

THE WEBSITE

<https://www.ips-docs.com/>

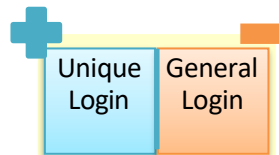
LOGGING IN

Advice on Email Addresses

It is recommended that you utilise a central email address or an insolvency specific email address that several people at your organisation will be able to review and see. This means that in the event of employee / user absence, the mail box is always covered by someone else.

Login Types

There are two possible methods of logging in.



Ideally you will want to use your Unique Log in because it will allow you to do so much more within the Portal.

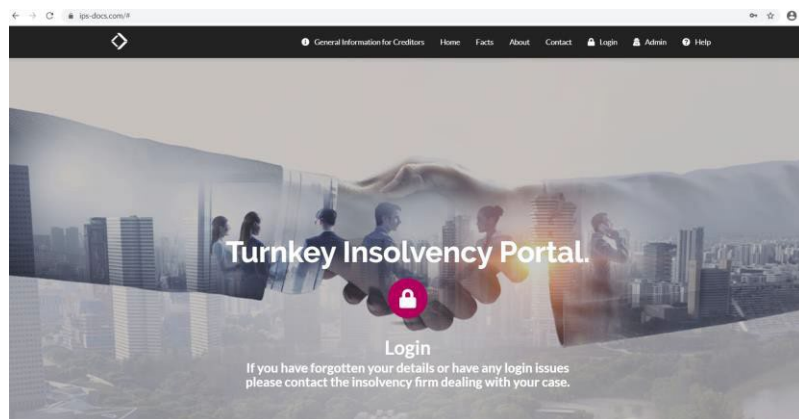
The Unique login will allow you to do so much more. But it will be unique to **you** and **the particular proceedings** (e.g. liquidation). You are advised to not share your unique log in details with anyone else.

Either way, the password is what is key and will determine whether you have unique access or general access.

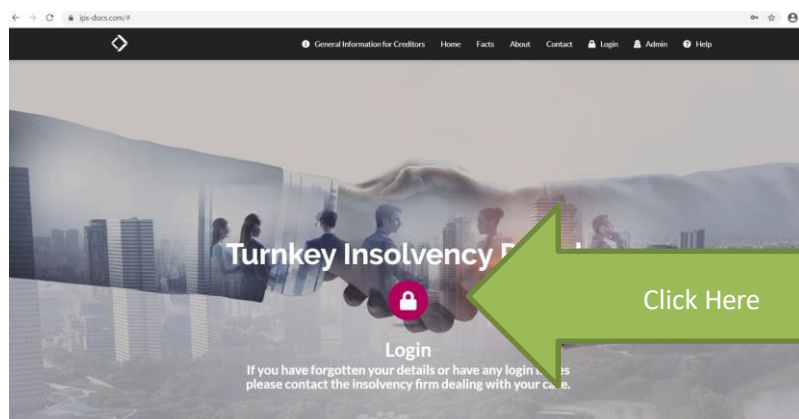
You can request your Unique Login details at any point from the Office Holder's office. Their contact details are found in "Further Help" below.

Go the Creditor Portal website <https://www.ips-docs.com/>

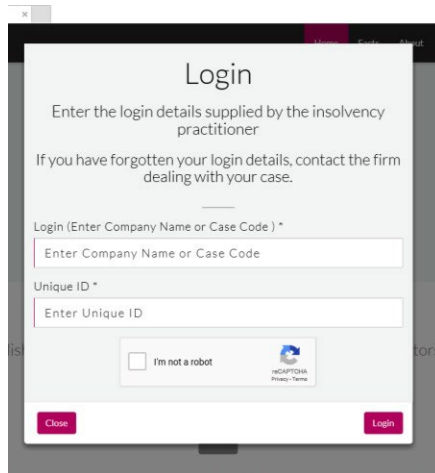
You will see the following:



Click on the padlock to login



This will provide you with the following:



The screenshot shows a web browser window with a 'Login' form. The form has a title 'Login' and instructions: 'Enter the login details supplied by the insolvency practitioner' and 'If you have forgotten your login details, contact the firm dealing with your case.' There are two input fields: 'Login (Enter Company Name or Case Code) *' with the placeholder text 'Enter Company Name or Case Code', and 'Unique ID *' with the placeholder text 'Enter Unique ID'. Below the fields is a CAPTCHA section with an unchecked checkbox labeled 'I'm not a robot' and a reCAPTCHA logo. At the bottom are 'Close' and 'Login' buttons.

