

Debt Help System User Manual

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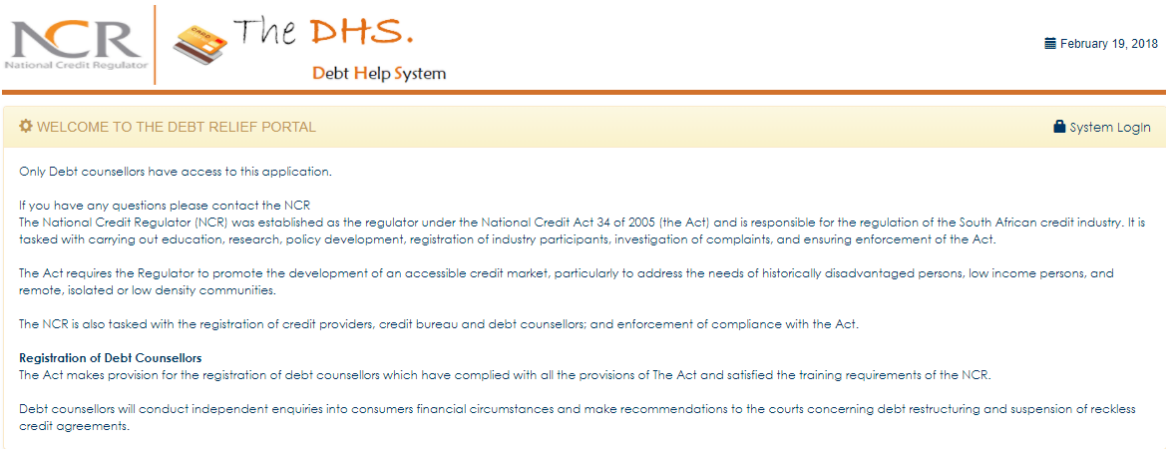
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1. Home



