MY CARE HUB

From My Care Consultant

ADVISER USER MANUAL

April 2024

My Care Hub – Adviser User Manual

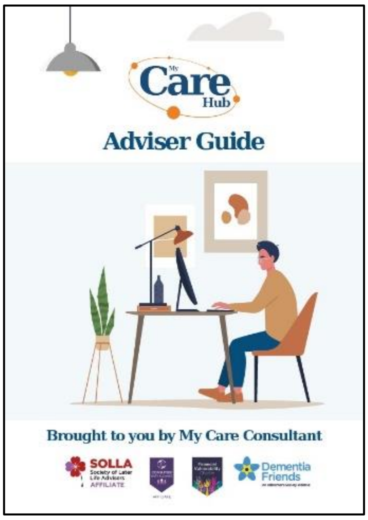
This manual is designed to take you step-by-step through the process of buying, registering and using My Care Hub and is designed to assist those who are looking to purchase access to My Care Hub for their clients. If you're not quite ready, and would like further information about My Care Hub, please 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 . 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.

On that page you will also find the My Care Hub pricing guide, which outlines what different packages are available, and the current cost.

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 either purchase the ability to give out up to 25 licences, or up to 50 licences. **Please be aware that in order to ensure the highest service levels, we are initially restricting this to a maximum of 50 per firm** – however we may be able to flex depending on capacity and up-take. 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.

What service levels do you want to purchase for your clients?

Decide whether you want to offer your clients the Core support package or the Premium support package. Both allow full access to all of the guided information, and all resources within My Care Hub, but with different levels of user support as follows:

Core Support – gives 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. Core support allows users (your clients and their family members) to contact the My Care Hub team by email or via the contact form, to ask for help in navigating the site, finding specific information, and dealing with any technical user issues they might be having. The team aims to respond to queries within one working day.

Premium Support – this offers everything in the Core support package, but also gives clients email access to our expert team of care navigators, at no additional charge to them. This means that as well as unlimited generic user support, 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. Premium Support provides expert guidance on up to three separate issues/queries of this kind per client during their 12-month access to My Care Hub. They can ask for clarification regarding the response they receive, without "using up" one of their three queries.

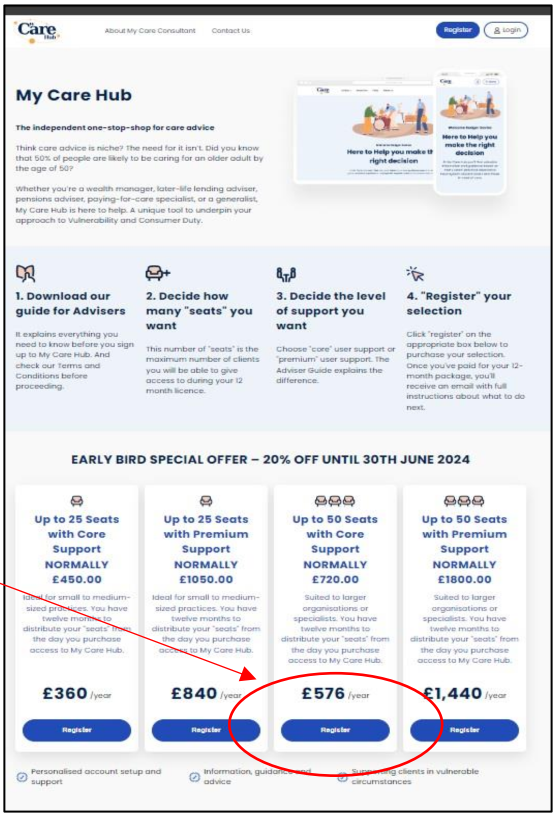
If their situation is particularly complex and would require a full understanding of their circumstances to be able to give appropriate advice, or if they have already received their full quota of expert guidance, we may recommend a 1:1 consultation with one of our expert care navigators, which is available 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 My Care Hub, please go to https://mycare-hub.com/join/ . This will take you to a page that should look like this:

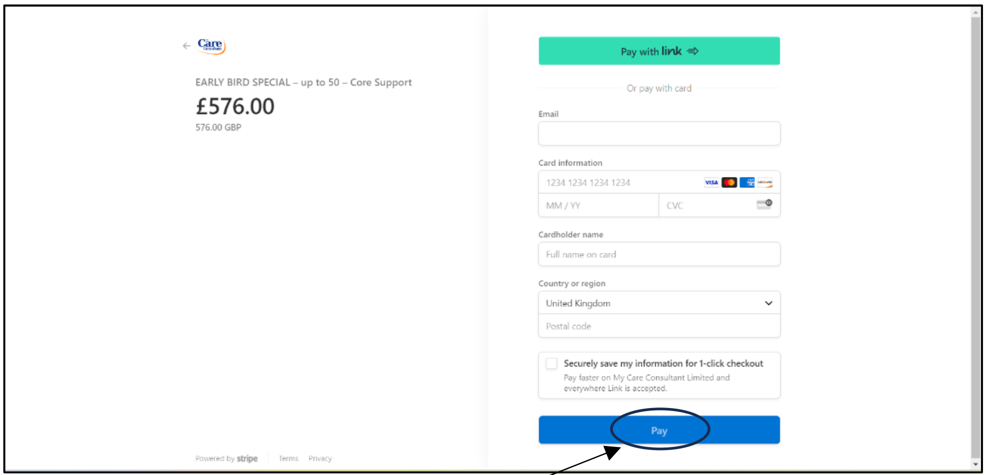
Here you will see the current prices for the My Care Hub offering.

When you know which package you want to purchase, click on the appropriate "Register" button.

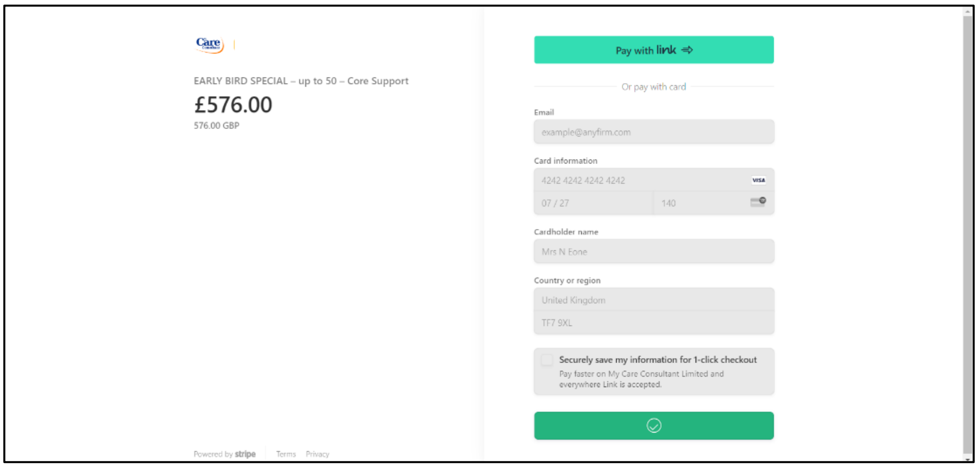


Stepping through the purchase process:

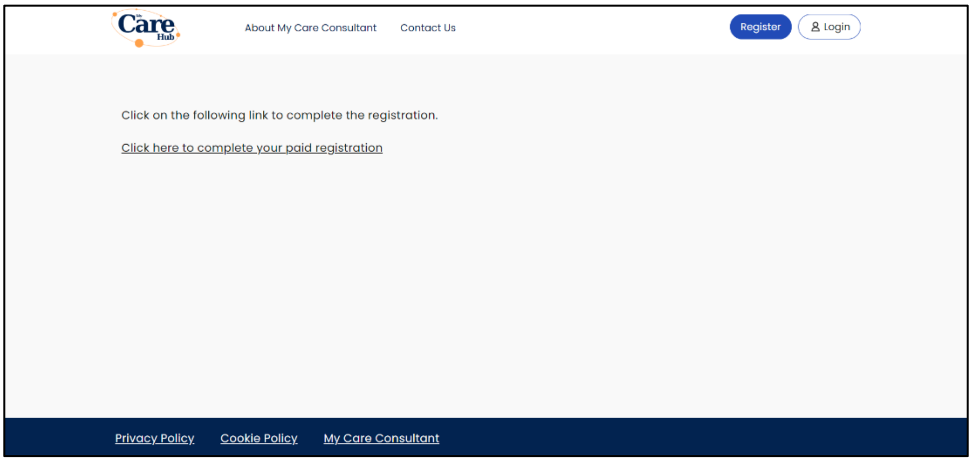
1. Select the package you want and click the “Register” button.
2. You will be taken to the purchase page, where you can purchase your My Care Hub package securely online using a credit or debit card:



3. Fill in your card details, then click “Pay” at the bottom of the screen. If your payment is successful, you’ll briefly see the following screen:



4. You will then automatically be redirected to:



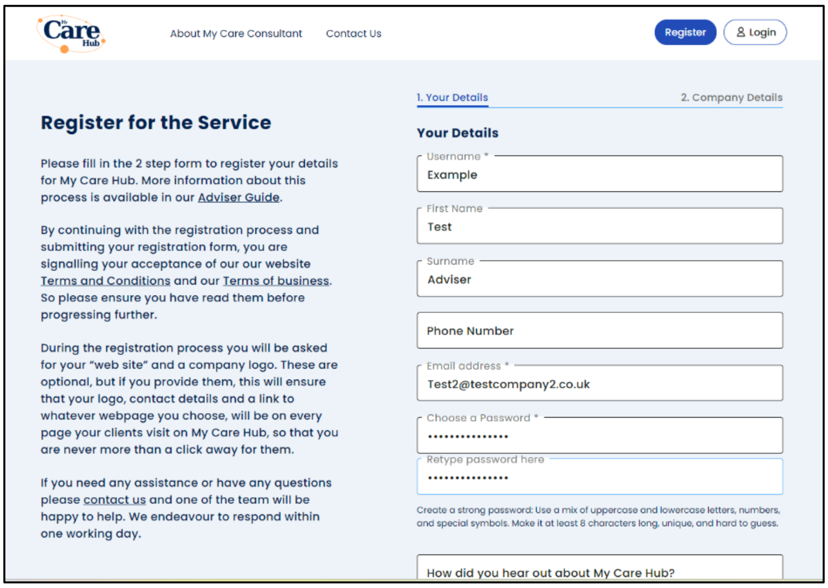
5. At this point, you can either proceed through the registration process outlined below, by clicking the on-screen link to “complete your paid registration”, or you can wait and return to this later, as you will also be sent a confirmation email containing the registration link, which you can use to complete the process at a later, more convenient time.

The Registration process

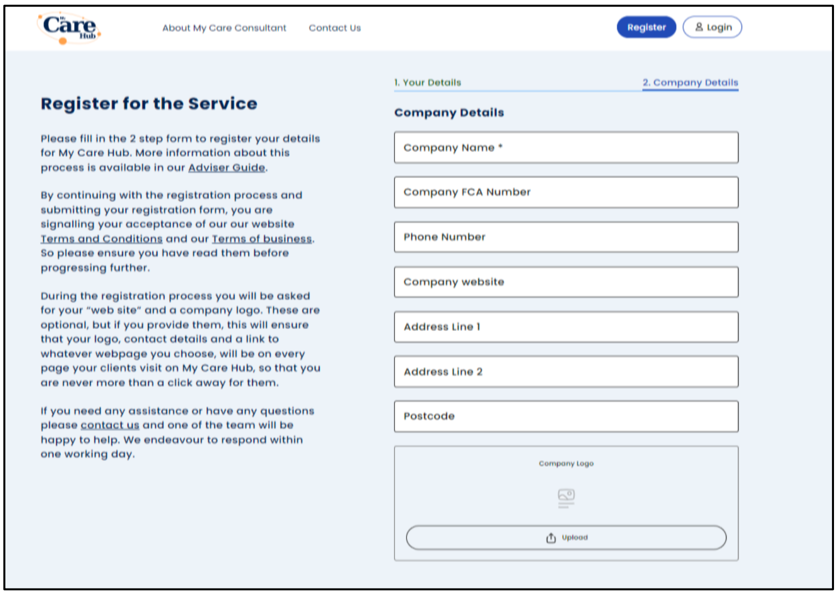
Completing the registration process will give My Care Hub all the information, logos etc needed for us to create your unique, Co-branded sign-up page, which will be available only to those people/clients that you choose to give access to. It involves completing a simple two-step form.

