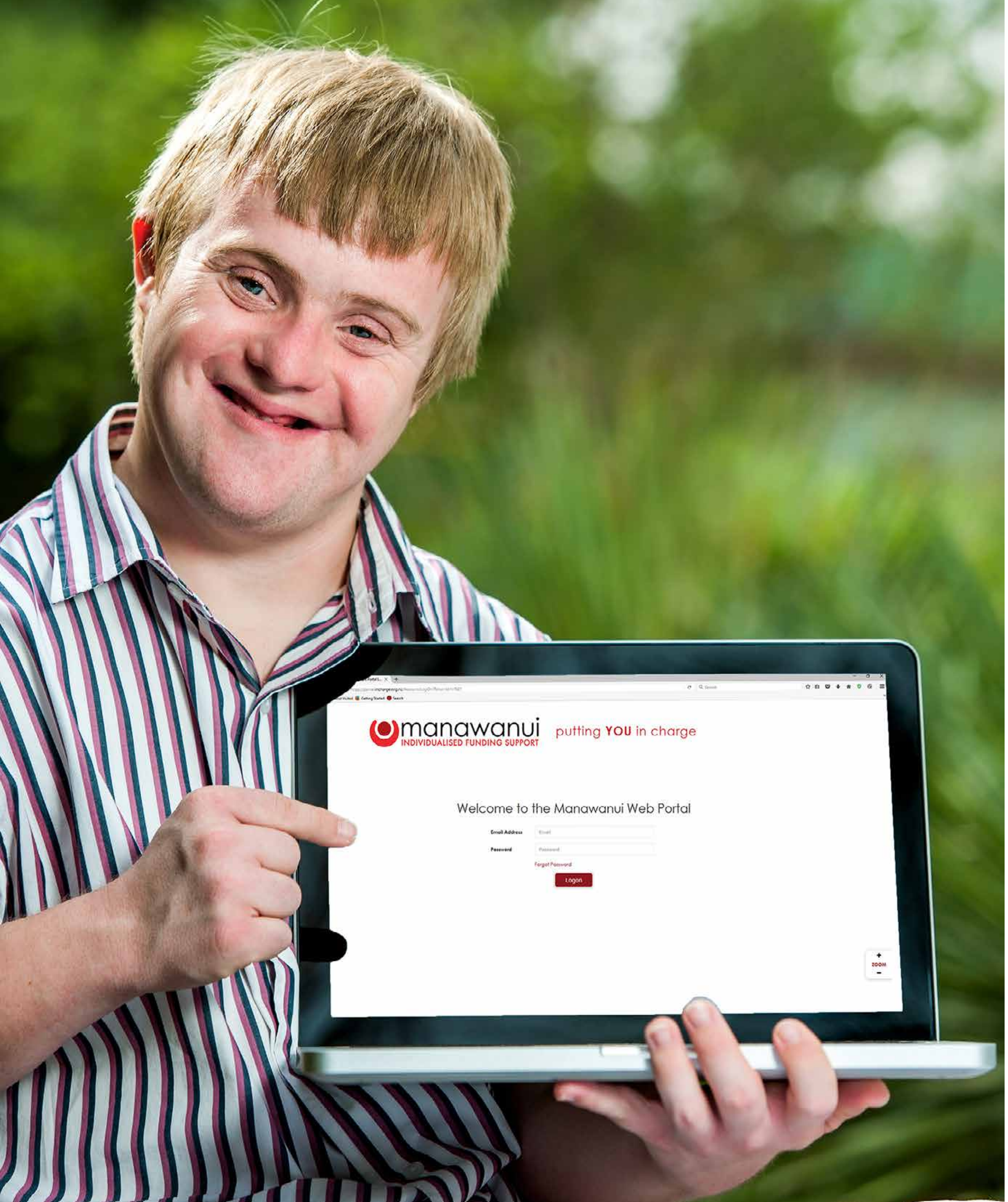

Web Portal Manual

For Self-Managing Clients

manawanui
INDIVIDUALISED FUNDING SUPPORT

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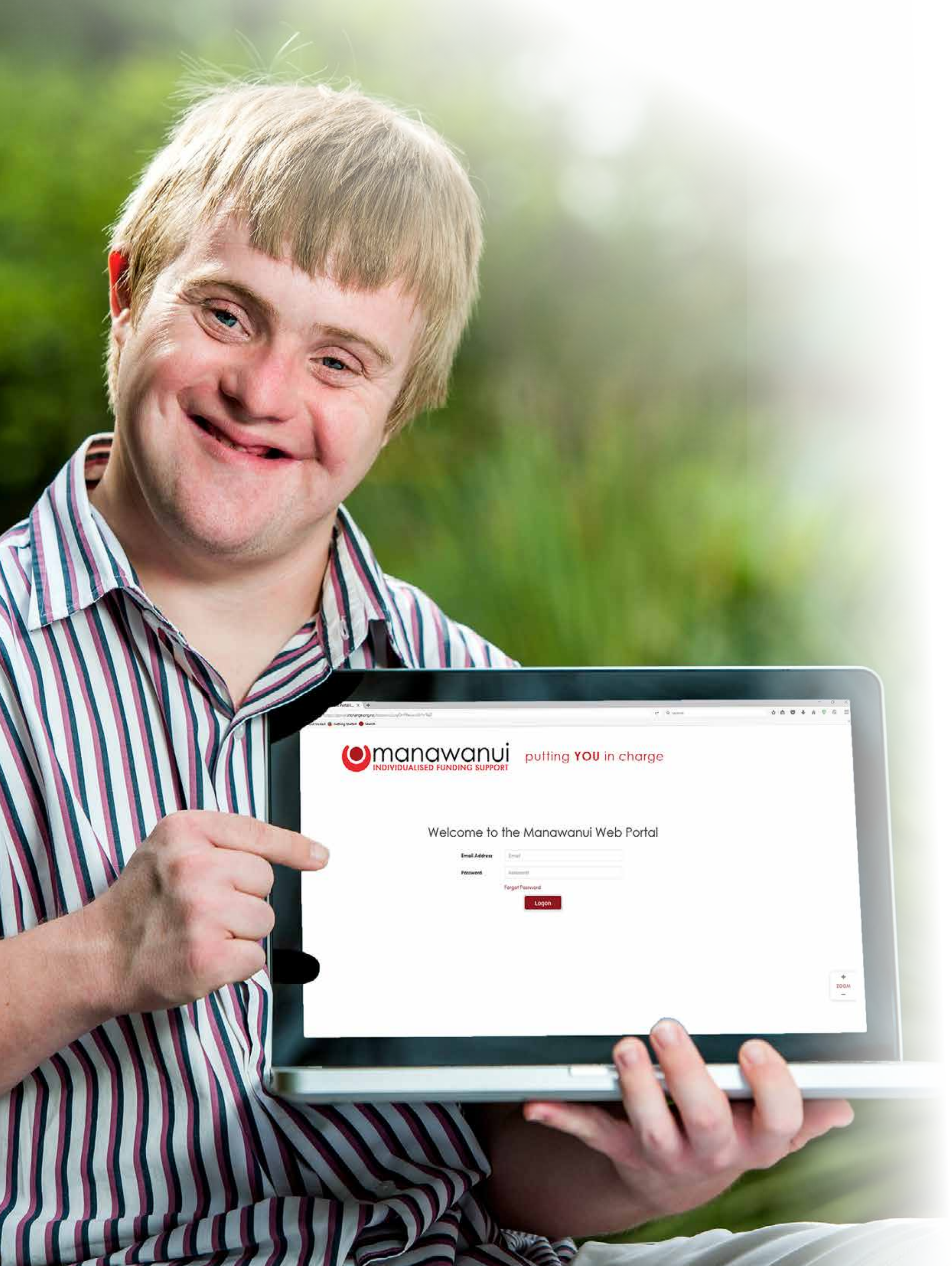