Debt Help System User Manual

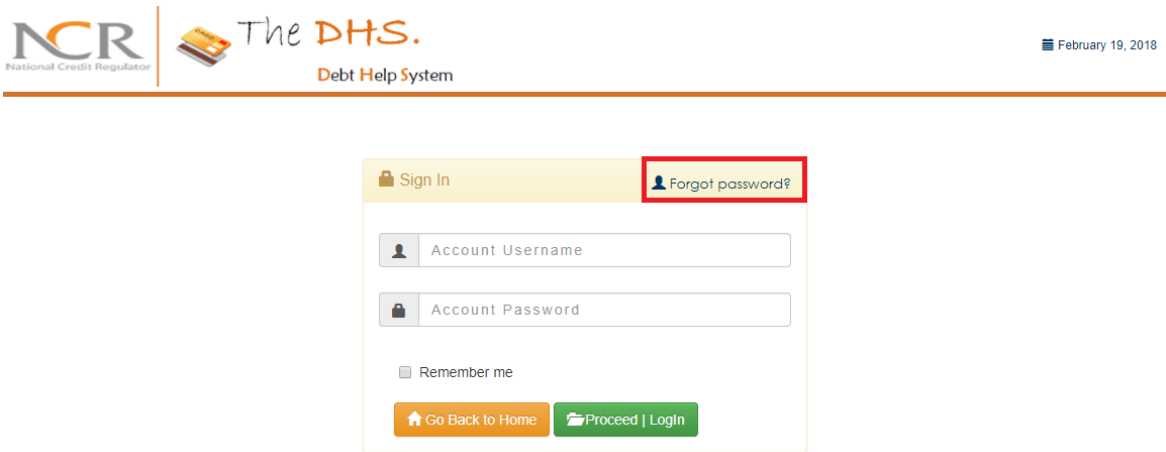
2. Landing Screen



3. Login Procedure

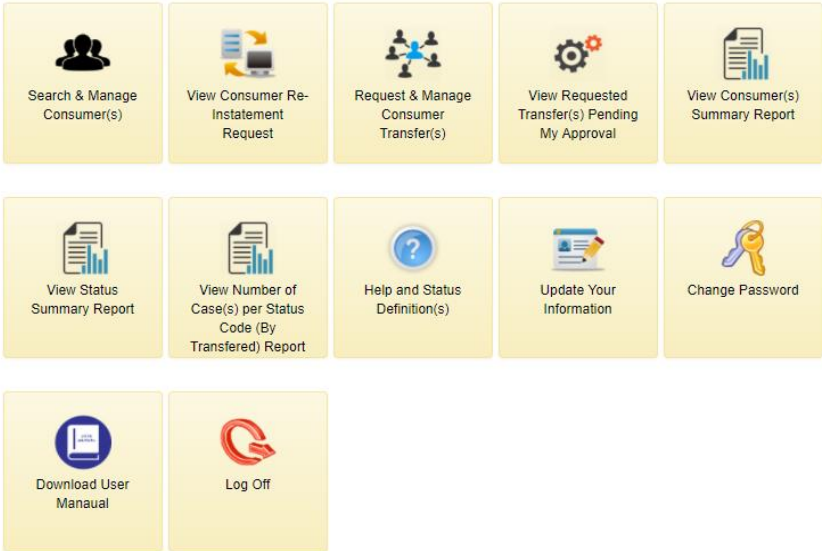
This screen will require the registered Debt Counsellor to login using their NCR Registration Number together with the password provided by the NCR. Once the account details have been provided the Debt Counsellor will have to proceed by clicking "Proceed | Login" button provided on the screen.

The Debt Counsellors will be able to retrieve their forgotten password by clicking on the highlighted link below.



4. Dashboard

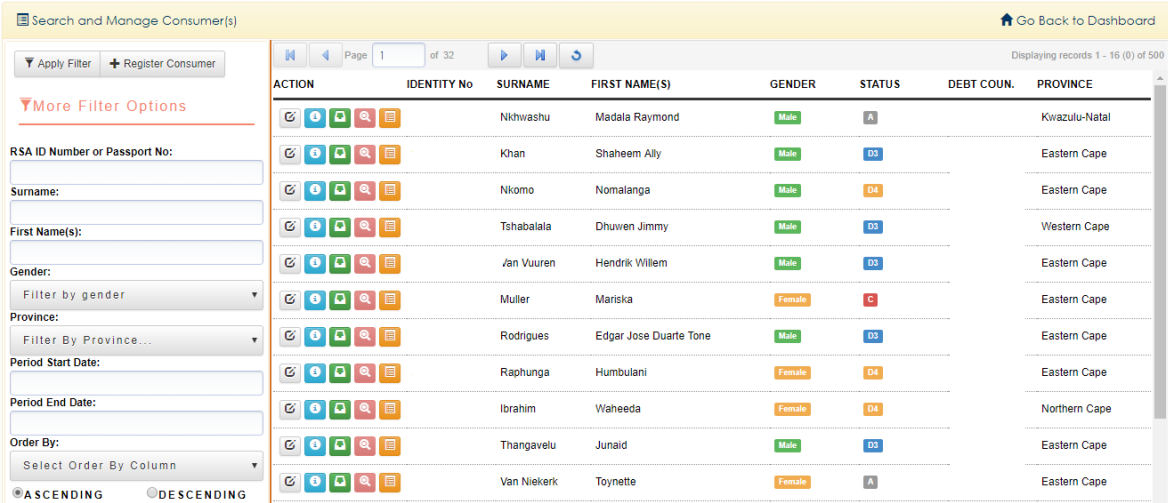
Once the Debt Counsellor has successfully logged in, the below menu options will be displayed allowing the Debt Counsellor to select their next move.



