

QUICK REFERENCE GUIDE

www.myvirtualwallet.co.uk

THE BASICS

Login to your account

 Go to <u>www.myvirtualwallet.co.uk</u> and click on My Virtual Wallet - Sign In button, and then enter your email address and password when prompted.

Navigation

There are two main areas, which are shown in the header at the top of the page.

- **1.** Account Summary You can check your balance, budget and all your financial activity.
- 2. My Support Allows you to plan and manage all of your support arrangements.

My Virtual Wallet - Sign In



ACCOUNT SUMMARY



A) Check your balance and funding

- The Current Balance is the amount of money within your Virtual Wallet account right now. It doesn't reflect any 'pending transactions', although you can see these on 'My Statement'.
- 2. Weekly Funding will show the money you get from the council, along with any contributions or 'top-ups' that you make.

	cheffe contribution	2550.00	
	Тор ир	£165.00	
		膏 You have £15	53 remaining of your weekly budget that is not currently being spent on ongoing orders



3. Ongoing Weekly Orders shows any recurring orders that you have with providers (note that it doesn't include PAs at this time).

B) Check your balance and funding

- **1.** The Current Balance is the amount of money within your Virtual Wallet account right now.
- 2. Available Balance also includes money waiting to be paid in or out that hasn't yet been processed.
- **3.** The Transactions tab shows all recent transactions.
- **4.** The Pending transactions tab displays money waiting to be paid in or out that hasn't yet been processed.
- **5.** Click View invoice to see full invoice breakdown, including dates it covers.

CONTACT US

If you get stuck, don't worry – the Virtual Wallet Support Team are available to assist, you can contact us on the following:

- 03300 582692 (Monday Friday 9am to 5pm)
- Get in touch with us via webchat at <u>www.myvirtualwallet.co.uk</u>
- info@myvirtualwallet.co.uk

MY SUPPORT

A) View your Support Summary

- **1.** You can see a breakdown of the your regular weekly support here.
- **2.** Clicking on the provider name allows you to drilldown to see more info.

B) View your support in My Calendar

This shows you a breakdown of all the support that you receive in a calendar-view, where you can choose to view in Day, Week or Month view.

• Accurd Summary • My Support • Details Support Summary • My Support • My



C) PA timesheets

If you are using a personal assistant(s), they can submit weekly timesheets for your approval, you can view, approve and reject here.

Do you know we offer a payroll service?

Find out more by contacting us on the following:

- virtualwalletpayroll@peopleplaceslives.co.uk
- 03300 586 711

✓ Account Summ	ary 🗸 My Support	✓ Details						
Support summary	Personal assistants	My typical week	My calendar	My quotes	Marketplaces			
Timesheets Details of all timesheets submitted by your Personal Assistants and their current status are listed below.								
Approve Timesheets	Category Contra	ct details						
From:	To: I	Filter by status: Please select× •	Filter by provider	1				
Status	Timesh	neet number	Period	Submit date	Provider	Total hou	rs Total Amount	Action

D) Self service payments

Self service payments can be made available to you, if this is something you would like to access, please contact the team for more information.

E) Find new providers or services

If you want to find new providers or services, you can use:

- My Quotes you can specify what you are looking for, and then invite a number of providers to respond with personalised quotes.
- **2.** Marketplace you can browse and search.



There are too many features and options to include in this quick reference guide, but please feel free to call the Virtual Wallet Support Team if you want to explore this functionality.

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