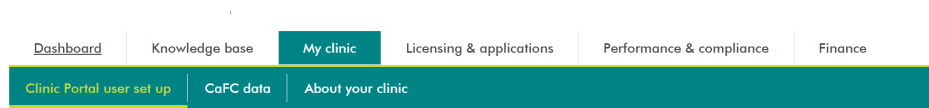
If you are a PR, please contact us at : [Portalsupport@hfea.gov.uk](mailto:Portalsupport@hfea.gov.uk).

If you are a clinic user, the HFEA is unable to create an account for you. The PR has the permissions to create additional log in accounts for staff of the clinic.

The PR is able to give different types of access to a new user depending on what information the new user needs access to by selecting the different options.

Please ask that your PR or User Admin (if the PR has assigned one) to create a user account for you (see steps below):

Click on 'My clinic' > 'Clinic portal user set up' > 'Add user':



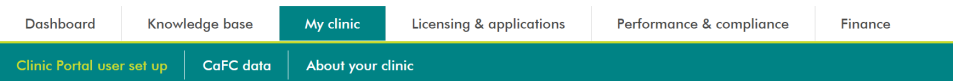
## Clinic Portal user set up

On this page you can give access to the password-protected parts of the Clinic Portal. All users have access to the knowledge base, users only need to be set up here when you want them to have access to other information about your clinic.

We have set up the person responsible (PR) at each licensed clinic. We have devised a number of different Clinic Portal users types based on the type of use they make of the portal. Users can have multiple roles (eg, as a user of user may combine 'general user', finance user and EDI user access).

Person responsible (PR) roles have access to all portal functionality, this is the only user role that we have set up for each clinic. The PR can set up other users to have access to the password-protected areas of Clinic Portal and can set up a user administrator to set up other users on their behalf.

[Add new user](#)



## Create user

First name

Last name

User's email address

Re-enter user's email address

Role type

- User admin [?](#)  General User [?](#)  Finance [?](#)  
 Register data [?](#)

[Cancel](#)

[Save](#)

#### 4. How can I update the clinic contact details?

Clinics can update their preferred contact details, organisation type, data submission system.

Click on **'My clinic' > 'About your clinic > 'Clinic Contact Details':**

The screenshot shows the 'About your clinic' page with the 'Clinic Contact Details' tab selected. The form contains the following fields:

- Person responsible name: Sheryl Homa
- Person responsible telephone number: 07813 077 797
- Person responsible email address: s.homa@androlgyrsolutions.co.uk
- Licence holder name: Sara Matthews
- Licence holder telephone number: 020 7390 8468
- Licence holder email address: saramatthews.nurse@gmail.com

Buttons: '+ Add an HFEA alert contact' and 'Update'.

More general information about the number of full-time staff equivalents in certain roles in the staff complement by role section can be found under the **'About your clinic'** tab and be updated by the PR.

Click on **'My clinic' > 'About your clinic > 'Staff Complement by Role':**

The screenshot shows the 'About your clinic' page with the 'Staff Complement by Role' tab selected. The form contains the following fields:

GMC registered doctor	0.1
HPC Registered scientist	1
Scientist working towards HPC registration	0
Non HPC	3.0
NMC Registered nurse	0
Non-NMC Registered health care professional	0
BICA accredited counsellor	0.1
Counsellor working towards BICA Accreditation	0
Non BICA accredited Counsellor	0
Research Staff	0
Support staff	0.3

Buttons: 'Save' and 'Cancel'.

## 5. I have a satellite but it does not appear on CaFC?

Please contact your inspector or the portal support team at: [Portalsupport@hfea.gov.uk](mailto:Portalsupport@hfea.gov.uk).

## 6. Why am I not able to submit the SAQ?

**Only the PR has the correct permissions to submit the SAQ.**

**If you are the PR, and the 'submit' button is not active then the SAQ may be incomplete.** Only a completed SAQ can be submitted to the HFEA via the portal. The SAQ can 'skip ahead' during completion which can leave unseen pages of the form. If a section is displaying as 'incomplete' please open the section and click 'previous' to reveal unanswered questions. Once each section is complete you should be able to submit.

### 2 Staff

Progress: 50%

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#### Guidance

Staff Section

Options:

1 = Fully compliant 2 = Almost compliant  
3 = Partially compliant 4 = Not compliant

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\* 2. Does your centre have an embryology laboratory? If YES answer questions in section 2, if NO go to question 3

Yes  
 No

\* 2.1: Is the individual responsible for the clinical embryology laboratory registered with the HPC? [see T14, 2.19(c)]

Yes  
 No

2.2: Are all eligible staff working in the clinical embryology laboratory registered with the HPC?

Yes  
 No

[Previous](#) [Print](#) [Save and Close](#) [Save and Continue](#)

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If you are still experiencing technical difficulties, not covered by those FAQs, please contact us at: [Portalsupport@hfea.gov.uk](mailto:Portalsupport@hfea.gov.uk).

If you have suggestions that you would like to share with us (i.e. functionality, further enhancements) please contact us at: [Portalsupport@hfea.gov.uk](mailto:Portalsupport@hfea.gov.uk).

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