

**amor group**

**Office of the Public Guardian  
(Scotland)**

**Electronic Power of Attorney  
Registration**

**Agent User Manual**

23 July 2012

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## Revision history

Rev	Date	Description	Author	Review	Check	Approve
0	28/02/2012	Initial version	A. Hendry	L.Travers	J.Connell	I.Cherry
1	20/04/2012	Updated following build 1.0.9. <ul style="list-style-type: none"> <li>Added Address validation;</li> <li>Added Terms and Conditions to Register Agent;</li> </ul> Changes as per OPG feedback from Rev 0.	A. Hendry	L.Travers	J.Connell	I.Cherry
2	15/06/2012	Updated following Variation 009. <ul style="list-style-type: none"> <li>Added Payment Successful email;</li> <li>Added "Awaiting Payment" status to Update Registration;</li> <li>Changed Pay Multiple Registrations link;</li> <li>Added Payment section;</li> <li>Added Logout confirmation;</li> <li>Changed Attorneys displayed for Verify Registration.</li> </ul>	A. Hendry	L.Travers	J.Connell	I.Cherry
3	12/07/2012	Minor corrections from previous version.	A. Hendry	A.Burnside	J.Connell	J.Logan
4	23/07/2012	Minor corrections from previous version. <ul style="list-style-type: none"> <li>Wording changes to 6.24 and 6.25.</li> </ul>	A. Hendry	A.Burnside	J.Connell	I. Cherry

# SECTION 1

## Introduction

### 1.1 Document Purpose

This document provides a guide for Agent users on the use of the Office of the Public Guardian (OPG) Electronic Power of Attorney Registration (EPOAR) System.

Agent accounts are designed to provide enhanced functionality for organisations that will submit multiple Registrations. If only a few Registrations are required to be submitted, please consider creating an Individual account instead.

This document is a guide to completing each screen in the system. The system contains help text in the full system release.

A separate Frequently Asked Questions (FAQs) screen is also provided to help you understand the system, and answer a number of questions that may arise.

The FAQs screen is available via links at the foot of the EPOAR homepage.

For further information and queries about EPOAR, please contact [epoar@scotcourts.gov.uk](mailto:epoar@scotcourts.gov.uk)

### 1.2 Structure of the Document

This Document is structured as follows:

- [Section 2](#) describes the Security procedures;
- [Section 3](#) provides an overview of the system navigation and features;
- [Section 4](#) describes the User maintenance features in detail;
- [Section 5](#) describes the Agent maintenance features in detail;
- [Section 6](#) describes the Registration maintenance features in detail;
- [Section 7](#) describes Registration Verification.

## SECTION 2

### Security

#### 2.1 Introduction

This section describes the security procedures on the EPOAR system for an Agent user. It consists of the following areas of functionality:

- Register Agent;
- Login;
- Logout;
- Provide New Password;
- Provide Security Details;
- Request Username Reminder;
- Reset Password.

The Agent user must either register a new Agent with EPOAR, or have an account created for them by an existing Agent administrator. Instructions for these tasks can be found in the [Register Agent](#) and [Create Agent User](#) Sections of this document.

#### 2.2 User Roles

Users within an Agent will have at least one of the following roles:

- Agent Administrator;
- Agent Data Entry.

The Administrator role is used to manage users within the Agent.

The Data Entry role is used to create and submit Registrations.

All user roles are capable of creating and updating Contact Details Templates.

#### 2.3 Register Agent

When registering a new Agent for EPOAR, a new user with all Agent user roles is also created. This new user is capable of creating further Agent users, as well as creating and submitting Registrations.

Please note that the user performing the registration of the Agent must agree to the Terms and Conditions on behalf of the Agent as an organisation.

To register a new Agent, perform the following steps:

1. Click the *Register New Agent* link on the EPOAR homepage;
2. Provide details for the Agent and Agent Administrator:
  - Business Name and Postcode together are unique within EPOAR;

- Town or City has been provided;
- Username must be unique within EPOAR;
- Email must not be associated with a non-deleted user within EPOAR;
- Terms and Conditions must be agreed. These can be viewed by clicking on the link above the checkbox.

Note: the constitution of the password must conform to the following:

Password must be between 6 and 20 characters and contain at least one lowercase character, one uppercase character and one digit.

The user can now proceed to login to EPOAR.

