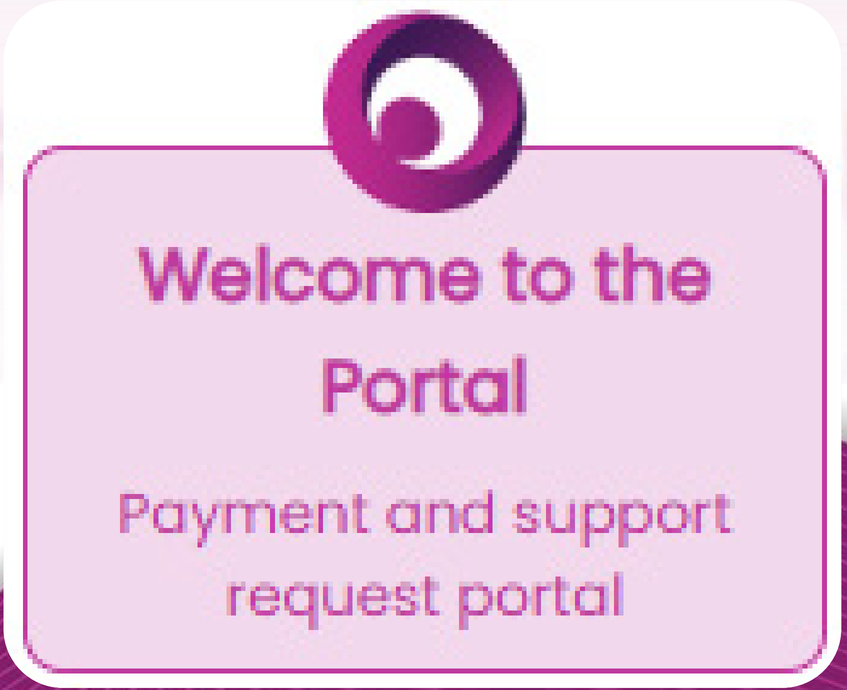
Guide to using the portal



Portal Log in

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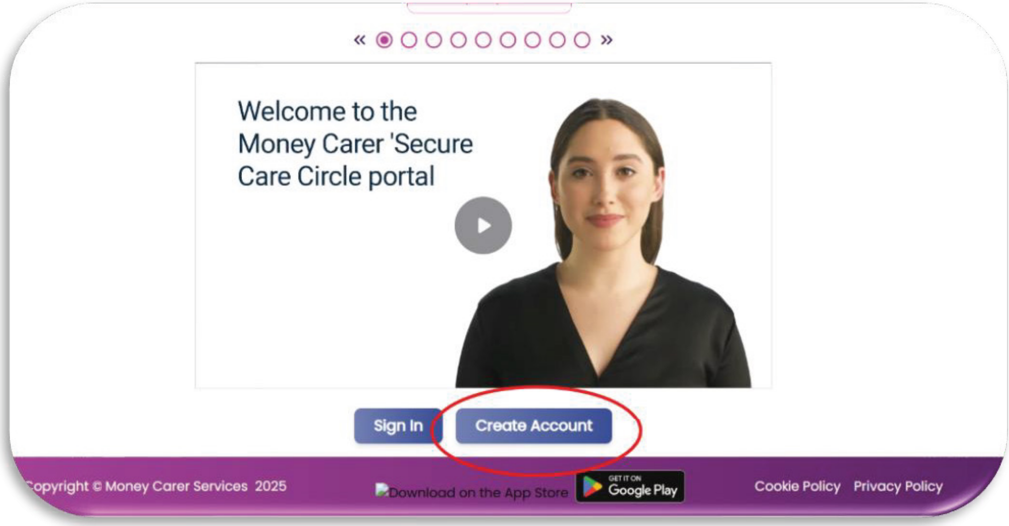
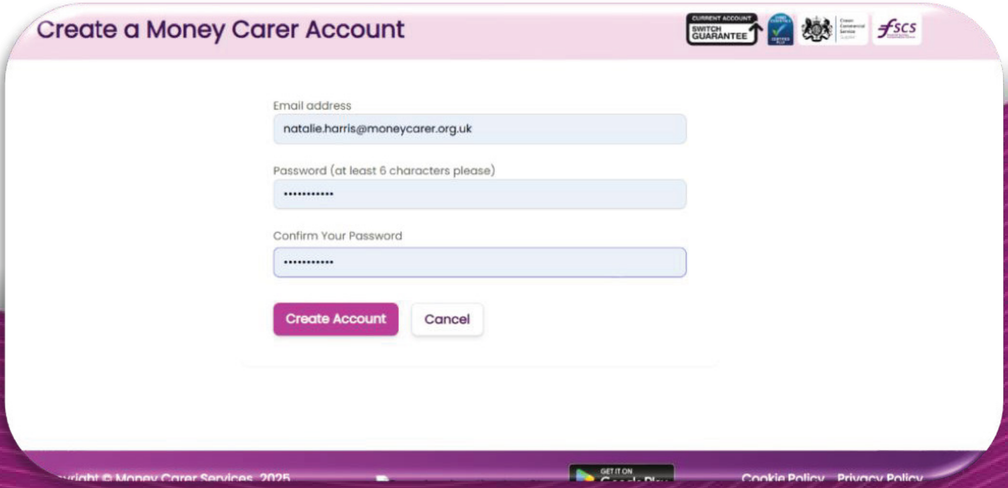
