

PORTAL GUIDE

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ICONS IN THIS GUIDE

 <p>This will give a hint, tip or suggestion in order to help you.</p>	 <p>The warning triangle will appear if you need to take care over a particular task or pay particular attention to it.</p>		
<p>Whether or not a particular task can be done depending on the method of logging in used:</p> <table border="1"><tr><td data-bbox="267 535 462 898"><p>Unique Login</p><p>Yes it can be done</p></td><td data-bbox="479 535 673 898"><p>General Login</p><p>No it can't be done</p></td></tr></table>	<p>Unique Login</p>  <p>Yes it can be done</p>	<p>General Login</p>  <p>No it can't be done</p>	 <p>Green arrows point to a particular area of a screen shot</p>
<p>Unique Login</p>  <p>Yes it can be done</p>	<p>General Login</p>  <p>No it can't be done</p>		

THE WEBSITE

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



You may wish to print this Portal Guide in order to help you as you access the Portal.



Please be aware that the Portal works better on some web browsers than others. If at any point the features do not appear to be working, try a different web browser first.

LOGGING IN

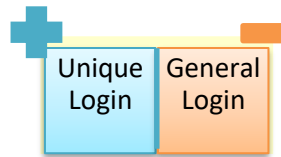
Advice on Email Addresses

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.

The Insolvency Practitioners may be choosing to simply publish documents on the Portal rather than individually posting them, and a centralised email address at your organisation ensures that no documents or potential deadlines are missed.

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:

Unique Login

- Find details about the proceedings
- Find contact details for the Insolvency Practitioners
- Obtain published documents
- See when Decisions or Meetings have taken place
- See the list of creditor names
- Sign up for email notifications for when something new is published
- Update your contact details
- Update your banking details
- Lodge a claim
- Participate in a decision procedure or meeting
- Suggest alternative resolutions
- Answer questionnaires
- Ask questions of the Insolvency Practitioner
- Submit documents to the Insolvency Practitioners

General Login

- Find details about the proceedings
- Find contact details for the Insolvency Practitioners
- Obtain published documents
- See when Decisions or Meetings have taken place
- See the list of creditor names
- Sign up for email notifications for when something new is published

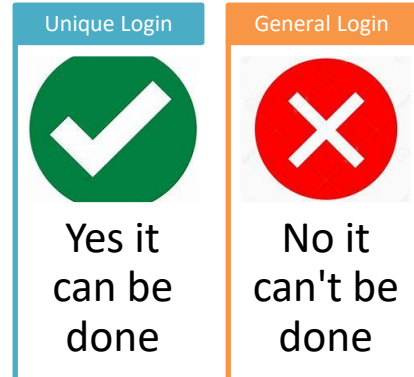
The Unique login will allow you to do so much more. But it will be unique to **you** and **the particular proceedings** (e.g. liquidation). You are advised to not share your unique log in details with anyone else.

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.

The rest of this guide will provide screen shots, etc. as if the unique password has been used. Although the relevant sections will still apply if a General password has been utilised.

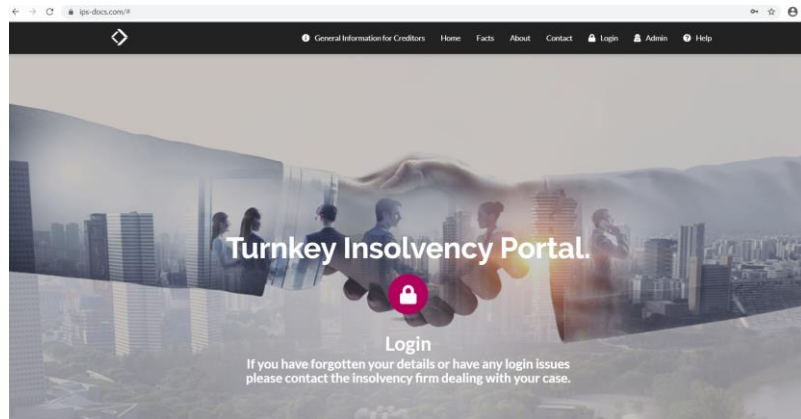
At the start of each section within this guide you will see an icon that will advise you whether the particular action can be done with each type of Login:



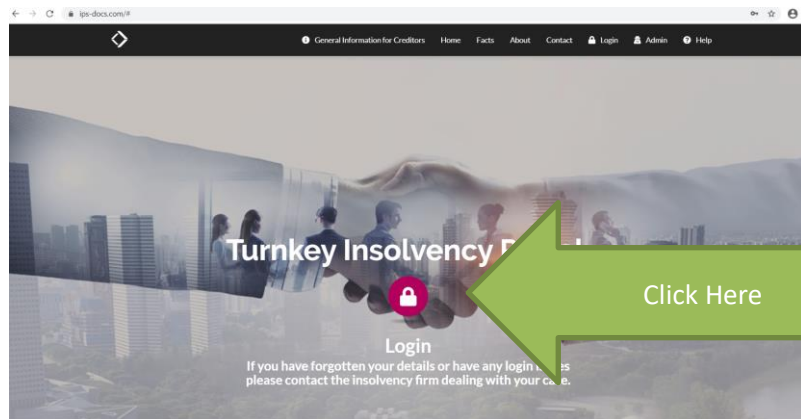
Step-by-Step Login

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

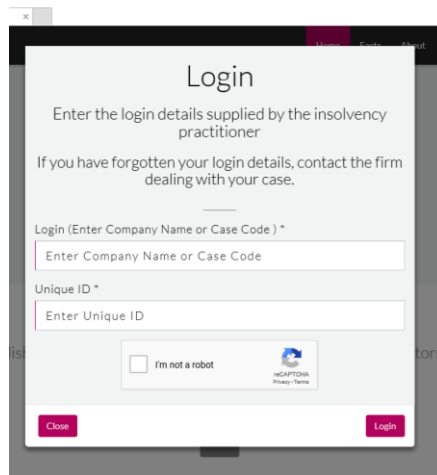
You will see the following:



Click on the padlock to login

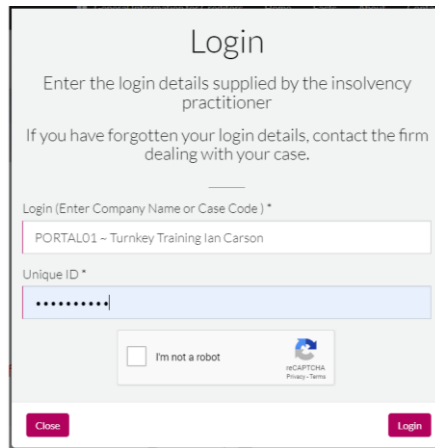


This will provide you with the following:



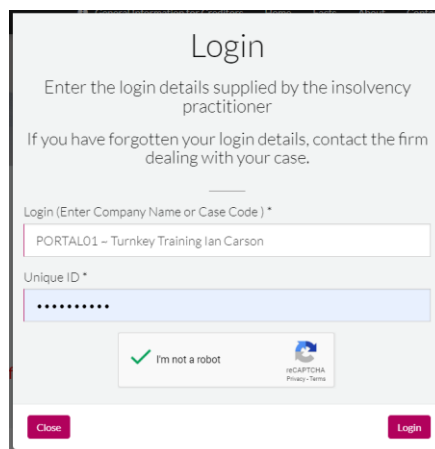
The screenshot shows a web browser window with a tab titled 'x'. The page content is a login form titled 'Login'. Below the title, it says 'Enter the login details supplied by the insolvency practitioner' and 'If you have forgotten your login details, contact the firm dealing with your case.' There are 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 Privacy - Terms' link. 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 remains 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' field still contains 'PORTAL01 - Turnkey Training Ian Carson' and the 'Unique ID' field contains dots.



