

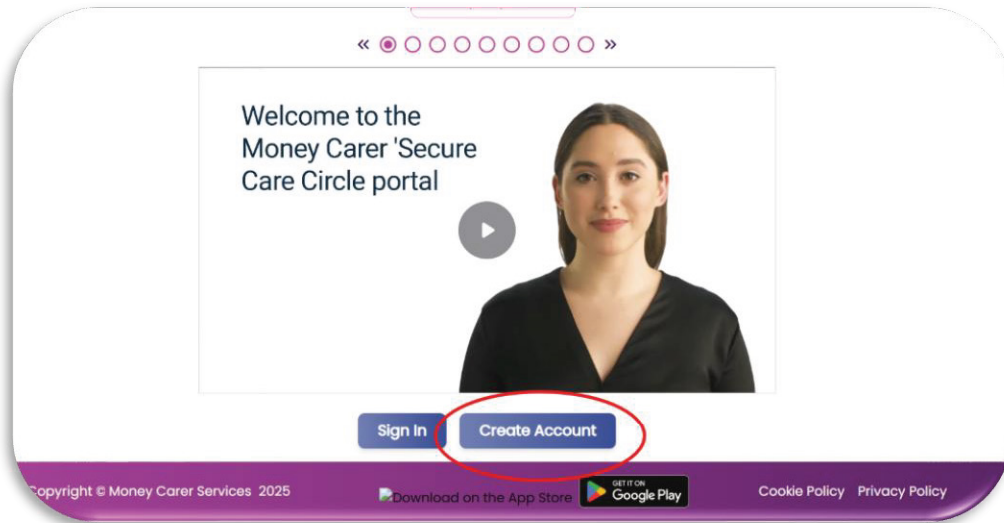
# Guide to using the portal



**Welcome to the  
Portal**

Payment and support  
request portal

# Portal Log in



First time users will need to follow the simple set up process to create a portal account. Verification will be sent to the email address used for sign up.

### Create a Money Carer Account

Current Account Switch Guarantee

Email address  
natalie.harris@moneycarer.org.uk

Password (at least 6 characters please)  
\*\*\*\*\*

Confirm Your Password  
\*\*\*\*\*

[Create Account](#) [Cancel](#)

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## User Account Details

Please give us a little more information about yourself, your company and your role.

Your Full Name \*  
Natalie Harris

Your Mobile Phone Number \*  
07940 166185

Company Name  
Money Carer

Your Role (e.g. Carer, Parent, Neighbour etc.)  
Head of Operations

[Register](#)



## Request Access to Client

Request access to a Money Carer client

Please tell us which category best describe you in relation to a known Money Carer Client



## Supplier to one of our Clients

You are requesting payment for services provided to a client



## Secure Message

You can contact us with a secure message to ask a question or send documents

Once sign up is complete your portal home page will look like this.

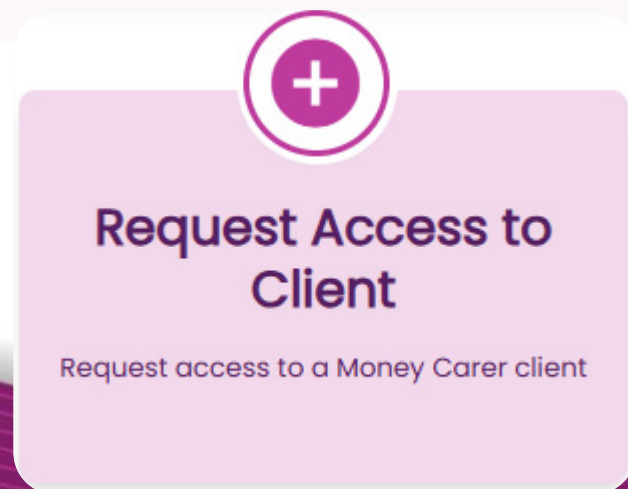
From here you can request access to clients (or your own records if you are the client).

Send invoices, timesheets or other bills if you supply services to a client.

Send messages via our fully encrypted secure messaging function.

