The Client Finance Portal User Guide

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What is the Client Finance Portal?

The Client Finance Portal is a way for adults receiving care and support from the Council, and their representatives, to access financial documents held in the Council's finance system, ContrOCC.

Who can register?

If you receive adult social care support, or represent someone who does, you can request access to the Client Finance Portal via the WCC website. The first thing to do is to set up a login - this is granted automatically.

Following that you need to request access to the Client Finance Portal, either for yourself, or on behalf of someone who receives care and support.

We will only be granting access to those who are acting in a formal role. The following list includes all the roles which we currently allow access to the Client Finance Portal.

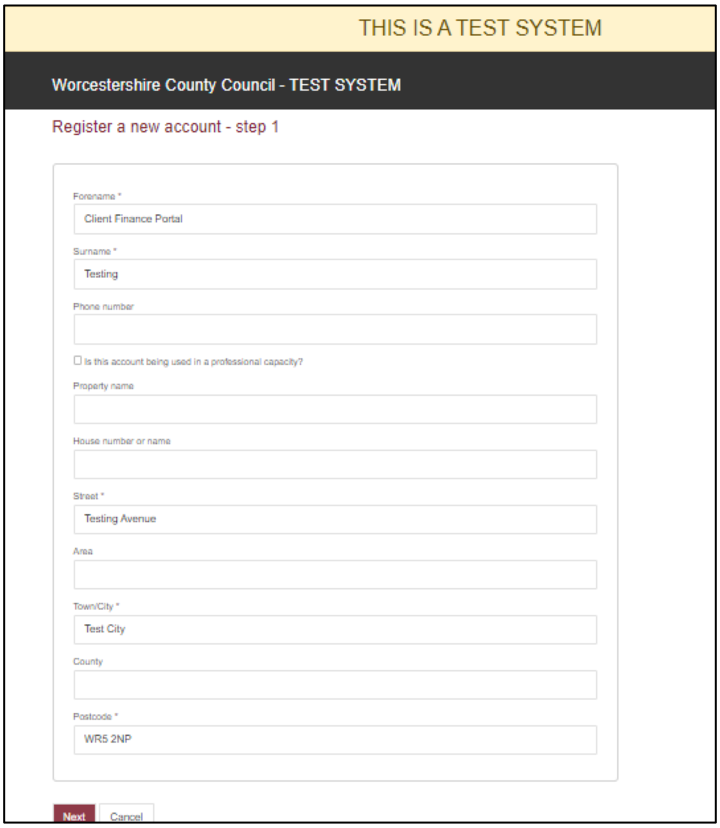
If someone is not acting in any of these roles, we will reject their request.

- Power of Attorney (POA)
- DWP Appointee
- Deputy
- Nominated financial representative (which requires a form to be filled in to agree consent to sharing information)
- Direct Payment nominee

Registration Link

To Register please click on the following link : [insert CFP test/live link]

Step By Step Guide for Registration



Step one: Enter your details

The first page you will see when you go to register is simple form entitled 'Register a new account' – step 1.

There are fields for you to submit your name, address and phone number.

Please ensure you fill these in fully and correctly as we will not be able to set up an account if the details don't match.

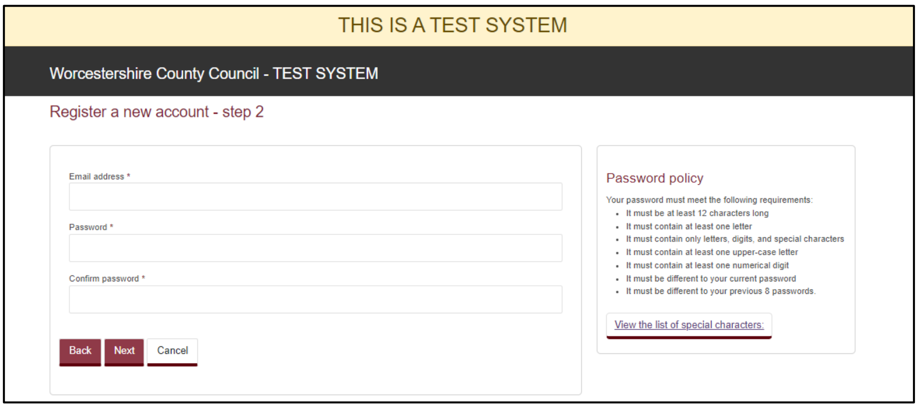
Once you have filled in the sections you can click next.