## 2.4 Login

To login to EPOAR:

1. From the EPOAR homepage, click the *Login* link. The Login screen is then displayed;
2. To Login, enter the following details:
  - Username;
  - Password.
3. Press the *Login* button.

Once the user has logged in, the Search Registrations screen is displayed.

## 2.5 Logout

To logout of EPOAR:

- Select the *Logout* link from the menu;
- Click the *Logout* button to confirm logging out;
- Click the *Back to Login* action link to return to the *Login* screen.

## 2.6 Provide New Password

After login, if the system recognises that the account currently has a system generated password, due to a Reset Password request, the user is asked to provide a new password.

1. Enter the following details:
  - New Password;
  - Confirm New Password.
2. Press the *Submit* button.

Note: the constitution of the password must conform to the following:

Password must be between 6 and 20 characters and contain at least one lowercase character, one uppercase character and one digit.

## 2.7 Provide Security Details

If the user account has been created by an Agent Administrator, the first time the user logs into EPOAR the system will request that security details are entered. These comprise of choosing a new Password and providing a Memorable Place.

1. To provide security details, enter the following:
  - New Password;
  - Confirm New Password;

- Memorable Place.

Note: the constitution of the password must conform to the following:

Password must be between 6 and 20 characters and contain at least one lowercase character, one uppercase character and one digit.

## 2.8 Request Username Reminder

If a user forgets their username, they can follow these steps:

1. Click the *Request Username Reminder* link on the login page;
2. Provide the following details:
  - Email Address;
  - Date of Birth;
  - Memorable Place.

An email containing a reminder of the username is then sent to the user's email address.

## 2.9 Reset Password

If a user forgets their password, they can follow these steps:

1. Click the *Reset Password* link on the login page;
2. Provide the following details:
  - Username;
  - Email Address;
  - Memorable Place.

An email containing a new password is then sent to the user's email address. The user must choose a new password on next login.

## 2.10 Update My Details

The user's details can be updated after logging in to EPOAR.

To Update My Details, perform the following:

1. Click the *Update My Details* link on the main menu;
2. Change any of the details as required:
  - Email must not be associated with a non-deleted user within EPOAR.
3. Click the *Update My Details* button.

Note: the constitution of the password must conform to the following:

Password must be between 6 and 20 characters and contain at least one lowercase character, one uppercase character and one digit.

## SECTION 3

# General Navigation and System Features

### 3.1 Introduction

After logging into EPOAR, the following features are present throughout the system.

### 3.2 Menu Buttons

Towards the top of the page are the Menu Buttons. The buttons allow navigation between the main areas of the system and are displayed are dependent on the user's role.

### 3.3 User Name Displayed

The user name of the currently logged-in user is displayed on the left-hand side of the screen.

### 3.4 Search Facility

The Search screen can be used to search various areas of the database, the results of which appear at the foot of the page. For example, the *Search Registrations* facility allows the user to search all Registrations that they have created within EPOAR.

By leaving all fields blank and pressing the Search button, the system returns a list of all suitable entities for the Agent.

Alternatively, the user can create a more specific search by selecting a status and/or entering values and then pressing Search. Text searches are not case sensitive.

### 3.5 Action Links

Action links are hyperlinks located at the bottom of the screen that take the user to additional functions or allow the user to cancel the current action.

### 3.6 Mandatory Fields

When completing forms, any mandatory fields will be marked with an asterisk (\*).

## SECTION 4

### User Administration

#### 4.1 Introduction

User administration involves creating, updating, deleting and viewing user accounts.

#### 4.2 View Agent User

This action is only available to users with the Agent Administrator role.

To view an Agent User, perform the following:

1. Click the *My Agent* link from the main menu;
2. Click the *View* link next to the desired user.

Details of the user are displayed.

#### 4.3 Create Agent User

This action is only available to users with the Agent Administrator role.

To create an Agent User, perform the following:

1. Click the *My Agent* link from the main menu;
2. Click the *Create User* action link;
3. Enter details for the new user, choosing appropriate roles, and click the *Create Agent User* button:
  - Username must be unique within EPOAR;
  - Email must not be associated with a non-deleted user within EPOAR.

An email is sent to the newly created user, informing them that an account has been created.

The newly created user can be seen on the *My Agent* screen.

Note: the constitution of the password must conform to the following:

Password must be between 6 and 20 characters and contain at least one lowercase character, one uppercase character and one digit.

