



MY CARE HUB

From My Care Consultant

ADVISER USER MANUAL

September 2025

My Care Hub – Adviser User Manual

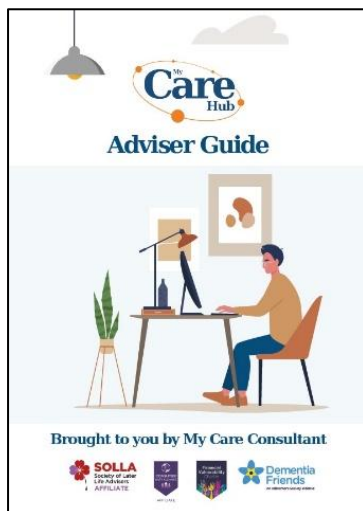
This manual is designed to take you step-by-step through the process of buying, registering and using My Care Hub and is designed to assist those who are looking to purchase access to My Care Hub for their clients. If you're not quite ready, and would like further information about My Care Hub, please go to <https://mycareconsultant.co.uk/care-hub> and download the "Adviser Guide to My Care Hub" which will give you a good overview of what My Care Hub is, how it works, why it's important and why you might want to purchase it.

Alternatively, you might want to register for one of our regular webinars where we demonstrate the live site, discuss the service, and take live Q&A. You'll find details of any upcoming webinars on the same page as the guide: <https://mycareconsultant.co.uk/care-hub>. On that page you will also find the My Care Hub pricing guide, which outlines what different packages are available, and the current cost.

And if you feel you need to take a good look at the site before making a final decision, just email the team at mycarehub@mycareconsultant.co.uk to ask for 48 hours' free access.

Once you're ready to get going with My Care Hub, come back here and this manual will make sure you know what to do and what to expect every step of the way.

Signing up for My Care Hub – preparing for purchase



If you haven't already done so, please download and read our *Guide to My Care Hub for Advisers*. This will clarify what My Care Hub offers and should answer most questions that you might have prior to purchasing My Care Hub. The *Pricing Guide* will make sure you know what each package costs.

You should also make sure you have read our Terms of Business. By proceeding with your purchase, you are agreeing to these terms.

All of these documents are available to download at:
<https://mycareconsultant.co.uk/care-hub>

If you want to check anything before purchasing, please just ask by emailing mycarehub@mycareconsultant.co.uk and one of the team will be happy to help.

How many "seats" do you want to be able to give out?

Decide how many licences ("seats") you want to be able to give or sell to your clients during your 12-month period. You can purchase the ability to give out up to 10 seats, 25 seats, 50 seats or 100 seats. **Please be aware that in order to ensure the highest service levels, we are initially restricting this to a maximum of 100 per firm** – however we may be able to flex depending on capacity and uptake. [Reach out to us](#) if you would like to purchase a higher number of seats, but please be aware that we may not be able to accommodate your request, particularly in the early days of the service.

How does the service work?

All subscriptions allow full access to all of the guided information, and all resources within My Care Hub and give each client 12 months of full access to all the information and guidance in My Care Hub from the date they sign up to the site, meaning they can frequently come back to look for further

guidance as they reach different stages in their care and advance planning journeys. Taking a subscription to My Care Hub also allows users (your clients and their family members) to contact the My Care Hub expert care navigator team via our email helpdesk at no additional charge to them, to ask for help in navigating the site, finding specific information, and dealing with any technical user issues they might be having. They can also request personalised, expert guidance by email about their own specific circumstances. This is particularly useful for more complex, individual situations which may not be typical. The team aims to respond to queries within one working day.

If their situation is particularly complex and would require a full understanding of their circumstances to be able to give appropriate advice, we may recommend a 1:1 consultation with one of our expert care navigators, which is available at an additional charge (but at an exclusive “My Care Hub” discount on our current open market rates). There will, of course, be no obligation or pressure for them to progress to this chargeable service.

Buying My Care Hub

When you're ready to purchase a subscription to My Care Hub, please go to <https://mycare-hub.com/advisers/>. This will take you to a page that should look like this:

Stepping through the purchase process:

1. Select the package you want and click the “Register” button.

Here you will see the current prices for the My Care Hub offering.

