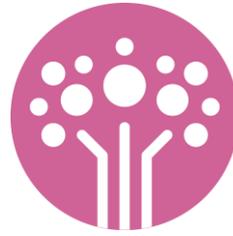




**START WITH
STRENGTHS**



**Social
Care &
Support**

Setting up your pre-payment card and online account

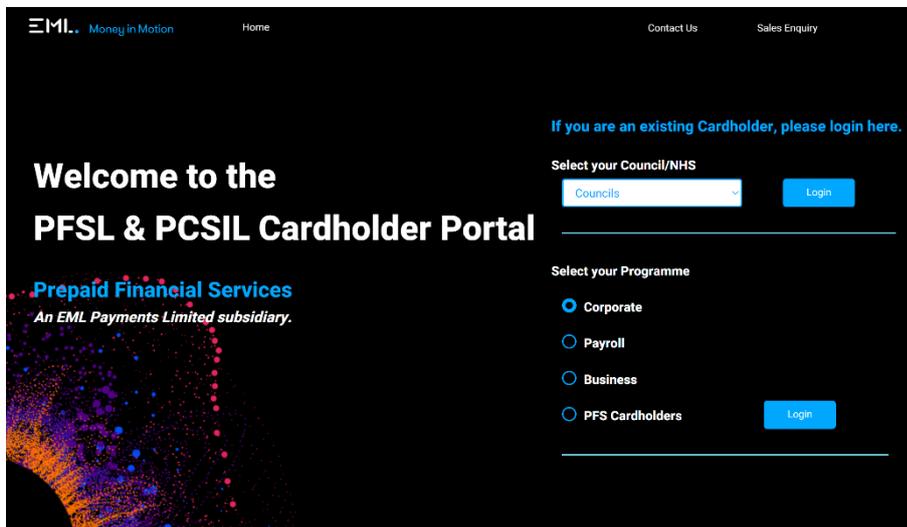
In this guidance, we will cover setting up the account and getting you started with making payments with the Direct Payment you receive. We can offer a 1 to 1 session to go through the set up and explain all the features that the prepaid card offers. Should you need this please contact ILT@Warwickshire.gov.uk or alternatively, phone 01926 413908.

Setting up the online account

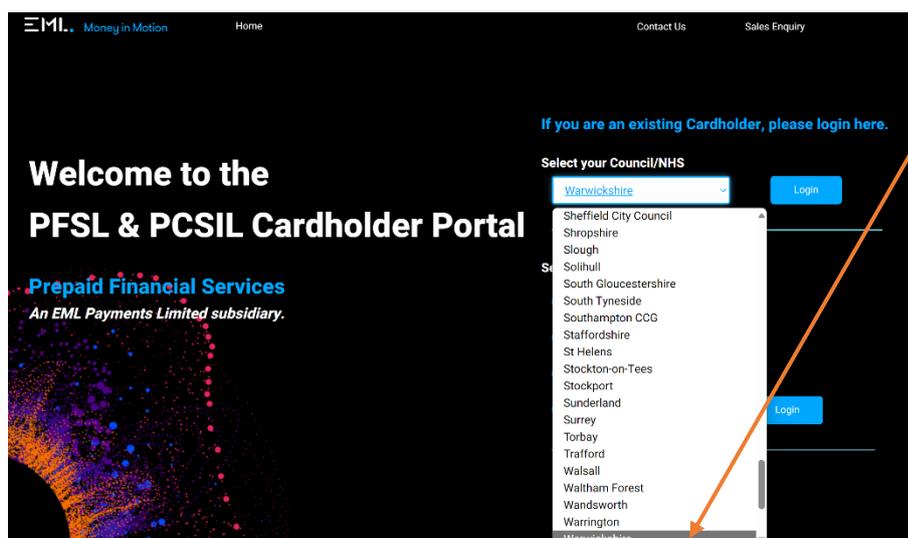
Once you have received the pre-payment card you will need to set up an online account following the steps below. This will take some time but once this is set up it will allow you to make payments, upload documents and manage the account.