Welcome to the Manawanui Web Portal

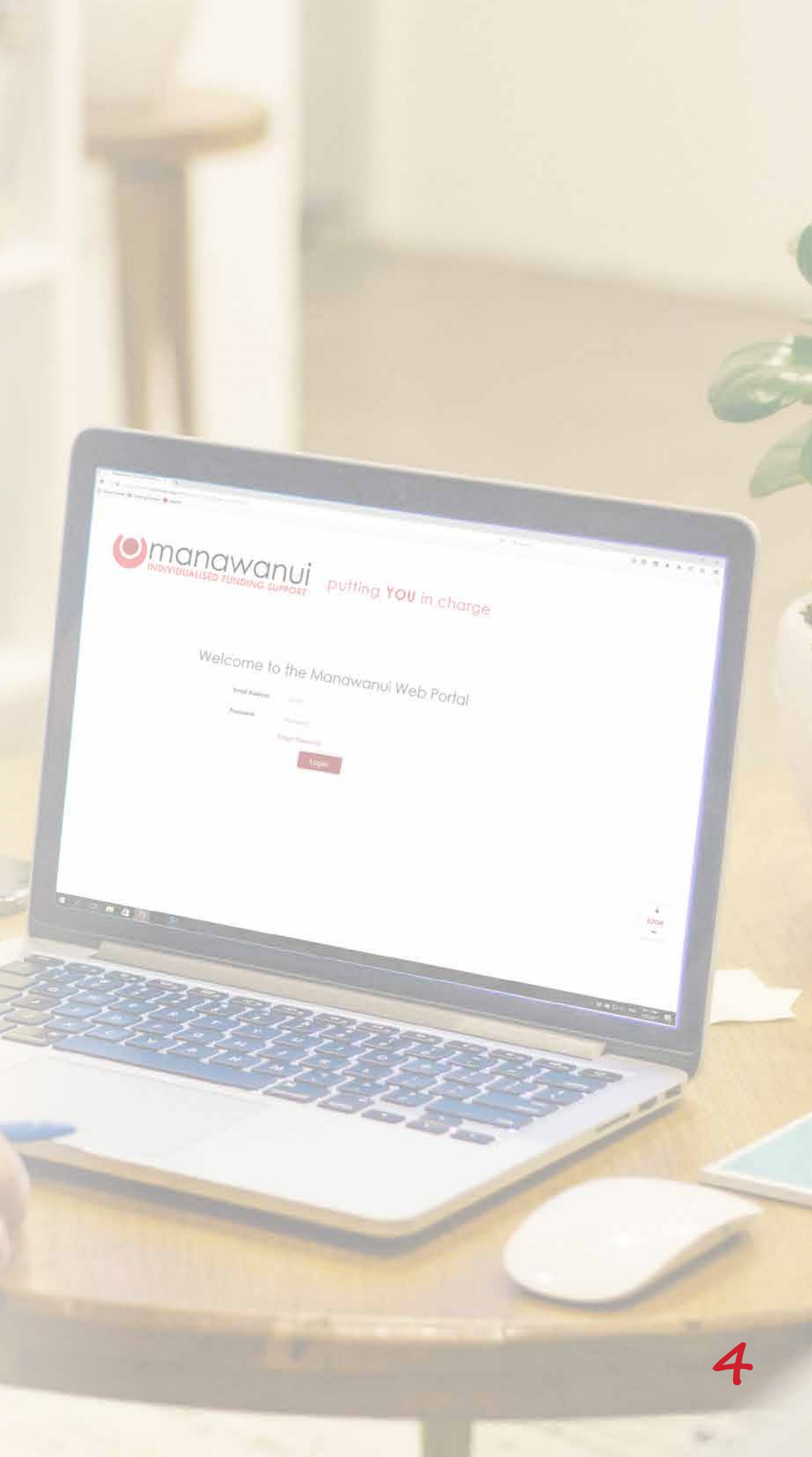
The Manawanui Web Portal is designed to enable our clients to undertake a number of tasks via the internet as well as being able to access up to date account information.

The purpose of this document is to provide an overview of the Web Portal and to provide guidance on how to use the various features in the Web Portal.

This is a dynamic document. If you click on a topic in the content you will be taken to that topic. If you click on a or icon you will be taken to the corresponding document page or website. Clicking on a screen shot with the icon will take you to the corresponding Web Portal page. You will need to login to view the page.

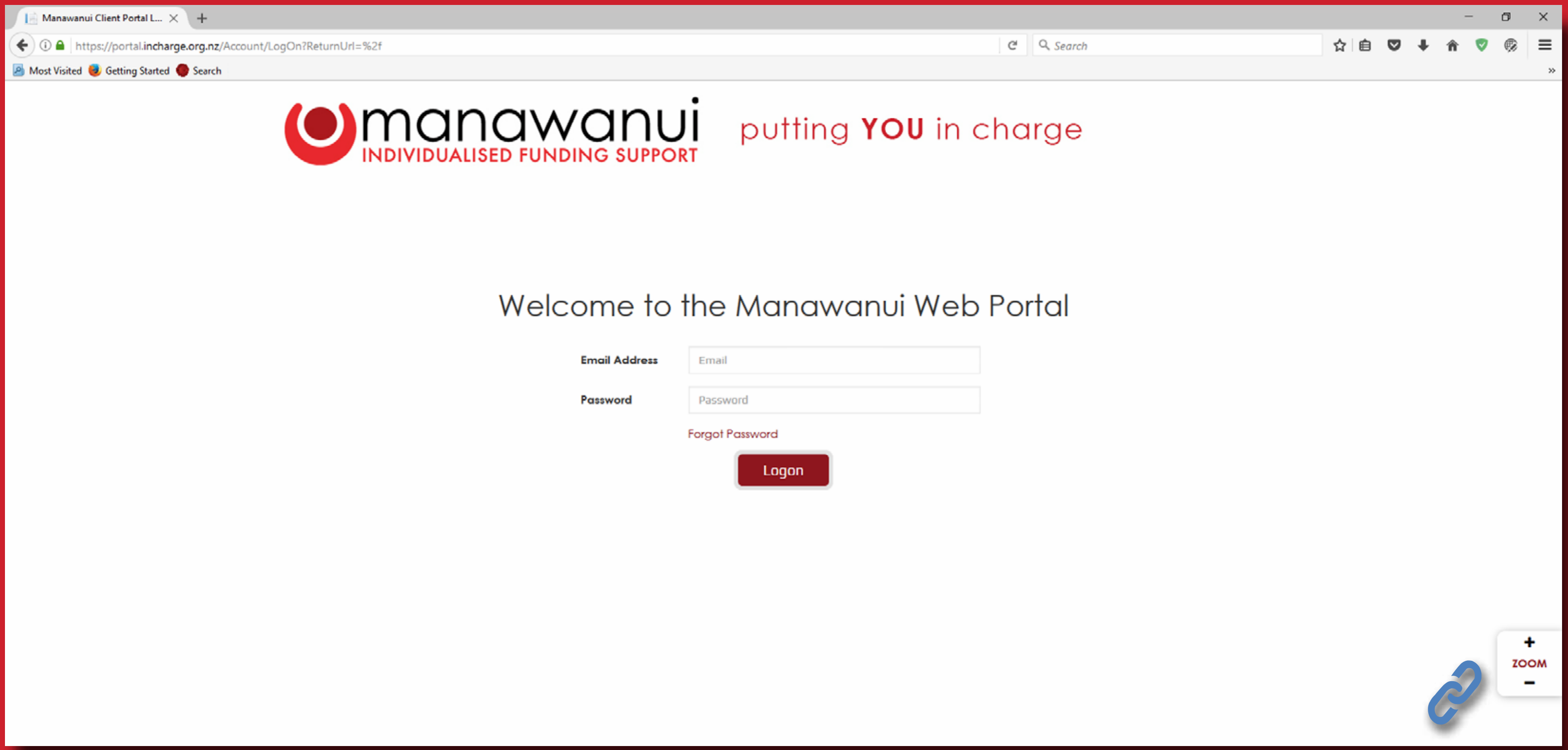
Overview

- The Web Portal enables a range of different tasks including submission of claims, budgeting and statements, and viewing statements.
- The Web Portal is designed to work on all widely used Internet Browsers and across devices including computers, tablets and on smart phones. Very old versions of Internet Browsers will not be compatible with the Web Portal. If you are using Internet Explorer you need to be using IE9 or later. If you are using Apple Safari, Google Chrome or Mozilla Firefox, you need to ensure that it is up to date.
- Account data in the Web Portal is updated daily with ‘transactional’ data for Statements being updated weekly.
- The Web Portal provides an HTTPS environment. All website traffic is secure and encrypted.
- Each user of the Web Portal will need to have their own, unique, email address for security purposes.