5. Search and Manage Consumer(s)

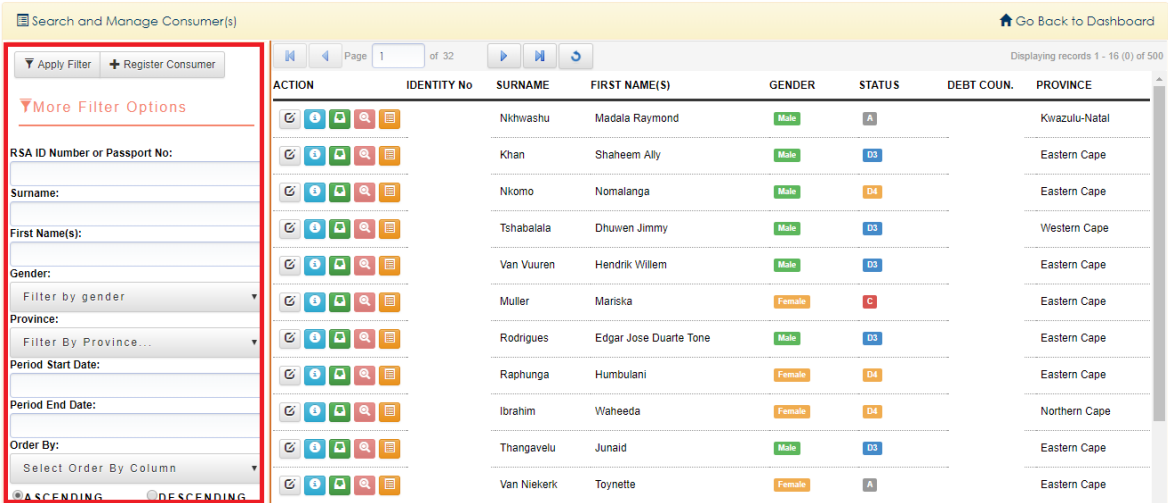
5.1 Manage Consumer(s)

Search and Manage Consumer(s) screen will allow the Debt Counsellor to search a consumer, update consumer profile, update consumer status, view status history, view summarised information and be able to request consumer re-instatement if the consumer status is on an inactive status code.



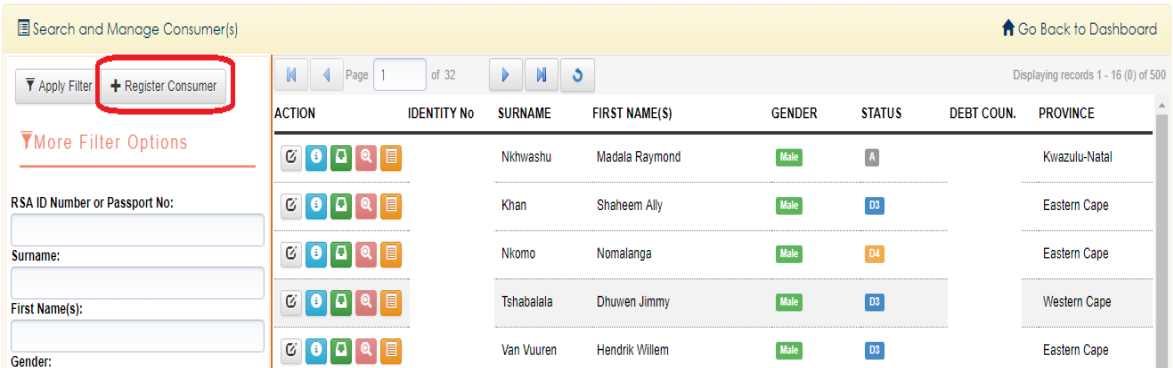
5.2 Search Consumer by Filter

The below screen allows the Debt Counsellor to search for a consumer using the following options: Consumer RSA ID or Passport, Surname, First Name(s), Gender, Province or by Registration Date(s) and can also display records based on selected order.

