



Online referral user guide

Business Portal User Guide

When you come to use the business portal for the first time, to refer a person to the Fitter Futures Warwickshire, you will need to register yourself and the business.

This guide will help you navigate the new online referral process.

To access the portal please go to: warwickshire.gov.uk/businessportal

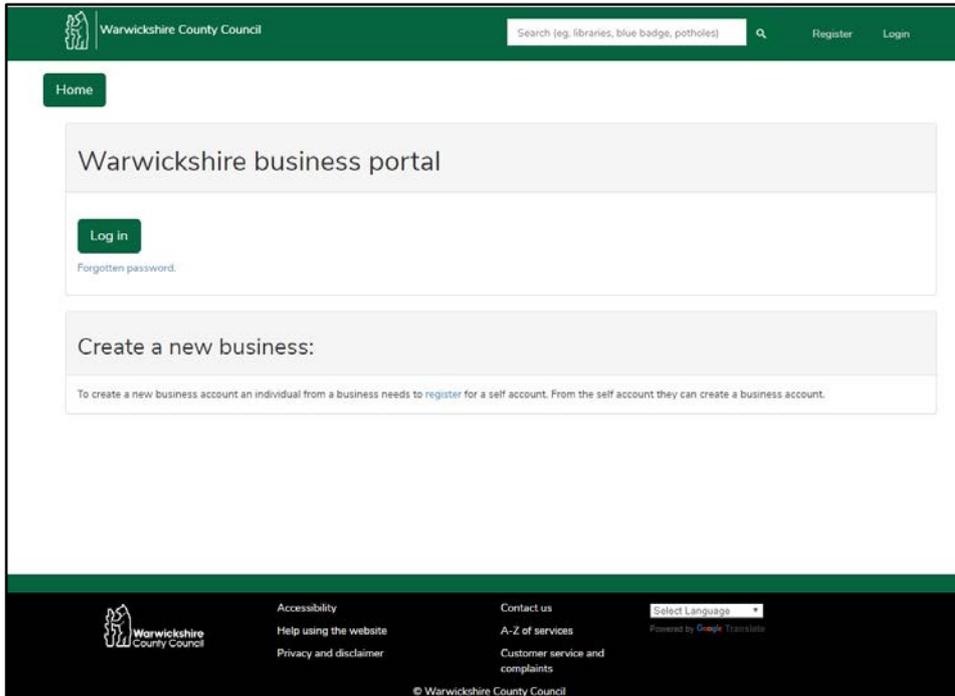
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Registering an individual for the first time

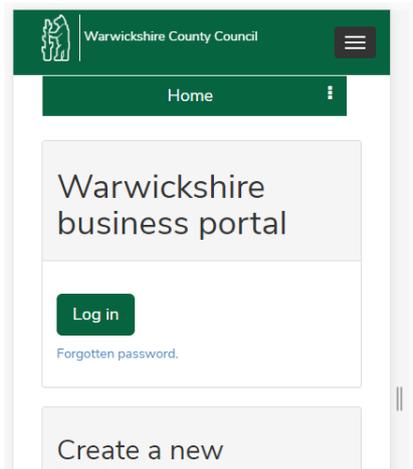
To be able to raise a case against your organisation, you will need to register for a Self Account.

If you already have a Self Account, you can use that email and password to login into the business portal. Please note that if you have already used your email address to register with Warwickshire County Council, you will not be able to use the same email twice.

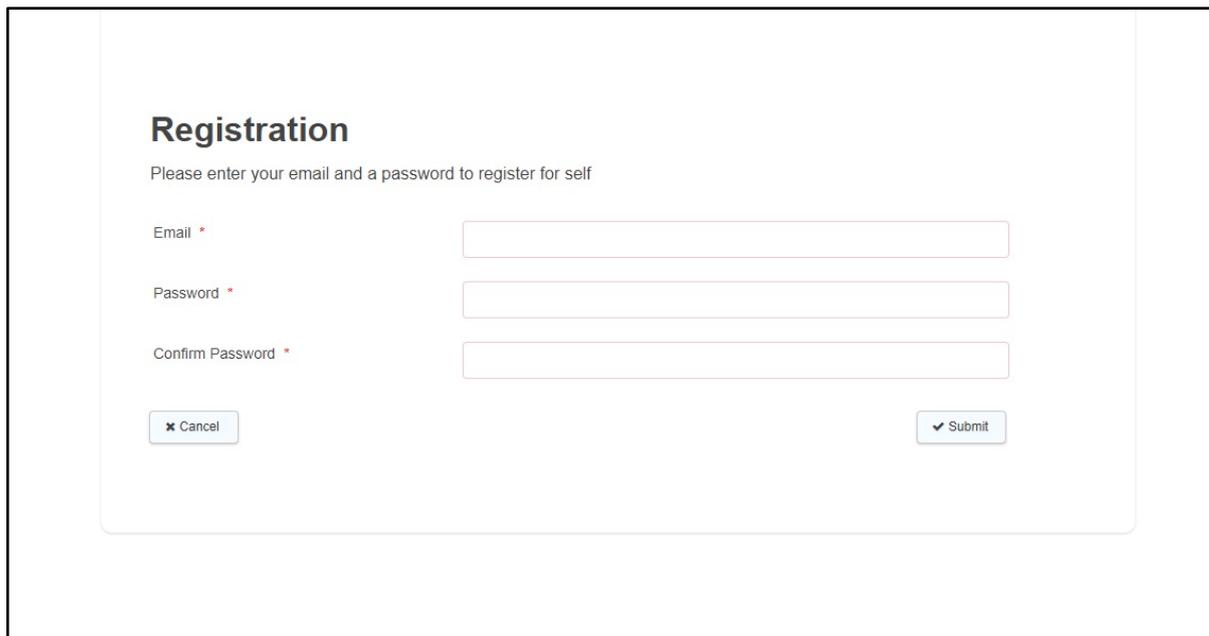
To register, use the register link - in the top right.