Getting Started

You can find the Web Portal at the following Web Address:
https://portal.incharge.org.nz/Account/Logon



You can add the Web Portal as a Favourite or Bookmark in your Internet Browser by pressing the 'Control' and 'D' keys together on a Windows computer, or 'Command' and 'D' on an Apple when you are on the Login Page.

Web Portal Basics

When you log into the Web Portal you will be presented with your 'Home' screen. You can navigate to any of the other main screens by selecting the label for each screen.

You can view changes to the Web Portal, read the guidance material or watch the guidance video, or make contact with the Portal Support Team by using the links directly below the navigation bar.

Home Statement Budget Employees & Payees Expenses Mail Profile

We've made some changes.....

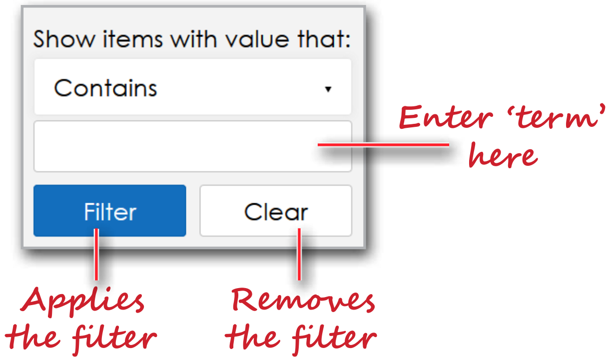
Click here for detailed guidance on using the Web Portal

Click here to get support

- Please note that the Web Portal menus appear differently to the above if you are using a Smart Phone.
- You can return to the Home screen at any time by selecting Home
- You can logout of the Web Portal by selecting 'Logout' which is at the top of the screen by your name. Hello Name Logout
- If you forget your password, simply go to the Login page for the Web Portal and click on the **Forgot Password** link.
- Some information is required for each Employee, Contractor or Organisation in the Web Portal before you can claim against them. This information is required to meet the verification requirements of the Ministry of Health.

- A + icon denotes that you can add a new record, such as a new employee or a timesheet, by clicking on it.
- A V icon denotes that there are other options available that can be selected such as alternative views of funding or mail folders.
- You can change the size of the Web Portal by using the Zoom function or you can press the 'Control' and '+' or '-' keys.

- An X icon denotes that you can delete an item or entry by clicking on it.
- In some screens it is possible to filter the information presented in the screen. You can do this by clicking on the filter icon. You will then be prompted to enter a 'term' to filter the data. The filter will present all records that contain that term.



Help and Support

- Accessibility information for the Web Portal can be found by navigating to the Accessibility page at the top left corner of the Home screen.
- Each of the main screens in the Web Portal contains an information button that includes a summary of the purpose of the screen and guidance on how to use the screen. A number of screens include video guidance and the guidance for the Home screen includes a link to the User Guide for the Web Portal.
- Most of the fields and functions in the Web Portal have an 'Info:' explanation. The 'Info:' explanations contain key information on what fields and functions are for and how they should be used.
- The Web Portal makes it easy to contact your Coach to get assistance and you can do this from the Profile Screen by selecting **+Email** beside your Coaches name.
- If you find yourself **'locked out'** of the Web Portal then you should contact the Portal Support team.
- A dedicated support team has been put in place which you can call or email for support.
    - You can contact the support team using the internal mail system in the Web Portal by going to the Mail screen and selecting **+Create a Secure Mail** and choosing 'Portal Support' in the 'To' field.
    - A number of the screens in the Web Portal include a button to request support Request MIC Help that will create a message with details of what you need assistance with in the Portal.
    - You can email the Portal Support team at: Support@incharge.org.nz
    - You can call the Portal Support team via the Manawanui mainline number on 0508 462 427. Please select Option 1 and ask to be put through to the Portal Support team.

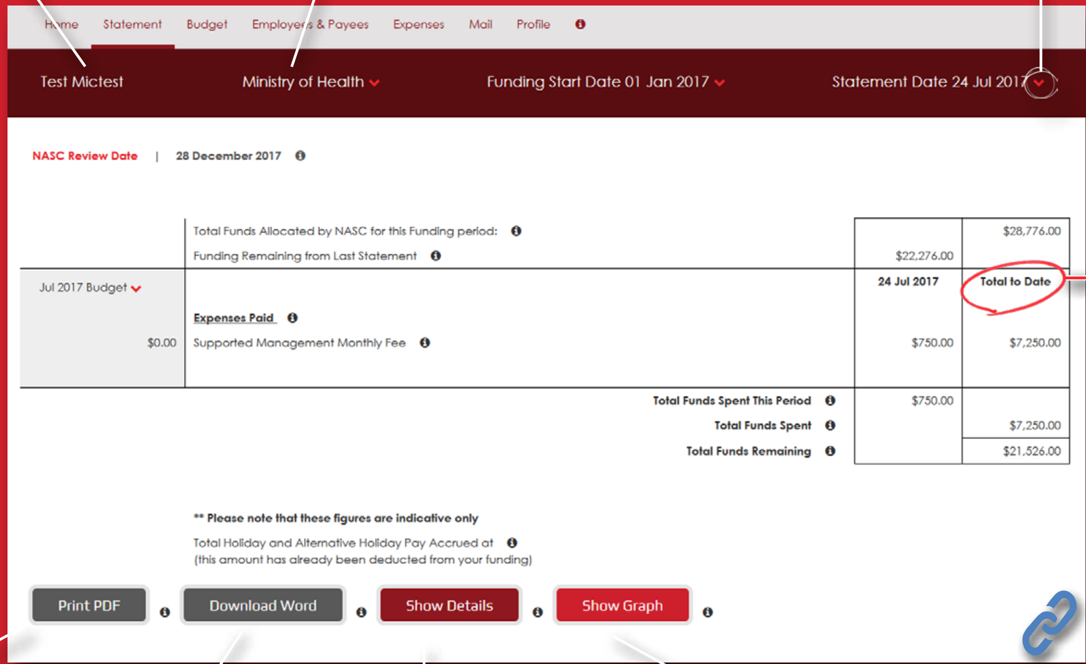
Statement Screen

- You can access your Statement and a history of Statements in this screen.
- The Statement is updated each week on a Monday night.
- You can access an end of funding statement using from the list of Statement Dates available.

If you are the 'Agent' for more than one person you can change accounts here

You can change your funding source here if you have more than one

View your history of past Statements and end of funding period statement from here



View the total spent this month versus 'to date' and check your remaining funds

Print a PDF version of your Statement

Download a copy of your Statement into a Microsoft Word document

View detailed transactions and download them if needed
Click to go to details page