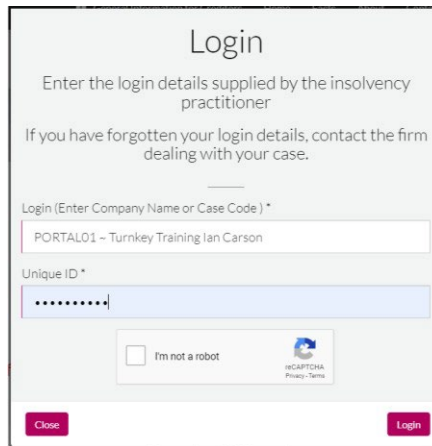
Enter the case name

or

(ideally) the Case Code log in you have been provided with

Enter the password (ideally your Unique login password)

The case (if found) should tell you the name of the Insolvency Practitioner firm looking after the proceedings.

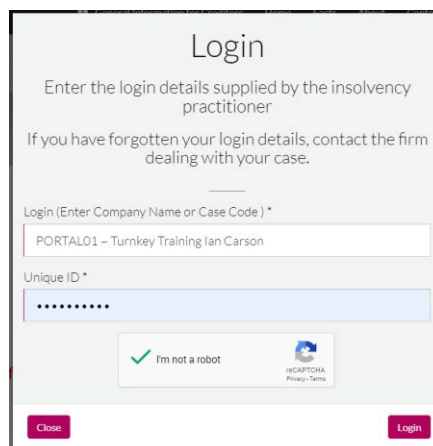


The screenshot shows the same login form as above, but with the 'Login' field filled with 'PORTAL01 - Turnkey Training Ian Carson' and the 'Unique ID' field filled with a series of dots. The 'I'm not a robot' checkbox is still unchecked.

Tick the box that says "I'm not a robot"

You will then get a screen to verify that you are indeed a person using a variety of methods (for example, selecting relevant pictures).

Once you have successfully completed this, you will need to click [Login]



The screenshot shows the login form with the 'I'm not a robot' checkbox now checked, indicating the CAPTCHA has been completed. The 'Login' button is highlighted.



If you are using your Unique login, your / your organisation name will now appear in the Name box.

You will need to enter an email address and select whether you wish to subscribe for e-mail notifications.

Please read the section above on Advice on Email Addresses.

The screenshot shows a dialog box titled "Email Verification". It contains the following text: "Please supply your email address to receive a one time pin code to continue" and "If you have logged in previously and opted to reuse your pin, please confirm your email address." There are two input fields: "Name" with a red error message "This field is required." and "Email Address *". Below the fields is a checkbox for "Automatically subscribe for email notifications on published documents, decisions or news items" which is checked. At the bottom are "Close" and "Confirm" buttons.

You will then be emailed a 6 digit pin code to enter into the data box

You can also get the pin code via SMS or change the e-mail address

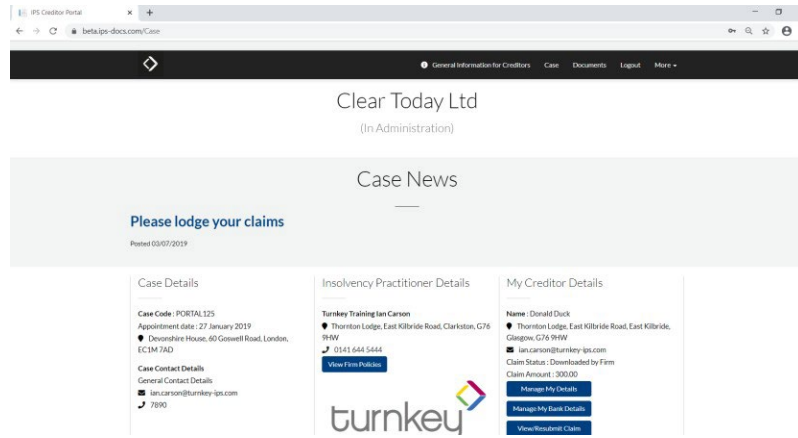
We advise you to use the drop down menu to increase the number of days this pin code will be valid for.

The screenshot shows a dialog box titled "Pin Verification". It contains the text: "Please enter the 6 digit pin that was emailed to the email address michelle.westmerland@turnkey-ips.com". There is a "Pin Code *" input field. Below it is a "Reuse pin code" checkbox which is checked, followed by a dropdown menu currently set to "30 Days". There are links for "Resend PIN code by Email" and "Get PIN code by SMS". A green arrow points to the dropdown menu with the text "No of Days Pin is valid for". At the bottom are "Close" and "Confirm" buttons.