#### 4.4 Update Agent User

This action is only available to users with the Agent Administrator role.

To update an Agent User, perform the following:

1. Click the *My Agent* link from the main menu;
2. Click the *View* link next to the desired user;
3. Click the *Update* action link;
4. Enter details for the user and click the *Update* button.

The updated user can be seen on the *My Agent* screen.

#### 4.5 Delete Agent User

This action is only available to users with the Agent Administrator role.

To delete an Agent User, perform the following:

1. Click the *My Agent* link from the main menu;
2. Click the *View* link next to the desired user;
3. Click the *Delete* action link;
4. Click the *Delete* button to confirm deletion.

The deleted user is marked as deleted on the *My Agent* screen.

#### 4.6 Unlock User

To unlock a user that has been locked, perform the following:

1. Click the *My Agent* link from the main menu;
2. Click the *View* link next to the desired user;
3. Click the *Unlock* action link;
4. Click the *Unlock* button to confirm unlocking.

The user is unlocked, their password is reset and they are informed by email. A new password is requested when they next login.

## SECTION 5

# Agent Administration

### 5.1 Introduction

Agent administration involves updating and viewing the Agent and creating, viewing, updating, searching and deleting Contact Details Templates.

### 5.2 View Agent

This action is only available to users with the Agent Administrator role.

To view the Agent, perform the following:

1. Click the *My Agent* link from the main menu.

Details of the Agent are displayed.

### 5.3 Update Agent

This action is only available to users with the Agent Administrator role.

To update the Agent, perform the following:

1. Click the *My Agent* link from the main menu;
2. Click the *Update* action link;
3. Enter details for the Agent and click the *Update* button:
  - Business Name and Postcode together are unique within EPOAR;
  - Town or City has been provided.

The updated details can be seen on the *My Agent* screen.

### 5.4 Search Contact Details Templates

To save time when entering the details of a frequently used Sender or Attorney, a Contact Details Template can be created to store their information. This can later be used to auto-complete the appropriate fields.

To search for a Contact Details Template, perform the following:

1. Click the *Contact Details Templates* link from the main menu;
2. Enter any appropriate search criteria that will help narrow down the search;
3. Click the *Search* button.

All templates that match the given search criteria are displayed.

### 5.5 Create Contact Details Template

To create a new Contact Details Template, perform the following:

1. Click the *Contact Details Templates* link from the main menu;

2. Click the *Create* action link;
3. Enter details for the new template and click the *Create* button:
  - One of Description, Property and House Number must be entered;
  - If House Number is entered, Street is also required;
  - If Country is “UK”, Postcode is required.

The newly created template can be seen on the *Contact Details Templates* screen.

## 5.6 View Contact Details Template

To view a Contact Details Template, perform the following:

1. Click the *Contact Details Templates* link from the main menu;
2. Enter any appropriate search criteria that will help narrow down the search;
3. Click the *Search* button;
4. Click the *View* link next to the desired template.

Details of the template are displayed.

## 5.7 Update Contact Details Template

To update a Contact Details Template, perform the following:

1. Click the *Contact Details Templates* link from the main menu;
2. Enter any appropriate search criteria that will help narrow down the search;
3. Click the *Search* button;
4. Click the *View* link next to the desired template;
5. Click the *Update* action link;
6. Enter the details for the template and click the *Update* button:
  - One of Description, Property and House Number must be entered;
  - If House Number is entered, Street is also required;
  - If Country is “UK”, Postcode is required.

The updated template can be seen on the *Contact Details Template* screen.

## 5.8 Delete Contact Details Template

To delete a Contact Details Template, perform the following:

1. Click the *Contact Details Templates* link from the main menu;
2. Enter any appropriate search criteria that will help narrow down the search;
3. Click the *Search* button;
4. Click the *View* link next to the desired template;
5. Click the *Delete* action link;
6. Click the *Delete* button to confirm deletion.

The deleted template can no longer be seen on the *Contact Details Template* screen.

## SECTION 6

# Registrations

### 6.1 Introduction

Registration maintenance involves creating, updating, viewing and submitting the Registrations.

### 6.2 Search Registrations

From the *Registrations* screen, the user is presented with the option to:

- Search Registrations;
- Create a Registration;
- View a Registration.