View a graph of your spending against your budget
Click to go to graph page

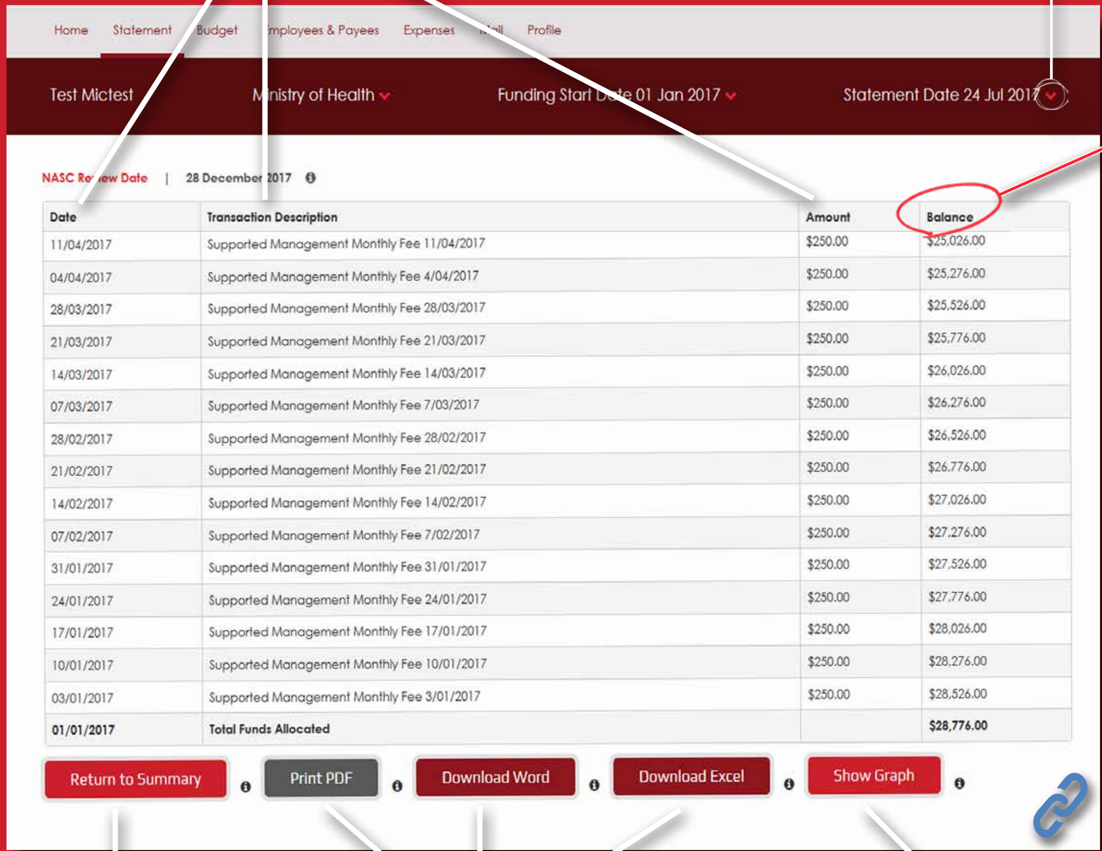
Detailed Transaction Screen

- **View the detailed and itemised transactions that your statement is based on.**
- **Sort the information by clicking on the column Headers.**
- **Print the transactions to a PDF document or extract them to a Word Document or Excel Spreadsheet.**

Sort the data by clicking on the Column Headers

View your history of past Statements and end of funding period statement from here

Indicates the running balance of the Statement

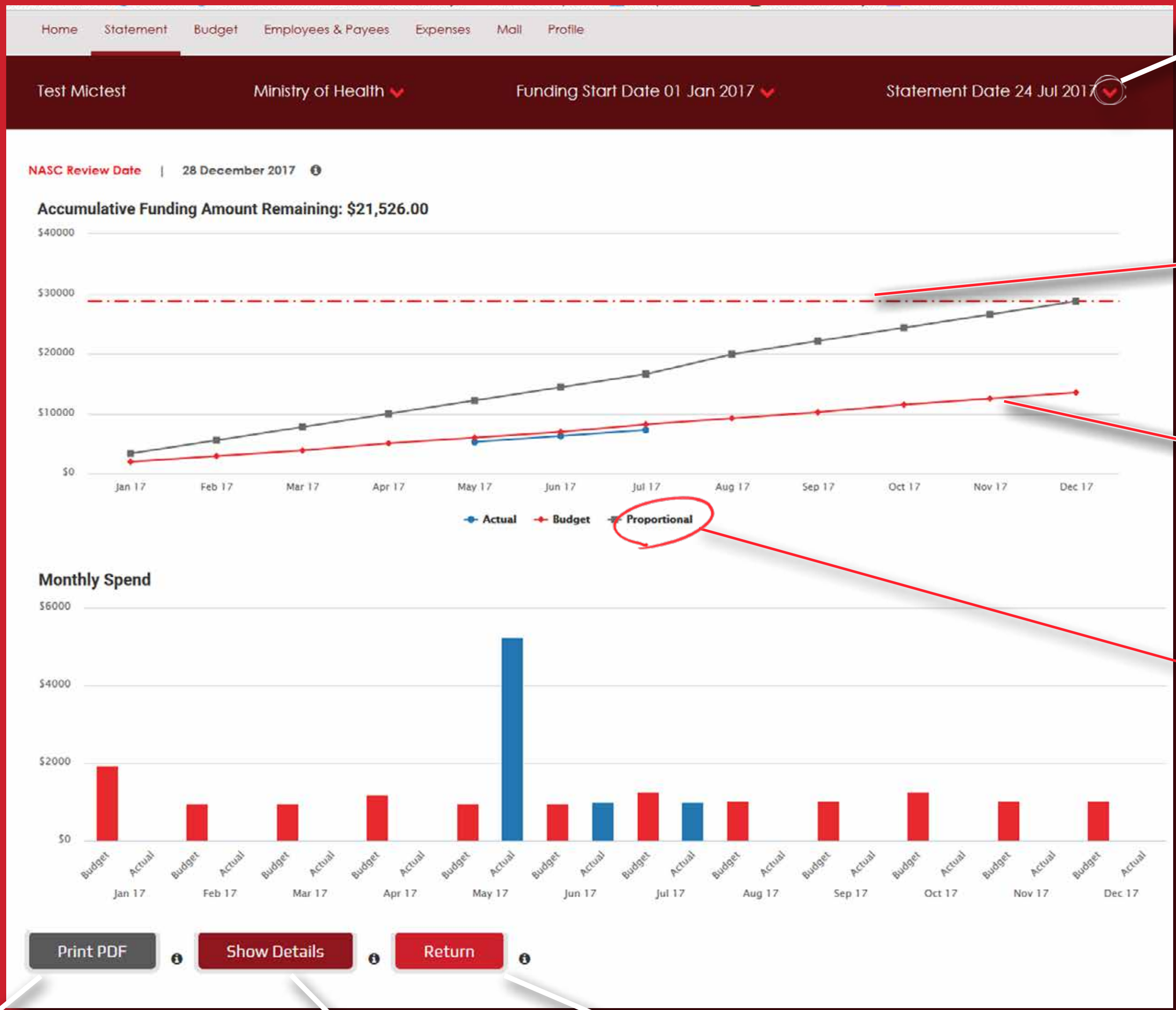


Return to the main Statement Summary page here

Print to a PDF, download a copy of your Statement into a Word document or extract the data to an Excel spreadsheet

View a graph of your spending against your budget.
Click to go to graph page

Statement Graph Screen



View your history of past Statements

Indicates the amount of funding remaining

Indicates the actual spending versus budgeted

A proportional budget is added that is proportional based on the funding divided by the months

Print the graph to a PDF document

Go back to the detailed transaction screen

Return to the main Statement Summary Page

Budget Screen

If you are the 'Agent' for more than one person you can change accounts here

Your budget will indicate if it is over or under your allocation

Select the funding to budget for

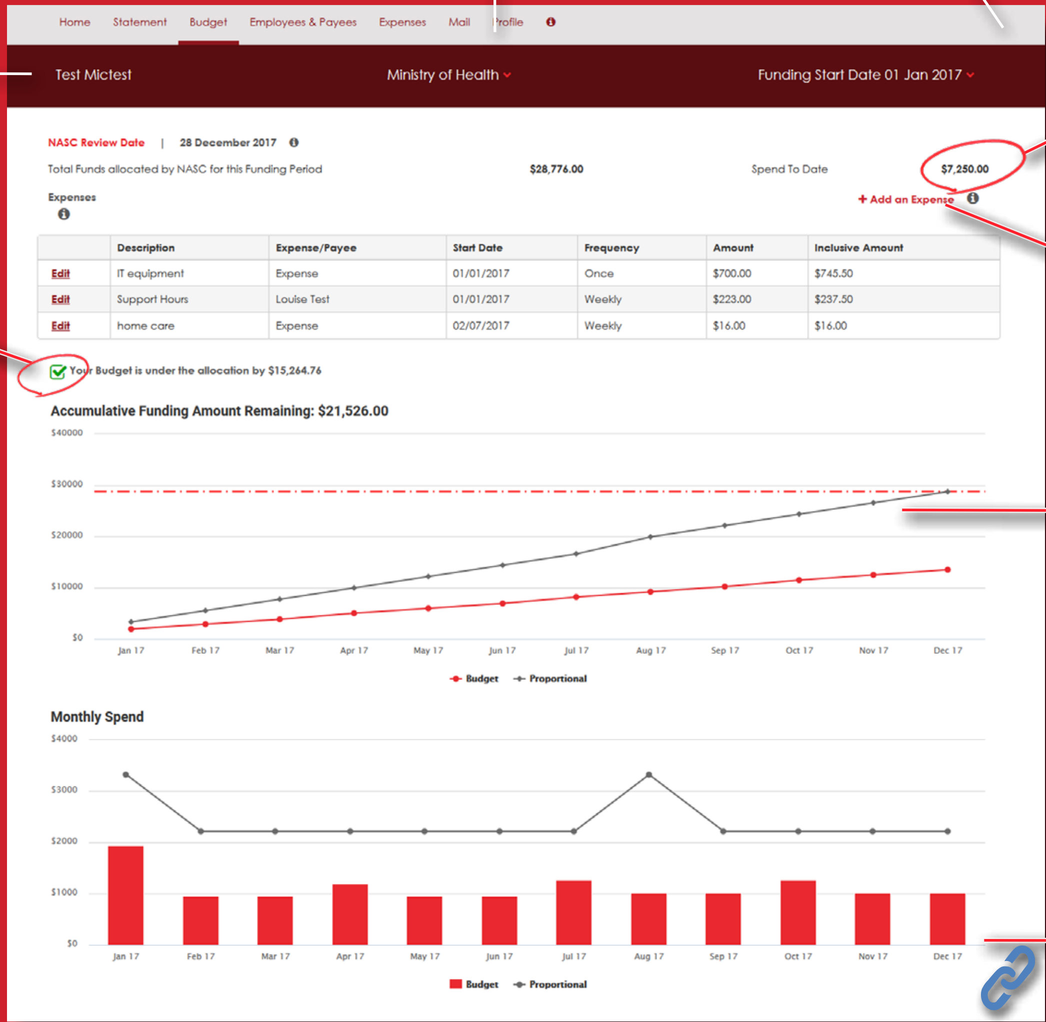
View a history of budgets here by viewing historical funding