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 the 'Email Verification' form. It has a title 'Email Verification' and two paragraphs of instructions. The first paragraph says 'Please supply your email address to receive a one time pin code to continue'. The second paragraph says '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 email field 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

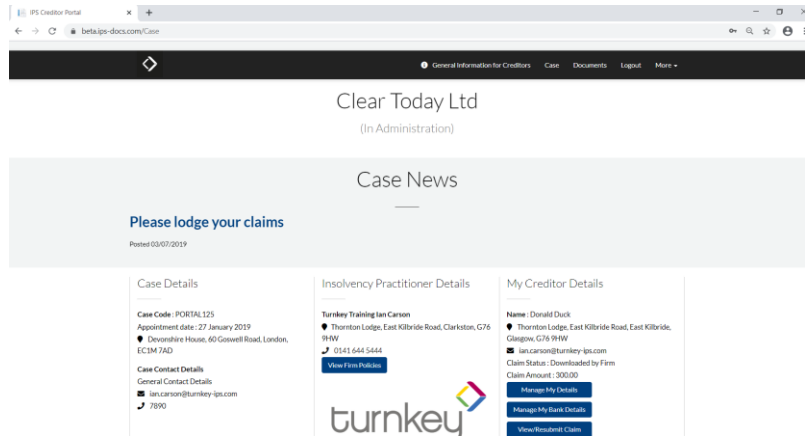
We advise you to use the drop down menu to increase the number of days this pin code will be valid for.

The screenshot shows the 'Pin Verification' form. It has a title 'Pin Verification' and two paragraphs of instructions. The first paragraph says 'Please enter the 6 digit pin that was emailed to the email address michelle.westmerland@turnkey-ips.com'. There is a 'Change Email' button. Below is a 'Pin Code *' input field. Underneath is a 'Reuse pin code' checkbox which is checked, followed by a dropdown menu currently set to '30 Days'. There are two links: 'Resend PIN code by Email' and 'Get PIN code by SMS'. At the bottom are 'Close' and 'Confirm' buttons. A large green arrow points from the right towards the dropdown menu with the text 'No of Days Pin is valid for'.

Click on [Confirm]

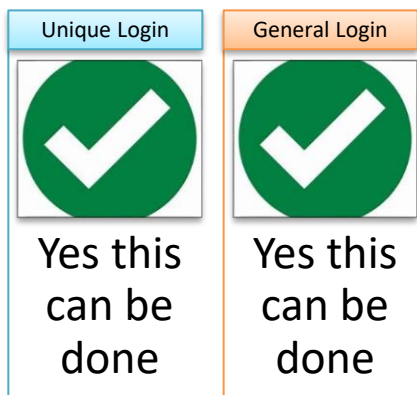
This screenshot is identical to the previous one, showing the 'Pin Verification' form. A large green arrow points from the right towards the 'Confirm' button at the bottom right of the form with the text 'Click here'.

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



From this point forwards you will have several tasks that you can do and obtain much information about the proceedings.

CORE INFORMATION



All of the data that follows will be seen no matter which Login is used.

Case News

If the Office Holder has any news they wish to share/highlight this will appear at the top of the page and may appear as follows:



You will also be able to see the name of the case and the type of proceedings at the top of the screen, as above.

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

✉ ian.carson@turnkey-ips.com

📞 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

📞 0141 644 5444

✉ ips.doc@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.

Handy
Hint

If you have any query about the proceedings, initially ask the case administrator.

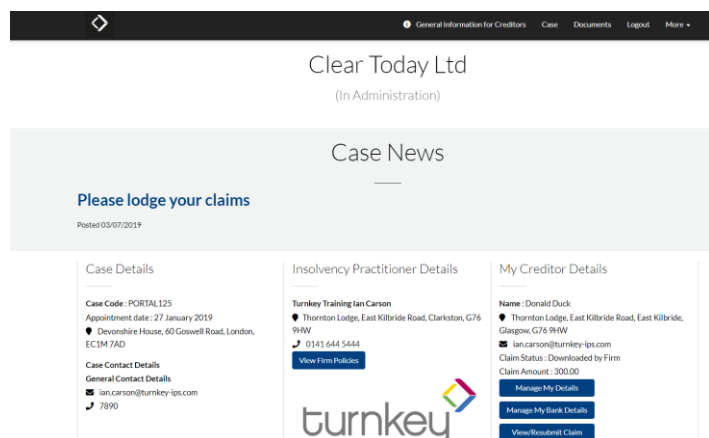
VIEWING DOCUMENTS

Unique Login	General Login
	
Yes this can be done	Yes this can be done

You can request individual documents, or you can request a link to all documents published.

Viewing Individual Documents

After you have logged in either scroll down to the Documents section or click on [Documents] in the top menu



Clear Today Ltd
(In Administration)

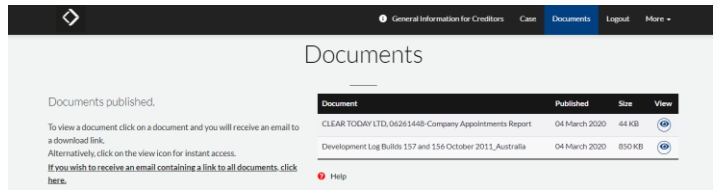
Case News

Please lodge your claims

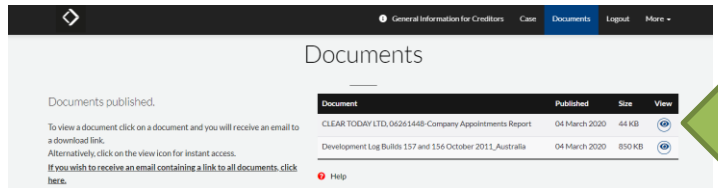
Posted 03/07/2019

<p>Case Details</p> <p>Case Code: PORTAL125 Appointment date: 27 January 2019 Devonshire House, 60 Goswell Road, London, EC1M 7AD</p> <p>Case Contact Details</p> <p>General Contact Details ian.carson@turnkey-ips.com 7890</p>	<p>Insolvency Practitioner Details</p> <p>Turnkey Training Ian Carson Thornton Lodge, East Kilbride Road, Clarkston, G76 9HW 0141 644 5444 View Firm Profiles</p>	<p>My Creditor Details</p> <p>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</p> <p>Manage My Details Manage My Bank Details View/Resubmit Claim</p>
--	--	---

You will see

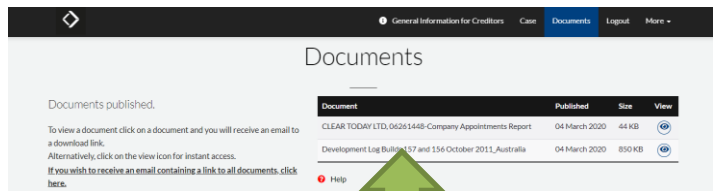


To select an individual document to view instantly, click on the eye icon to the right hand side of the document



Eye Icon

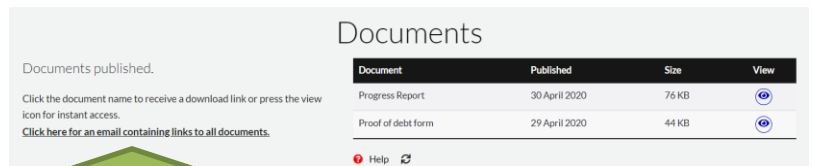
Alternatively, if you click on the document name you will be asked to supply an email address where the link to the document will be emailed.



Handy Hint Upon receipt of the document, immediately "Save As" to a location of your own choosing.

Requesting All Documents



Click on the specific link and complete the email address request form. You will be sent an email containing links to all documents published.