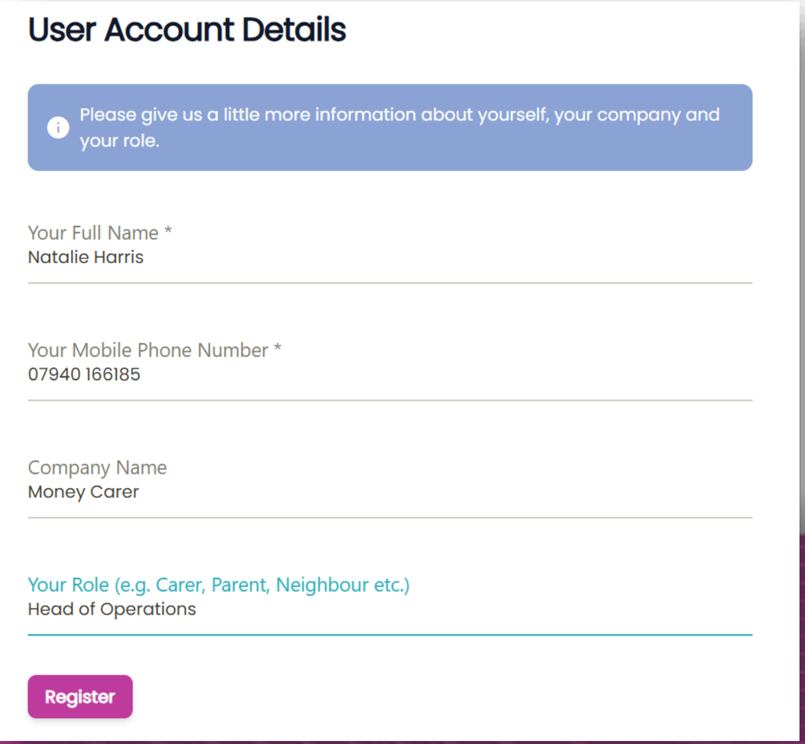
First time users will need to follow the simple set up process to create a portal account. Verification will be sent to the email address used for sign up.







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.