Check your spending to date here

Add expenses to your budget
Click to go to page

A proportional budget forecast is automatically generated

View a graph of your budget spend by month



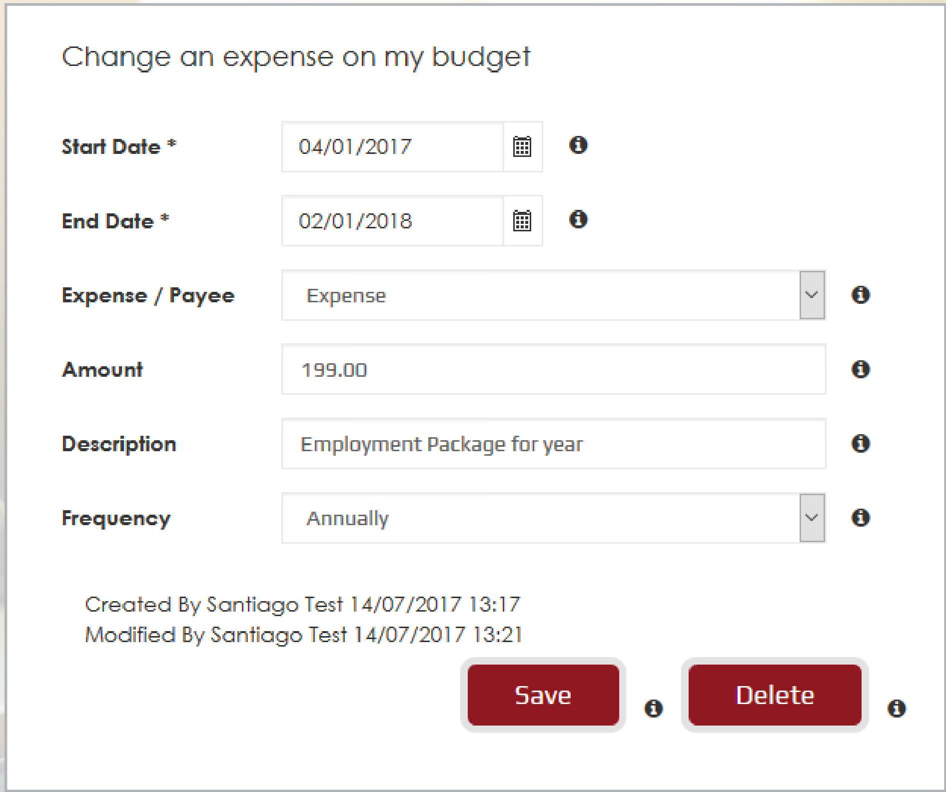
- You can use the '+ Add an Expense' function to add an expense for a purchase or for the costs of a Contractor or Organisation.
- The budget will vary in some months where there is an extra fortnight.

Notes on the Budgeting Screen

- Maximise your spending using the budget tool. Add expenses to build your budget. Use expenses to add expenses such as purchases as well as expenses for the cost of Employees, Contractors and Organisations
- A separate budget is required for each source of funding.
- A proportional budget is automatically forecast that divides your funding by the number of months in the funding period. The proportional forecast will vary in some months where there are additional pay periods that fall within that month.
- You can review and revise your budget at any time during your funding period.

How to add an Expense to your Budget

- To add a new expense to your budget select **+ Add an Expense** on the right hand corner of the screen.
- You will then be prompted to complete the data in the view opposite.
  - Set the Start Date and End Date for the Expense. Please note that you can add recurring expenses if required.
  - Select expense or an existing employee or payee.
  - Set the amount of the Expense.
  - Add a brief description so you can remember what the Expense is.
  - Identify the Frequency of the Expense which could be just ‘Once’ or a range of periodic options.
  - Select Save once entered.
- For guidance on what types of expenses you can add to your Budget please contact your Coach.

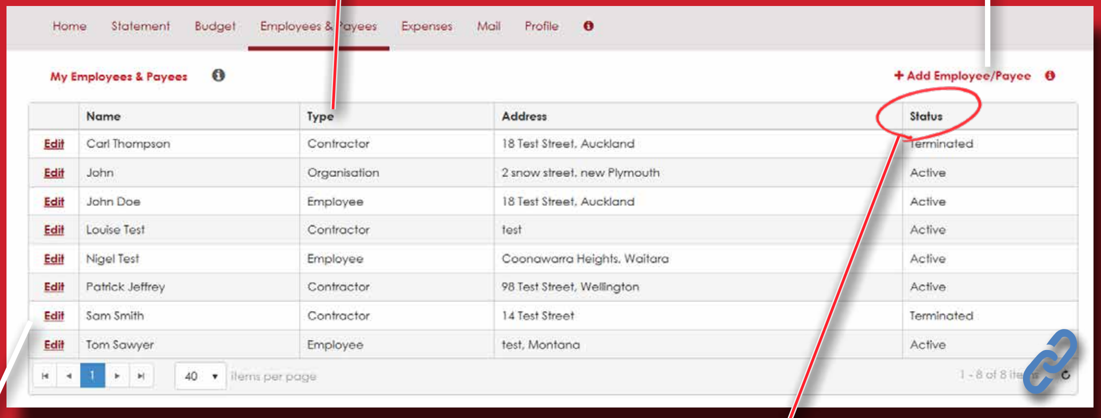


Employees & Payees Screen

- The Employees & Payees screen shows all Employees, Contractors and Organisations.
- It is a requirement by the Ministry of Health to capture some key information for each of your Employee & Payee so this can be associated with your Claims when you submit them.

View the type of Employee or Payee

Add a new Employee or Payee


Home Statement Budget Employees & Payees Expenses Mail Profile

My Employees & Payees

+ Add Employee/Payee

	Name	Type	Address	Status
Edit	Carl Thompson	Contractor	18 Test Street, Auckland	Terminated
Edit	John	Organisation	2 snow street, new Plymouth	Active
Edit	John Doe	Employee	18 Test Street, Auckland	Active
Edit	Louise Test	Contractor	test	Active
Edit	Nigel Test	Employee	Coonawarra Heights, Waitara	Active
Edit	Patrick Jeffrey	Contractor	98 Test Street, Wellington	Active
Edit	Sam Smith	Contractor	14 Test Street	Terminated
Edit	Tom Sawyer	Employee	test, Montana	Active

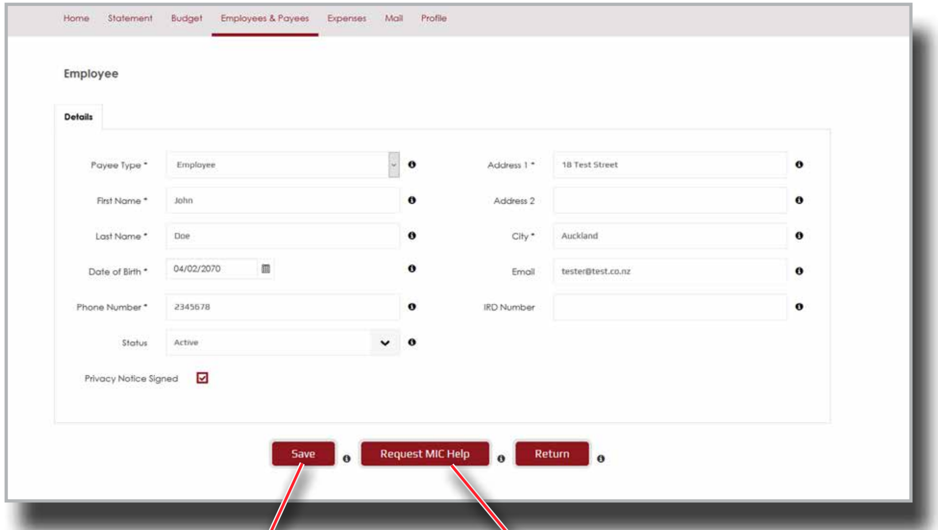
40 items per page

Select 'Edit' to edit the details for an Employee

View the Status of an Employee or Payee. Active indicates that they are actively working. Terminated indicates that the Employee or Payee is no longer employed.