To search Registrations, perform the following:

1. Click the *Registrations* link from the main menu;
2. Enter any appropriate search criteria that will help narrow down the search;
3. Click the *Search* button.

The system displays all Registrations that have been created by the user's Agent and match the given search criteria, or displays a message informing the user that there were no Registrations that matched.

The user then has the option to view any of the returned Registrations.

### 6.3 Create Registration

**This action is only available to users with the Agent Data Entry role.**

While proceeding through the Registration wizard, it is possible to click the *Proceed* button to proceed to the next screen, click the *Return* button to go back to the previous page, click the *Save* button to save the Registration and continue, or click the *Save and Exit* button to save your progress and view the Registration. If saved, the Registration can be completed at a later date.

A check is carried out on clicking the *Proceed* button. If there are any errors found, the user is notified and asked to correct them before proceeding.

To create a Registration and submit it to OPG, perform the following:

1. Click the *Registrations* link from the main menu;
2. Click the *Create* action link;
3. Read and agree to the Statutory Requirements;
4. Click the *Proceed* button;
5. Enter the details for the Registration and click the *Proceed* button:

- If “Other” is selected for Title, Title If Other must be specified;
  - The user must agree to the powers requirements appropriate for the Nature of Powers selection made;
  - The Date Granter Signed cannot be in the future.
6. Enter the details for the Granter and click the *Proceed* button:
    - If “Other” is selected for Title, Title If Other must be specified;
    - One of Description, Property and House Number must be entered;
    - If House Number is entered, Street is also required;
    - If Country is “UK”, Postcode is required;
    - If “Email” is selected for Return Type, an email address must be provided;
    - The Granter must be 16 years of age or over.
  7. Enter the details for the Sender and click the *Proceed* button:
    - A Contact Details Template may be used to automatically fill in most of the fields. To use a Contact Details Template, click the *Select* link beside the desired template;
    - If “Other” is selected for Title, Title If Other must be specified;
    - One of Description, Property and House Number must be entered;
    - If House Number is entered, Street is also required;
    - If Country is “UK”, Postcode is required.
  8. Add any Attorneys as required and click the *Proceed* button:
    - The number of Attorneys and their associated Nature of Power must match those of the Registration in order to proceed to the next screen;
    - Further details can be found in the *Manage Attorneys* Section of this document.
  9. Add any Specified People as required and click the *Proceed* button:
    - Further details can be found in the *Manage Specified People* Section of this document.
  10. Upload the Deed:
    - The uploaded Deed must be a PDF file and cannot have a file size of more than 2 MB.
  11. Select a payment option:
    - Further details can be found in the *Select Payment Option* Section of this document.

Once payment has been completed, no further changes can be made to the Registration.

After payment has been made successfully, the Registration is submitted to OPG. OPG then checks that the POA meets statutory requirements and you are informed of the result by email.

- If successful, the Registration is marked as “Authorised”. The submitting user can then view the Certificate online. Further details of how to do this can be found in the [View Certificate](#) Section of this document;
- If unsuccessful, the Registration status is set to “Rejected”. The submitting user will receive the reasons for rejection in the email;

- If the user has requested that the submission be withdrawn, the Registration status is set to “Withdrawn” and the submitting user receives confirmation by email.

## 6.4 Manage Attorneys

**These actions are only available to users with the Agent Data Entry role.**

Attorney maintenance involves creating, updating, viewing and deleting Attorneys for a Registration.

From the *Manage Attorneys* screen, the user is presented with the option to:

- Create an Attorney;
- Update an Attorney;
- Delete an Attorney.

Before the user is permitted to proceed to the next screen, then number of Attorneys must be consistent with the Registration’s Attorney Type and the Registration’s Nature of Powers must be covered by the Nature of Powers of the Attorneys.

From the *View Registration* screen, the user is presented with the option to:

- View an Attorney.

## 6.5 Create Attorney

**This action is only available to users with the Agent Data Entry role.**

To create an Attorney, perform the following:

1. Proceed through the Registration wizard until the *Manage Attorneys* screen is reached;
2. Click the *Create Attorney* action link;
3. Enter the details for the Attorney and click the *Create* button:
  - If available, a Contact Details Template may be used to automatically fill in most of the fields. To use a Contact Details Template, click the *Select* link beside the desired template;
  - If “Other” is selected for Title, Title If Other must be specified;
  - One of Description, Property and House Number must be entered;
  - If House Number is entered, Street is also required;
  - If Country is “UK”, Postcode is required;
  - If “Email” is selected for Return Type, an email address must be provided;
  - If “Is Specified Person” is checked, a Return Type must be supplied.

