Quick Reference Guide

www.myvirtualwallet.co.uk/croydon

NEW REFERRAL TO VIRTUAL WALLET IN CROYDON

How to get set up on Jira

 Before you can refer an individual to the Virtual Wallet, you must have a user account set up on the PCG Help desk called Jira.

 \bigvee Tip: It is a good idea to save this link as a bookmark.

2 Send an email to <u>info@myvirtualwallet.co.uk</u> OR

The best and quickest way to get set up is to ask your supervisor or colleague to fill in the 'New account' form within the helpdesk.

A+ New account

PCG Help Centre PCG Help desk		
Please select the relevant o	ption from the left hand menu to find the he	lp you need.
What do you need help with	h?	
Search		Q
		Search help
General	A+ New account	
Request for Change		
Live Issues	Forgot Your Password	l
Integrations		
Virtual Wallet	Request Report/Data	Export

IN BRIEF

- Request a help desk account
- Click the link in the email and set up your own password
- Open the help desk in your internet browser
- Login using your email and the password you chose
- Select Virtual Wallet from the left hand menu
- Select new referral to virtual wallet
- Complete the form
- Click create

NEW REFERRAL

New referrals are easy. Simply log on to the helpdesk, select Virtual Wallet and then New Referral, fill in the form and select create.

- Before you can refer an Individual to the Virtual Wallet, you must have a user account on the PCG Helpdesk (see step 1).
- 2 When you are ready to refer a case, log into the Helpdesk, locate the New Virtual Wallet referral form, complete it in full and select Create.

- Go to the PCG helpdesk
- Log in with your email address and password
- Select Virtual wallet from the menu on the left
- Select New referral to Virtual Wallet
- Fill in all the details on the form
- Click Create



www.myvirtualwallet.co.uk/croydon Scroll to the footer & click '**New referral**'.

Please select the relevant op	otion from the left han	d menu to find the help you need.	
What do you need help with	17		
Search			Q
	6 B		Search help
General	A+ New Referral to Virtual Wallet Use this template to refer a new individual on to the Virtual		
Request for Change	Wa	llet	
Live Issues	0	des sequest	1
	WW For	virtual wallet managed accounts only	Select New
integrations			referral to virtual wallet
Virtual Wallet	(2) Vin	tual Wallet enquiry and support with a victual wallet costomer cou	
	Page 140	ev august i mora re usa wanet customer qui	
	(E) Ma	inual reimbursement	
	You You	u need to request a manual reimbursement fi	rom an

Need help? Contact us

𝔅 03300 582 690☑ info@myvirtualwallet.co.uk

Useful links

www.myvirtualwallet.co.uk https://jira.pcgprojects.co.uk/projects/CTS/customers https://www.myvirtualwallet.co.uk/croydon