Or if using a mobile device - you can get to the registration page using the button with the three lines at the top right:



This will lead you to the registration screen.



Registration

Please enter your email and a password to register for self

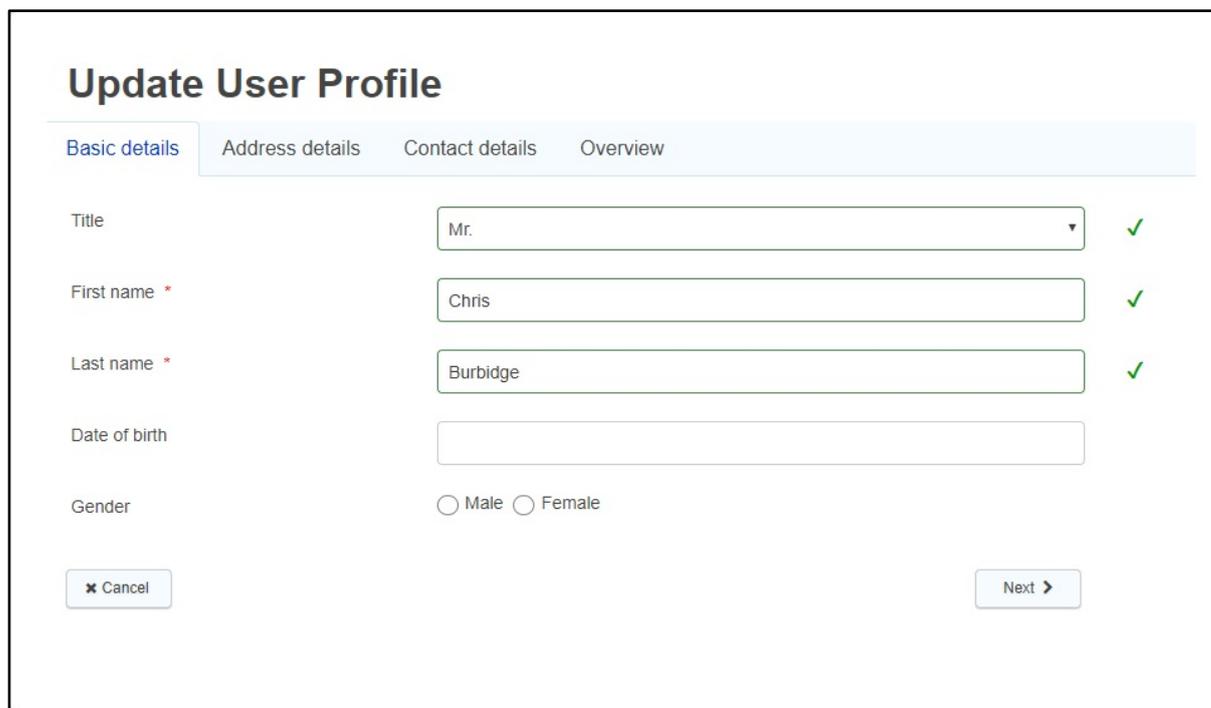
Email *

Password *

Confirm Password *

Questions marked with a * are mandatory - they need to be answered for you to be able to submit the registration.

Next you will be asked to complete a user profile (name, address and contact details etc.) If you are registering on behalf of a business and have a team email, you can use that rather than your personal email address if you prefer. Please note that you are not required to provide a date of birth or your gender.



