

Provider Financial Monitoring System (PFMS) SharePoint Portals Guide

Version 5

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What are PFMS portals?

PFMS (Provider Financial Monitoring System) is a system used by NHS England to collect certain submissions from organisations. We have set up PFMS SharePoint 'portals' for each relevant organisation via which they can download documents we send to them and submit documents to us.

Quick Tips:

- PFMS portal users will now log in using either their NHSmail credentials (if they have an @nhs.net email address) or, otherwise, using credentials for an HSCIC account given to them by NHS England's IT support team.
- If you have an issue with your NHSmail account or password, please contact your own organisation's IT support team for assistance.
- If you think there is an IT issue (e.g. with access, HSCIC account passwords, error messages that do not direct you to another NHS England team), please contact the NHS England IT support team at england.itservicedesk@nhs.net or on 0300 303 4868.
- If you have a query related to the contents of a submission (e.g. technical accounting advice, submission deadlines, etc), please contact the NHS England team that requested the submission (usually shown in the document's Cover sheet).

Log in to a PFMS portal

Access / Login details for new users

Please contact the NHS England IT Support Team at england.itservicedesk@nhs.net and request access to the PFMS SharePoint portal for your organisation.

When contacting IT Support, the email must include the following information:

- Your full name and email address
- Your organisation's name (and MARSID, if you know it)
- Evidence that your finance director has approved your access request (such as forwarding an email from them approving you to have access to the PFMS portal)

Existing users requiring password resets

For NHSmail password resets, please contact your own organisation's IT support team.

For HSCIC account password resets, please contact the NHS England IT Support Team at england.itservicedesk@nhs.net or on 0300 303 4868, provide your HSCIC account username and request a PFMS portal password reset.

How to log in

Once you have your login details and PFMS portal URL from NHS England's IT Support Team, navigate to the URL for your PFMS portal using your internet browser.

Please note:

- The URL will be as follows, **but you will need to replace 'MARSID' in this link with your organisation's actual MARSID:**

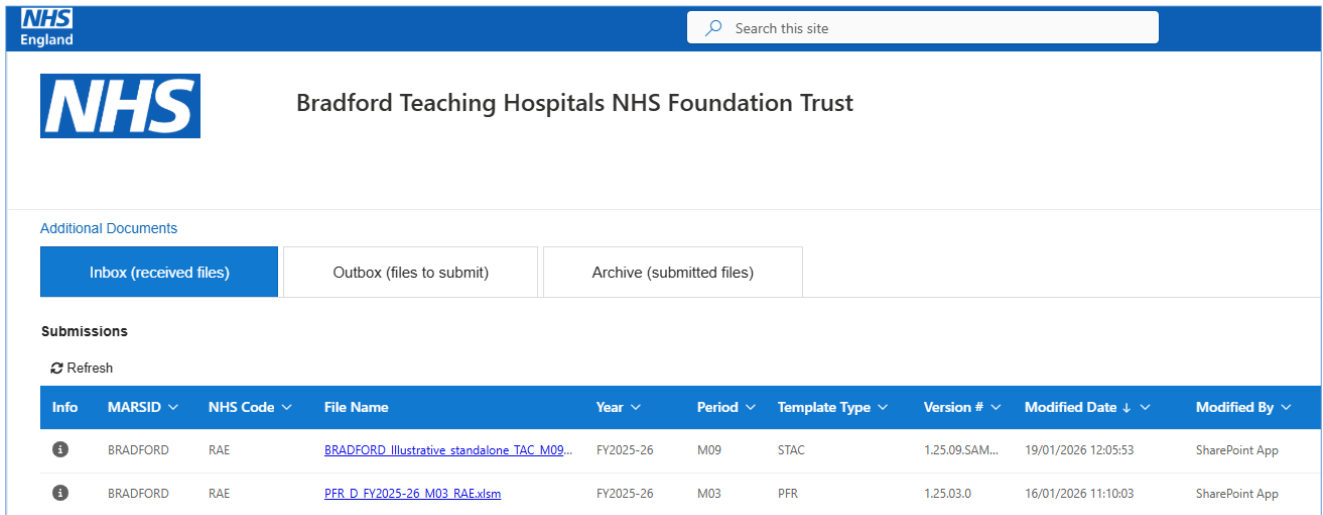
https://hscic365.sharepoint.com/sites/pfms_MARSID

- The NHS England IT Support team should be able to provide your organisation's MARSID if you do not know it and cannot find it out from a colleague or a PFMS data collection form.