Please visit - <https://prepaidfinancialservices.com/en/>

The site looks like this:



1. On the right of the page there is a box which says, 'Select your council/NHS'. Click on this drop-down list, scroll down all the down way to 'Warwickshire' and press Login.



2. This will then bring a box up with Username, Password and 'I do not have a username/ password'. Please click on 'I do not have a username/password'.

3. Type the 16-digit number on the front of your card into the box. If this does not work, then please ring the following number – 02036 331626. Explain to them that you are trying to set up the online account and you need your card holder ID/card number.

Register User

Cardholder ID / Card Number *

▲ Cardholder ID / Card Number is required

Date of Birth *

Day Month Year

Submit

[Return to Login](#)

4. Once you have entered the 16-digit number it will ask for a date of birth. Please enter the date of birth of the person receiving the Direct Payment. If there is an authorised person in place, then it would be the date of birth of the authorised person.

Register User

Username *

Confirm Username *

Username must be between 6-20 characters and can only consist of alphanumeric characters and the following special symbols: _ . @

Password *

Confirm Password *

The password must be between 8 and 20 characters without spaces, one uppercase letter, one lowercase, number and a minimum of two special characters, E, \$, %, &, *, _ . @ ! - .

Security Question *

Security Answer *

Select

Submit

[Return to Login](#)

5. It will then take you a screen where you can select a username and password. For the username we suggest your first and last name, all one word with a capital at the beginning. For your password ensure there is a capital, one number and it should end with two @@ symbols.

For example: DirectPaym3nts@@

There will also be a security question. Click on 'Select' and pick your question and answer.

Security Question *

Select

Select

- Favourite animal
- Favourite team
- Your favourite book
- Your first school
- Your mother's maiden name?

6. Once this information has been entered and successfully saved, you should be able to log in using the new username and password just created. We suggest you keep record of your password by either writing it down or keeping a note on your electronic device. The next part will include instructions if you have forgotten the password. If not applicable, please move on to the section below about the prepaid card home page.

6.A. If you have forgotten or lost your password, select the forgotten password link at the bottom of the log in page:

Enter your Credentials to login

Username *

[Forgot Username?](#)

Password *

[Forgot your password?](#)

[I do not have a username/password](#) [Login](#)

Once you have done this you will be taken to a page which will ask you for:

1) Card number (located on front of the card).

2) Date of birth (the person that is set up on the card, either customer or, if there is an authorised person, their date of birth)

3) The security question you previously set up. (Refer to step 5)

The above will look like the box shown:

Forgotten Password

Card Number *

DOB *

Day Month Year

Security Question *

Select

Security Answer *

[Submit](#)

[Return to Login](#)

Once you have filled out all the sections, it will ask you to input a new password and you will need to enter it again to confirm this. Once this is completed, it will send you back to the log in page. If the problem persists and you are unable to complete this, a Direct Payment Coordinator/officer can help on 01926 413908.

The prepaid card home page

Once logged in, you will now have access to the main screen of the prepaid card site. There will be many tabs down the left-hand side.

The first one is the **View Account Details**, and this will show **Card Balance, Card Number, Card Status, Expiry Date and Currency**. Additionally, it will show the cardholder's details.

| ACCOUNT OVERVIEW | |
|--------------------|-----------|
| Account Details | |
| Card Balance | 0.00 |
| Card Number | *****2631 |
| Card Status | Open |
| Expiry Date | 08/25 |
| Currency | GBP |
| Cardholder Details | |

- View Account Details
- Edit Account Details
- View Transaction History
- Register Loading Card
- Load Funds
- Payment Request Form
- Direct Debits
- Block/Unblock/Lost & Stolen
- Pin Reveal
- Upload Supporting Documents
- FAQs
- Terms and Conditions
- Contact Us

The above screenshot highlights the tabs that you will use the most: these are described below.