The newly created Attorney can be seen on the *Manage Attorneys* screen.

If “Is Specified Person” was checked, a Specified Person is also created using the same details. This saves the user from entering duplicate information on the *Specified People* Screen. The Specified Person can be seen on the next screen.

## 6.6 Update Attorney

**This action is only available to users with the Agent Data Entry role.**

To update an Attorney, perform the following:

1. Proceed through the Registration wizard until the *Manage Attorneys* screen is reached;
2. Click the *Update* link for the desired Attorney;
3. Enter the details for the Attorney and click the *Update* button:

- If “Other” is selected for Title, Title If Other must be specified;
- One of Description, Property and House Number must be entered;
- If House Number is entered, Street is also required;
- If Country is “UK”, Postcode is required;
- If “Email” is selected for Return Type, an email address must be provided.

The updated Attorney can be seen on the *Manage Attorneys* screen.

## 6.7 Delete Attorney

This action is only available to users with the Agent Data Entry role.

To delete an Attorney, perform the following:

1. Proceed through the Registration wizard until the *Manage Attorneys* screen is reached;
2. Click the *Delete* link for the desired Attorney;
3. Click the *Delete* button to confirm deletion.

The deleted Attorney can no longer be seen on the *Manage Attorneys* screen.

## 6.8 View Attorney

To view an Attorney, perform the following:

1. Click the *Registrations* link from the main menu;
2. Enter any appropriate search criteria that will help narrow down the search;
3. Click the *Search* button;
4. Click the *View* link next to the desired Registration within the search results;
5. Click the *View* link next to the desired Attorney within the Attorney list.

Details of the Attorney are now displayed.

## 6.9 Manage Specified People

These actions are only available to users with the Agent Data Entry role.

Specified Person maintenance involves creating, updating, viewing and deleting Specified People for a Registration.

From the *Manage Specified People* screen, the user is presented with the option to:

- Create a Specified Person;
- Update a Specified Person;
- Delete a Specified Person.

From the *View Registration* screen, the user is presented with the option to:

- View a Specified Person.

## 6.10 Create Specified Person

This action is only available to users with the Agent Data Entry role.

Any Specified People added to the Registration must also be specified within the Deed.

To create a Specified Person, perform the following:

1. Proceed through the Registration wizard until the *Manage Specified People* screen is reached;

2. Click the *Create Specified Person* action link;
3. Enter the details for the Specified Person and click the *Create* button:
  - If “Other” is selected for Title, Title If Other must be specified;
  - One of Description, Property and House Number must be entered;
  - If House Number is entered, Street is also required;
  - If Country is “UK”, Postcode is required;
  - If “Email” is selected for Return Type, an email address must be provided.

The newly created Specified Person can be seen on the *Manage Specified People* screen.

## 6.11 Update Specified Person

**This action is only available to users with the Agent Data Entry role.**

To update a Specified Person, perform the following:

1. Proceed through the Registration wizard until the *Manage Specified People* screen is reached;
2. Click the *Update* link for the desired Specified Person;
3. Enter the details for the Specified Person and click the *Update* button:
  - If “Other” is selected for Title, Title If Other must be specified;
  - One of Description, Property and House Number must be entered;
  - If House Number is entered, Street is also required;
  - If Country is “UK”, Postcode is required;
  - If “Email” is selected for Return Type, an email address must be provided.

The updated Specified Person can be seen on the *Manage Specified People* screen.

## 6.12 Delete Specified Person

**This action is only available to users with the Agent Data Entry role.**

To delete a Specified Person, perform the following:

1. Proceed through the Registration wizard until the *Manage Specified People* screen is reached;
2. Click the *Delete* link for the desired Specified Person;
3. Click the *Delete* button to confirm deletion.

The deleted Specified Person can no longer be seen on the *Manage Specified People* screen.

## 6.13 View Specified Person

To view a Specified Person, perform the following:

1. Click the *Registrations* link from the main menu;
2. Enter any appropriate search criteria that will help narrow down the search;
3. Click the *Search* button;
4. Click the *View* link next to the desired Registration within the search results;
5. Click the *View* link next to the desired Specified Person within the Specified People list.