Once you have navigated to the PFMS portal URL, when prompted, enter your Username and your Password.

The first time you log in, you may also be prompted to set up multifactor authorisation (MFA) – please contact your organisation’s IT support team for assistance with this if required.

Once successfully logged in, a screen like this will be displayed.



NHS England

Search this site

NHS Bradford Teaching Hospitals NHS Foundation Trust

Additional Documents

Inbox (received files) | Outbox (files to submit) | Archive (submitted files)

Submissions

Refresh

Info	MARSID	NHS Code	File Name	Year	Period	Template Type	Version #	Modified Date	Modified By
	BRADFORD	RAE	BRADFORD Illustrative standalone TAC M09...	FY2025-26	M09	STAC	1.25.09.SAM...	19/01/2026 12:05:53	SharePoint App
	BRADFORD	RAE	PFR D FY2025-26 M03_RAE.xlsx	FY2025-26	M03	PFR	1.25.03.0	16/01/2026 11:10:03	SharePoint App

Download a document

Once successfully logged in, the PFMS portal **Inbox** tab is displayed.

This shows documents sent to organisations, with the most recent files at the top of the list.

NHS England Search this site

NHS Bradford Teaching Hospitals NHS Foundation Trust

Additional Documents

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Submissions

Refresh

Info	MARSID	NHS Code	File Name	Year	Period	Template Type	Version #	Modified Date	Modified By
	BRADFORD	RAE	BRADFORD Illustrative standalone TAC M09...	FY2025-26	M09	STAC	1.25.09.SAM...	19/01/2026 12:05:53	SharePoint App
	BRADFORD	RAE	PFR_D FY2025-26 M03 RAE.xlsm	FY2025-26	M03	PFR	1.25.03.0	16/01/2026 11:10:03	SharePoint App

Click on a document's file name to download it.

Submissions

Refresh

Info	MARSID	NHS Code	File Name	Year	Period	Template Type	Version #	Modified Date	Modified By
	BRADFORD	RAE	BRADFORD Illustrative standalone TAC M09...	FY2025-26	M09	STAC	1.25.09.SAM...	19/01/2026 12:05:53	SharePoint App
	BRADFORD	RAE	PFR_D FY2025-26 M03 RAE.xlsm	FY2025-26	M03	PFR	1.25.03.0	16/01/2026 11:10:03	SharePoint App

The download dialogue box will appear in the top right corner. Click **Open file** and save to your local system.

Downloads

BRADFORD_Illustrative_standalone_TAC_M09_2025-26_not_for_submission.xlsm

Open file

If the document from NHS England is a form to complete, you will now be able to open it and fill it in so you can submit it back to us by the submission deadline.

Please note: Where applicable, the submission deadline is usually shown on the document's Cover sheet, along with other useful information such as which NHS England teams to contact if you have queries.