The two-step registration form

1. The first page will ask you to create your own username and password, identifying you as the owner of the account, and it includes an optional request to tell us how you heard about My Care Hub:



2. Fill in the first page of the form with your details and click the “Save and continue” button at the bottom of the form. This will take you to the second page of the registration form:



3. The only **compulsory** field here is the company name field, because that will be needed in order to create your unique, bespoke landing page to give to your clients.
4. 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.

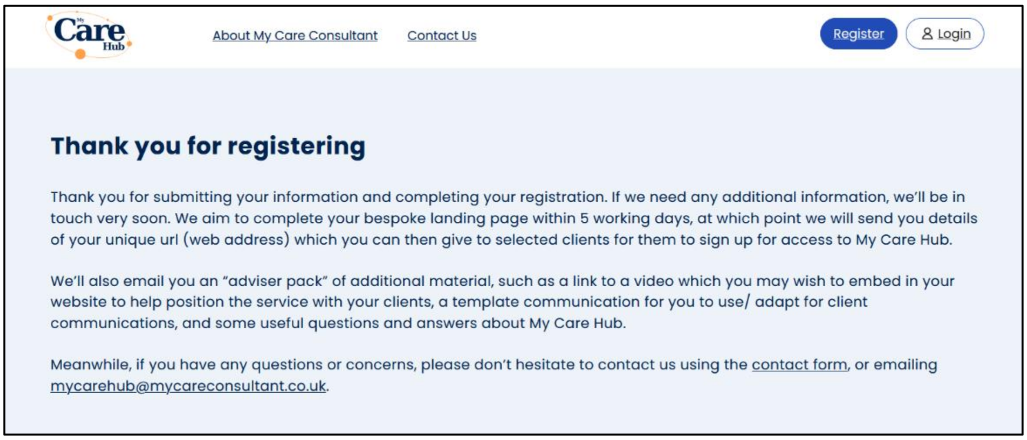
5. **The ability to “Upload Company Logo” is optional but here is why you will want to include it:** It allows us to display your branding prominently on the client sign up page, and at various points throughout My Care Hub, so that when your clients are logged in, they are reminded about who gave them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

   To upload your logo, click the “Upload” button in the Company Logo box on the form.

   Browse to where you have your logo saved, select your logo file and click “open”. The system will accept logos in either .jpeg or .png format.

   Your logo should appear in the logo box on the form. You’re now ready to submit your registration.

6. **Click “Register” at the bottom of the form. A successful submission will bring you to the “Registration Complete” screen which should look like this:**



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

Within 5 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 020 3290 3110 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.

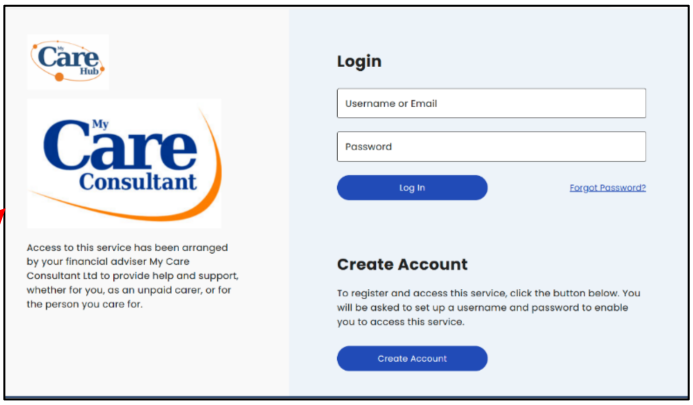
You may have decided to charge clients for access to My Care Hub, or you may have decided to absorb the cost. Make sure you have settled on what approach you are taking *before* you begin to give the link out to clients.

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.