Details of the Specified Person are now displayed.

## 6.14 View Registration

To view a Registration, perform the following:

1. Click the *Registrations* link from the main menu;
2. Enter any appropriate search criteria that will help narrow down the search;
3. Click the *Search* button;
4. Click the *View* link next to the desired Registration within the search results.

Details of the Registration are now displayed.

## 6.15 View Deed

The Deed for a Registration can only be viewed if a valid Deed has been uploaded, and only if the Registration has not yet been processed by OPG.

To view the Deed for a Registration, perform the following:

1. Click the *Registrations* link from the main menu;
2. Enter any appropriate search criteria that will help narrow down the search;
3. Click the *Search* button;
4. Click the *View* link next to the desired Registration within the search results;
5. Click the *View Deed* action link to open or save the Deed.

## 6.16 View Certificate

The Certificate for a Registration can only be viewed if the Registration has been authorised by OPG.

To view the Certificate for a Registration, perform the following:

1. Click the *Registrations* link from the main menu;
2. Enter any appropriate search criteria that will help narrow down the search;
3. Click the *Search* button;
4. Click the *View* link next to the desired Registration within the search results;
5. Click the *View Certificate* action link to open or save the Deed.

## 6.17 Update Registration

**This action is only available to users with the Agent Data Entry role.**

If a Registration has a status of “In Progress”, “Awaiting Check”, “Awaiting Payment” or “Inactive” it can be updated. To continue the submission, perform the following:

1. Select to *View* the Registration;
2. Click the *Update* action link;
3. Proceed through the Registration wizard as per *Create Registration*.

## 6.18 Select Payment Option

**These actions are only available to users with the Agent Data Entry role.**

There are two methods of paying for a Registration:

- “Pay Now” using the e-Kashu payment system;
- “Pay by Transfer” using a payment from a previously Rejected Registration.

It is also possible to delay payment until later using the following options:

- “Pay Later” using the Multiple Payment function;
- “Mark Registration as Awaiting Check”.

### 6.19 Mark Registration as Awaiting Check

Before a Registration is paid, it may be required to be checked by another user. For example, a Registration may be required to be checked by a solicitor before submission.

To allow a Registration to be checked, perform the following:

1. Proceed through the Registration wizard until the *Select Payment Option* screen is reached;
2. Click the *Mark Registration as Awaiting Check* button.

The Registration will now be marked as “Awaiting Check”. To pay for the Registration, proceed through the Registration wizard as per [Update Registration](#).

### 6.20 Pay Now



e-Kashu is a secure payment system provided by CreditCall, which is certified under the PCI DSS (Payment Card Industry Data Security Standard). Since the entire transaction is handled by CreditCall, no payment details are stored within EPOAR.

To pay for a Registration using the e-Kashu payment system, perform the following:

1. Proceed through the Registration wizard until the *Select Payment Option* screen is reached;
2. Click the *Pay Now* button;
3. Click the *Pay* button after verifying Registration details and amount;
4. Once redirected to the e-Kashu screen, payment details are requested to pay for the Registration;
5. On completion, the user is returned to EPOAR and a message informs of the success or failure of the payment. If successful, a confirmation email is sent to the Registration User and all non-deleted Administrators for the User’s Agent.

The Registration is now ready to be processed by OPG.

### 6.21 Pay by Transfer

If the user has at least one previous Registration with a status of “Rejected”, that payment can be used to pay for a new Registration. To transfer payment from a Rejected Registration, perform the following:

1. Proceed through the Registration wizard until the *Select Payment Option* screen is reached;
2. Click the *Pay by Transfer* button;
3. Click the *Select* link next to the desired Registration from which to transfer the payment;
4. Click the *Transfer Payment* button after verifying the details of the “Transfer From” and “Transfer To” Registrations.

The “Transfer To” Registration is marked as “Paid by Transfer”, while the “Transfer From” Registration is marked as “Payment Transferred”.

The Registration is now ready to be processed by OPG.

## 6.22 Pay Later

In the case of an Agent having to process many Registrations, it may be easier to pay for them simultaneously. To allow a Registration to be paid as part of a multiple payment, perform the following:

1. Proceed through the Registration wizard until the *Select Payment Option* screen is reached;
2. Click the *Pay Later* button.