Submit a document

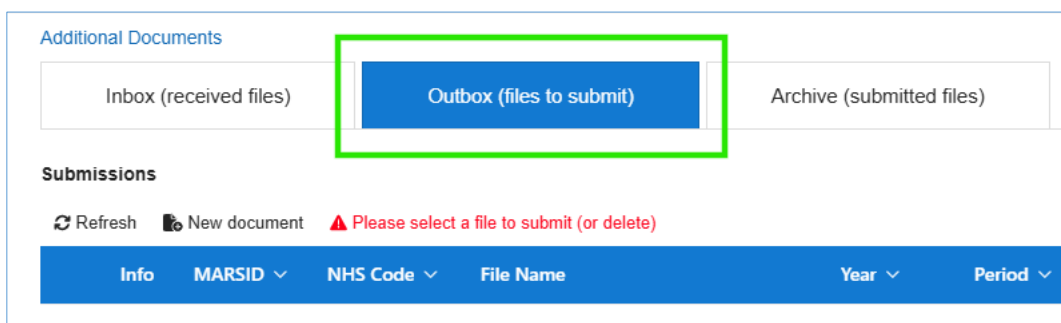
Submitting a document to NHS England involves two main steps: **uploading** a document and **submitting** a document.

Please note: There are also two types of submission: **template returns** and **supporting documents**. The steps for uploading are the same for both types but are different for submission.

Template returns are Excel files with a file extension of .xlsm that have been distributed by NHS England to organisations' PFMS portal Inboxes and that NHS England will ask organisations (via email) to submit back to us via their PFMS portals. They will always have a three-letter acronym in the filename when distributed by NHS England, e.g. FPR, PFR, PWR, etc. These files should be automatically recognised and labelled by your PFMS portal during the submission process.

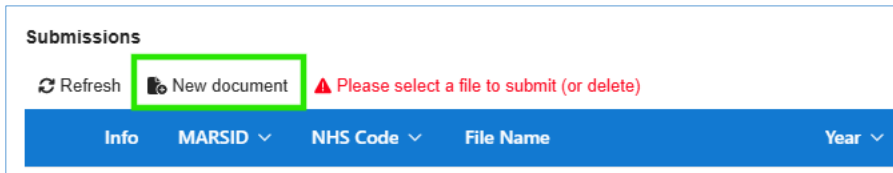
Supporting documents are files of any type that an organisation chooses to submit, or is asked to submit by NHS England, in support of a template return. An example of this would be a financial commentary to accompany an in-year financial return (PFR) template type. These files will not be automatically recognised and labelled by your PFMS portal, and you will need to follow the PFMS portal steps / prompts to manually label the file with certain key information so NHS England can associate it with the submission it supports.

To submit a document, always start by clicking on the OUTBOX tab.



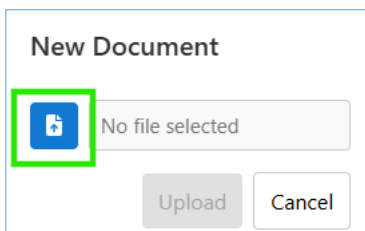
Uploading a document

Click **New document** and wait for a new window to open.

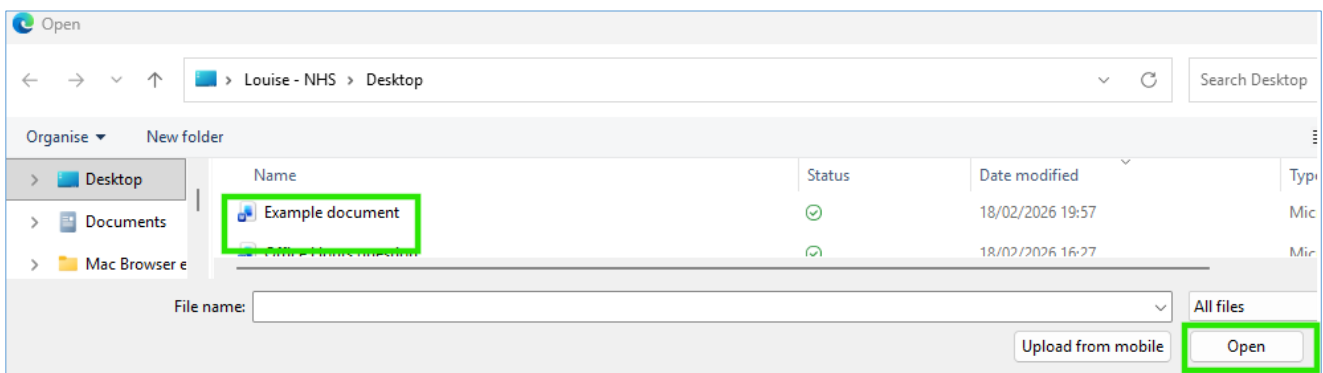


Please note: You can only upload one document at a time using this button and you must always only use this button for this step as the upload process can malfunction if any other method is used.