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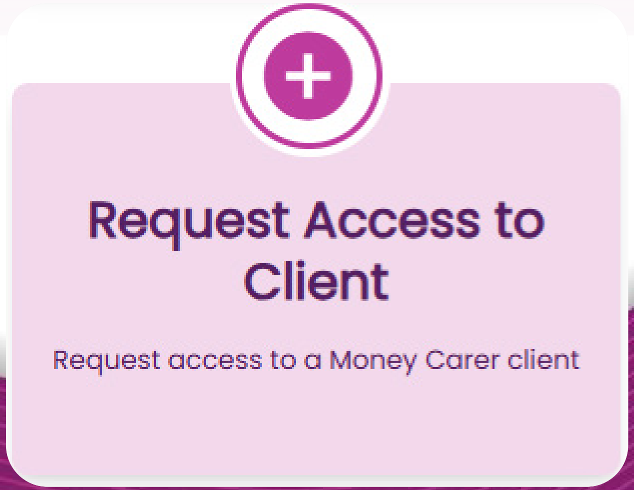
Cookie Policy Privacy Policy

Client Access

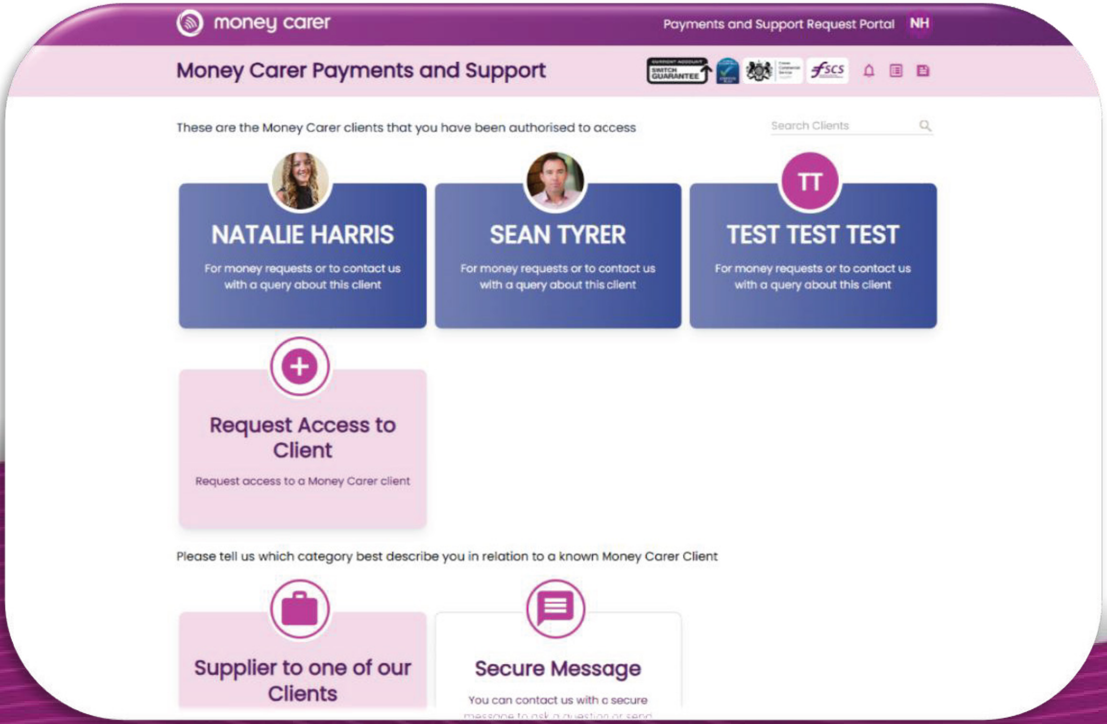
- If you’re a client (or need access to client records) you can request client access.

• How much access you have to the clients details depends on your role • Full access will allow you to see client documents, ac-counts and statements