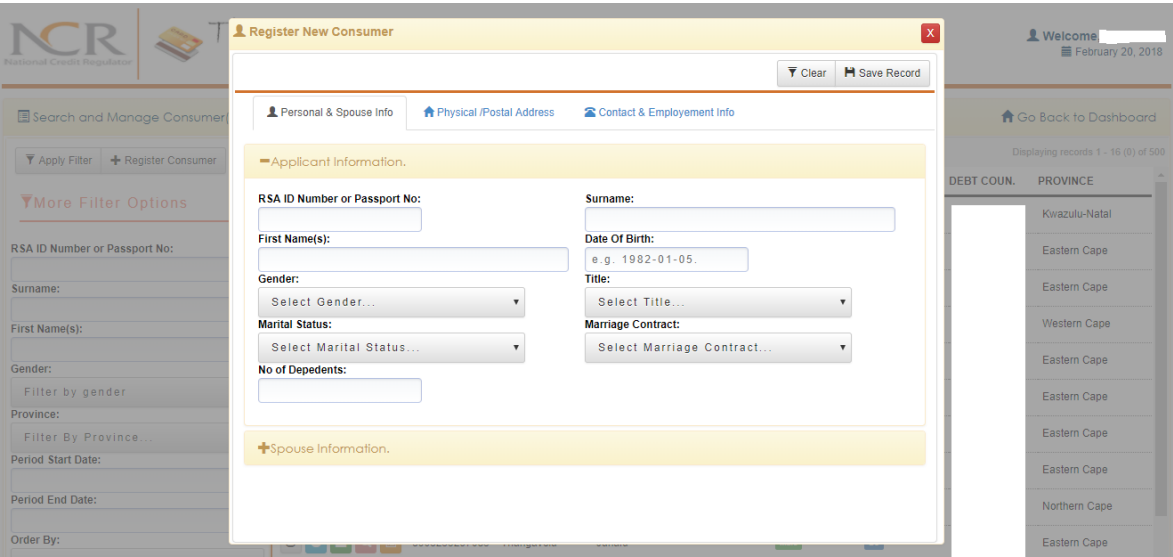


5.3 Load New Consumer Profile

The Debt Counsellor can load a new consumer by clicking on **Register Consumer Button** as highlighted below.

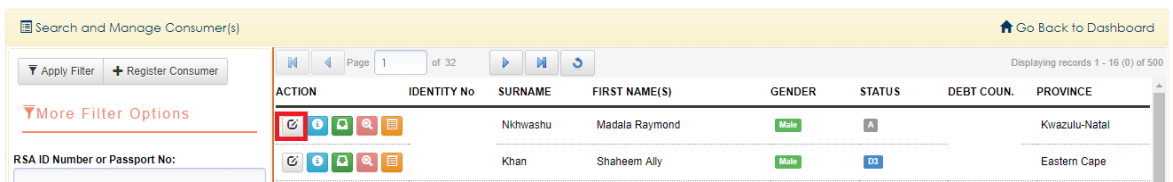


The below screen will be displayed allowing the Debt Counsellor to capture consumer`s details.