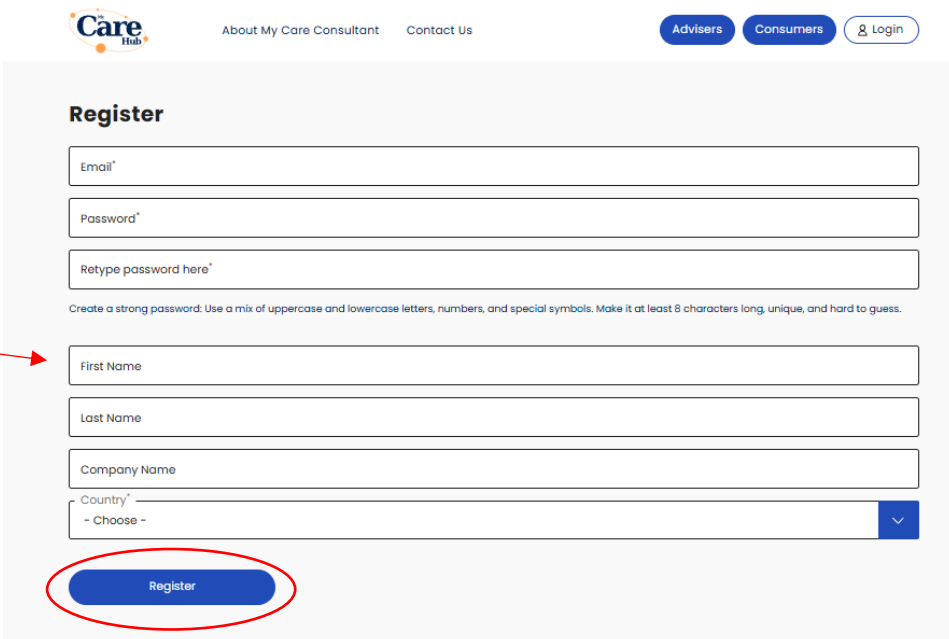
When you know which subscription you want to purchase, click on the appropriate “Register” button.

The screenshot displays the My Care Hub website. At the top, it says "My Care Hub" and "The Independent one-stop-shop for care advice". Below this is a video player titled "What is My Care Hub?". The main content area is divided into three steps: 1. Download our Adviser manual, 2. Decide how many "seats" you want, and 3. "Register" your selection. Below these steps is a section titled "MY CARE HUB SUBSCRIPTION OPTIONS" with four columns representing different seat counts and prices: Up to 10 Seats (£300/year), Up to 25 Seats (£500/year), Up to 50 Seats (£750/year), and Up to 100 Seats (£1,000/year). Each column has a "Register" button. A red circle highlights the "Register" button for the £500/year option, and a red arrow points from the text box on the left to this button.

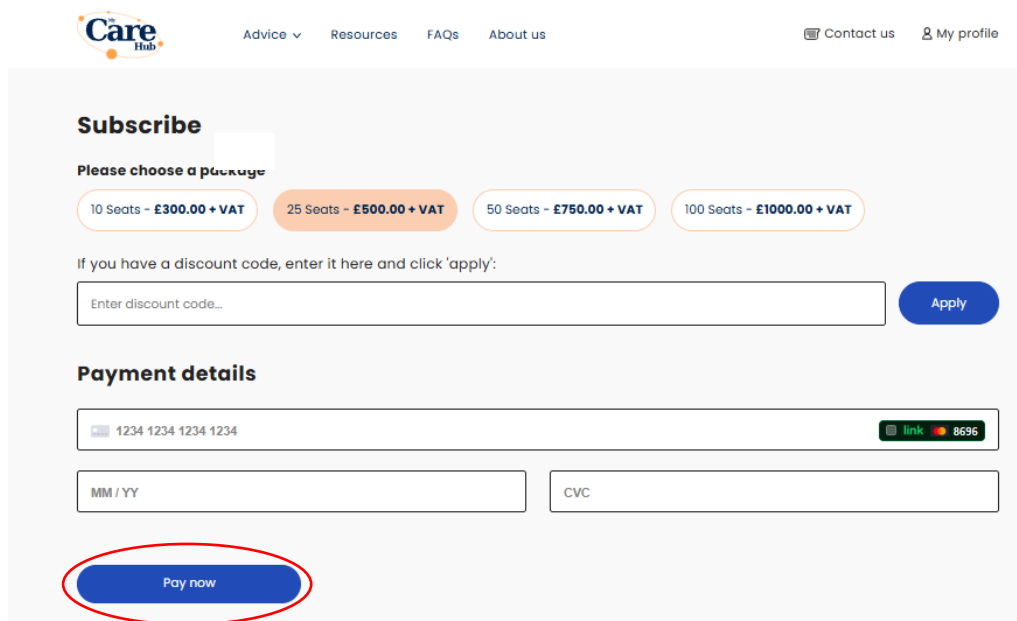
Up to 10 Seats	Up to 25 Seats	Up to 50 Seats	Up to 100 Seats
£300 +VAT /year	£500 +VAT /year	£750 +VAT /year	£1,000 +VAT /year
Register	Register	Register	Register

2. You will arrive on the registration page, where you will be asked to provide your name and company name, as well as the relevant country where your firm is situated. Click 'Register' when you have finished entering your details:

Enter your name and firm name, and select the relevant country here.