Employee & Payee Detail Screen

- **Manage the details of your Employees & Payees in this screen.**
- **To select the Employee or Payee on an Expense Claim, they need to be set to the Status of 'Active'.**

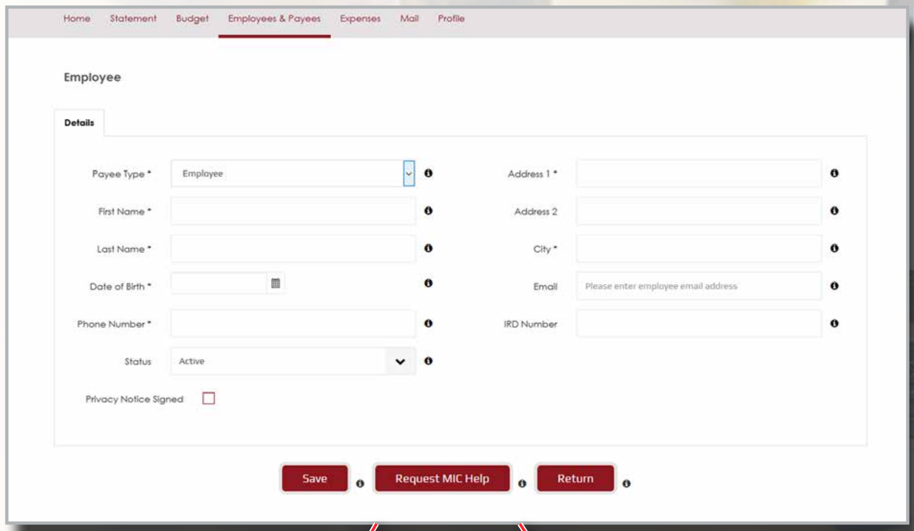


Once you have updated the details select Save

Clicking on Request MIC Help will open a mail message

How to add a New Employee or Payee in the Web Portal

- To add a new Employee or Payee select **+Add Employee/Payee** on the Employee & Payee screen. You will then be presented with the screen below to enter their details.
- To select the Employee or Payee on an Expense Claim, they need to be set to the Status of 'Active'.
- Date of Birth and Phone Number are mandatory for Employees and Contractors.



Once you have updated the details select Save

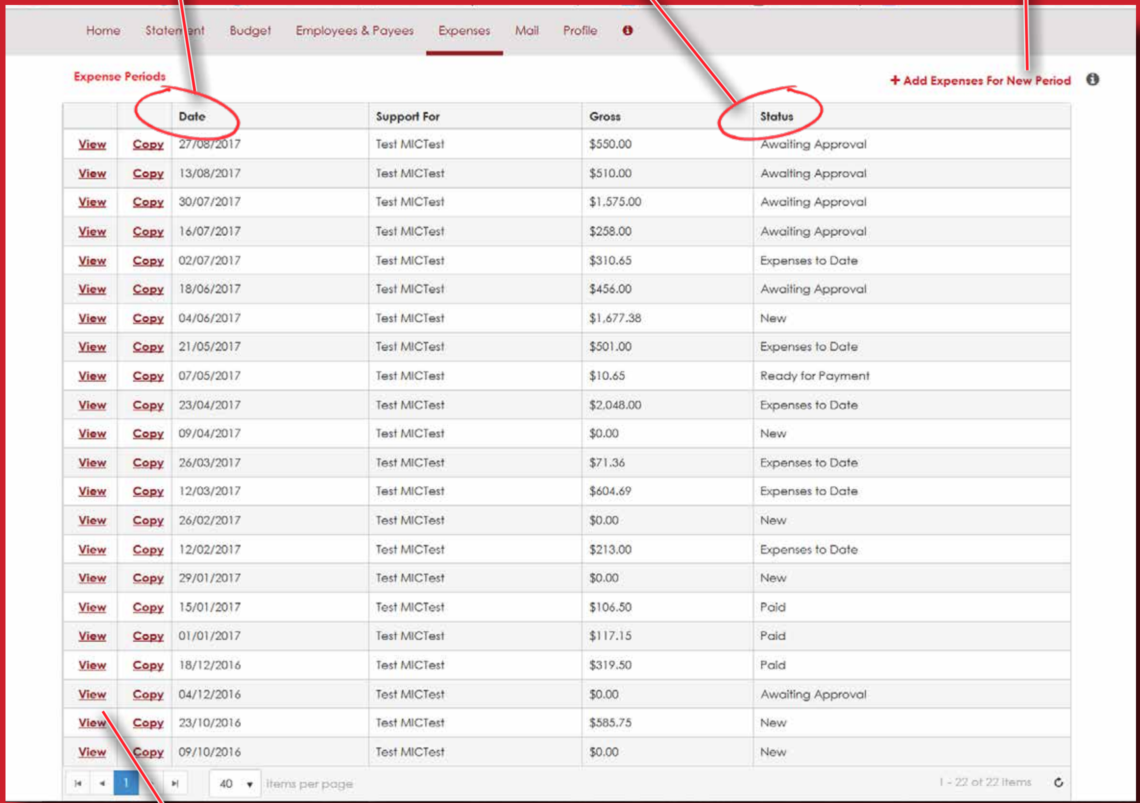
Clicking on Request MIC Help will open a mail message

Expenses Screen

Date indicates the period ending date for the Expenses Claim

Track the Status of an Expenses Claim in the Status column.

Add a new Expenses Claim here



		Date	Support For	Gross	Status
View	Copy	27/08/2017	Test MICTest	$550.00	Awaiting Approval
View	Copy	13/08/2017	Test MICTest	$510.00	Awaiting Approval
View	Copy	30/07/2017	Test MICTest	$1,575.00	Awaiting Approval
View	Copy	16/07/2017	Test MICTest	$258.00	Awaiting Approval
View	Copy	02/07/2017	Test MICTest	$310.65	Expenses to Date
View	Copy	18/06/2017	Test MICTest	$456.00	Awaiting Approval
View	Copy	04/06/2017	Test MICTest	$1,677.38	New
View	Copy	21/05/2017	Test MICTest	$501.00	Expenses to Date
View	Copy	07/05/2017	Test MICTest	$10.65	Ready for Payment
View	Copy	23/04/2017	Test MICTest	$2,048.00	Expenses to Date
View	Copy	09/04/2017	Test MICTest	$0.00	New
View	Copy	26/03/2017	Test MICTest	$71.36	Expenses to Date
View	Copy	12/03/2017	Test MICTest	$604.69	Expenses to Date
View	Copy	26/02/2017	Test MICTest	$0.00	New
View	Copy	12/02/2017	Test MICTest	$213.00	Expenses to Date
View	Copy	29/01/2017	Test MICTest	$0.00	New
View	Copy	15/01/2017	Test MICTest	$106.50	Paid
View	Copy	01/01/2017	Test MICTest	$117.15	Paid
View	Copy	18/12/2016	Test MICTest	$319.50	Paid
View	Copy	04/12/2016	Test MICTest	$0.00	Awaiting Approval
View	Copy	23/10/2016	Test MICTest	$585.75	New
View	Copy	09/10/2016	Test MICTest	$0.00	New

1 40 items per page 1 - 22 of 22 items

Select View to view the details of the Expenses Claim

Understanding the Status Column.