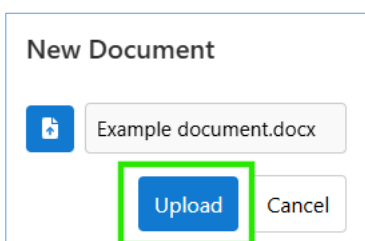
Click the **Browse** icon to find the document to submit on your local system.



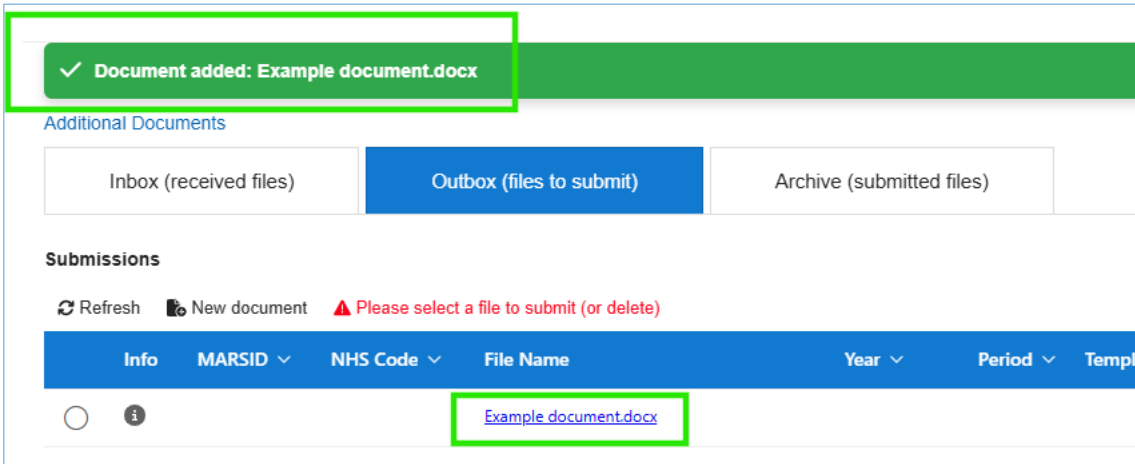
Once you have selected the document, click **Open**.



Click **Upload**.



User notifications will tell you when the Upload action is in progress and when it has completed. The document will then be displayed in the **OUTBOX**, waiting to be submitted.



Please note: **Template returns** should be recognised by PFMS portals when uploaded to an Outbox, i.e. all the columns of information about the file in the Outbox should auto-populate on upload – if this does not happen, make sure you are following the steps above exactly. If you are sure you are doing only the steps set out above, contact the NHS England team that requested the submission (usually shown on the submission’s Cover sheet) for advice.

Please note: If the text in the ‘**Status**’ column says anything other than ‘**Ready to submit**’, hover your cursor over the status to read a more detailed message on the potential issue identified with the file you have uploaded. If you require further assistance contact, the NHS England team that requested the submission (usually shown on the submission’s Cover sheet) for advice.

Modified by	Status
Rachel Marsh	Corrupt file uploaded
Rachel Marsh	Ready to submit
Rachel Marsh	Ready to submit
Rachel Marsh	Ready to submit
Rachel Marsh	Error - macros disabled

NHS England and NHS Improvement template files need macros to work properly, but macros are disabled on this file. Please either re-download the original template sent to you with macros enabled and fill it in again, or contact the team requesting the submission for advice.