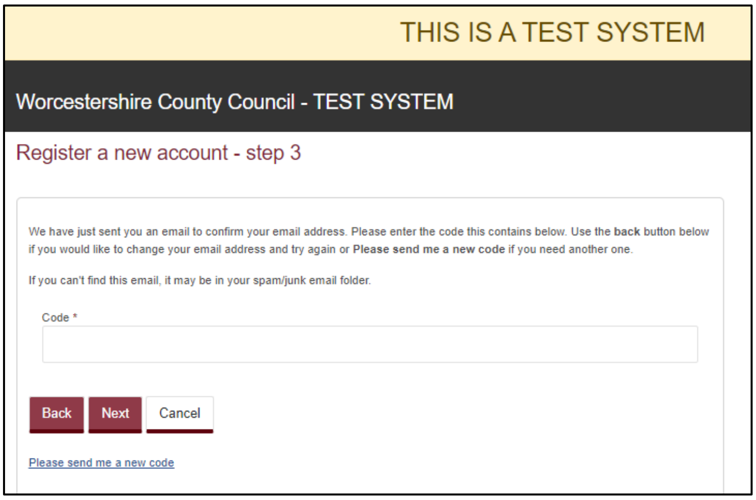
Step two: Create your login

Once you have clicked next you will be taken to a page entitled 'Register a New Account – Step 2'. This is where you can create your login information.

Please enter the email address that you used to register initially and ensure it is correct. You can then create a password. Your password must be at least 12 characters long, contain a mixture of lowercase and uppercase letters, numbers and special characters.

When you have filled in the fields you can click Next. The system will tell you if your password does not meet the necessary requirements.





Step three: Enter your unique code

You should now see a screen entitled 'Register a New Account – Step 3'.

This page requires you to enter your unique eight digit code in the following format: e.g. 8765 1263

You will receive your unique code via the email you used to register. It will come from an email address called 'Worcestershire Portals donotreply@liquidlogic.co.uk'

If you do not receive the email please check your junk/spam folders.

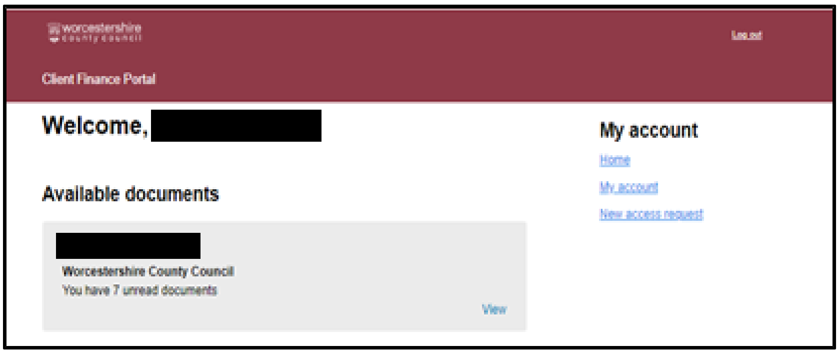
Important information to note:

Do not reply to the email – the inbox is not monitored.

The unique code will expire within 5 minutes so make sure you enter it onto the registration form as soon as you receive it – if you find the code has expired you can click on the 'Please send me a new code' button on the form.

Step four: Registration is complete

Once you have successfully entered the code and pressed 'Finish' your account is set up and you will be able to access your Client Finance Portal home page.



Step by Step Guide for Requesting Access

Step one: Navigating the Form

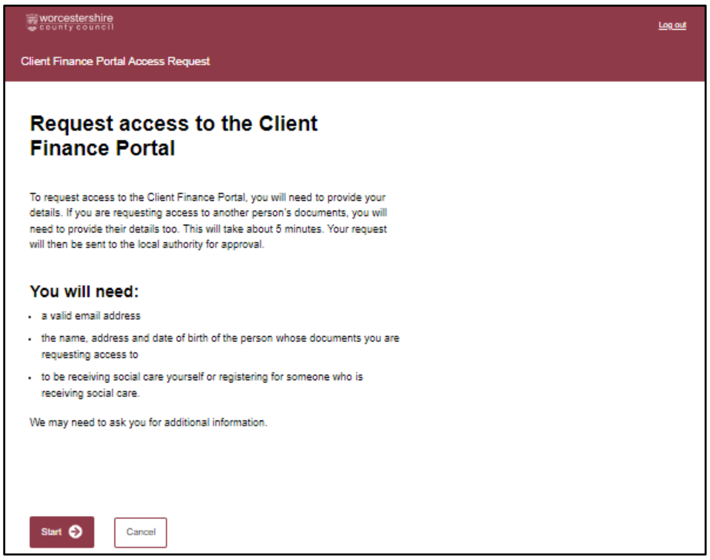
Now registration is complete you must request access for yourself or the person you represent in order to view their documents. You can do this by clicking the 'New Access Request' button on the right hand side of the screen underneath 'My Account'.