All Documents

VIEWING MEETING OR DECISION DETAILS



You can view the basic times and dates of meetings and decisions using the General Login.

Unique Login	General Login
	
Yes this can be done	Yes this can be done

Claims, Votes and Proxy Forms can be submitted directly on the Portal using your Unique Login details. See later in this Portal Guide for “Participating in Meetings or Decisions” via the Portal.

However if you are just using a General Login, and you wish to participate in a decision process or meeting, you would have to download the relevant documents [See “Viewing Documents” above], complete the necessary paperwork and submit them by mail or email.



CREDITORS

Unique Login	General Login
	
Yes this can be done	Yes this can be done

If the Office Holder has chosen to publish creditor names, you can view the names of the creditors involved in these proceedings.

NOTIFICATIONS

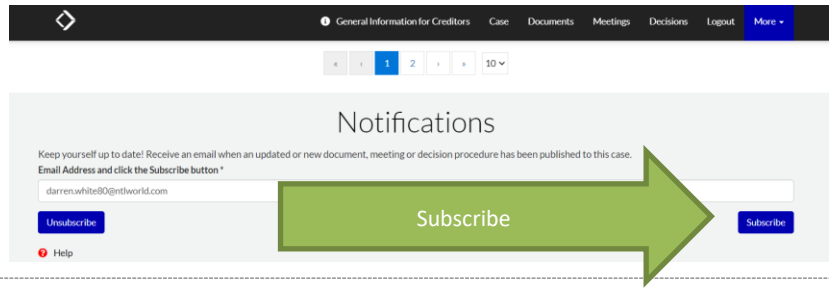
We would really like for you to stay informed about these proceedings. So every time a new document is published you would automatically receive a notification.

Unique Login	General Login
	
Yes this can be done	Yes this can be done

The Office Holder is highly likely to publish a Notice that indicates all future documents will be published on the Creditor Portal, without writing or emailing creditors specifically. It is a cost effective method of delivering reports, notices, etc.

If you complete your email address in the Notifications box and subscribe, that email account will receive an email to advise you when something new has been published.

Enter your email address and select [Subscribe]



UPDATING CONTACT & BANK DETAILS

Unique Login	General Login
	
Yes it can be done	No it can't be done

Once you are logged into the Creditor Portal using your Unique Login you may update your contact details.

Updating Contact Details

You will see the current information that is held in the [Creditor Details] panel. This data may need updating and / or adding to.

It is worth checking they are still correct.

The initial screen will look like this:

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](#)

You need to click [Manage My 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

You will then see a form to complete the details.
Please try to ensure there is an address, telephone number and reference number as a minimum.



Creditor details

Creditor Name *
Donald Duck

Contact Name
Ian Carson

Company Registration Number
Company Registration Number

Country or territory of incorporation
United Kingdom

Email Address *
ian.carson@turnkey-ips.com

Address Line 1
Thornton Lodge

Address Line 2
East Kilbride Road

Address Line 3
East Kilbride

Save Close

There are two icons:
Save [This is the left hand icon]
Please save your contact details first
Close ... but before you close...
[SAVE]!



Creditor details

Creditor Name *
Donald Duck

Contact Name
Ian Carson

Company Registration Number
Company Registration Number

Country or territory of incorporation
United Kingdom

Email Address *
ian.carson@turnkey-ips.com

Address Line 1
Thornton Lodge

Address Line 2
East Kilbride Road

Address Line 3
East Kilbride

Save Close



Don't forget to save your contact details!

Opting Out

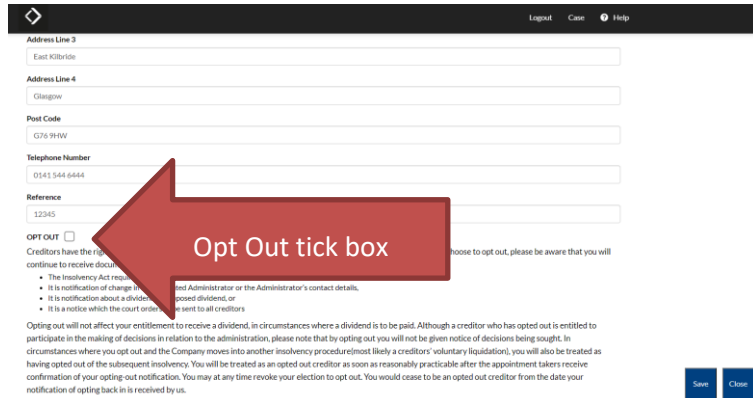
You have a right to opt-out of receiving the majority of Notifications. Some Notices will still be issued to you irrespective of your decision to Opt Out.

Ideally we do not want you to Opt Out as we would like you to stay involved in this process. But it is your choice, and there will be some information to read about Creditor Rights to Opt Out.

At the bottom of the screen is some information about opting out. Please read this carefully.

Should you wish to opt out from receiving information in relation to these proceedings, then add the tick to the box.

We do not recommend that you opt out, but you may choose.



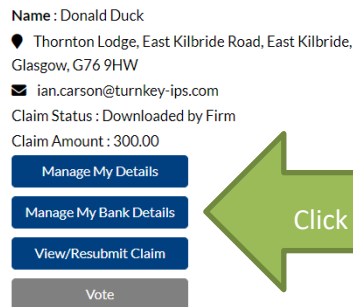
The screenshot shows a web form with the following fields: Address Line 3 (East Kilbride), Address Line 4 (Glasgow), Post Code (G76 9HW), Telephone Number (0141 544 6444), and Reference (12345). Below these fields is an 'OPT OUT' checkbox which is currently unchecked. A large red arrow points to this checkbox with the text 'Opt Out tick box'. Below the checkbox is a block of text explaining the implications of opting out, including that it affects the right to receive a dividend and that the creditor will be treated as an opted-out creditor. At the bottom right of the form are 'Save' and 'Close' buttons.

Updating Your Bank Details

If the Office Holder allows you to update your bank details using their Unique Login, then this is possible. Please note, that if the Office Holder has chosen to not let you update your bank details, then the [Creditor Bank Details] button will not appear.

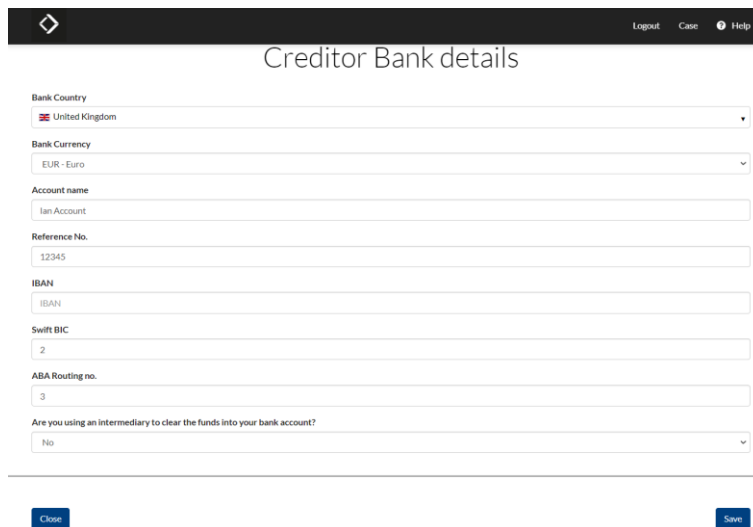
The initial screen will look like this:

My Creditor Details



The screenshot shows the 'My Creditor Details' page with the following information: Name: Donald Duck; Address: Thornton Lodge, East Kilbride Road, East Kilbride, Glasgow, G76 9HW; Email: ian.carson@turnkey-ips.com; Claim Status: Downloaded by Firm; Claim Amount: 300.00. Below this information are four buttons: 'Manage My Details', 'Manage My Bank Details', 'View/Resubmit Claim', and 'Vote'. A large green arrow points to the 'Manage My Bank Details' button with the text 'Click here'.