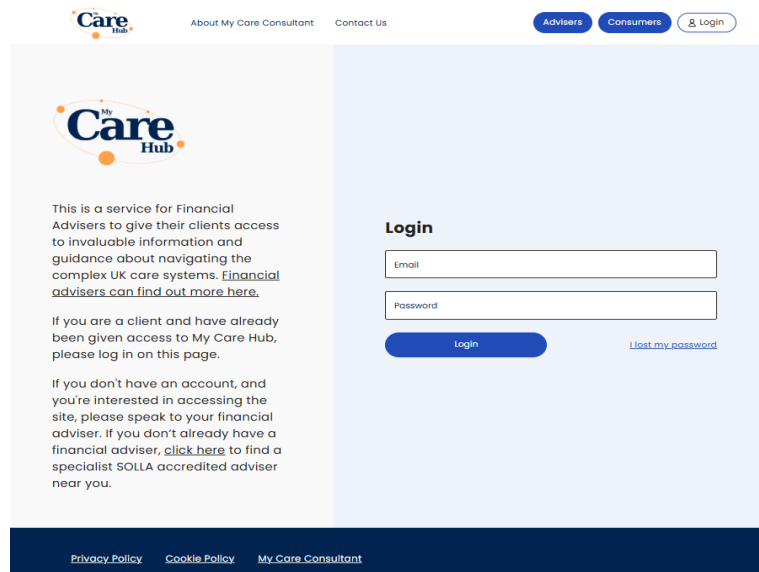


3. Select the package you would like to buy, fill in your card details, then click "Pay now" at the bottom of the screen:



4. You will then receive an automated confirmation email direct to your inbox. Please check your spam folder if you cannot find the confirmation email in your inbox.

5. You can now login to My Care Hub straight away using the email address and password you entered when you registered. You can login in via: <https://mycare-hub.com/login/>:

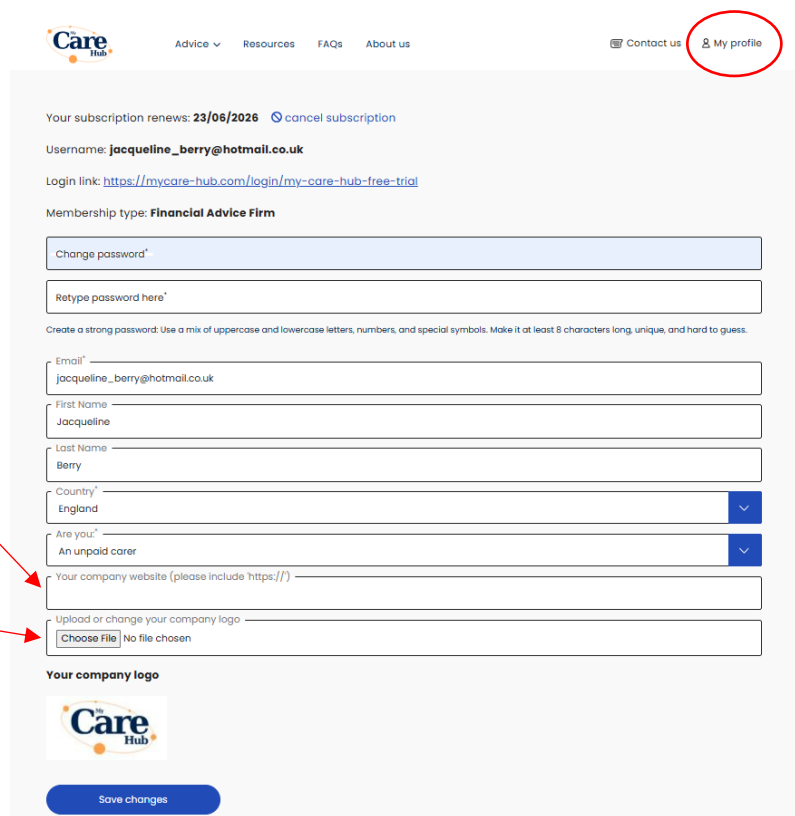


The Registration process

Completing the registration process will allow My Care Hub to create your unique, Co-branded sign-up page, which will be available only to those people/clients that you choose to give access to.