Update User Profile

Basic details | Address details | Contact details | Overview

Title ✓

First name * ✓

Last name * ✓

Date of birth

Gender Male Female

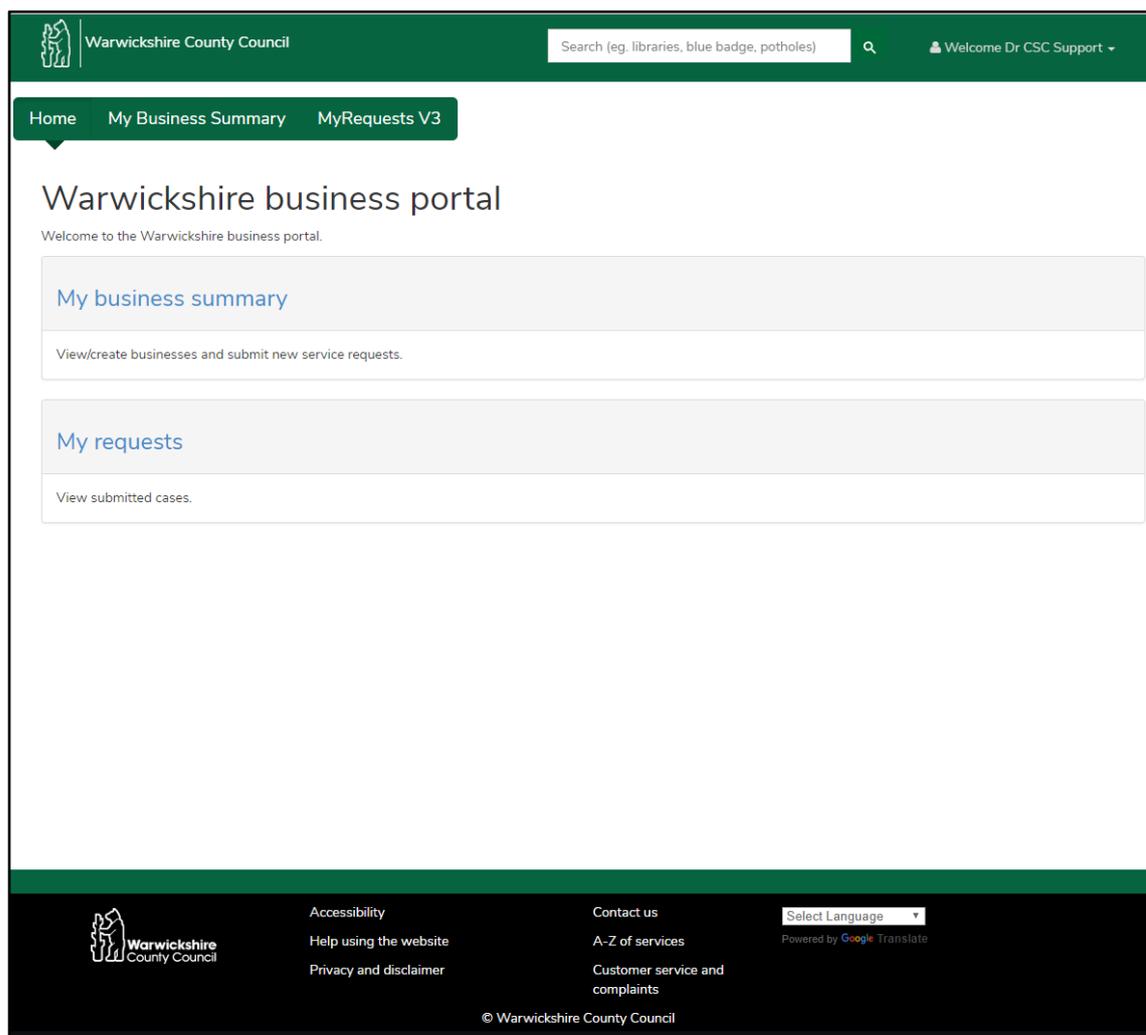
Once you have submitted this, you will be automatically signed into the portal. From here you can create your business/organisation.

Create a business

Now that you have created your personal log-in details you will need to register your business/organisation/department, as Fitter Futures Warwickshire referrals are raised against the business rather than an individual.

The business will only need to do this once, as any subsequent team member who register will be able to link to the business that was created. This will be discussed in a later section.

Once you are in the Business Portal select [My business summary](#).



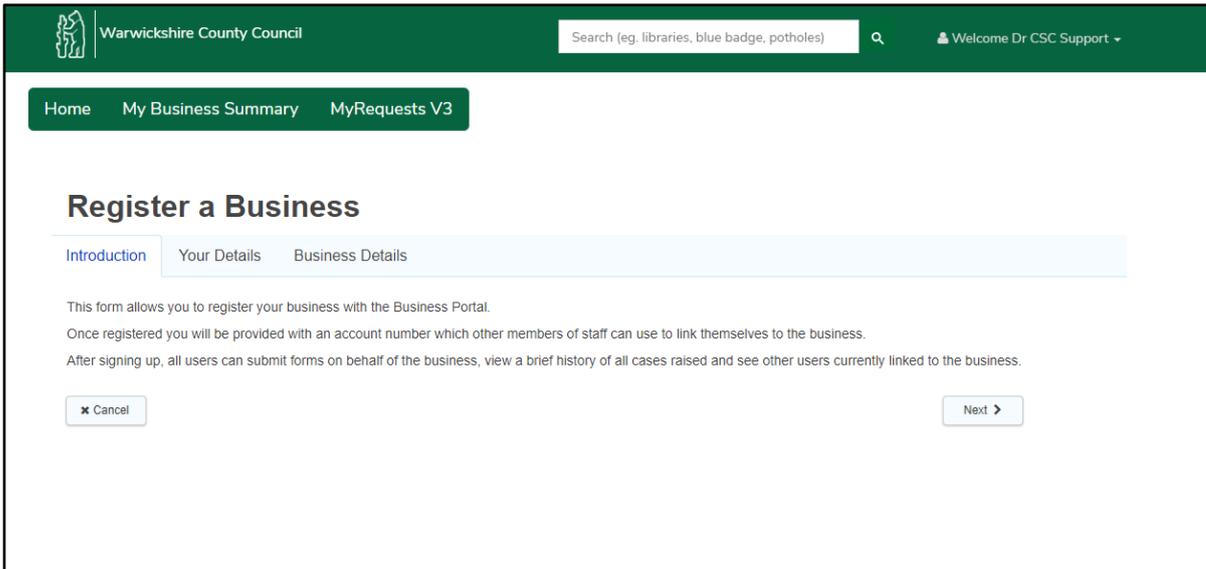
The screenshot shows the Warwickshire business portal homepage. At the top, there is a green header with the Warwickshire County Council logo, a search bar, and a user greeting 'Welcome Dr CSC Support'. Below the header is a navigation menu with 'Home', 'My Business Summary', and 'MyRequests V3'. The main content area is titled 'Warwickshire business portal' and includes a welcome message. There are two main sections: 'My business summary' with a sub-link 'View/create businesses and submit new service requests.', and 'My requests' with a sub-link 'View submitted cases.'. The footer contains various links like 'Accessibility', 'Contact us', and 'Select Language', along with the Warwickshire County Council logo and copyright information.