Enter your relevant bank details onto the screen and click [Save]



The screenshot shows the 'Creditor Bank details' form with the following fields: Bank Country (United Kingdom), Bank Currency (EUR - Euro), Account name (Ians Account), Reference No. (12345), IBAN, Swift BIC (2), ABA Routing no. (3), and a dropdown menu for 'Are you using an intermediary to clear the funds into your bank account?' (No). At the bottom of the form are 'Close' and 'Save' buttons. A large green arrow points to the 'Save' button with the text 'Click Here'.



Please then send your bank details on your official Letterhead either by Post or via "Submitting Evidence" (see below).

The Office Holder automatically gets notified that you have changed your bank details. However, they will only approve them for use on a case once they have received your Letterhead confirmation.

This is in order to help prevent any potential fraud.

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.

Unique Login	General Login
	
Yes it can be done	No it can't be done

Once submitted, the information is transmitted to the Office Holder and you can keep track of the claim progress by Check Claim Status (see below)

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.

Make sure you carry on scrolling to the very bottom of the screen

After you have saved your claim form, a button will appear AT THE VERY BOTTOM below the submitting documents section

Click on [Submit Claim]



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

The screenshot shows the 'Supporting Documents' section of a web form. It includes a file upload area with a 'Browse' button, a dropdown menu for 'Please select a document type' (currently set to 'Invoice'), and an 'Upload' button. Below this is a table with columns for 'File Name', 'Document Type', 'Delete', and 'View'. A single row is visible with 'Portal Guide.pdf' and 'Invoice'. 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]

This screenshot is similar to the previous one but includes a confirmation dialog box in the center. The dialog box asks 'Are you sure you want to Submit your Claim?' and has 'YES' and 'NO' buttons. The 'Submit Claim' button is visible at the bottom right of the form.

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.' There is an 'OK' button at the bottom right of the dialog box.

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.

This screenshot is similar to the previous one but includes a confirmation dialog box. A large green arrow points from the text 'Click Here to Close' to the 'Close' button at the bottom right of the form.

Handy Hint

Save your progress regularly, or you may lose the information

Handy Hint

Save everything again before you close the screen

SUBMITTING EVIDENCE

Once you have logged in using your Unique Login, and found your way to the “Lodging a Claim” (see above) section, you may wish to submit evidence to the Office Holder.



Documents to be submitted MUST be in PDF formats.



Make sure all of your evidence is saved in a PDF format first.

This facility can be used to submit the following documents:

- Invoice
- Proof of Debt Form
- Bank Statement
- Questionnaire
- Contract / Agreement
- Statement of Account
- Opt Out Form
- Committee Nomination Form

As you can see, the facility is not just for submitting evidence to support your claim.

You can submit evidence within the [Supporting Documents] section of the claim screen.

Supporting Documents

Choose one or many files to upload (PDF only)

Please select a document type

Invoice

File Name Document Type Delete View

*Denotes a mandatory field

This website is part of the IPS System. Copyright © 2020 Turnkey Computer Technology Ltd.

Send Close

You may only upload PDF documents.

Use the Browse button to find your file(s)

The screenshot shows the 'Supporting Documents' form. A green arrow points to the 'Browse' button. The form includes a 'Please select a document type' dropdown menu with 'Invoice' selected. Below the form is a table with columns for 'File Name', 'Document Type', 'Delete', and 'View'. At the bottom, there is a footer with a copyright notice and 'Save' and 'Close' buttons.

It is helpful if you tell us what the nature of the supporting documents are by selecting from the drop down menu

The screenshot shows the 'Supporting Documents' form with the 'Please select a document type' dropdown menu open. The form includes a 'Please select a document type' dropdown menu with 'Invoice' selected. Below the form is a table with columns for 'File Name', 'Document Type', 'Delete', and 'View'. At the bottom, there is a footer with a copyright notice and 'Save' and 'Close' buttons.

The options are:

- Invoice
- Proof of Debt Form
- Bank Statement
- Questionnaire
- Contract / Agreement
- Statement of Account
- Opt Out Form
- Committee Nomination Form

The screenshot shows the 'Supporting Documents' form with the 'Please select a document type' dropdown menu open, displaying a list of options: Invoice, Proof of Debt form, Bank Statement, Questionnaire, Contract / Agreement, Statement of Account, Opt Out form, and Committee Nomination form. Below the form is a table with columns for 'File Name', 'Document Type', 'Delete', and 'View'. At the bottom, there is a footer with a copyright notice and 'Save' and 'Close' buttons.

Select [Upload]

The screenshot shows the 'Supporting Documents' form. A green arrow points to the 'Upload' button. The form includes a 'Please select a document type' dropdown menu with 'Invoice' selected. Below the form is a table with columns for 'File Name', 'Document Type', 'Delete', and 'View'. At the bottom, there is a footer with a copyright notice and 'Save' and 'Close' buttons.

Remember to [Save]

The screenshot shows the 'Supporting Documents' form. A green arrow points to the 'Save' button. The form includes a 'Please select a document type' dropdown menu with 'Invoice' selected. Below the form is a table with columns for 'File Name', 'Document Type', 'Delete', and 'View'. At the bottom, there is a footer with a copyright notice and 'Save' and 'Close' buttons.

Make sure you carry on scrolling to the very bottom of the screen

After you have saved your evidence, a button will appear AT THE VERY BOTTOM below the submitting documents section

Click on [Submit Claim]



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

This action will send everything to the Office Holder.

File Name	Document Type	Delete	View
Development Log Build 171 April 2020.pdf	Bank Statement		

You will be asked whether you want to submit the claim

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

You should receive the following confirmation message:

Click [OK]



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



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

CHECK CLAIM STATUS

This is where you can check to see how your claim is progressing, after logging in using your Unique Login details.

Unique Login	General Login
	
Yes this can be done	No this can't be done

You can see the status of your claim here

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

Claim Status

You can also view or resubmit your claim here

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

Click here

Status Meaning

Status: Awaited

- Please submit your claim electronically.

Status: Downloaded by Firm

- This means that the claim form has been started, but not yet submitted to the Office Holder.

Status: Submitted

- This means you have submitted your claim, the office holder is aware of your claim but has not yet processed it.

Status: Received

- This means the office holder has received your claim. They are currently evaluating it for admitting for voting and/or dividend purposes.

Status: Admitted

- This means your claim has been admitted for dividend purposes. You do not need to submit a further claim under this account.

Status: Admitted/Rejected



- The office holder has agreed part of your claim and rejected the balance. You will receive correspondence in relation to this.

Status: Rejected

- The office holder has rejected your claim entirely. You will receive correspondence in relation to this.

PARTICIPATING IN MEETINGS OR DECISIONS

This section will guide you in how you may submit your vote(s) in a meeting or decision procedure using the Portal.

Unique Login	General Login
	
Yes this can be done	No this can't be done



You **MUST** have submitted a claim prior to being able to vote using the Portal.

See “Check Claim Status” above.

Meetings – Virtual or Physical or Decision by Correspondence

If you wish to participate in the meeting (which can be a virtual meeting, a physical meeting or a vote by correspondence) but either

- not attend the meeting in person
- nominate a person to act on your behalf

you may complete the proxy form electronically.



Please note that if this is a vote “By Correspondence” you will not be able to participate in any way **APART FROM** nominating the Chairperson as a proxy holder. The Proxy Form is essentially the Voting Form and you may complete it in the same way as for a Meeting.

Either

Go to the [Meetings] section

You will see a speech bubble icon to the right hand side under the column marked “Vote”

Click on the Speech Bubble.