The Registration will then be marked as “Awaiting Payment” and will be available to select as part of a multiple payment. Further details can be found in the [Pay Multiple Registrations](#) Section of this document.

Once a Registration is marked as “Awaiting Payment”, further amendments can still be made by proceeding through the Registration wizard as per [Update Registration](#).

## 6.23 Pay Multiple Registrations

**These actions are only available to users with the Agent Data Entry role.**

To pay for multiple Registrations simultaneously, perform the following:

1. Click the *Payments* link from the main menu;
2. Click the *Pay Multiple Registrations* action link;
3. Select between 1 and 20 Registrations for which to make payment;
4. Click the *Submit* button;
5. After verifying the details of the Registrations to be paid, click the *Pay* button;
6. Once redirected to the e-Kashu screen, payment details are requested to pay for the Registration;
7. On completion, the user is returned to EPOAR and a message informs of the success or failure of the payment. If successful, a confirmation email is sent to the Registration User and all non-deleted Administrators for the User’s Agent.

The Registration is now ready to be processed by OPG.

## 6.24 Submit Revocation

A user can submit a revocation for any Registration that has been authorised by OPG.

To submit a revocation for a Registration, perform the following:

1. Click the *Submit Revocation* link from the main menu;
2. Enter the following details and click the *Search* button:
  - Sigma Case Reference;
  - Granter Surname;
  - Date Granter Signed.
3. Upload the Revocation and click the *Upload* button:
  - The uploaded document must be a PDF file and cannot have a file size of more than 2 MB.

The revocation will then be submitted to OPG for deliberation, and a copy of the email will also be sent to the user who submitted the revocation.

If OPG are satisfied that the revocation meets the requirements of the Act then the Registration status is set to “Revoked”. The user who created the Registration (and all administrators from their Agent if relevant) is notified by email.

## 6.25 Registration Termination

There is no method of terminating a Registration using EPOAR. To request a termination, please contact OPG. Details of how to contact OPG can be found on the OPG website: [http://www.publicguardian-scotland.gov.uk/contact\\_us.asp](http://www.publicguardian-scotland.gov.uk/contact_us.asp).

- If OPG are satisfied that the termination meets the requirements of the Act then the Registration status is set to “Terminated”. The user who created the Registration is notified by email.

## 6.26 Inactive Registrations

Registrations that are not updated over a period of 4 weeks or more have their status set to “Inactive”. The user who created the Registration is informed by email.

If the Registration is not updated within a further 2 weeks, it is permanently deleted from EPOAR.

## SECTION 7

### Payments

#### 7.1 Introduction

Payment functionality involves searching and viewing the Payments.

#### 7.2 Search Payments

From the *Payments* screen, the user is presented with the option to:

- Search Payments;
- View a Payment.

If an Agent Data Entry user, the user is also presented with the option to:

- Pay Multiple Registrations.

To search Payments, perform the following:

1. Click the *Payments* link from the main menu;
2. Enter any appropriate search criteria that will help narrow down the search;
3. Click the *Search* button.

The system displays all Successful Payments that have been created by the user's Agent and match the given search criteria, or displays a message informing the user that there were no Payments that matched.

The user then has the option to view any of the returned Payments.

#### 7.3 View Payment

To view a Payment, perform the following:

1. Click the *Payments* link from the main menu;
2. Enter any appropriate search criteria that will help narrow down the search;
3. Click the *Search* button;
4. Click the *View* link next to the desired Payment within the search results.

Details of the Payment are now displayed.

## SECTION 8

### Verification

#### 8.1 Introduction

If a Power of Attorney was processed electronically, it is possible to verify it through EPOAR. This functionality can be used by institutions, such as a bank, to quickly check the validity of a Power of Attorney Certificate that is presented to them.

A user does not require to be logged in to EPOAR to verify a Registration.

#### 8.2 Verify Registration

To verify a Registration, perform the following:

1. Click the *Verify Registration* link on the EPOAR homepage;
2. Enter the following details and click the *Search* button:
  - Sigma Case Reference;
  - Granter First Name;
  - Granter Surname;
  - Date Granter Signed.

If an authorised Registration is found within EPOAR, the details and list of Attorneys will be displayed, along with a message informing the user that the Registration was successfully verified.

If there are no Registrations within EPOAR that match the search criteria, a message is displayed to inform the user. Note, only Registrations submitted digitally are able to be verified through EPOAR.