View Transaction History – this will allow you to check what’s coming in, what’s going out and the balance in the account. You will be able to use this function to check if a payment has successful been made or if the payment from Warwickshire County Council has reached the account. You will need to select a date range to check any transactions, for example if you made a payment on 15/07/2023 then you would need to select date either side (01/07/2023 – 30/07/2023).

| TRANSACTION HISTORY | |
|--|----------|
| Ledger Balance | GBP 0.00 |
| <p>▲ There are no transactions associated with the selected date range</p> <p>Select a date range to view your transactions</p> <p>Date from: 1 July 2023</p> <p>Date to: 30 July 2023</p> <p>Get Transactions</p> | |

Payment Request Form – This will allow you to make payments to whoever is providing the care (an Agency, Care Home, or Personal Assistant). You can also set up a Direct Debit just like any other bank.

PAYMENT REQUEST FORM

Please ensure the services you access are in line with your support plan.

Fill in the details of the account you wish to credit from your PFS Prepaid Mastercard®, in association with Warwickshire County Council, below. We will deduct the requested amount from your card balance, and send the payment on your behalf.

Please enter the account information carefully to ensure your transaction is processed correctly.

Current Available Balance GBP 0.00

Payment Frequency

- Make a one off payment
- Make a set number of payments and then stop
- Make payments until a specified date

To make a payment you will need to do the following:

- Click on Payment Request Form
- Select 'Make a one-off payment'.
- 'Payment type' – select the one that relates to the payment you are making. For example, 'carer' for the PA, 'Care agency' for an organisation.
- Then fill out: name, sort code, account number, amount and reference.
- You **do not have to fill in the section named 'additional information'**
- Once the bank details have been entered, they should be saved so the next time you log in to make payments you will only need to enter the new amount and a new reference if needed.

Upload Supporting Documents – this will allow you to upload receipts, salary information and invoices so that the direct payment monitoring team can audit the account correctly. You will need to either have these files on your electronic device or you can take a photo and upload it that way.

UPLOAD SUPPORTING DOCUMENTS

In this section you can upload separate documents to better explain this transaction to the Warwickshire County Council team for monitoring purposes only.

Document Type *

Document 1* No file chosen

Document 2 No file chosen

Explanatory Note
255 Characters left

Part of the Direct Payment agreement is that all evidence on how the direct payment is spent is kept and sent to the monitoring team. Using this portal and uploading all your documentation will allow them to see the evidence and monitor your account without the need to contact you. By clicking this tab, it allows you to pick a document type from the drop-down list best suited for the evidence you are uploading. For example, a Tax bill, PA salary, or a care agency invoice. Once this is selected it will ask you to 'Choose File'. This will then allow you to find the document on your computer, phone or tablet and upload it to your account. If you have any questions about the monitoring of the prepaid card, please do not hesitate to contact the monitoring team on 01926 413044 or email us at DPmonitoring@warwickshire.gov.uk

Lost card

If you **lose** your card, please contact 01926 413908 immediately to inform us that the card will need to be closed and replaced. We are contactable from 9:00 – 17:30 Monday – Thursday and 9:00 – 17:00 Friday. **Do not close the card yourself** unless it is outside of office hours. The following will show you how to freeze your card until you are able to get in touch with us.

Go to the box saying 'Block/Unblock/Lost & Stolen'.

Once you have clicked on this, it will have a REPORT LOST/ STOLEN CARD box. In the bottom right-hand corner will be an option saying, 'Click on this option' and a pop-up will display asking if you want to proceed.



Block/Unblock/Lost & Stolen



Report card as lost or stolen

Further support or advice

Should you need any support or need to get in touch to discuss your Direct Payment please contact 01926 413908. Our contactable hours are 9:00 – 17:30 Monday – Thursday and 9:00 – 17:00 Friday. If you are unable to get through, please leave a message and we will return your call soon as possible. Alternatively, please email ILT@Warwickshire.gov.uk