Purpose	Type	Date	Time	Address	Proxy Deadline	Meeting Link	Vote
Creditors Meeting (First)	Physical	21/08/2019	12:00	Thornton Lodge, East Kilbride Road, Clarkston, G76 9HW	21/08/2019 12:00		



OR

Go to the initial creditor screen and click [Vote]

My Creditor Details

Name : White & Sons Ltd
Thornton Lodge, East Kilbride Road, Clarkston, G76 9HW
darren.white80@ntlworld.com
Claim Status : Downloaded by Firm
Claim Amount : 5,400.00

Manage My Details
Manage My Bank Details
View/Resubmit Claim
Decision Process
Vote

You may be asked which meeting / decision process you wish to participate in.

Select the meeting
Click [Continue]

Meeting Selection

Select a meeting at which you want to Vote.

Creditors Meeting (Latest) 30/04/2019 11.30am

Close Continue

The form looks like this:

Voting

Please insert name of person (who must be 18 or over) or the chairperson of the meeting. If you wish to provide for alternative proxy holders in the circumstances that your first choice is unable to attend please state the name(s) of the alternatives as well.

Name or Name of Proxy Holder * This is a mandatory field

Chairperson
Alternative Proxy Holder
Alternative Proxy Holder
Alternative Proxy Holder

I appoint the above person to be my/the creditor's proxy holder at the meeting of creditors to be held on 12 June 2020, or at any adjournment of that meeting. The proxy holder is to propose or vote as instructed below.

To agree office holders remuneration	To agree office holders or special for sale of business	To approve the Administrators Proposals To approve the Administrators Proposals To approve the Administrators Proposals To approve the Administrators Proposals	A/N Other resolution (a short one)
<input type="radio"/> For <input checked="" type="radio"/> Against <input type="radio"/> Abstain	<input checked="" type="radio"/> For <input type="radio"/> Against <input type="radio"/> Abstain	<input checked="" type="radio"/> For <input type="radio"/> Against <input type="radio"/> Abstain	<input checked="" type="radio"/> For <input type="radio"/> Against <input type="radio"/> Abstain

Submit Vote Save Close

The first section is for you to nominate your proxy holders.
Complete up to 3 names.

Voting

Please insert name of person (who must be 18 or over) or the chairperson of the meeting. If you wish to provide for alternative proxy holders in the circumstances that your first choice is unable to attend please state the name(s) of the alternatives as well.

Name or Name of Proxy Holder * This is a mandatory field

Chairperson
Alternative Proxy Holder
Alternative Proxy Holder
Alternative Proxy Holder

You can nominate up to three people aged 18 or over to be a proxy holder.



You can nominate the Chairperson if you wish.



If the decision is by Correspondence, the proxy holder **MUST** be the Chairperson.

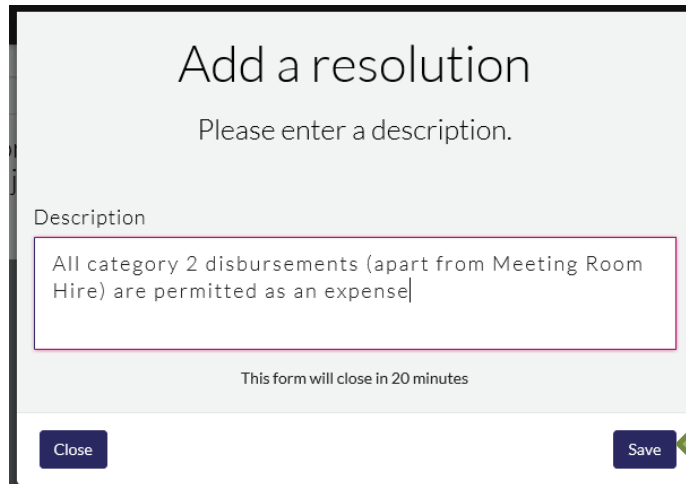
Then each resolution is stated in a grey box ...

... and you may select your voting preferences accordingly.

You can even add your own resolution if you wish to:

Type in the box what you want all creditors to express an opinion on:

Remember to click [Save] to close the window

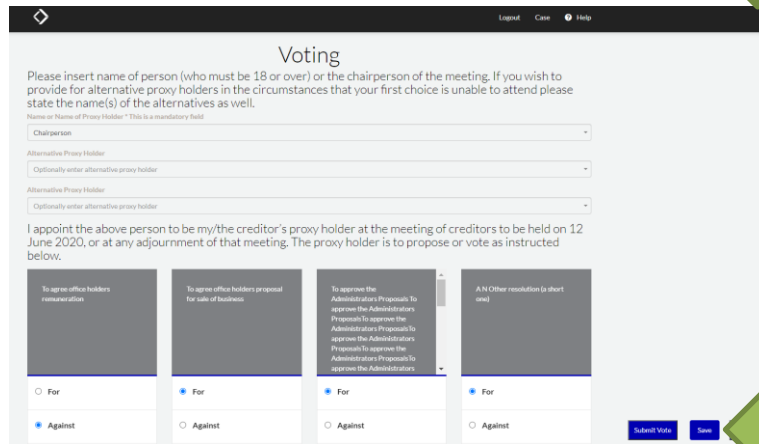


The screenshot shows a web form titled "Add a resolution". Below the title, it says "Please enter a description." There is a text input field with the text "All category 2 disbursements (apart from Meeting Room Hire) are permitted as an expense". Below the input field, it says "This form will close in 20 minutes". At the bottom of the form, there are two buttons: "Close" on the left and "Save" on the right.



Click here

Click [Save]

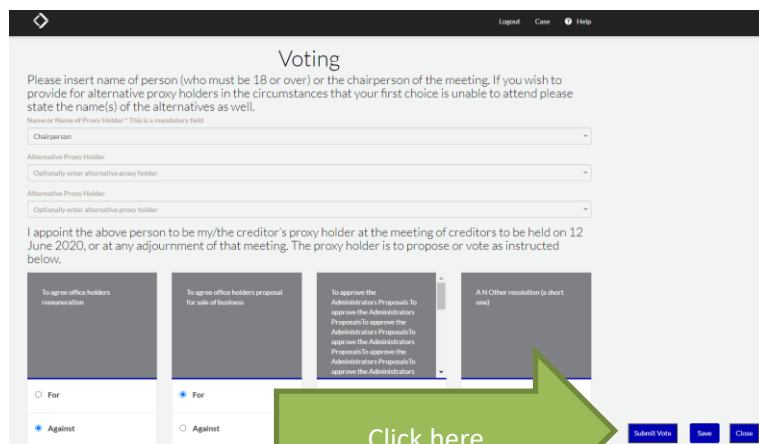


The screenshot shows a web form titled "Voting". It asks the user to "Please insert name of person (who must be 18 or over) or the chairperson of the meeting. If you wish to provide for alternative proxy holders in the circumstances that your first choice is unable to attend please state the name(s) of the alternatives as well." There are three input fields for "Chairperson" and "Alternative Proxy Holder". Below these, it says "I appoint the above person to be my/the creditor's proxy holder at the meeting of creditors to be held on 12 June 2020, or at any adjournment of that meeting. The proxy holder is to propose or vote as instructed below." There are four columns of voting options, each with "For" and "Against" radio buttons. The second and third columns have "For" selected. At the bottom right, there are "Submit Vote" and "Save" buttons.

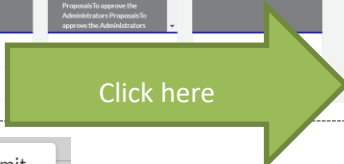


Click here

Once you have saved your voting instructions, you MUST SUBMIT them

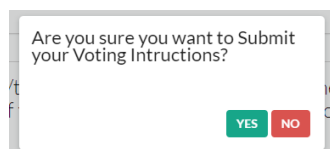


This is a duplicate of the "Voting" form screenshot above, showing the same fields and voting options.