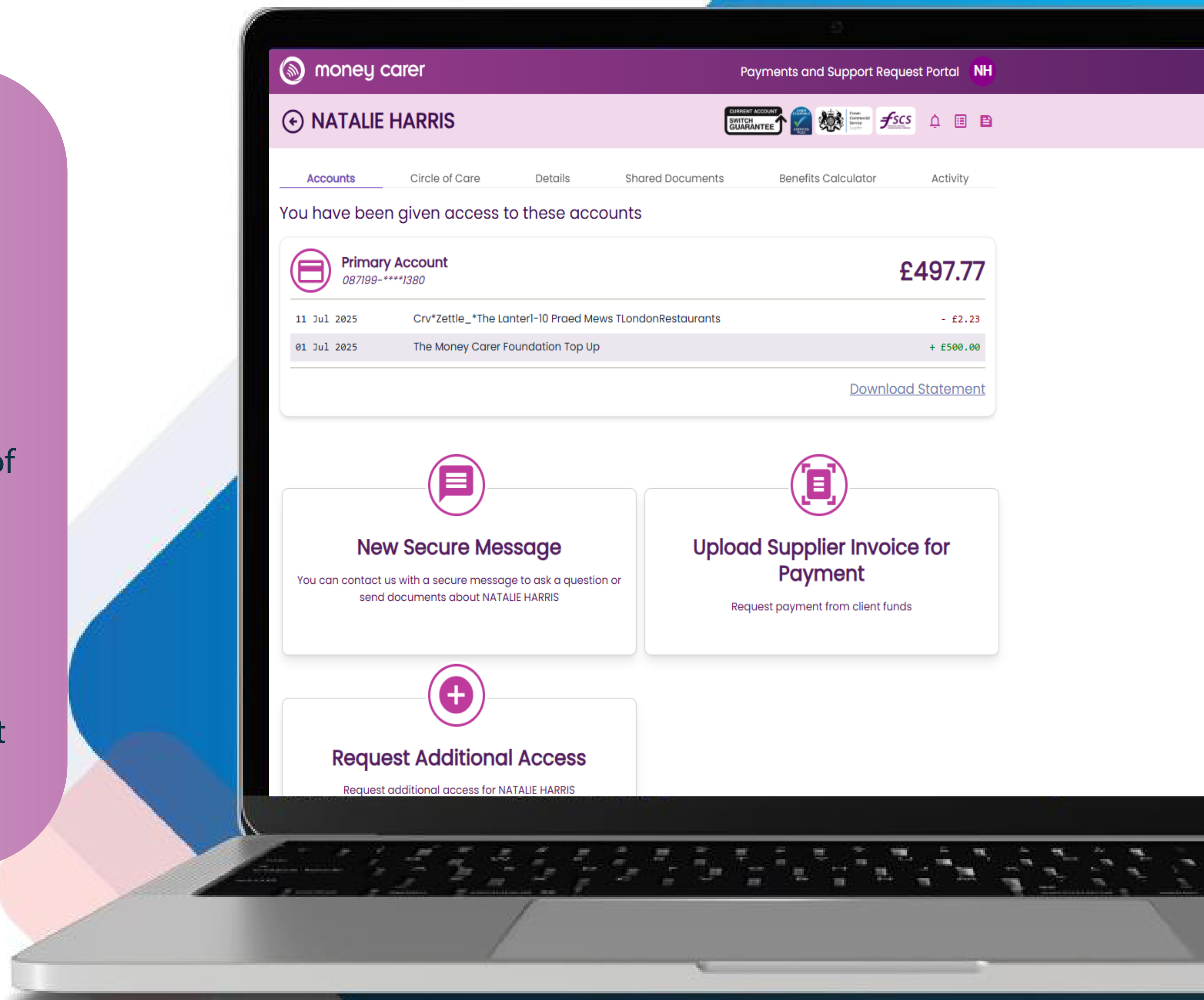


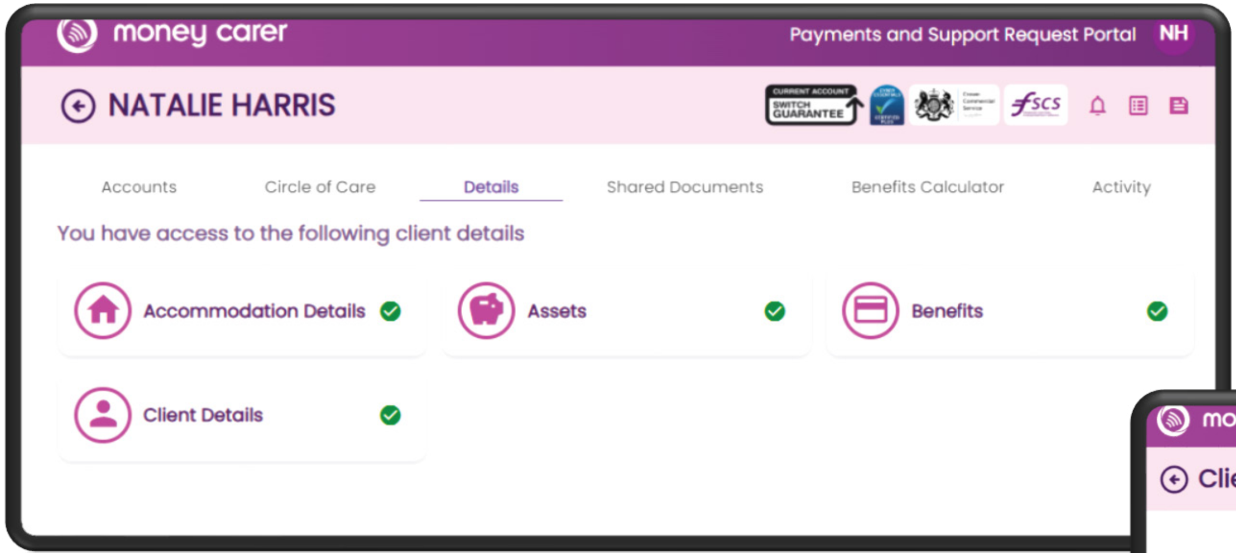
When your request to access a client is approved your available client re-cords will be shown at the top of your portal home page.