# Client Access

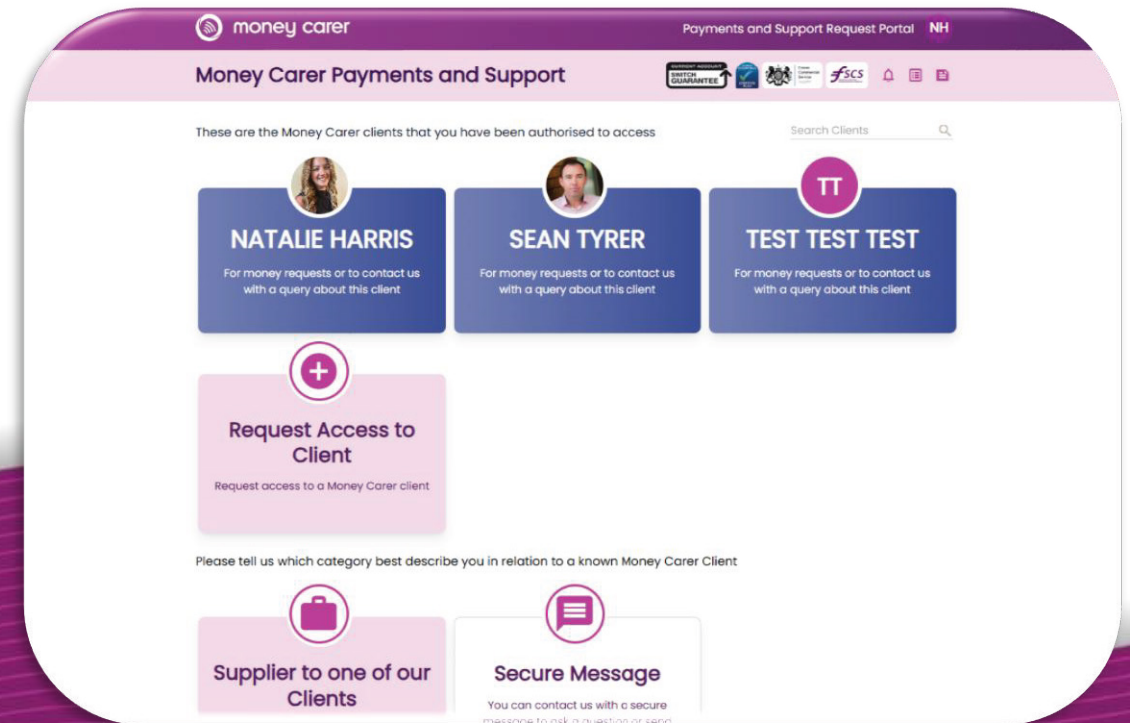
- If you're a client (or need access to client records) you can request client access.
- How much access you have to the clients details depends on your role • Full access will allow you to see client documents, accounts and statements