Modified by	Status
Rachel Marsh	Corrupt file uploaded
<div data-bbox="813 1467 1276 1579" style="border: 1px solid gray; padding: 5px; background-color: #f0f0f0;"> <p>The file uploaded is corrupted. Please delete this (copy) file from your Outbox; then please fix the (original) file on your local network, re-upload it and try to submit the fixed file.</p> </div>	
Rachel Marsh	Error - macros disabled
Rachel Marsh	Ready to submit

Submitting a document

As above, there are two types of submission: **template returns** and **supporting documents**.

The step to select them for submission is the same for both types, as is the method by which you can check the files have been submitted successfully; but the steps to submit them are different.

Select a file for submission

If it shows as Ready to Submit in the Status column, select the document to be submitted by clicking in the Tick box for the document.

Please note: You can only submit one document at a time.

Info	MARSID	NHS Code	File Name	Year	Period	Template Type	Version #	Modified Date	Modified By	Status
<input type="checkbox"/>			Example document.docx					18/02/2026 20:03:34	BREAKWELL, Louise (NHS ...)	Ready to submit

Once you have selected a document, click on '**Submit document**'.

Submissions

[Refresh](#) [New document](#) [Submit document](#) [Delete document\(s\)](#)

Info	MARSID	NHS Code	File Name
<input checked="" type="checkbox"/>			Example document.docx

Confirm your choice to submit this document by clicking **Confirm** when prompted.

Submit document

Are you sure you want to submit the selected document?

Template returns

There are no additional steps to submit a template return file.

If NHS England is not expecting a submission of the type you are trying to make, you will see a red banner message at the top of the screen informing you of this as the submission process is executing.

You will then see '**Submission blocked**' in the '**Status**' column.

Modified Date ↓ ▾	Modified By ▾	Status ▾
03/02/2026 17:28:31	SharePoint App	Submission blocked - submission type

We were not expecting submissions of this type at the time of the last submission attempt for this file – please try again at a later time; or please check the submission deadline in any related guidance/communications, or with the team that requested this submission.

Please note: If you see this status, or any status other than '**Ready to Submit**', you should hover your cursor over it to read a more detailed message on the potential issue identified with the file you have uploaded.

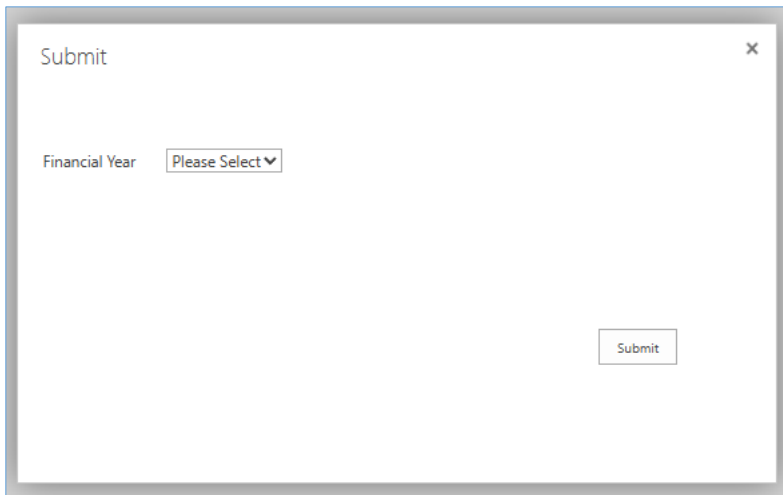
If you require more assistance, contact the NHS England team that requested the submission (usually shown in the submission's Cover sheet) for advice.

If submission has completed as expected, skip to the 'Check a submission' section below.