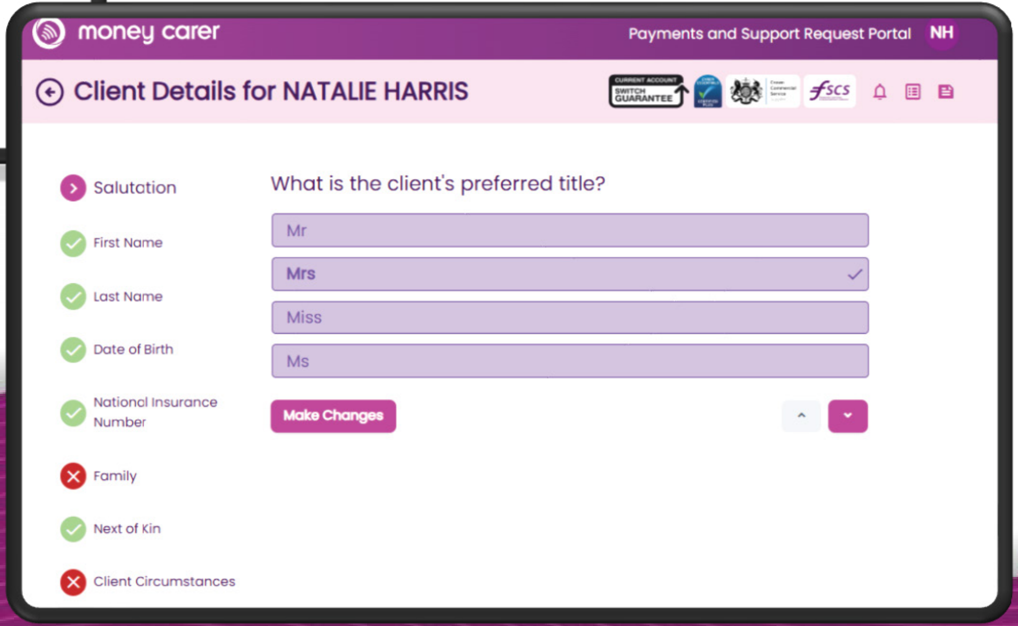
Simply click on the client you wish to view to see further information.



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







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.