The final step to complete your co-branded sign up page

1. When you're logged into My Care Hub, visit your profile by selecting the 'My Profile' tab at the top right of the home page. Here you will be able to upload your company logo and website address to complete your co-branded sign up page:



Enter your company website URL (please include <http://> in the website address) and upload your company logo.

Make sure your logo is in one of the following formats: JPEG, PNG, SNV, otherwise it won't be recognised by the website.

The **“Company Web site”** part of the registration form is optional – but here is why you will want to include it: When you’re asked for your web site, this is the link which will be placed on all pages on My Care Hub that your clients visit when they log in. We frequently champion the need for regulated financial advice in My Care Hub, so there are several times when we will suggest that your client should speak to the financial advice firm that gave them access to My Care Hub. By ensuring your website is available throughout My Care Hub, you’ll be making it easy for them to turn to you.

You might simply want to use the home page of your company website – but you can enter any URL (web address) in this part of the registration form, so you may have a particular page on your website that you would like these clients to be directed to, or you might create one specifically for clients coming from My Care Hub. It’s entirely your choice.

Remember to include the https:// part at the front of your web address, or the system won’t accept it as a valid URL.

The ability to **“Upload Company Logo”** is optional but here is why you will want to include it: It allows us to display your branding prominently on the client sign up page, and at various points throughout My Care Hub, so that when your clients are logged in, they are reminded about who gave them access to this valuable resource and will frequently see you’re your branding.

OK – I’ve paid and registered – what happens now?

Within 2 days of registering for the service, we will email you with a link to your bespoke “sign up” page, confirming it’s live and ready for use. With that email you will also receive an “adviser pack” which includes:

- a link to a pre-recorded video that you may wish to embed on your website to help you position the new service with your clients.
- a template approach letter that you may want to use (or adapt) in communications with clients, flagging up this new service.
- Suggestions/ tips on how you might want to distribute your available “seats”.

At any time, if you have any questions, you’re very welcome to contact the team by emailing mycarehub@mycareconsultant.co.uk or you can call our help desk on (0) 20 3290 3110 or (0) 330 223 7116 and leave a message with the call handler. One of our team will get back to you within one working day.

Do I have access to My Care Hub?

Yes, as the owner of the account, you can log in to My Care Hub using the email address and password you set up when you registered for My Care Hub. This means you can view the log in and use the site as though you were a client.

How do my clients access the site?

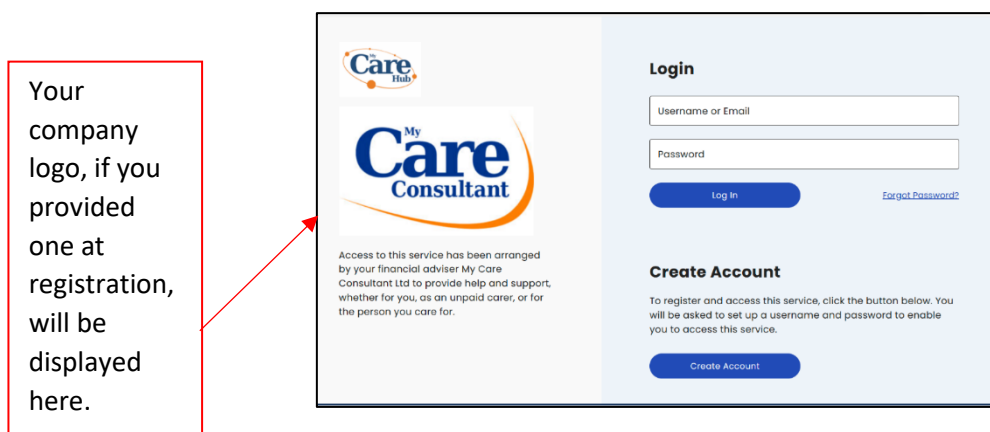
Once you have received confirmation that your bespoke sign-up page is live and ready for use, you can start to give the link to your selected clients.

You may have decided to charge clients for access to My Care Hub, or you may have decided to absorb the cost. Make sure you have settled on what approach you are taking *before* you begin to give the link out to clients.

Remember: your number of seats is limited, so we recommend controlling access to your sign-up page so that you are not quickly over-subscribed.