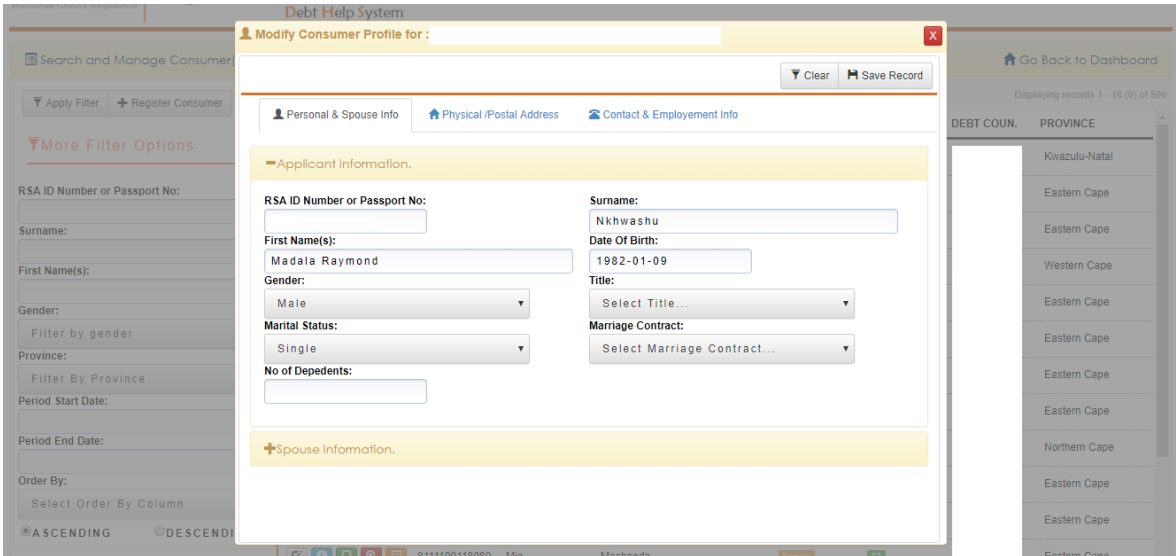


5.4 Update Existing Consumer Profile

The Debt Counsellor can only update consumers listed under their profile, this can be achieved by selecting **EDIT Menu** button as highlighted below.

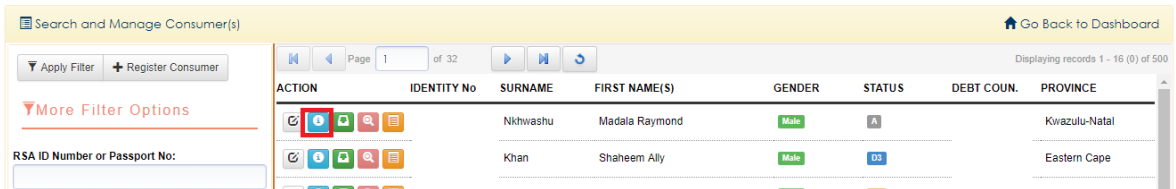


The below screen will be displayed allowing the Debt Counsellor to update the consumer`s profile.



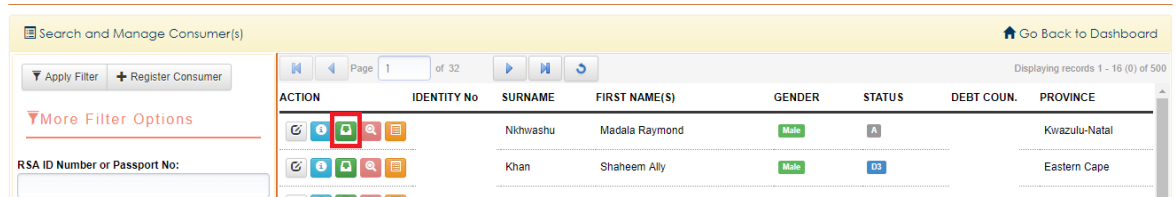
5.5 View Consumer Summary Information

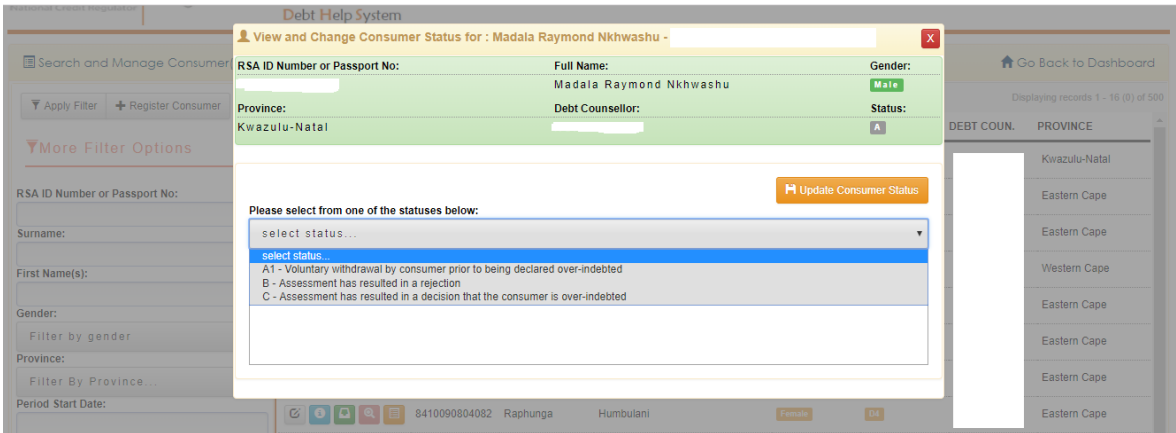
The below screen will allow the Debt Counsellor to view summarized consumer information, by selecting **View Consumer Summary Information** button as highlighted below.