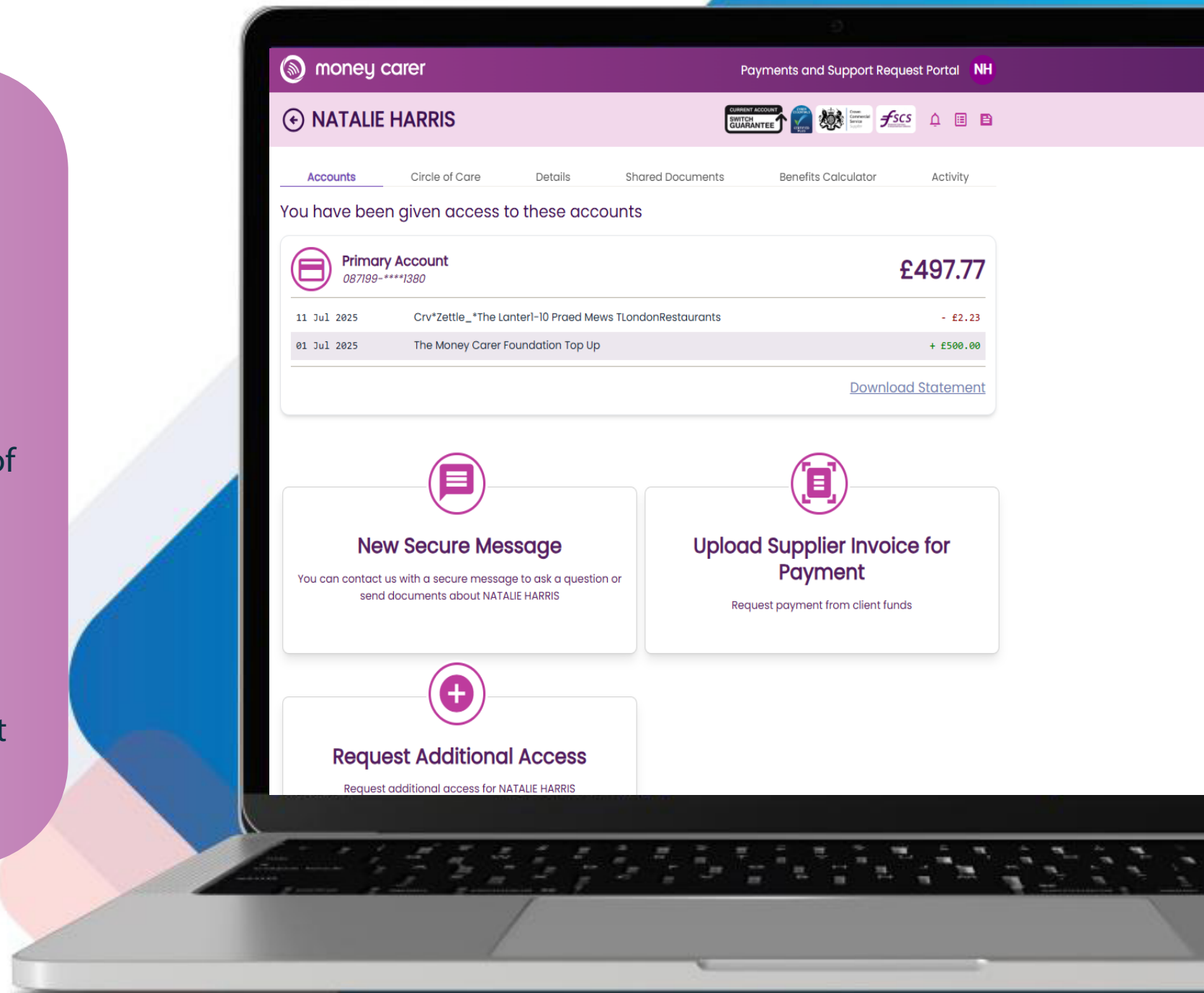


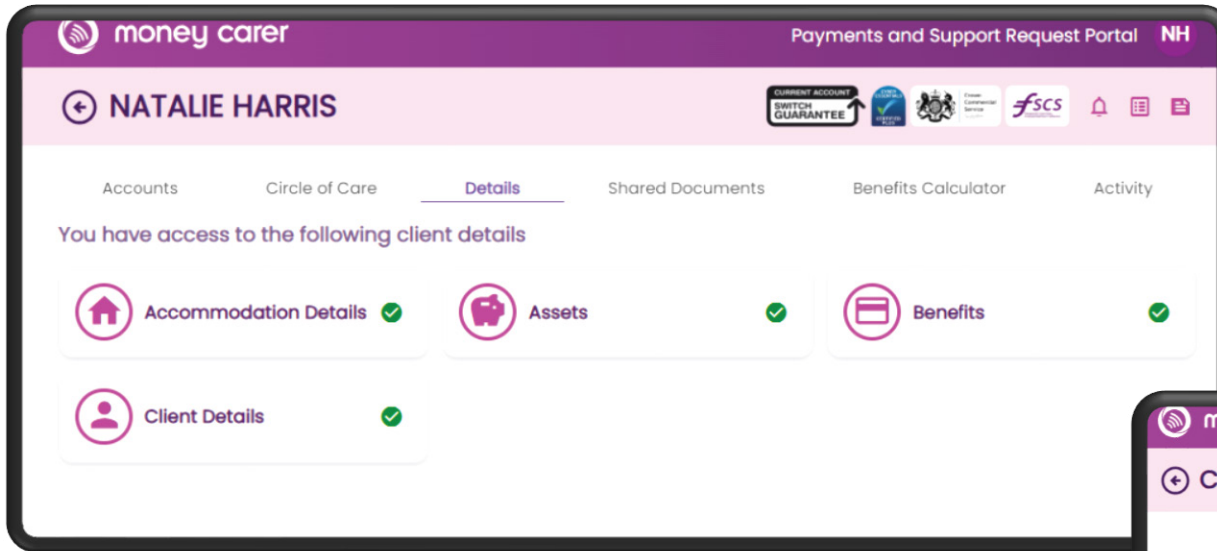
When your request to access a client is approved your available client records will be shown at the top of your portal home page.

Simply click on the client you wish to view to see further information.