Payment request

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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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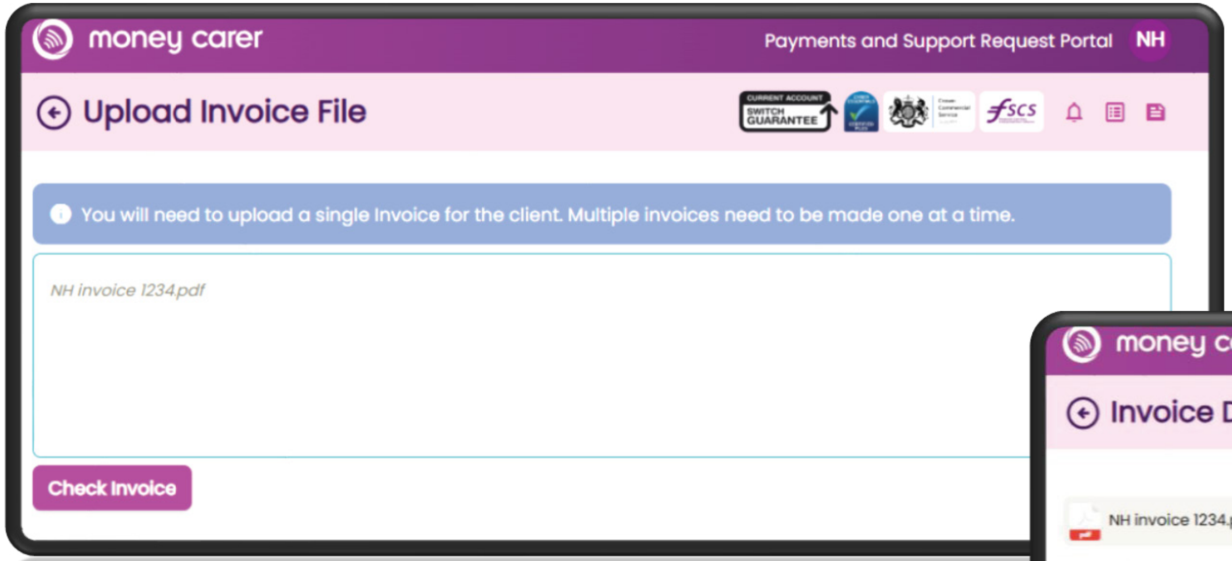