Step two: Gathering information

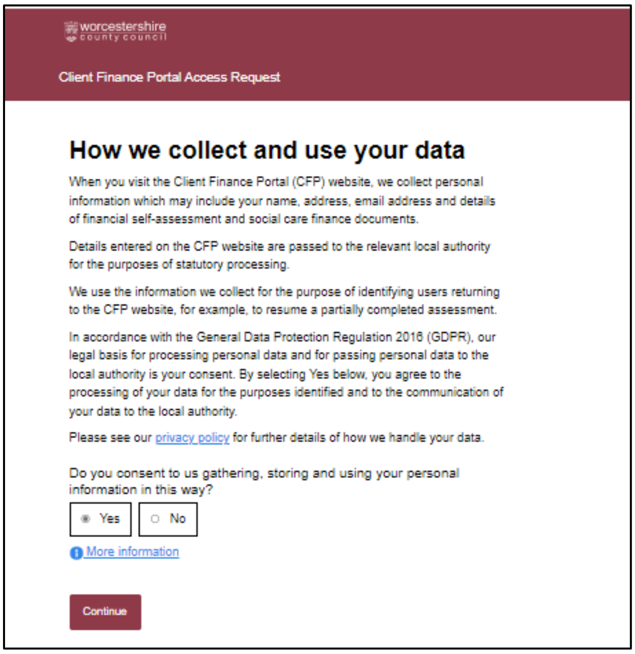
This action will take you to the 'Request access to the Client Finance Portal' page which is the start of the process for requesting access to your documents.

Please be aware if you are a financial representative you will need the name, address and date of birth of the person or persons you are representing.

Once you have read the requirements you can click 'Start' to begin your request.



Step three: Data Collection Notice



The next page of the form is all about how we collect and use your data. Please read the information and if you consent click ‘Yes’.

You are then free to click ‘Continue’ and continue on through the Form.

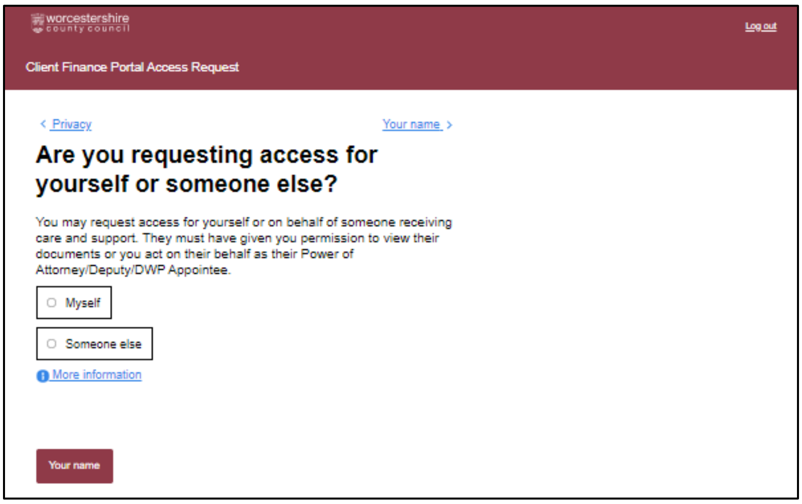
Step four: Requesting Access for yourself

You will now be asked to select from a drop down if you are requesting access for yourself or someone else.

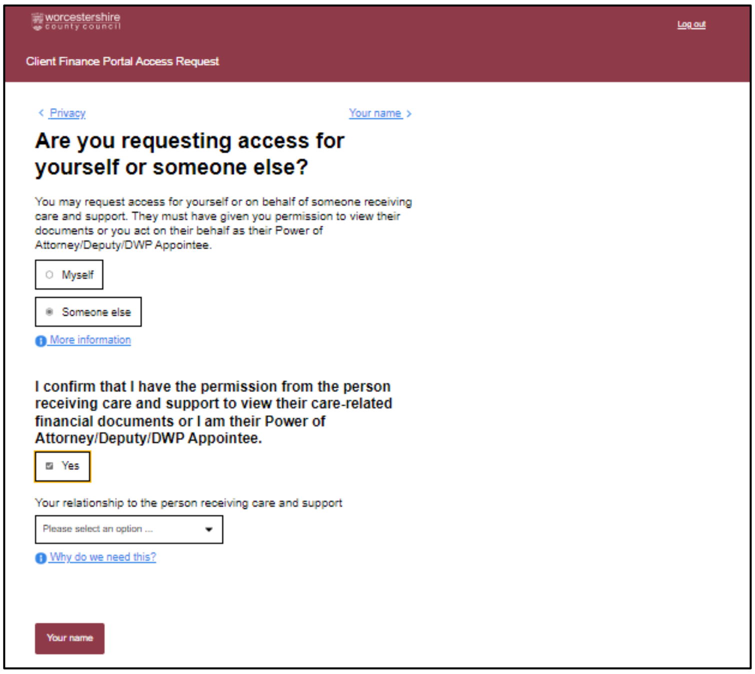
If you select myself, you will be asked to confirm your name, date of birth and address and can then click ‘Send Request.’