Supporting documents

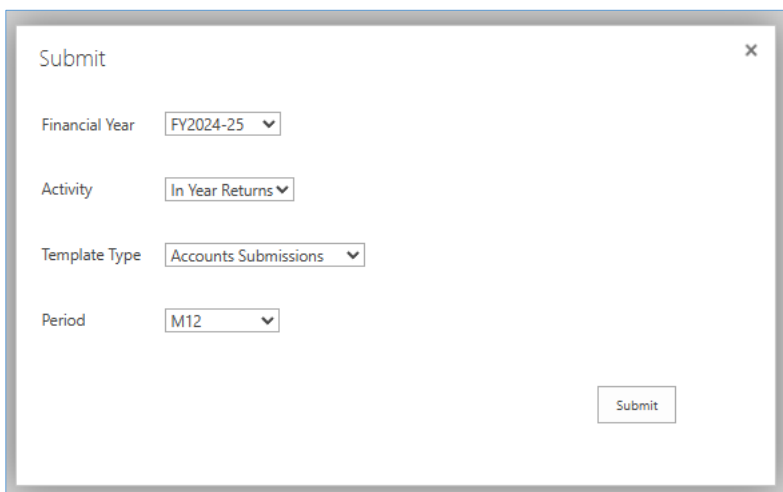
As a supporting document will not originally have been sent out by NHS England, it cannot be automatically recognised and labelled by a PFMS portal. As such, there are some additional steps to submit a supporting document file.

Once you have selected the supporting document file you want to submit, pressed Submit and then OK, you will see the pop-up box below:



The screenshot shows a window titled "Submit" with a close button (X) in the top right corner. Inside the window, there is a label "Financial Year" followed by a dropdown menu that currently displays "Please Select". At the bottom right of the window, there is a "Submit" button.

Please then choose the relevant options from the drop-downs available for each of the required fields – in the example below, you would be marking the file as supporting your 2024/25 M12 annual accounts submission; but if you are unsure how to label your supporting document file, please contact the NHS England team that requested the submission it supports (usually shown in the submission's Cover sheet) for advice.



The screenshot shows the same "Submit" window, but now all four dropdown menus are filled out. The "Financial Year" dropdown is set to "FY2024-25", the "Activity" dropdown is set to "In Year Returns", the "Template Type" dropdown is set to "Accounts Submissions", and the "Period" dropdown is set to "M12". The "Submit" button remains at the bottom right.

Once you have completed all the fields, press the **Submit** button to submit the file.

Check a submission

When a document has been successfully submitted, it will move from the **OUTBOX** to the **ARCHIVE**. Submission of the document is then complete.

To double check your document has been submitted successfully, click on the **ARCHIVE** tab and check the document is visible in the list of files displayed.

If you can see the document listed there, it has been submitted. By default, the most recently submitted documents show at the top of the list.

Additional Documents

Inbox (received files) Outbox (files to submit) **Archive (submitted files)**

Submissions

Filters

Financial Year

- FY2030-31
- FY2026-27
- FY2025-26
- FY2024-25
- FY2023-24

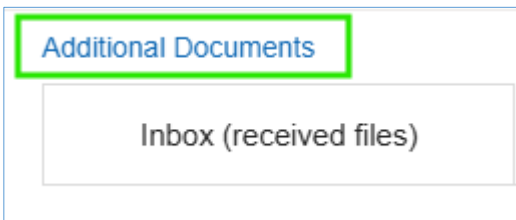
Refresh

Info	MARSID	NHS Code	File Name	Year	Period	Template Type	Version #	Submission #	Submission Date	Submission By
ALDERHEY	RBS		SRO_D_FY2025-26_M08_RBS^10^1.xlsx	FY2025-26	M08	SRO	1.25.08.0	10	13/02/2026 10:28:02	MARSH, Rachel (NHS ENG...

Additional documents

This area contains supplementary documentation provided by NHS England, e.g. user guides and other guidance documents.

To view these documents, click the **Additional Documents** link above the Inbox.



The **Additional Documents** page will be displayed.