5.6 Update Consumer Status Code

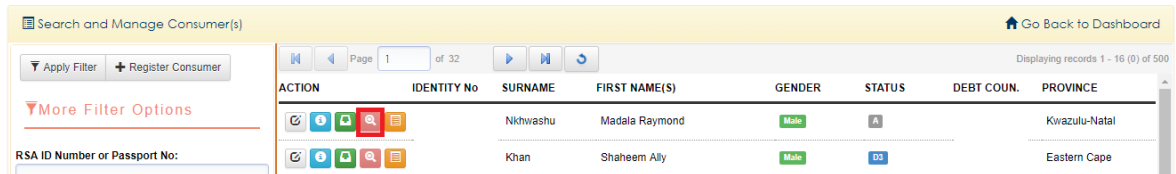
The Debt Counsellor can update the consumer`s status code by selecting **Change Consumer Status Menu** button as highlighted below.



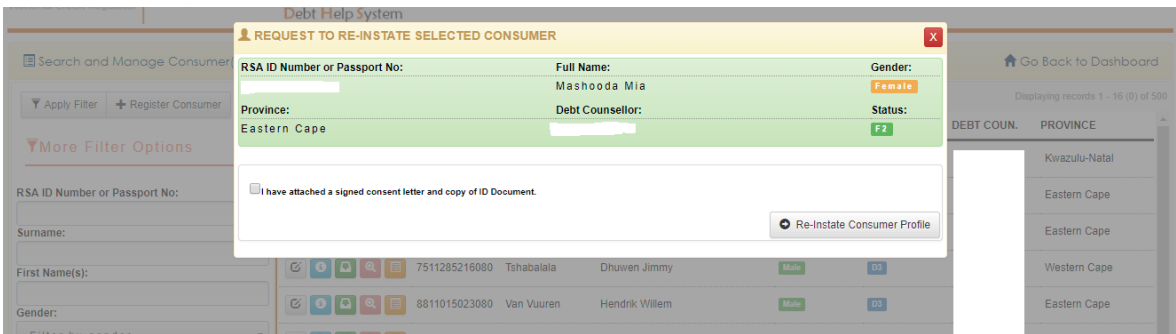


5.7 Request to Reinstate Consumer

The Debt Counsellor will be able to request for a re-instatement when the consumer is on an inactive status code. This can be achieved by selecting **Re-Instate Consumer Menu** button as highlighted below. User will notice this button will be inactive if the consumer is already on an active on Debt Help System.