The process for your clients:

Clients can share their “seat” with family members, carers or attorneys. So, if several people are likely to be using their account, **the family should decide on who should be the main contact for My Care Hub**, and it is this person’s details that should be used to sign-up for the service. It’s this individual’s email address that any contact with the service will be linked to, and which will be recognised as a “legitimate” user. When the client clicks on the link you have provided to them, they will be taken to your bespoke sign-up page, which will look something like this:



1. The client now clicks the “Create Account” button. They will be taken to the following simple sign-up form, where they can fill in the fields and create their log in details:
2. **Username:** This must be unique. A straightforward option is to use their email address as their username too.
3. **Country:** They can use this drop-down box to select which of the 4 UK nations they would like the site to default to. (NB: Once they are logged into the site, they can change the country at any time, to see information relating to any of the home nations – this is useful in a variety of circumstances, e.g. when a family member may be in one country, while the person in need of care is in another.)
4. **Email and password:** When they enter their email and create their password, they should make a note of these – these are the log in details that they will be sharing with others in their family to allow them all to make use of the site.
5. **“Are you...” drop down box:** this is where the main account holder can identify their main role/ reason for using the site. They can identify themselves as an unpaid carer, the person in need of care, organising care for someone else, or an attorney for someone in need of

care. This will help the team behind My Care Hub to quickly identify the kind of support the client is most likely to need if they contact us.

6. When they have completed this information, they can then click the “Register” button at the end of the form.

At this stage, they can either click the “Log in to My Care Hub” button and start exploring the website, or they can navigate away from the site for now, and at any time, they and any family members, or attorneys can visit <https://mycare-hub.com> and use the log in details they created to log in to the site.

How do I know if the site is being well used?

Your clients may, of course, let you know what they think of My Care Hub, how much they have used it, and how useful they have found it. Indeed, we will be able to solicit this information from your clients from time to time, to enable you to evidence good outcomes, as well as to help you decide whether to resubscribe to My Care Hub when your first 12 months comes to an end.

However, you will also be able to view a live report from within My Care Hub, indicating how many of your “seats” have been activated, and by whom, and how many seats you have remaining.

What happens if we reach our maximum number of seats before our subscription end date?

When you purchase My Care Hub, you will have 12 months to “give out” or sell the 10, 25, 50 or 100 seats that you selected.

The My Care Hub system runs a monthly “check” on all accounts. If, during that check, your account is flagged as being near to or at maximum allocation, we will contact you to let you know. We reserve the right to temporarily “switch off” your bespoke sign-up page to avoid any further activations, while you decide on which of the following options you will take:

1. **Option one:** you can choose to “revoke” some of the activated seats to reduce the number of seats you have used (e.g. some clients may no longer need access, or may not have made much use of their seat, so you may feel comfortable about removing their access). The client/user report within My Care Hub may help you in making this decision.
2. **Option two:** you can choose to purchase additional seats e.g. an additional 10, 25, 50 or 100. See our current pricing guide to find out the cost of each subscription or visit our subscription page here: <https://mycare-hub.com/advisers/>).

What happens at the end of my 12 months?

- If you have subscribed and paid online your subscription will automatically renew at the end of 12 months. We will aim to contact you about a month before your access runs out, to explain your options. You can cancel your subscription any time by logging into My Care Hub, visit your ‘My Profile’ page and selecting ‘Cancel my subscription’, your subscription will automatically end immediately, you will not be charged, and your bespoke sign up page will switch off.
- If you have paid by invoice, we will aim to contact you about a month before your access runs out, to explain your options and discuss whether you would like to renew your subscription.

What about clients who have already signed up to use My Care Hub?

Even if a client has activated their “seat” in My Care Hub just a few days before your 12-month period runs out, they will still have access to My Care Hub for a full 12 months from the day their own account was activated. Client “seats” automatically stop working at the end of *their own* 12-month period.

What if I still have un-used seats left over at the end of my 12-month period?

You have 12 months to give out (or sell) all of the seats you purchased. Any seats that you have not distributed before your period ends, cannot be “rolled over” – they automatically expire. When you purchase “Up to 10, 25, 50 or 100” seats, this allows us to ensure we have sufficient support resource in place to service up to that number of seats during the next 12 months. However, logistically, it would not be feasible for us to offer these seats as “open ended”, meaning new sign ups could continue for months or even years after your 12 month period had expired!

I have more questions!

If there’s anything else you would like to ask about, please email us at mycarehub@mycareconsultant.co.uk and one of the team will be happy to help.

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