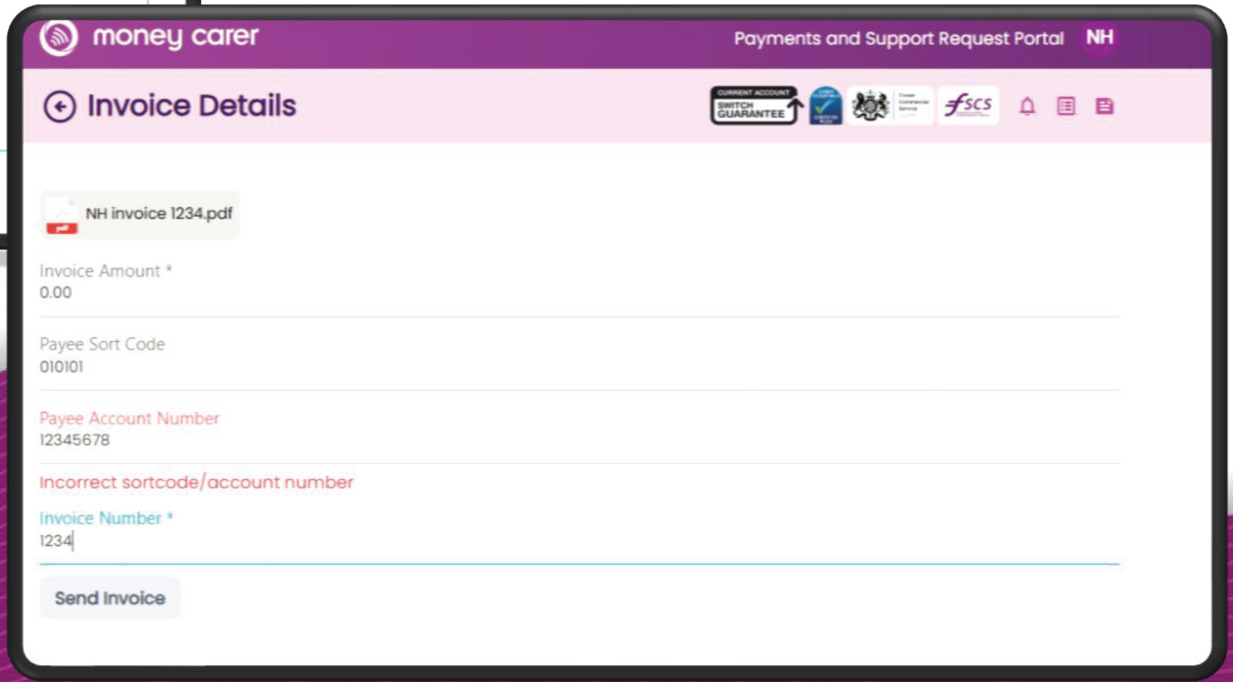
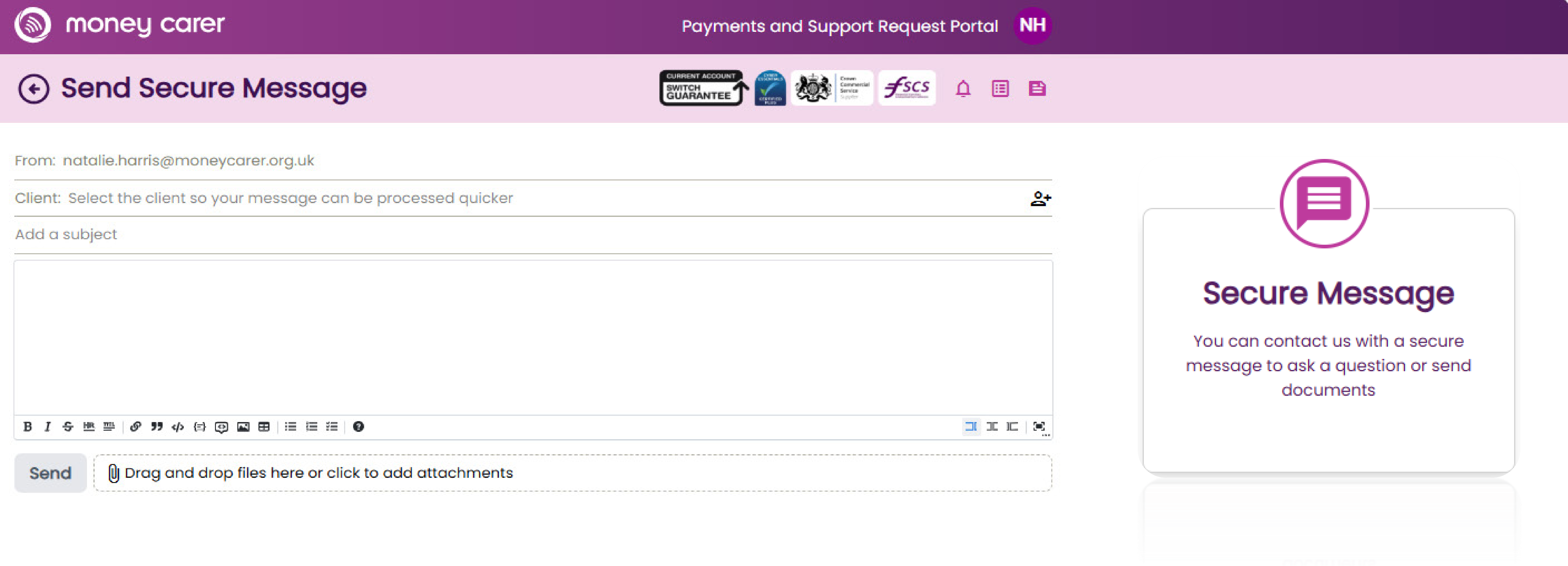


Simply drag and drop your file into upload box



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



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