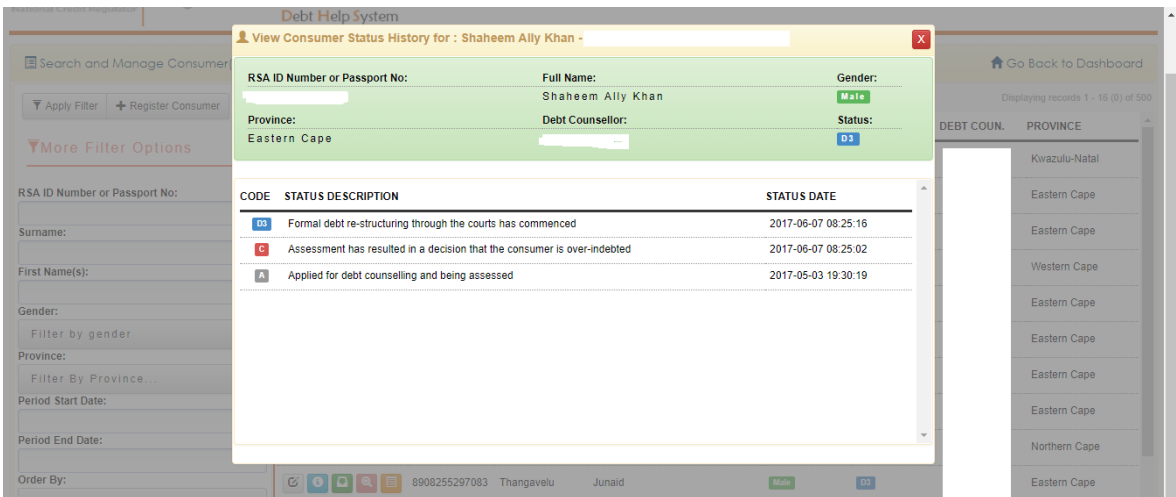
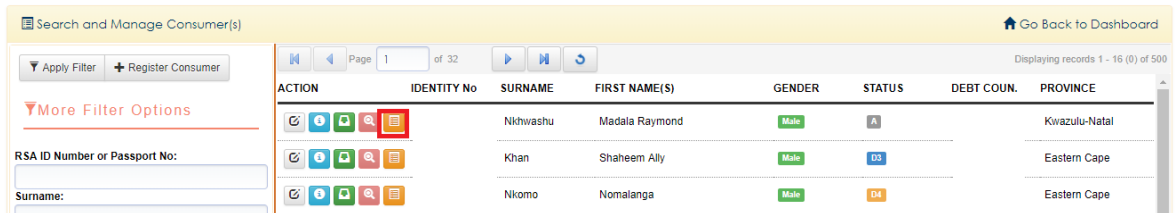


The below screen will be displayed for the Debt Counsellor to request reinstatement.



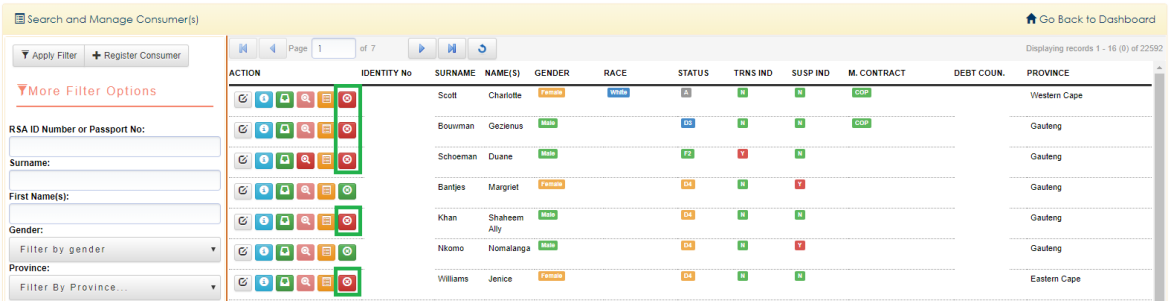
5.8 View Consumer Status History

The Debt Counsellor will be able to view consumer status history. This can be achieved by selecting **View Consumer Status History** button as highlighted below.