Additional Documents

Home

Documents

Recycle bin

Edit

+ New Page details Preview Analytics

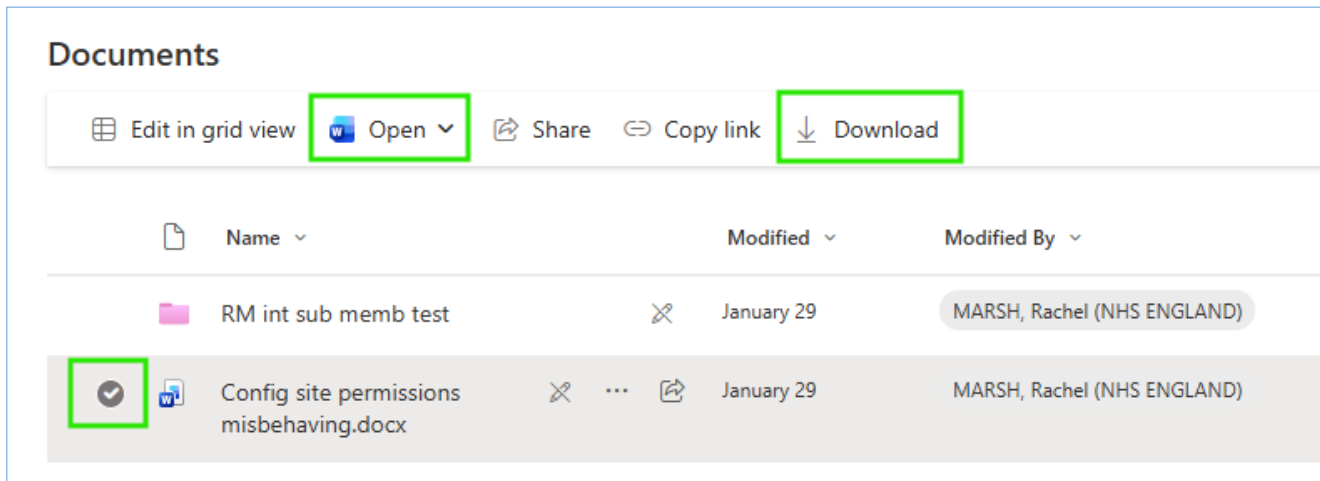
Documents

+ New Upload Edit in grid view Export to Excel Sync

Name	Modified	Modified By
Financial Accounting	1/26/2026 12:54 PM	SHIRTLIFF, Eleanor (N
Financial Planning	9/9/2024 12:09 PM	MORRIS, Sarah (NHS
PFR Monthly Reporting	9/9/2024 11:53 AM	MORRIS, Sarah (NHS
Training Resources	5/28/2024 4:03 PM	ROBINSON, Luke (NH

Click on the document(s) you wish to view.

Use the relevant application (as opposed to viewing in your web browser); for example, to open a document with Microsoft Excel or Word, or click Download.



Troubleshooting

Cannot access URL

If you have issues accessing your portal URL, there are several options you can try:

- Ensure you have an 's' after 'http:' in the URL (i.e. 'https').
- Use a different browser, eg Edge, Chrome, or Firefox.
(**NB** for any browser used, it should be the most up-to-date version of that browser.)
- Add the URL to the list of 'trusted sites' in your internet browser's security settings.
- Check whether there is a firewall setting that needs changing to allow you to access the URL – you will need to ask your in-house IT support team about this.

Unable to upload / submit documents

When trying to upload / submit documents on your portal:

- If you get a temporary error message across the top of the screen and then the 'Status' of your file is anything other than 'Ready to Submit', hover your mouse over the text for your file in the 'Status' column and follow the advice in the hover-over user notification message.

NB the email address for relevant NHS England team that requested the submission you are trying to submit should be shown in the Cover sheet of the submission if it is one of our template returns (.xlsm Excel file, three-letter acronym in filename when file was distributed to your organisation by NHS England, e.g. FPR, PFR, etc).

- If you are having what appears to be an IT issue, email england.itservicedesk@nhs.net with the subject line '**PFMS SharePoint portal submission issue**' requesting assistance.



For any other assistance, please contact either the NHS England team that requested the submission you are trying to make, or alternatively contact england.itservicedesk@nhs.net