

Monitor Portal Upload Instructions

Following the instructions below will ensure that all files are submitted to Monitor correctly and submissions are not classed as late due to errors in the Monitor Portal upload process.

You are advised to check your Monitor Portal log in works as planned several days prior to the submission deadline. Due to the high volume of queries Monitor receives around submission day, it may prove difficult to contact a member of Monitor staff who can help you with any log in problems.

1. Open the Internet Browser (Internet Explorer 7 and higher is recommended as the system is not supported on Firefox and Chrome as well as earlier versions of Internet Explorer)
2. Browse to [https://portal.monitor-nhsft.gov.uk/trusts/\[MARSID\]](https://portal.monitor-nhsft.gov.uk/trusts/[MARSID]) with MARS being the ID as communicated to you by monitor.
3. Enter your username and password into the dialog box which appears. These will have been emailed to the person whose name the account is in. All usernames begin with IRNHSFT\ and there is a full stop in between the first and last name. You will then see the screen below

Monitor
Independent Regulator
of NHS Foundation Trusts

Foundation Trust Home

Robin Thakur's password will expire in 4 days [Change password](#)

Foundation Trust Resources

- [How to use this site](#)
- [Monitor web site](#)
- [Contact us \(email\)](#)
- [Annual reporting manual](#)
- [Amendments to the Guide July 2010](#)
- [Compliance framework](#)
- [Prudential borrowing code](#)
- [FT Bulletin](#)

Trust Submissions

- [Inbox \(from Monitor\)](#)
- [Outbox \(to send to Monitor\)](#)
- [Archive](#)

Trust type: Specialist

Key contacts

Chair: [Redacted] [✉](#)
Chief Executive: [Redacted] [✉](#)
Finance Director: [Redacted] [✉](#)
Nursing Director: [Redacted] [✉](#)

Please let us know if any of the above information is incorrect or incomplete

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4. Click on Outbox (to send to Monitor) and you will see something similar to the screen below.
Note: all files to be sent to Monitor must be sent through the FT Submissions: Outbox.

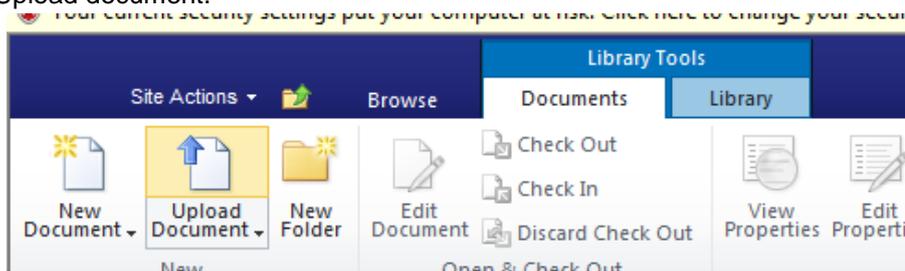
Monitor
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FT Submissions · Outbox (to send to Monitor) · All Documents

Type	Name	Activity	Modified	Modified By	Notes
[Redacted]	[Redacted] pack MASTER @rev		26/03/2012 05:17 PM	[Redacted]	
[Redacted]	M07 Financial Report for Monitor	Other	02/12/2011 12:52 PM	[Redacted]	DRAFT Finance Report for M07 as per normal routine for
[Redacted]	[Redacted] 213 Initial (capex) plan return template v1	Return for DH	13/01/2012 05:33 PM	[Redacted]	THIS REPORT HAS NOT YET BEEN RATIFIED BY THE TRUST BOARD WHICH SITS NEXT ON 26 JANUARY 2012. THIS SUBMISSION HAS BEEN PROVIDED WITH THE PERMISSION OF STEPHEN COLE, NON-EXECUTIVE DIRECTOR, WITH THIS CAVEAT ATTACHED.
[Redacted]	[Redacted] 011-12 FTC for 9 months data revised after focer and further change for revaluation Feb 03 Final	FTC 9 Months	10/02/2012 04:17 PM	[Redacted]	

[Add new item](#)

- Click on the documents tab at the top of the screen, (see below tab in white) then click on Upload document.



- Click on browse and find the file which you wish to upload then click on OK.
- Once the file has uploaded, you need to tell the system what kind of file it is.
- Monitors systems will check for two types of content, it is very important to select the correct content type.

Type of File	Content Type
Excel return template which you have filled in for analysis by Monitor	Trust Return
Supporting document (such as quarterly commentary, ISA 260 or signed accounts)	Trust Submission

In year, APR and FTC reporting files are therefore a Trust Return.

- Choose the Activity for what you are returning. If you are unsure what activity to choose, refer to Monitor.

The screenshot shows a window titled 'FT Submissions'. The 'Content Type' field is filled with a greyed-out value. The 'Name' field is also greyed out. The 'Title' field contains 'External Assurance Report on 2010 11 Quality accounts'. The 'Activity' dropdown menu is open, showing a list of activities. The selected activity is 'FTC Statement M12-Unaudited'. Other activities in the list include 'Annual accounts', 'Quarterly monitoring', 'Monthly monitoring', 'Annual accounts', 'APR', 'Capex reforecasting', 'Escalation project', 'Visits and meetings', 'Other', 'FTC Restatement', 'FTC Statement', 'Return for DH', 'FTC 9 Months', 'Reforecast Plan', 'FTC Restatement Resubmission', 'FTC 9 Months Resubmission', 'AoB SHA analysis - 10-11', 'AoB SHA analysis - M9', 'AoB SHA analysis - M12', 'Annual Plan Review', 'FTC Statement M12-Resubmission', and 'FTC Statement M12-Audited'. The 'Version' is 0.1, and it was created on 01/08/2011 12:20 PM by Ian. The last modified date is 01/08/2011 12:21 PM by Ian. There is a 'Cancel' button at the bottom right.

10. **Important Note: *The 2 fields above MUST be filled out correctly otherwise Monitor's automated systems cannot recognise the files. Monitor will only collect files from the outbox, once collect Monitor will remove the file from the outbox. There will be a delay in analysing your data and your return might be marked as late by Monitor if it is incorrectly labelled or placed in an incorrect folder.***
11. Monitor's systems cannot retrieve data from a file that has not been checked in. When a file is checked out it has the following icon:



As a final check please ensure that the last user of a file has checked the file back in by 5pm on the last day of the month for Monitor to collect.