The next screen will give you the option to: create a new business, link to an existing business, or remove yourself from a business you are linked to.

In the first instance please use the 'Register a new Business' option:

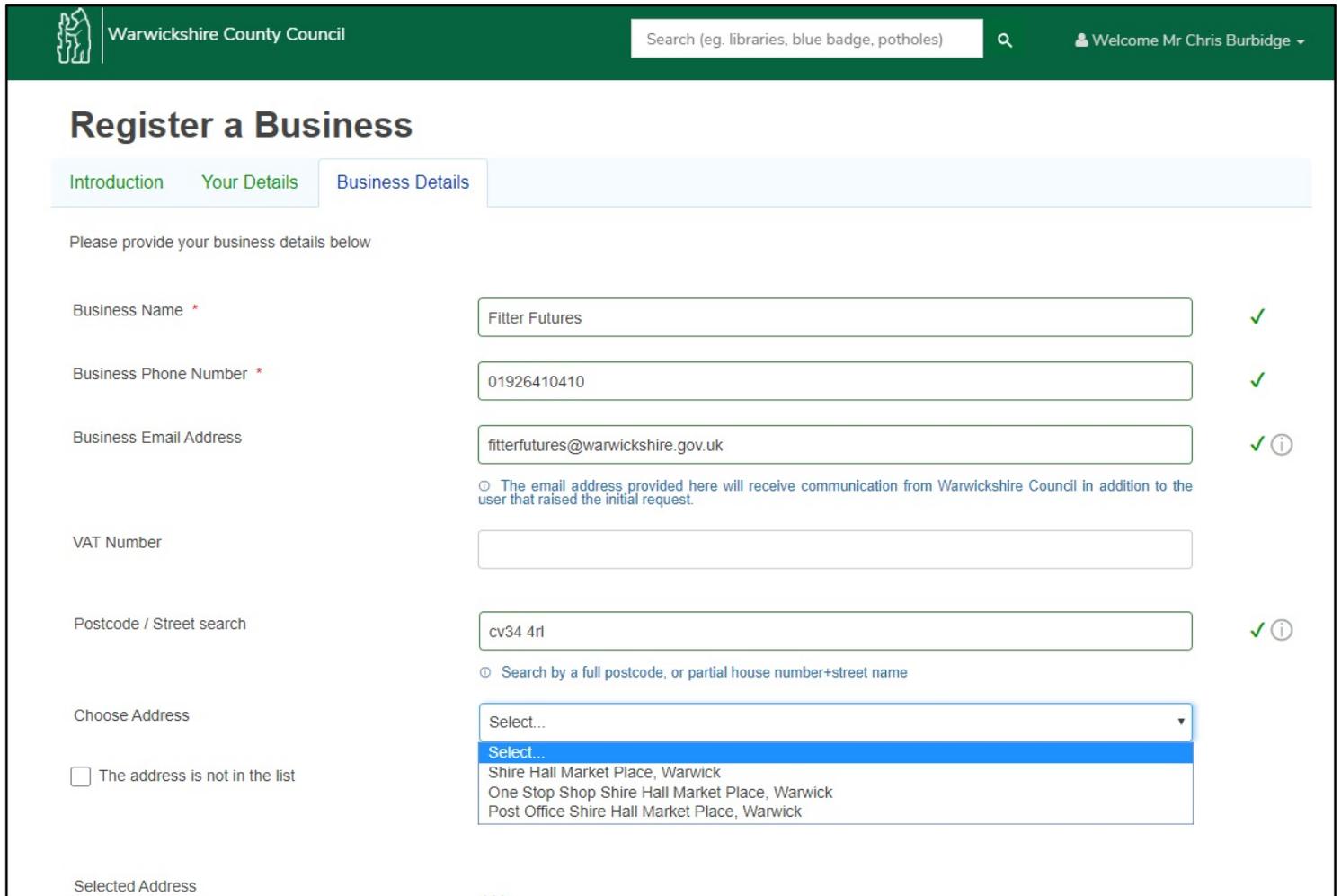


The 'Register a new business' screen will give you a summary of what you are about to do, when you've read this go to 'next'.