To ensure that you have successfully requested access you will be given a reference number usually in the following format:

e.g. J_Bloggs_1234_5



Step five: Requesting Access for someone else (please skip to step six if you are representing yourself)



If you need to request access for someone you are financially representing you will need to confirm you have the correct permissions by checking 'Yes'.

You must also tell us who the person is to you by selecting an option on the 'Drop Down' menu.

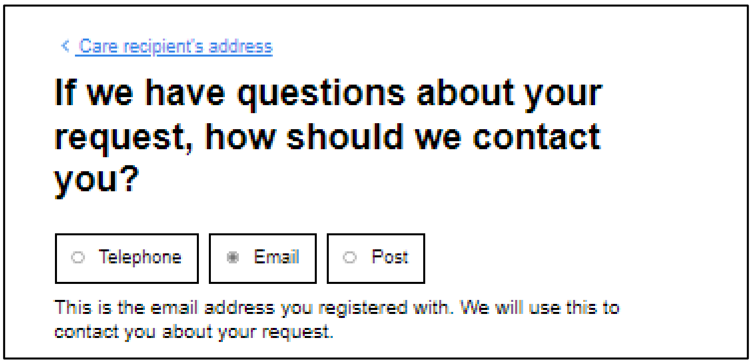
Continue on through the form by clicking 'Your Name'. You will be asked to submit your first and last name.

You will then be asked to enter your address. You can use your postcode to look up the address.

Once you have submitted your information fully and correctly. Click 'Care Recipient Name' and enter the name of the person receiving care and support.

Continue by clicking 'Date of Birth' and enter the date of birth of the person receiving care.

Finally, enter the postcode of the person you represent and select 'Lookup'. You will then be able to select the persons address.



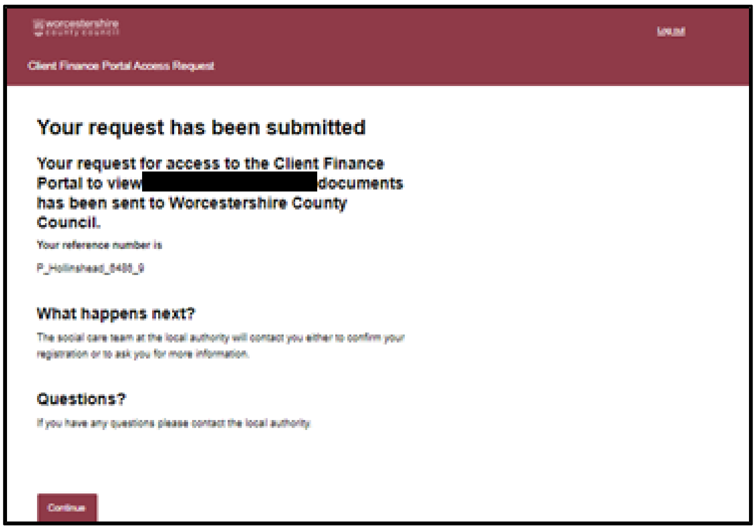
It is important to ensure all this information is correct so we can correctly match this to the details we hold for the person. When you have filled in all required fields please click 'Preferred Contact Method' to move on.

When selecting your 'Preferred Contact Method' please ensure you select 'Email' as this is the best and most efficient way for us to contact you.

Step six: Access Confirmation

You will receive an email within one working day which will confirm either:

- Your Client Finance Portal request has been rejected – This could be because you are not in a formal role to act as a financial representative.
- Your Client Finance Portal request has been approved.



Once approved, you will be able to view the relevant financial documents for either yourself or the person you are representing financially.

Please be aware that if you are acting for more than one service user, you would need to request a separate new access for them. Once approved, your account will contain the relevant information for each service users that you formally financially represent.