<u>**New**</u>
A newly created expenses claim

<u>**Expenses to Date**</u>
Indicates a claim that is in progress and being added to

<u>**Awaiting Approval**</u>
Indicates that the expenses claim has been verified and sent to the Self-Managing Team for their review and approval

<u>**Ready for Payment**</u>
Indicates that the claim has been approved by the Self-Managing Team and is being processed for payment

<u>**Paid**</u>
Indicates that the expenses claim has been paid

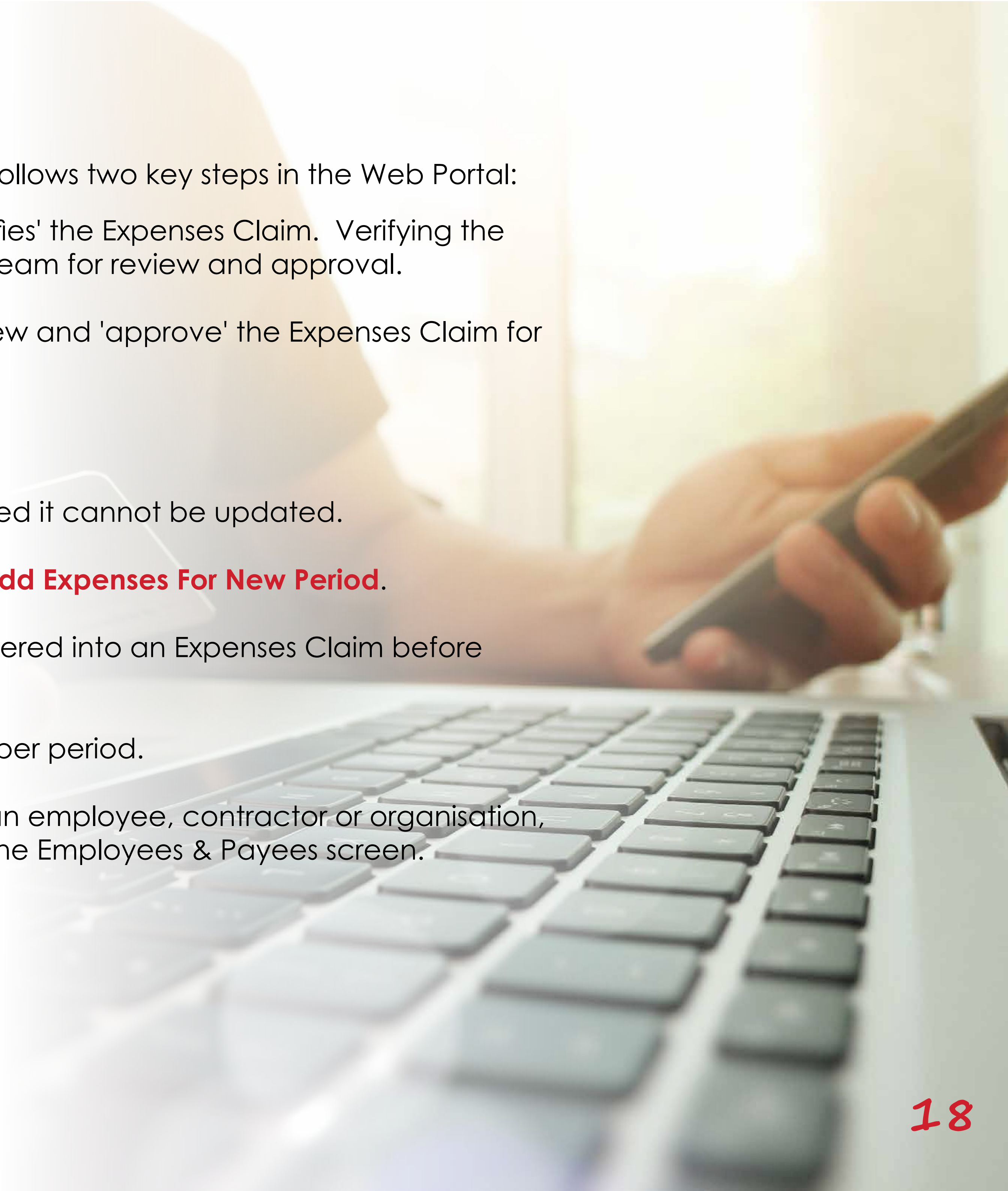
Notes on the Expenses Screen

The process for submitting an Expense Claim follows two key steps in the Web Portal:

1. The Employer enters, reviews and 'Verifies' the Expenses Claim. Verifying the claim submits it to the Self-Managing Team for review and approval.

2. The Self-Managing Team will then review and 'approve' the Expenses Claim for processing and payment.

- Once an Expenses Claim has been verified it cannot be updated.
- To add a new Expenses Claim select **+Add Expenses For New Period**.
- Please ensure that all data has been entered into an Expenses Claim before submitting it.
- You can only enter one Expenses Claim per period.
- If you want to record expenses against an employee, contractor or organisation, their Status needs to be set to Active in the Employees & Payees screen.



How to Enter an Expenses Claim

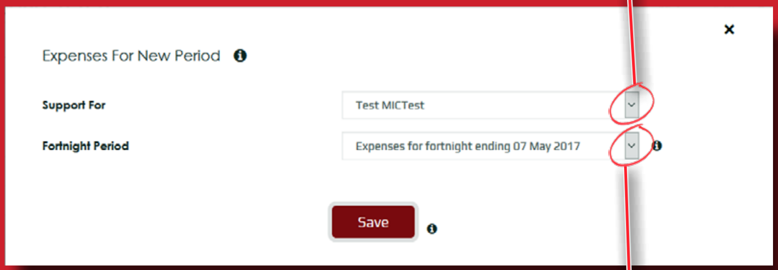
1 On the Expenses screen, select +Add Expense For New Period and you will be presented with the following screen. Select who the support was for and the fortnight ending period for the expense.

Click save.

2 Once you have clicked save, you will be presented with the new Expenses Claim screen below.

Select +Add Expense to enter an expense.

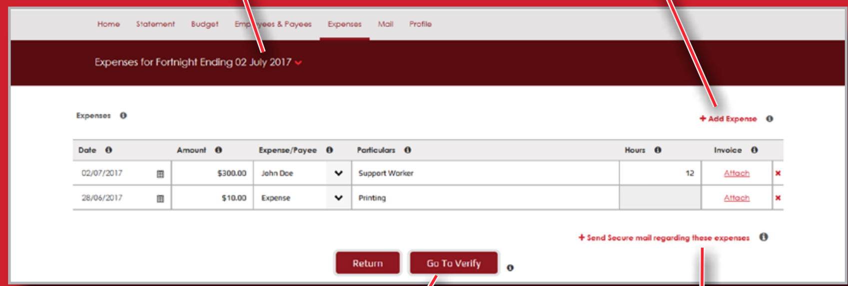
Select 'Support For'



Select the Fortnight Ending

Indicates the fortnight period ending date

Click on 'Add Expense' to add a new expenses entry



Once all entries are added, click 'Go to Verify' to verify the expense and send it to the Self-Managing Team

Click here to send a message relating to the expenses claim to the Self-Managing Team or your Coach

Entering Expenses

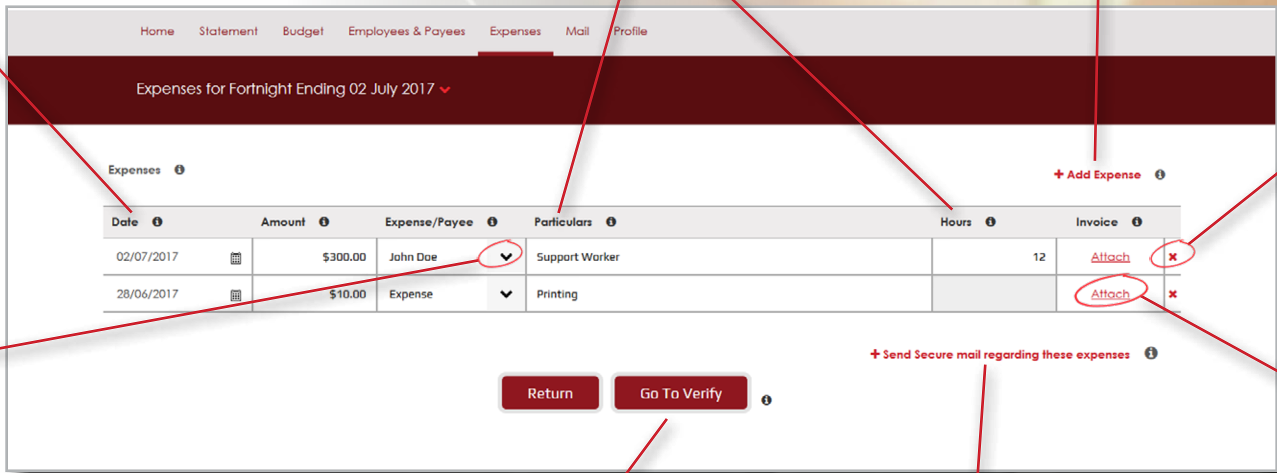
- The tabular expense claim displays all of the fields required to be entered and depending on the value selected in the Expense/Payee field the remaining fields will change to highlight those that are required. The particulars field is not required when entering an expenses that is for an Employee or Contractor but the Hours field is required.