The next screen is asking for your details, again you can enter your details or the business details. In the following screen you are asked for the business contact details, but the system will use the email from this screen as the confirmation email for registering a business:

In the Business Details section, please note that VAT Number is not mandatory. Also, when entering the business address - by entering the post code, it will not automatically present the addresses, you will need to click on the arrow-head to the right of the 'Choose Address' box.



Warwickshire County Council

Search (eg. libraries, blue badge, potholes)  Welcome Mr Chris Burbidge 

Register a Business

[Introduction](#) [Your Details](#) [Business Details](#)

Please provide your business details below

Business Name * ✓

Business Phone Number * ✓

Business Email Address ✓ ⓘ
ⓘ The email address provided here will receive communication from Warwickshire Council in addition to the user that raised the initial request.

VAT Number

Postcode / Street search ✓ ⓘ
ⓘ Search by a full postcode, or partial house number+street name

Choose Address 
 The address is not in the list
Select...
Shire Hall Market Place, Warwick
One Stop Shop Shire Hall Market Place, Warwick
Post Office Shire Hall Market Place, Warwick

Selected Address

When you go to 'next', you will be given confirmation of the successful completion of the registration of the business. At this stage you will be given the 9-digit unique reference number for your business, this will also be sent to your email.

You will need this code if anyone else from your organisation is setting up an account, as they will use this to find the business you've just registered.

Linking to a registered business

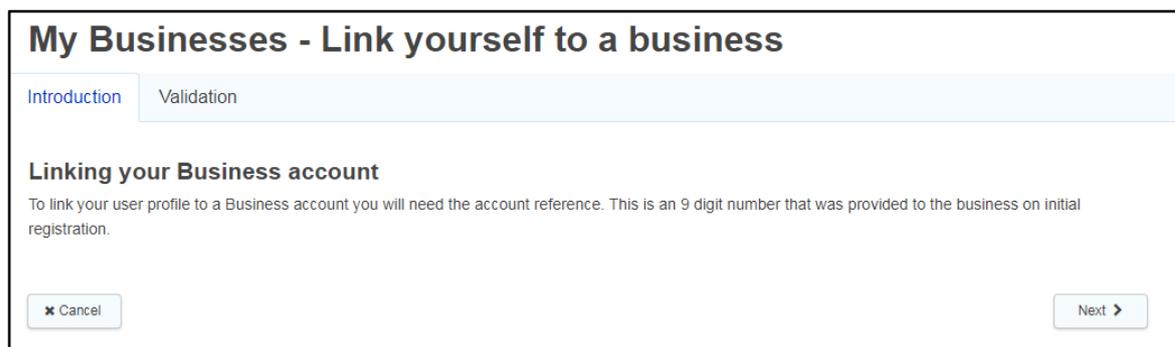
If another person in your business wishes to register and then link to the created business from the last section. They will need to follow the steps from the [creating a person section](#)

They will also need the unique 9-digit code that was emailed to the person who set up the business.

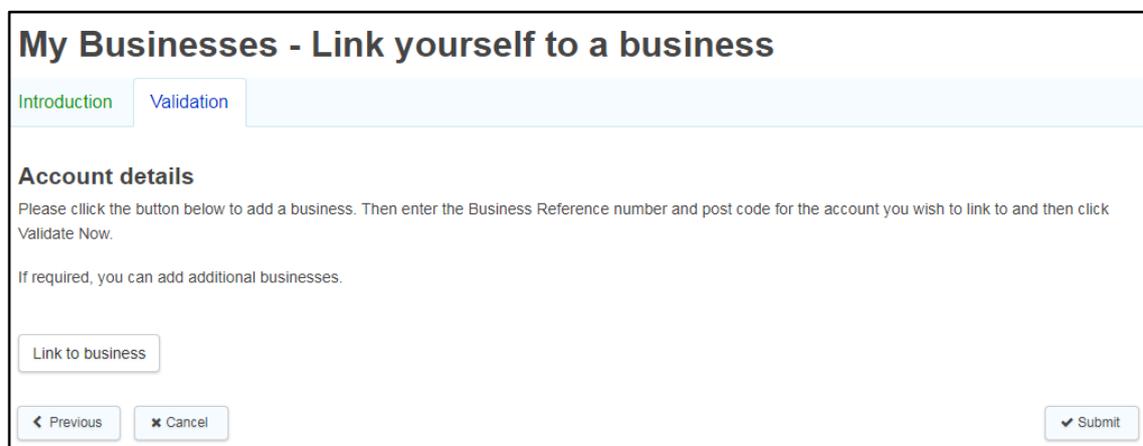
Once they have set their account up and logged in they will need to click on the 'My Business Summary' tab and select the 'link yourself to a business' option:



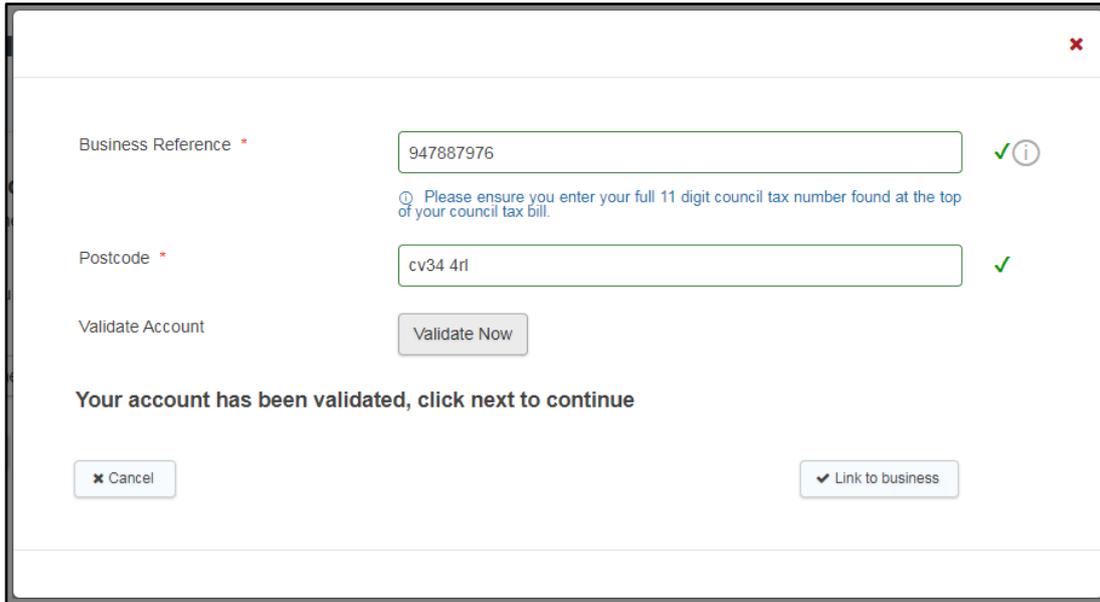
Where they will see a summary before selecting next:



In the 'Validation' section click on the 'Link to business' button:



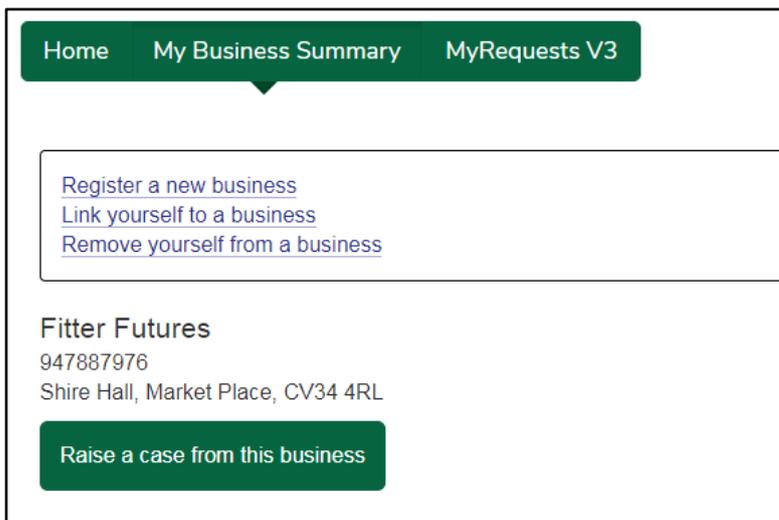
You will need to enter the code sent to you when creating the business, and the post code of the business, and then press the 'Validate Now' button. This will confirm validation, and then you can click the 'Link to business' button to complete:



The screenshot shows a validation form with the following fields and elements:

- Business Reference ***: Input field containing "947887976" with a green checkmark and an information icon (i).
- Postcode ***: Input field containing "cv34 4rl" with a green checkmark.
- Validate Account**: A button labeled "Validate Now".
- Message**: "Your account has been validated, click next to continue".
- Buttons**: "Cancel" and "Link to business".
- Help Text**: "Please ensure you enter your full 11 digit council tax number found at the top of your council tax bill." (indicated by a blue circle with an 'i').

When you submit the request it will take you back to the 'My Business Summary' section, and you will need to refresh (press F5 or the ↻ symbol) this to see the business you've just linked to:



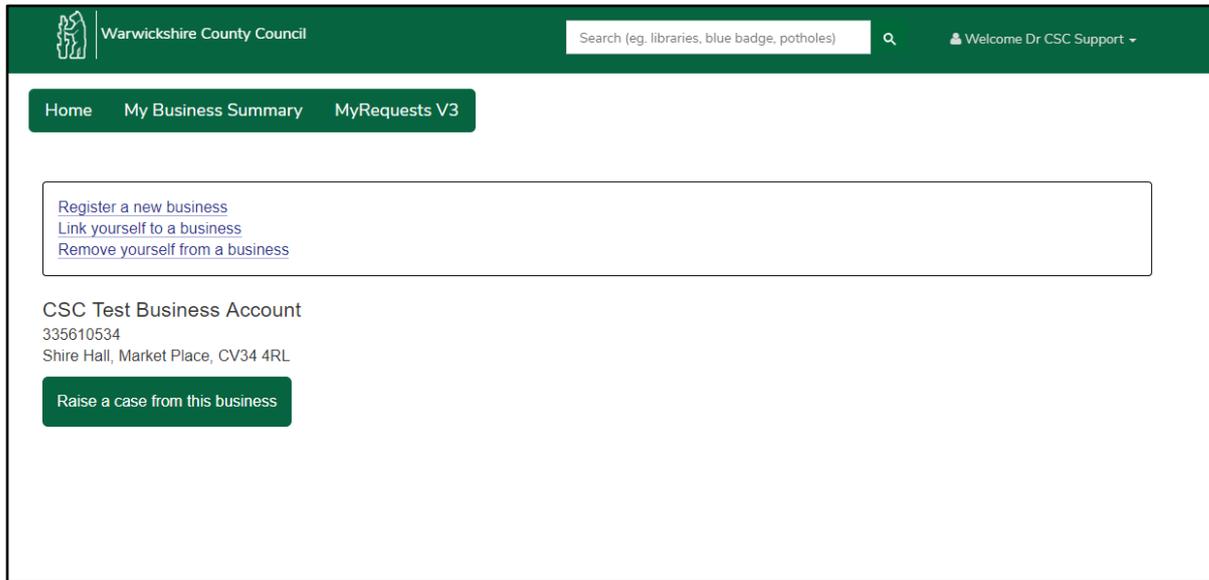
The screenshot shows the 'My Business Summary' page with the following content:

- Navigation Bar**: Home, My Business Summary, MyRequests V3.
- Business Actions**:
 - [Register a new business](#)
 - [Link yourself to a business](#)
 - [Remove yourself from a business](#)
- Business Details**:
 - Fitter Futures**
 - 947887976
 - Shire Hall, Market Place, CV34 4RL
- Action Button**: "Raise a case from this business".

Raising a case

After setting up your login details and registering a business, you are now able to refer cases to Fitter Futures Warwickshire

To raise a case, log in to your account and go to the 'My Business Summary' tab. From here you can now make your referral by selecting the 'Raise a case from this business' button. This will open your business up whereby you can then select the Fitter Futures Warwickshire referral service:



Warwickshire County Council

Search (eg. libraries, blue badge, potholes)

Welcome Dr CSC Support

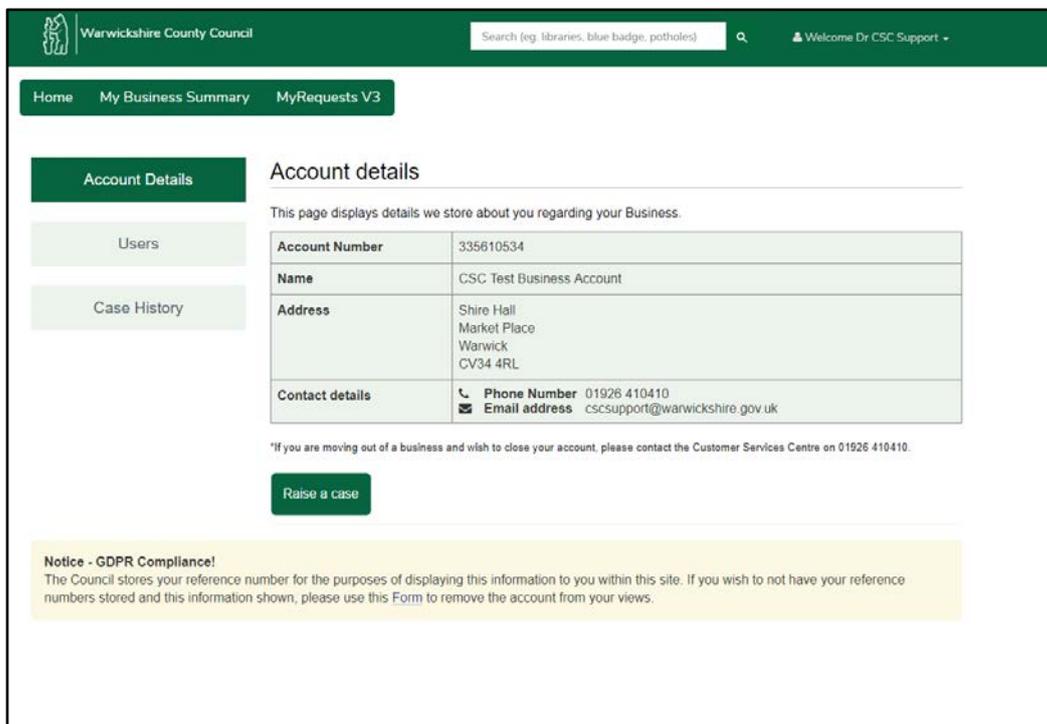
Home My Business Summary MyRequests V3

[Register a new business](#)
[Link yourself to a business](#)
[Remove yourself from a business](#)

CSC Test Business Account
335610534
Shire Hall, Market Place, CV34 4RL

Raise a case from this business

A summary of your business will be displayed, this will include a list of people registered to use it and provide a history of your cases submitted since the 1st April 2019:



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Search (eg. libraries, blue badge, potholes)

Welcome Dr CSC Support

Home My Business Summary MyRequests V3

Account Details

Account details

This page displays details we store about you regarding your Business.

| | |
|-----------------|---|
| Account Number | 335610534 |
| Name | CSC Test Business Account |
| Address | Shire Hall Market Place Warwick CV34 4RL |
| Contact details | Phone Number 01926 410410 Email address cscsupport@warwickshire.gov.uk |

*If you are moving out of a business and wish to close your account, please contact the Customer Services Centre on 01926 410410.