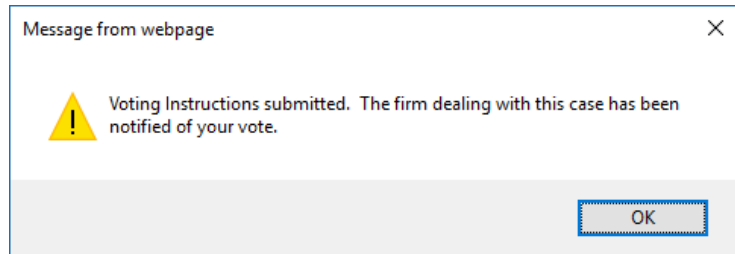
Click here

You will be asked "Are you sure?"
Click [Yes]



A small dialog box with the text "Are you sure you want to Submit your Voting Instructions?". At the bottom, there are two buttons: "YES" in green and "NO" in red.

You should receive a confirmation message:
Click [OK]

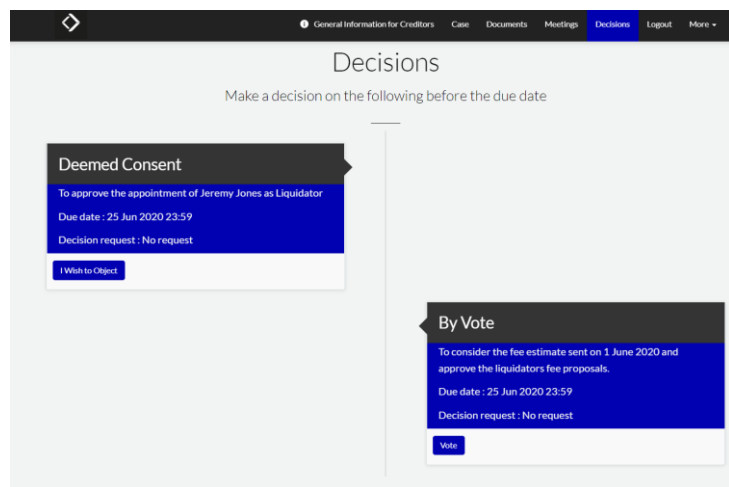


Decisions – Deemed Consent

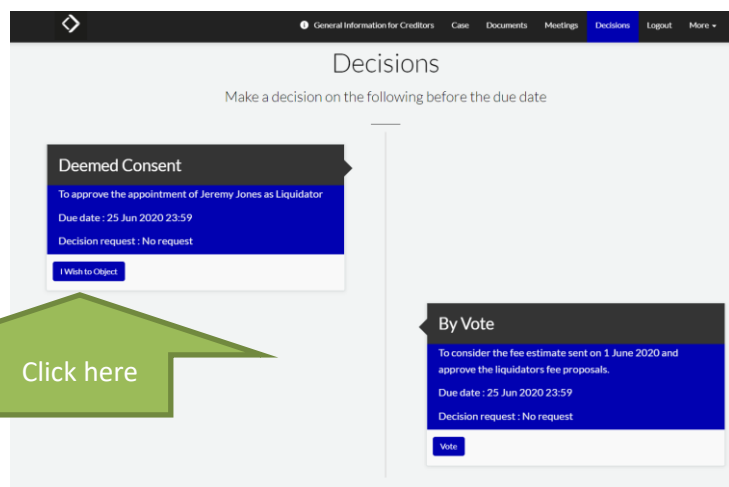
If there are Decisions to consider, then [Decisions] will appear in the top menu bar

The Deemed Consent process is very easy. If you agree to the decision being proposed, you DO NOT HAVE TO DO ANYTHING!

Go to the [Decisions] section



If you wish to object to the Deemed Consent decision click [I wish to Object]



You then get a form to complete that looks like this:

Decision Object - Deemed Consent

IMPORTANT: You should read the guidance posted here before objecting. Sufficient objections would trigger a physical meeting of creditors.

Reasons

You may give reasons for your objection here

In accordance with rule 15.31(8), your vote cannot be changed once submitted.

Close without Objecting Object

Meeting Request Reason

Close Request Meeting

This form will close in 20 minutes

If you want to read some guidance about objecting to a decision, click [posted here]

Decision Object - Deemed Consent

IMPORTANT: You should read the guidance posted here before objecting. Sufficient objections would trigger a physical meeting of creditors.

Reasons

You may give reasons for your objection here

In accordance with rule 15.31(8), your vote cannot be changed once submitted.

Close without Objecting Object

Meeting Request Reason

Close Request Meeting

This form will close in 20 minutes

Please provide a reason for your objection. If you do not wish to provide a reason, simply type a full stop.

Decision Object - Deemed Consent

IMPORTANT: You should read the guidance posted here before objecting. Sufficient objections would trigger a physical meeting of creditors.

Reasons

You may give reasons for your objection here

In accordance with rule 15.31(8), your vote cannot be changed once submitted.

Close without Objecting Object

Meeting Request Reason

Close Request Meeting

This form will close in 20 minutes

Then click [Object]

Decision Object - Deemed Consent

IMPORTANT: You should read the guidance posted here before objecting. Sufficient objections would trigger a physical meeting of creditors.

Reasons

You may give reasons for your objection here

In accordance with rule 15.31(8), your vote cannot be changed once submitted.

Close without Objecting

Object

Meeting Request Reason

Close

Request Meeting

This form will close in 20 minutes



You are asked to confirm your decision
Click [Yes]

Decision Object - Deemed Consent

IMPORTANT: You should read the guidance posted here before objecting. Sufficient objections would trigger a physical meeting of creditors.

Reasons

test

Do you want to Object to this decision?

YES

In accordance with rule 15.31(8), your vote cannot be changed once submitted.

Close without Objecting

Object

Meeting Request Reason

Close

Request Meeting

This form will close in 20 minutes



You have a right to request a meeting or alternative decision process in relation to this decision.

If you don't want to request a meeting or other decision process, click [Close]

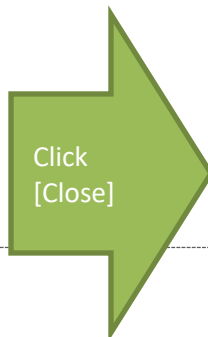
Decision Object - Deemed Consent

Meeting Request Reason

Close

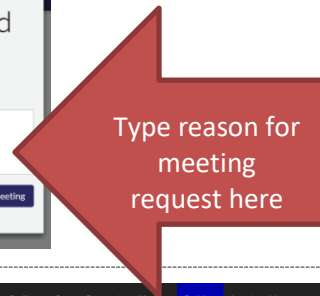
Request Meeting

This form will close in 20 minutes



Alternatively, if you do, then you must provide a reason for your request...

... then click [Request Meeting]



Once you have participated in a decision you return to the main decisions section and you can see your decision here.



There maybe more than one decision to consider.

Decisions – Vote

This method of decision making is simply a “Yes / No” option. There is no opportunity to submit alternative decisions to consider. If you do try to modify the decision it will simply be treated as a “No” vote.

Once you have voted, you cannot change your mind.

Click on [Vote] by the decision procedure



Please note that once you have voted, you cannot change your mind.

Select your vote either [Yes] or [No]

You can add comments if you wish.

You have a choice to [Close without Voting] or [Vote]

You can [Request Meeting] if you wish.

Once you have cast your vote, click [Vote]



Click here

You will be asked to confirm.

Click [Yes]



Click here

Confirmation should be received.