- Once you have clicked the client you wish to view, depending on your permission level you will likely be able to see their account.
- Download a statement
- View others in the clients circle of care
- View shared documents
- Complete forms
- View activity related to the client





money carer Payments and Support Request Portal NH

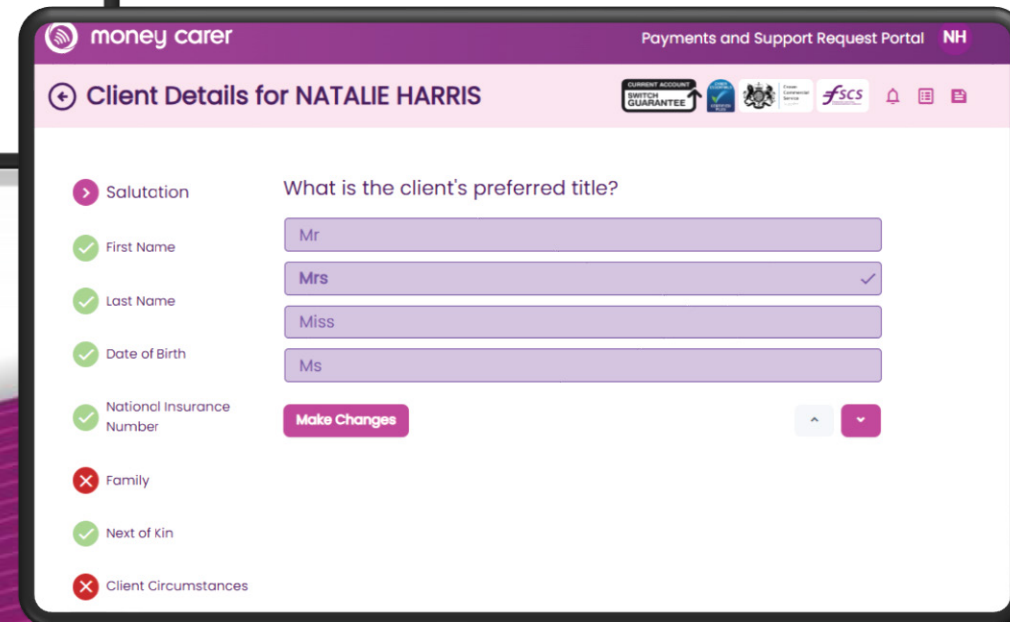
NATALIE HARRIS

Accounts Circle of Care **Details** Shared Documents Benefits Calculator Activity

You have access to the following client details

- Accommodation Details ✓
- Assets ✓
- Benefits ✓
- Client Details ✓

You can easily navigate from the sections of a client record via the titles at the top of the page. Each title will bring up more options for you.



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Client Details for NATALIE HARRIS

What is the client's preferred title?

Mr Mrs ✓ Miss Ms

Make Changes

Salutation

First Name

Last Name

Date of Birth

National Insurance Number

Family

Next of Kin

Client Circumstances



# Payment request



## Supplier to one of our Clients

You are requesting payment for services provided to a client



## Upload Supplier Invoice for Payment

Request payment from client funds



## Coming Soon Reimbursement

Send us a receipt for reimbursement from Client funds

To send us a client invoice simply click on the button above

You can then upload the invoice to be paid using the above button

Very soon you'll also be able to send us receipts for reimbursement requests



# Invoice payment



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Upload Invoice File

ⓘ You will need to upload a single Invoice for the client. Multiple invoices need to be made one at a time.

NH invoice 1234.pdf

Check Invoice

Simply drag and drop your file into upload box

money carer Payments and Support Request Portal NH

Invoice Details

NH invoice 1234.pdf

Invoice Amount \*  
0.00

Payee Sort Code  
010101

Payee Account Number  
12345678

Incorrect sortcode/account number

Invoice Number \*  
1234

Send Invoice

The invoice details should be automatically picked up, check the details are correct and submit the invoice



## Send Secure Message



From: natalie.harris@moneycarer.org.uk

Client: Select the client so your message can be processed quicker



Add a subject

**B** *I* U ~~ABC~~

Send

Drag and drop files here or click to add attachments



### Secure Message

You can contact us with a secure message to ask a question or send documents

To send a secure message via the portal using the button above is simple. Select the client your message relates to, drag and drop attachments if needed, and type your message as you would a normal email.

Welcome to the portal  
If you need any assistance  
please contact us on

[Croydon@kcil.org.uk](mailto:Croydon@kcil.org.uk)

