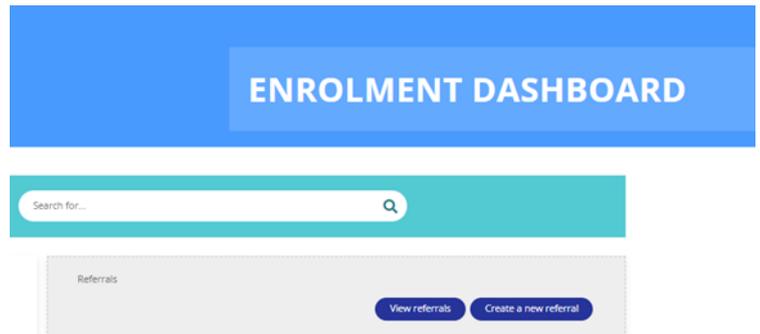


Short Guide: Creating a New VW Referral

This short guide will show you how make new referrals using Online Enrolment in Virtual Wallet.

You will require your own Virtual Wallet log-in details with permission to create referrals. If you do not have access to Virtual Wallet, please speak to your team manager.

Step 1. Login and go to the Enrolment Dashboard. Click on "Create a new referral"

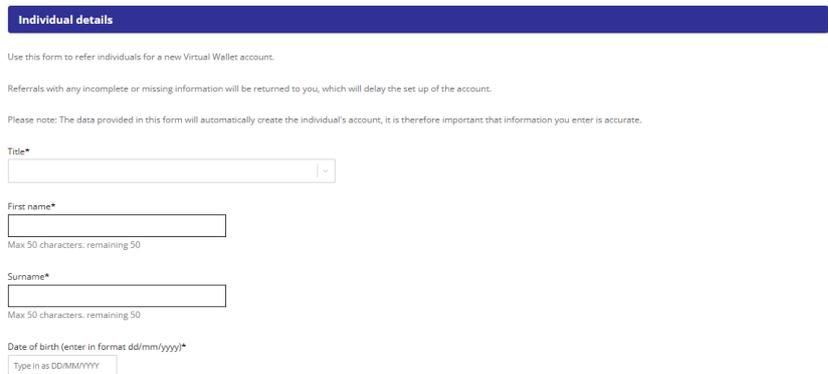


Step 2. Complete the Individual Details.

Note: Reponses will automatically update the questions displayed and, in some cases, change whether questions are mandatory. *Denotes mandatory.

Individual's Basic Details

1. Individual name*
2. Date of birth*



The screenshot shows the 'Individual details' form. It includes a title dropdown menu, a first name text field with a 'Max 50 characters, remaining 50' character count, a surname text field with a 'Max 50 characters, remaining 50' character count, and a date of birth field with the instruction '(enter in format dd/mm/yyyy)*' and a 'Type in as DD/MM/YYYY' prompt.

3. Type of VW account*
Self-service or Supported
4. Adults or Children
5. Whether they have an authorised representative*
6. Care Track ID*
7. Referrer details

*Mandatory Fields

Account Details

What type of Virtual Wallet account is this?*

Which group should this individual be assigned to?*

Does the individual have an authorised representative?*

- Yes
 No

CareTrack ID*

Max 10 characters. remaining 10

Referrer details

Enter your first name or surname and click search.

Alternatively click Search, then scroll through the list to select your name.

If you cannot find the referrer's name, please contact Virtual Wallet support to help set up an account.

Step 4. Add details for Authorised Representative if there is one. You will need:

1. Auth rep name*
2. Date of birth* (required to validate contact that we receive from the AR)
3. Address*
4. Email address
5. Phone Number*

*Mandatory Fields

✓ Individual details
Representative details

Representative details

✓ Individual details

Representative details

Provider details

First name
First name of the representative*

Max 50 characters. remaining 50

Surname
Last name of the representative*

Max 50 characters. remaining 50

Representative's date of birth
This will be used to verify their identity*

Address *

Search for...

Email address

Home contact number

+44

I confirm that the Representative information is correct*

Yes

Step 5. Add provider info

For the purposes of registration – only one main provider can be added. Multiple providers can be added after the individual’s VW account has been approved.

Note: For PAs – you will need to enter

1. Full Name*
2. Date of birth (required to validate contact that we receive from the PA) *
3. Full Address*
4. Phone Number
5. Email Address

✓ Individual details
✓ Representative details
✎ Provider details

Provider details

Do you want to add a provider*

Yes
 No

Select Provider Type*

Provider
 PA - Employed
 PA - Self Employed

Save Previous Next

Note: For Providers – you will need to enter

1. Name of Agency*
2. Full Address*
3. Email Address*

*Mandatory Fields

Step 6. Click “Next” then review the details.

This will enable you to check the information entered and make changes.

Step 7. The form will be forwarded to the Virtual Wallet Support team.

The VW support team will send you a notification once they have reviewed the referral and either Approve, Return or Deny.

In the case of Return – you will be asked to provide further information and resubmit.

In the case of Deny – you will be given a reason for the denial.