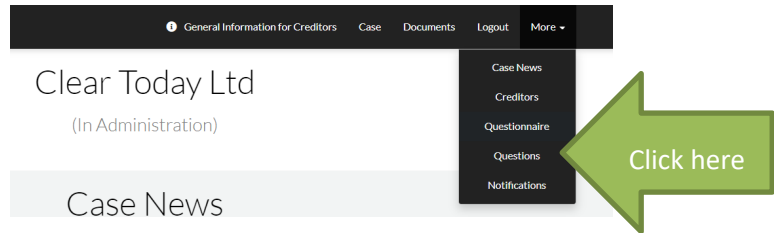
EMAIL A QUESTION

Unique Login	General Login
Yes it can be done	No it can't be done

You are able to communicate with the Officer Holder and their team via the Portal.

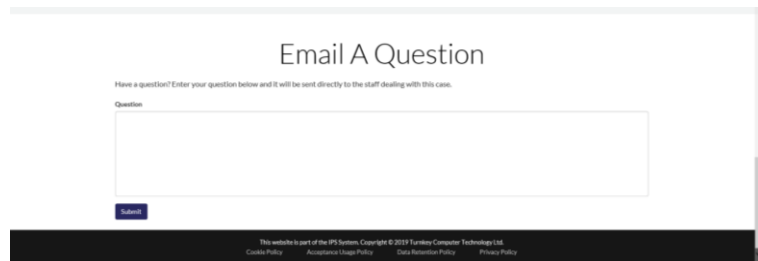
Either

In the menu bar at the top select [More] then select [Questions]

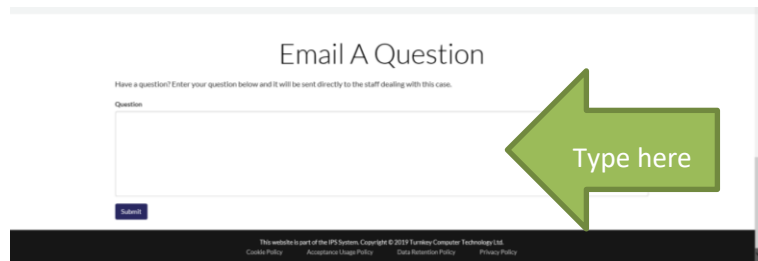


Or

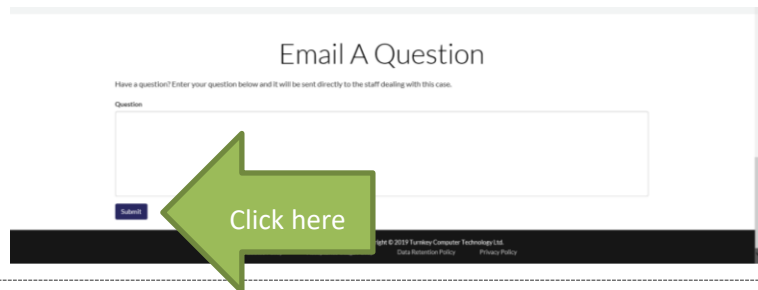
Scroll down until you reach the "Email a Question" section



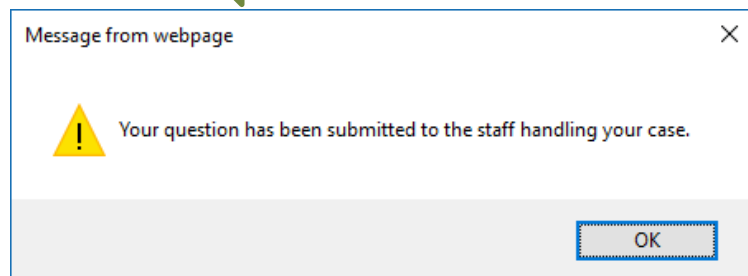
Complete your query



Click [Submit]



You will receive a confirmation message
Click [OK]



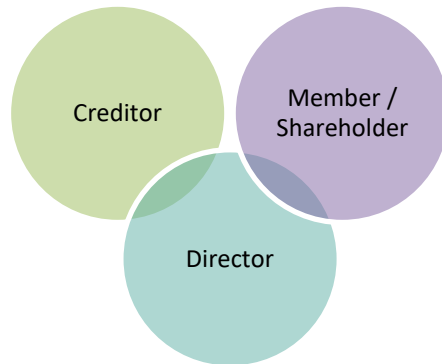
Your registered email address will receive a confirmation email containing your question.

QUESTIONNAIRES



There are some standard questionnaires that you may wish to complete in order to provide further information to the Office Holder.

Not all questionnaires will be capable of being seen, as it may depend on whether you are:



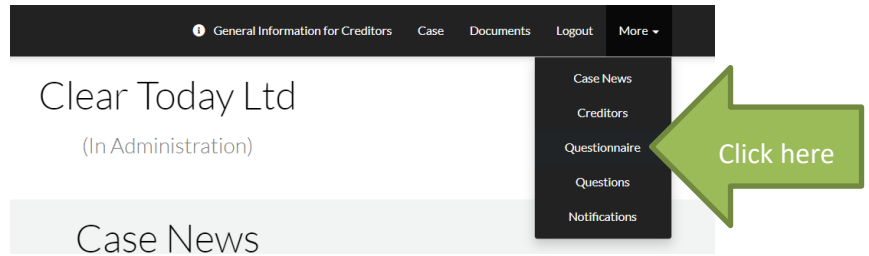
The types of Questionnaires potentially available

Creditor	Director	Member / Shareholder
<ul style="list-style-type: none">• Creditor's Questionnaire• Retention of Title Questionnaire	<ul style="list-style-type: none">• Director's Questionnaire	<ul style="list-style-type: none">• Member's Questionnaire

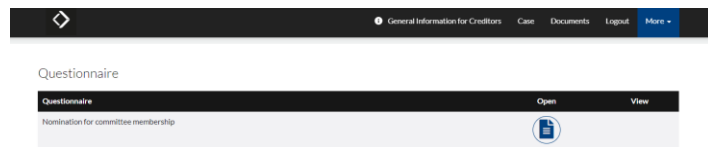
But the approach is the same no matter what the questionnaire is.

Questionnaires can also be sent to specific contacts i.e. if a Retention of Title Questionnaire was submitted by a particular supplier (Supplier "A") and the Office Holder wants to ask some more questions about the answers already provided, then a further questionnaire may be issued to only Supplier A so that no other creditors / directors / members could actually see the questionnaire.

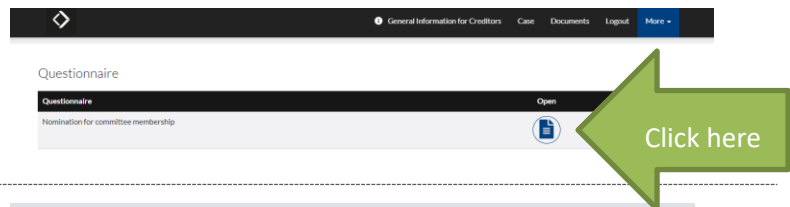
In the menu bar at the top select [More] then select [Questionnaire]



You will see the following:

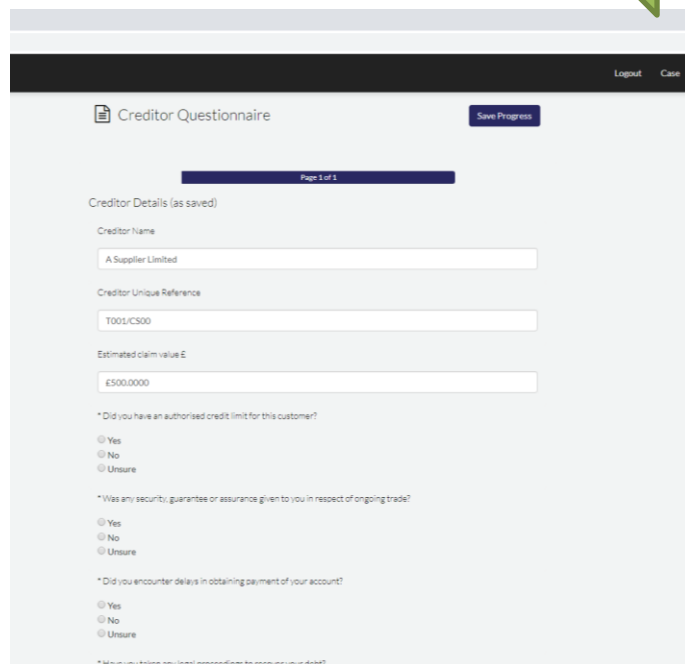


All questionnaires potentially available to you will be listed here. Click on the [Open] questionnaire item

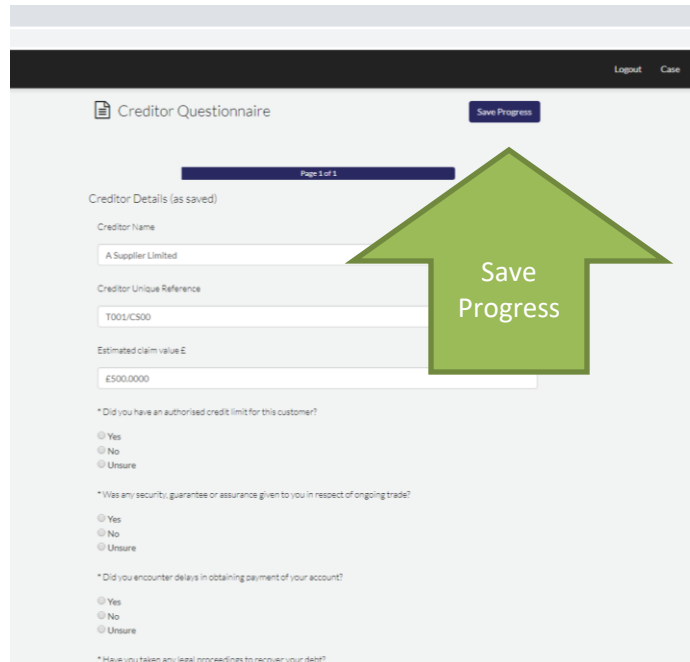


Answer the questions. As you work your way through the questionnaire you may find other questions appear depending upon previous answers.

Questions marked with a [*] are mandatory. Others are optional.

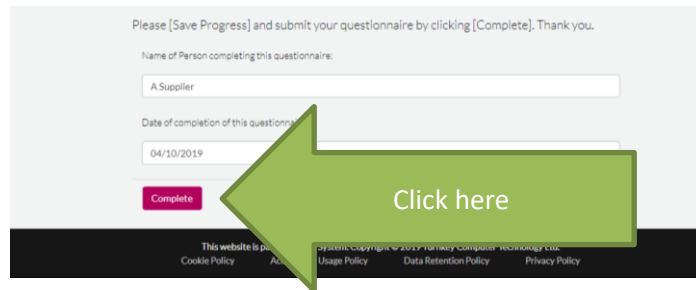


[Save Progress] is found at the top of the questionnaire



The screenshot shows the 'Creditor Questionnaire' form. At the top right, there is a 'Save Progress' button. A large green arrow points to this button. The form contains several input fields: 'Creditor Name' (A Supplier Limited), 'Creditor Unique Reference' (T001/CS00), and 'Estimated claim value £' (£500,000). Below these are three radio button questions: 'Did you have an authorised credit limit for this customer?', 'Was any security/guarantee or assurance given to you in respect of ongoing trade?', and 'Did you encounter delays in obtaining payment of your account?'. Each question has options for 'Yes', 'No', and 'Unsure'. A fourth question, 'Have you taken any legal proceedings to recover your debt?', is partially visible at the bottom.

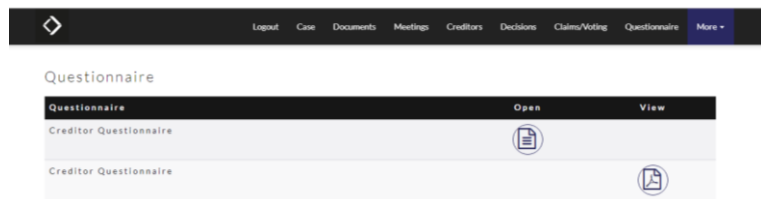
To submit the questionnaire click [Complete]



The screenshot shows the completion screen. It says 'Please [Save Progress] and submit your questionnaire by clicking [Complete]. Thank you.' Below this is a form with 'Name of Person completing this questionnaire:' (A Supplier) and 'Date of completion of this questionnaire:' (04/10/2019). A pink 'Complete' button is highlighted with a large green arrow pointing to it. At the bottom, there is a footer with 'This website is powered by...' and various policy links like 'Cookie Policy', 'Usage Policy', 'Data Retention Policy', and 'Privacy Policy'.

Reviewing Questionnaire Submitted

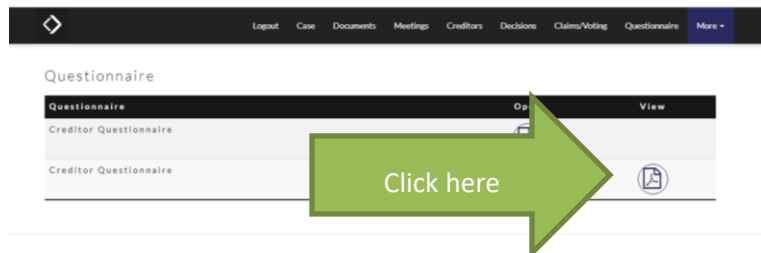
Return to the Questionnaires section and you will now see the following screen:



The screenshot shows a table with the following structure:

Questionnaire	Open	View
Creditor Questionnaire		
Creditor Questionnaire		

Click on the PDF icon under the "View" column



The screenshot shows the same table as above. A large green arrow points to the PDF icon in the 'View' column of the second row.

You will get a PDF version of your responses provided that you may "Save As" to a file location of your choice.

1/2

Creditor Questionnaire		
1	Creditor Name	LQCONTACT NAME
2	Creditor Unique Reference	LQCASE_CASECODE/LQCONTA CT_KEY
3	Estimated claim value £	£500.00
4	Did you have an authorised credit limit for this customer?	Yes
5	If yes, how much was the authorised credit limit?	400
6	Was any security, guarantee or assurance given to you in respect of ongoing trade?	Yes
7	If so, what security, guarantee or assurance was given to you?	Verbal
8	Who provided the security, guarantee or assurance?	
8.1	Name	Mr Anthony Director
8.2	Position	MD
9	Did you encounter delays in obtaining payment of your account?	Yes
10	When did you first encounter delays?	01/06/2018
11	Do you have any evidence of the delays?	Yes
12	What evidence do you have relating to the delays to payment?	Credit control telecon file notes
13	Have you taken any legal proceedings to recover your debt?	Yes
14	If so, what legal proceedings have you taken?	CCJ
15	Enter the name, firm & address of your solicitor (if any)	Mr Solicitor
16	Enter the name, firm & address of High Court Enforcement Officer, or equivalent, (if any)	Mrs Bailiff
17	Have any payments been dishonoured i.e. bounced?	Yes
18	If so, please give details	
18.1	Date	01/10/2018
18.2	Amount £	400
19	Are there any other issues that you believe ought to be investigated by	Yes

FURTHER HELP



Please be aware that the Portal works better on some web browsers than others. If at any point the features do not appear to be working, please try a different web browser first.

If you require further assistance, please contact the insolvency firm looking after the proceedings.