Click on [Confirm]

This screenshot is identical to the previous one, showing the "Pin Verification" dialog box. A green arrow points to the "Confirm" button at the bottom right with the text "Click here".

You will then see the following page relating to you (if you have used your Unique login details) and the proceedings:



Case Details

Case Details

Case Code : PORTAL125

Appointment date : 27 January 2019

Devonshire House, 60 Goswell Road, London, EC1M 7AD

Case Contact Details

General Contact Details

Email: ian.carson@turnkey-ips.com

Phone: 7890

You will be able to see:

- Case code
- Date of Office Holder's appointment
- Case address (unless it has been protected by the utilisation of a specific type of court order)
- Case contact email address and telephone number

Details of the Insolvency Practitioners

Insolvency Practitioner Details

Anthony Partner

Andrew Nigel Other

Turnkey Demo

Thornton Lodge, East Kilbride Road, Clarkston, G76 9HW

Phone: 0141 644 5444

Email: ips.docs@turnkey-ips.com



You will be able to see:

- Insolvency Practitioner's(s') names
- Company name & Logo
- Address
- Telephone number
- E-mail address

Creditor Details

My Creditor Details

Name : Donald Duck

📍 Thornton Lodge, East Kilbride Road, East Kilbride,
Glasgow, G76 9HW

✉️ ian.carson@turnkey-ips.com

Claim Status : Downloaded by Firm

Claim Amount : 300.00

Manage My Details

Manage My Bank Details

View/Resubmit Claim

Vote

If logged in using your unique login, at this stage you will be able to see:

- Your name
- Your address
- Your e-mail address
- Claim Status
- Claim amount

You will also have the ability to manage your details, view or resubmit your claim and vote. This will be expanded on later in the portal guide.

LOGGING A CLAIM

If you are owed money in these proceedings, you can lodge your claim and proof of debt via the Portal using your Unique Login details.

Once submitted, the information is transmitted to the Office Holder and you can keep track of the claim progress.

After logging in with your Unique Log in details, you can Submit your claim:

My Creditor Details

Name : Jane Black Enterprises Ltd

✉️ jane.black@turnkey-ips.com

Claim Status : AWAITED

Manage My Details

Manage My Bank Details

Submit Claim

Decision Process

Vote



You see:

On the left hand side of the screen you will see your contact detail (you cannot amend them here – there is a link at the top to take you to the section where details can be amended – See “Updating Contact & Bank Details” above).

You will need to complete the details on the right hand side.

Work your way down the right hand side of the Claim form until you get to the bottom.

Keep going entering all the relevant information, or stating “Not Applicable” if that is the case.

You can save regularly using the [Save] icon.

If you wish to submit evidence to support your claim see “Submitting Evidence” below. Please only provide the evidence if the Office Holder requests you to do so.

Click on [Submit Claim]



Your claim is not submitted until you have clicked the [Submit Claim] button.

The screenshot shows the 'Supporting Documents' form. At the top, it says 'Supporting Documents' and 'Choose one or many files to upload (PDF only)'. Below that is a 'Please select a document type' dropdown menu with 'Invoice' selected. There is an 'Upload' button. Below the dropdown is a table with columns 'File Name', 'Document Type', 'Delete', and 'View'. The first row contains 'Portal Guide.pdf', 'Invoice', and empty cells for 'Delete' and 'View'. At the bottom right of the form, there is a 'Submit Claim' button. A large green arrow points from the text 'Click Submit Claim' to this button.

You will be asked whether you want to submit the claim

If you are ready to transmit the data, Click [Yes]

The screenshot shows the 'Supporting Documents' form with a confirmation dialog box overlaid. The dialog box asks 'Are you sure you want to Submit your Claim?' and has 'YES' and 'NO' buttons. The 'Supporting Documents' form is visible in the background, showing the same fields as in the previous screenshot.

You should receive the following confirmation message:

Click [OK]

The screenshot shows a 'Message from webpage' dialog box. It contains a yellow warning icon and the text 'Claim submitted. The firm dealing with this case has been notified of your claim.' At the bottom right, there is an 'OK' button.

If the screen does not automatically close after submitting the claim, then select [Close]



Selecting [Close] without clicking [Submit Claim] means that the form has not been sent to the Office Holder.

The screenshot shows the 'Supporting Documents' form with a confirmation dialog box overlaid. The dialog box asks 'Are you sure you want to Submit your Claim?' and has 'YES' and 'NO' buttons. The 'Supporting Documents' form is visible in the background. A large green arrow points from the text 'Click Here to Close' to the 'Close' button at the bottom right of the form.