Select the date of the Expense or the date that the invoice was received

The Hours field is not required if Expense is selected in the Expense / Payee field or if an Organisation is selected. Please enter particulars for these types of expenses to describe what they are for.

Select +Add Expense to add new expenses entries

You can choose if the item is an expense or you can choose from a list of Employee, Contractors or Organisations that already exist in the Web Portal. To add an Employee, Contractor or Organisation you first need to enter them into the Employee & Payees screen



Select 'X' to delete an entry in the claim

Attach an invoice or receipt by selecting 'Attach'. An invoice is required for some expenses that are over $500

Click to go to Employees & Payees Screen

Once all expenses are added select 'G o To Verify' to submit the Expenses Claim

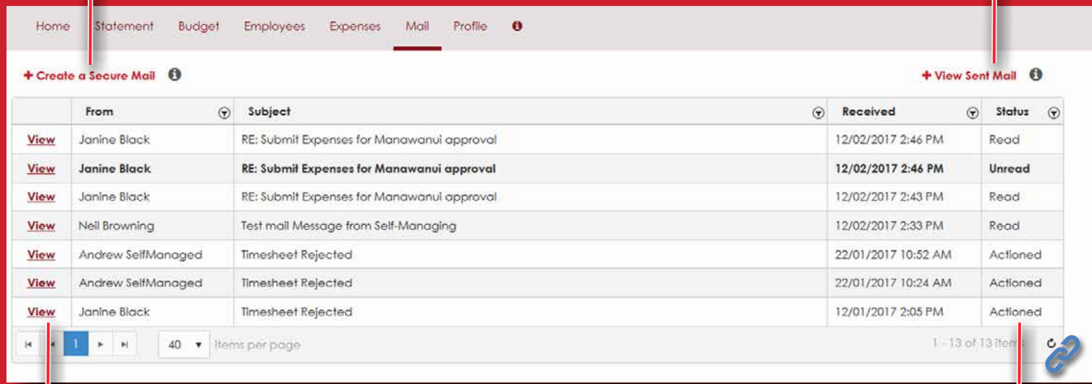
You can ask for support relating to the expenses claim by clicking on the send secure mail function

Mail Screen

The Web Portal has an internal 'Secure Mail' system that can be used to communicate with your Coach, the Helpdesk, Portal Support and the Self-Managing team. When you receive a message in the Web Portal, the Web Portal will send you an email notification to advise you. Mail messages that have not been read will appear in bold text and will be identified as 'unread' in the Status column.

Create a new message by clicking here

View your sent mail items here



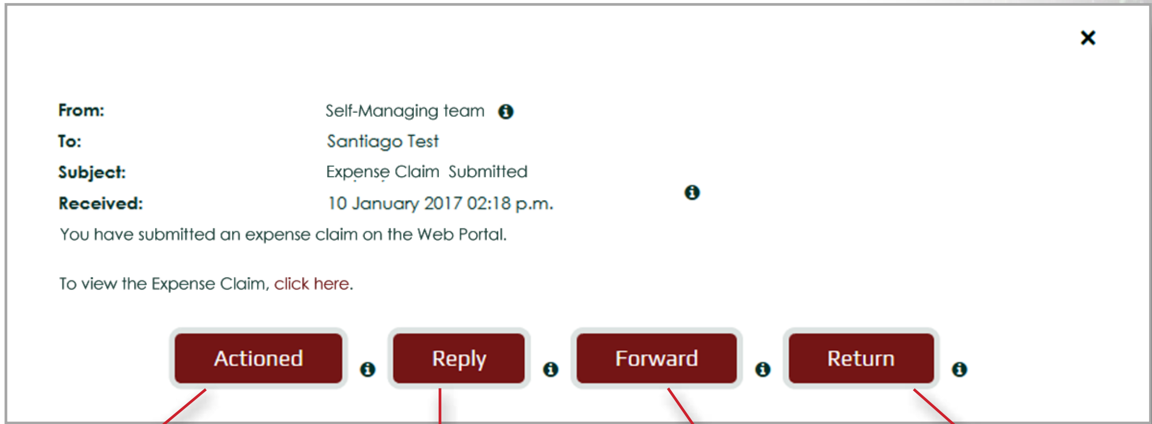
Open and view a mail by selecting 'View'

Indicates the Status of the mail. Unread mail will be identified as 'Unread'

Viewing Messages

To view a mail message, click on **View** and the message will be opened in the view below. In this example mail message received from the Self-Managing Team about an Expense Claim you can go directly to the Expense Claim by clicking on **Expenses Link**.

Note: It is not possible to attach documents to a mail message in the Web Portal.



Enables you to 'Action' a mail message. It will then be removed from your inbox in the Web Portal

Reply to the Sender

Forward the mail message to someone else only within the Web Portal mail system

Return will close the mail and take you back to your mailbox in the Web Portal

Profile Screen

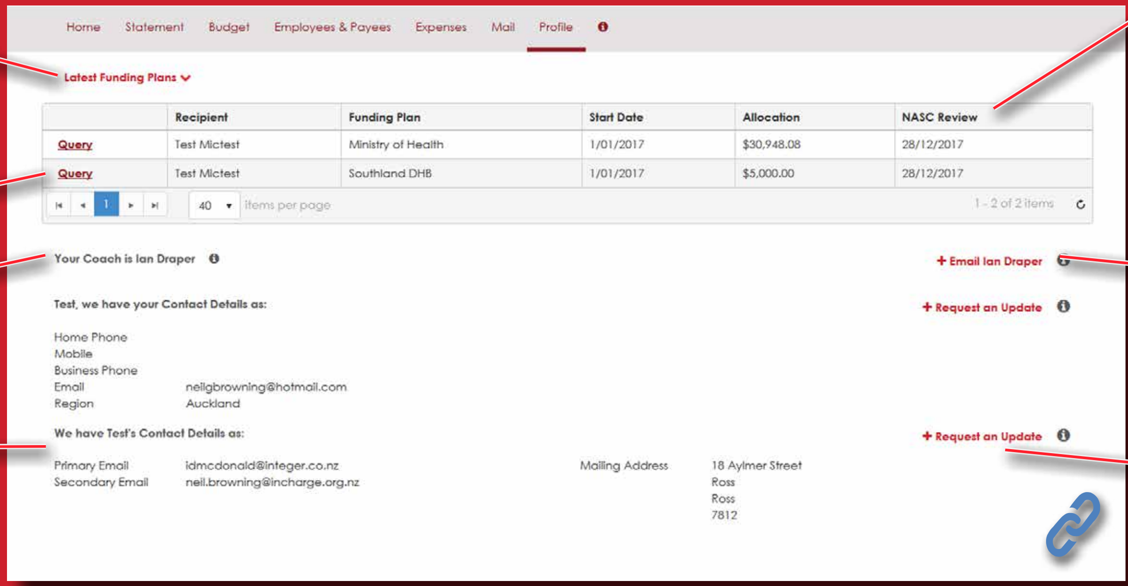
You can view your key account information in the Web Portal and update it if needed. The Profile screen also shows details of your funding as well as who your Coach is.

View past funding plans by clicking here

Select 'Query' to send an email relating to your funding

Your Coach

Your contact information



Shows a summary of key information about your funding including the NASC Review date

Email your Coach by clicking here

Request an update to your contact details by clicking here


manawanui
INDIVIDUALISED FUNDING SUPPORT

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