Raise a case

Notice - GDPR Compliance!
The Council stores your reference number for the purposes of displaying this information to you within this site. If you wish to not have your reference numbers stored and this information shown, please use this [Form](#) to remove the account from your views.

From here, use the "Raise a case" button.

Under Business Services you will be able to select the referral process - Fitter Futures

Warwickshire County Council

Search (eg. libraries, blue badge, potholes)

Welcome

Home My Business Summary MyRequests

Account Details

Business Services

Please select the relevant service to raise a case.

Users

Case History

[Fitter Futures](#)

Notice - GDPR Compliance!
The Council stores your reference number for the purposes of displaying this information to you within this site. If you wish to not have your reference numbers stored and this information shown, please use this [Form](#) to remove the account from your views.

Patient Details

Once in the referral form, the first screen is asking for the patient's contact details. Where it is available, please capture their email address. This will make the referral process much faster for the patient:

Fitter Futures Referral Form

Applicant/Service User Details

Title * ✓

First Name * ✓

Last Name * ✓

Date of Birth * ✓

Gender * ✓

Ethnicity * ✓

Telephone Number * ✓

Email Address * ✓

Postcode * ✓

To ensure that the address is found please format the postcode with the appropriate space e.g. CV34 4RL

House Number/Name * ✓

Street * ✓

Locality

Town * ✓

County * ✓

Referral Information

This section is where you will provide the details of which service you would like the patient to be referred to and the supporting medical information:

www.warwickshire.gov.uk/fitterfutures

Please note that if a patient's BMI is over 50, we do not have a facility available for the Physical Activity pathway. Therefore, please consider referring to the Young people and Adult Weight Management service instead.

Referral Information

Preferred service provider *

Primary Reason for referral *

Additional health reason (Please tick all that apply)

- Diabetes Type 1&2
- Early to mid stage Dementia
- Hypertension
- Mental Health Condition e.g. mild to moderate depression/anxiety/low mood
- Muscular skeletal condition
- Neurological condition
- Obesity/Overweight
- Osteo/Rheumatoid/Arthritis/Osteoporosis
- Overweight with additional conditions
- Postnatal and Overweight
- Pre-Diabetes
- Pregnant and Overweight (Maternal Pathway)
- Recovering from Cancer
- Respiratory condition
- Risk of cardiovascular disease
- Strength and Balance Concerns

Supplementary information (to support the provider) *

BMI ⓘ

Is your patient currently taking any medication? * Yes No

Medication

We also need to record the GP surgery to which the patient is registered, this is because if they are not registered to a Warwickshire GP they will not be eligible to use the Fitter Futures Warwickshire service. If they are not registered to a Warwickshire based GP, they will need to contact the Local Authority that covers their GP.

Supplementary information (to support the provider) ⓘ

BMI * ⓘ ✓

ⓘ Please note that if the BMI is greater than 50 the service may not be able to support the user

Is your patient currently taking any medication? * Yes ✓
 No

Medication

Please note:
 Only applicants who are registered with a Warwickshire G.P can be referred to the Fitter Futures service

Applicant's registered GP Practice *

Reference: FS110551040

Referrer details

In this section we need to capture the contact details of the individual making the referral, this is so that if we need to contact you for additional information or clarification we can contact the correct person.

Referrer Details

Title *

First Name *

Last Name *

Profession *

Location *

Telephone Number *

Email Address *

Declaration Statement

The final step of submitting the record is the declaration statement giving permission, from the patient, for their details to be used within the Fitter Futures Warwickshire programme. This is the same statement that is on the paper form and consent should have been given as part of the referral discussion. If the patient is under 16, the screen will ask that you seek permission from someone with parental responsibility.

Patient Details Referral Information Referrer Details **Declaration** Completion - Next Steps

Declaration Statement

I would like to access services available through Fitter Futures Warwickshire. I understand that some of the services are free but others are chargeable at a reduced price. The options and costs will be discussed at the first meeting. I agree that my details can be used as part of monitoring and evaluation process of Fitter Futures Warwickshire.

Name *

Tick to give consent * Yes

Date * 18/03/2019

Congratulations

The referral will now be screened by the Fitter Futures Single Point of Access team who will: ensure we have all of the required information, the patient meets the required criteria and contact them to provide the next steps.

If some of the required information is not clear or missing we may contact you to confirm.

Updating your details

Most accounts have been set up to use the generic department/business email address as the username to sign in. Therefore, if you are changing the email address or password on the account please consider other users and how they will access the account.

Forgotten password

In the first instance ask your team, because by changing the password it will affect all people within your team who share the access.

If you have forgotten the password to log in - go to the log in screen <http://warwickshire.gov.uk/businessportal> where you can request a password be reset. You will need to use the registered email and a link to reset the password will be sent to this inbox.

Home

Warwickshire business portal

[Log in](#)

[Forgotten password.](#)

Changing Username

If you need to change the username in the future please contact fitterfutures@warwickshire.gov.uk. We will make the change and communicate to everyone who is registered to use that profile.