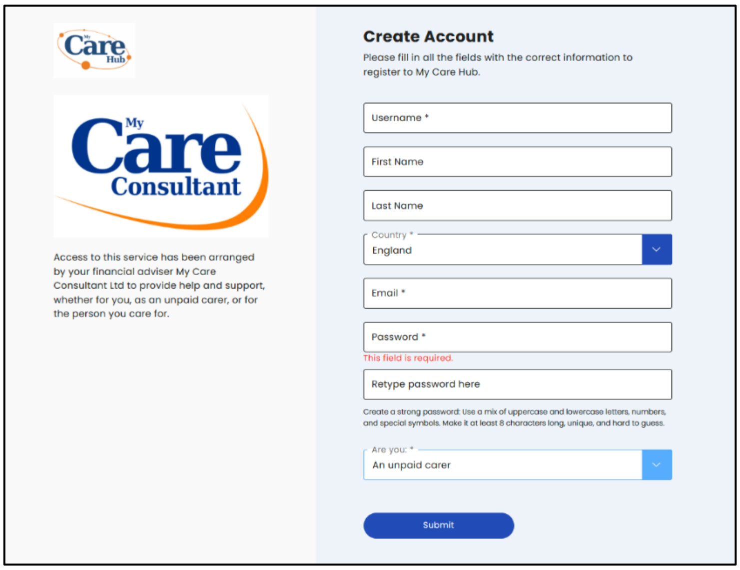
The process for your clients:

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" userWhen 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:

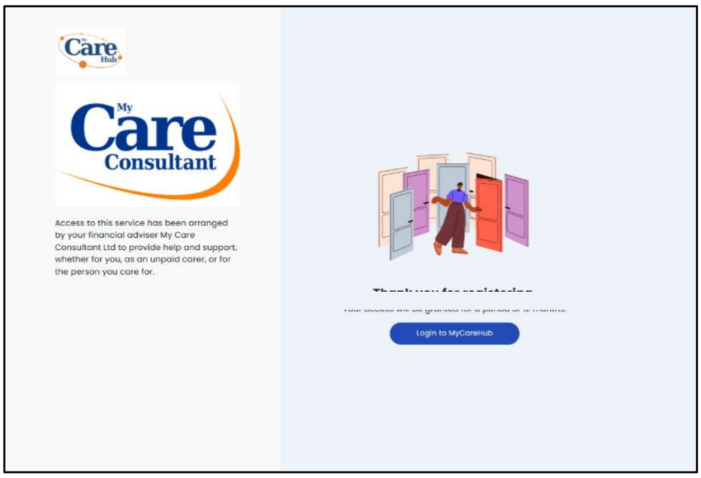
Your company logo, if you provided one at registration, will be displayed here.



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 they 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 "submit" button at the end of the form. They'll now arrive at this screen:



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 would encourage you 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 sent a quarterly report from My Care Hub, highlighting activity levels, indicating how many of your "seats" have been activated, and by whom, any feedback we have received from your clients, and other useful MI to help you measure the usage and impact the service is having.

What happens if we give out too many seats?

When you purchase My Care Hub, you will have 12 months to "give out" or sell the 25 or 50 seats that you selected (this limited number of seats per purchase/firm has been introduced at launch to ensure that we deliver the highest service levels while we gauge uptake of the service – we envisage being able to open this up to higher numbers in the future).

The My Care Hub system runs a monthly "check" on all accounts. If, during that check, your account is flagged as being over 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 will be given a grace period to "revoke" some of the activated seats to bring your numbers back in line with your purchased allocation (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). Your quarterly MI report may help you in making this decision.
2. **Option two:** you can choose to keep the extra licences and pay a supplement for each additional licence (see our current pricing guide to see what the supplementary charge per licence is).
3. **Please Note: If you have purchased the maximum 50 seats, and have gone over your allocation, option 2 will only be available if we at My Care Hub agree that we have the capacity to service these additional seats.**

What happens at the end of my 12 months?

There is no automatic renewal of your subscription to My Care Hub. We will contact you about a month before your access runs out, to explain your options. If you choose to do nothing, your bespoke sign-up page will switch off, and you will no longer be able to give access to new clients.

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 25” or 50 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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