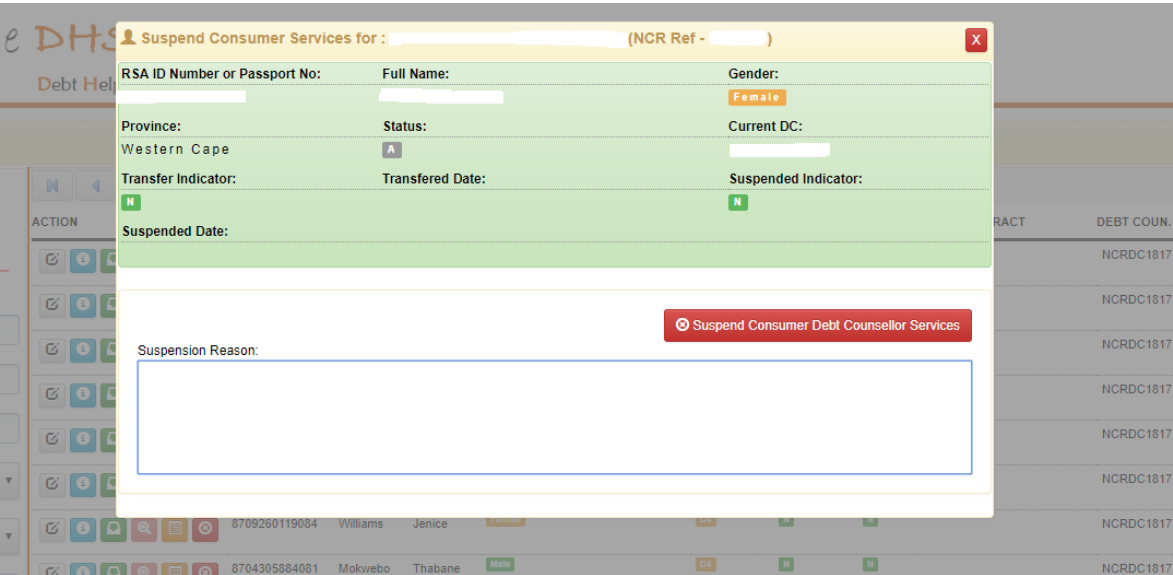


5.9 Suspend Debt Counsellor Services

In a case where by a Debt Counsellor want to suspend services on consumers, Debt Counsellor will have to selecting **Suspend Consumer Services** button as highlighted below.

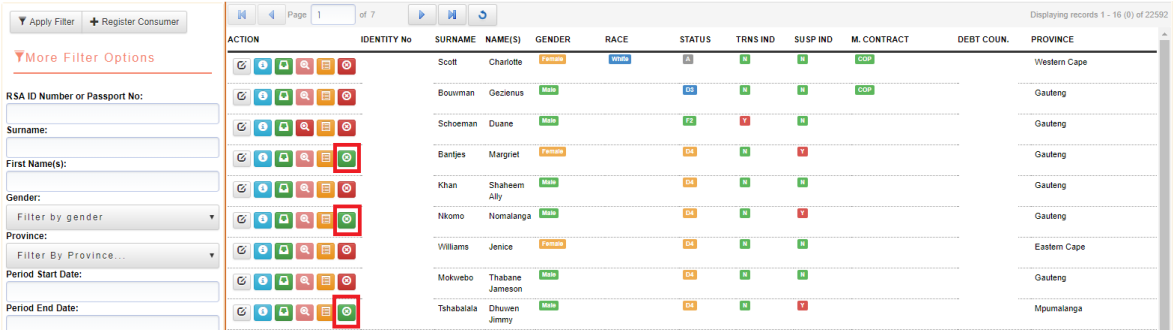


As the Debt Counsellor clicks the menu as explained below screen will appear allowing Debt Counsellor to Type in a reason for suspending services on a selected consumer. Once the reason for suspending services, DC will be required to click **Suspend Consumer Debt Counsellor Services** button to complete the process.



5.10 Unsuspend Debt Counsellor Services

In a case where by a Debt Counsellor has already suspended services and want to unsuspend services on consumers, Debt Counsellor will have to selecting **Unsuspend Consumer Services** button as highlighted below.



As the Debt Counsellor clicks the menu as explained above, below screen will appear allowing Debt Counsellor to Type in a reason for unsuspending services on a selected consumer. Once the reason for unsuspending services, DC will be required to click **Unsuspend Consumer Debt Counsellor Services** button to complete the process.

Unsuspend Consumer Services for : Margriet Bantjes -

RSA ID Number or Passport No:

Province:

Gauteng

Transfer Indicator:

N

Suspended Date:

2018-08-27 14:22:18

Full Name:

Margriet Bantjes

Status:

D4

Transferred Date:

Gender:

Female

Current DC:

Suspended Indicator:

Y

Unsuspend Consumer Debt Counsellor Services Reason:

Unsuspend Consumer Debt Counsellor Services

6. Request and Manage Consumer Transfers

This screen will allow the Debt Counsellor to request the new transfer and view previously requested transfer(s). This can be achieved by clicking **Request and Manage Consumer Transfer(s) Menu** on Dashboard.

Request & Manage Consumer Transfer(s)

Go Back to Dashboard

Apply Filter + Request Transfer

More Filter Options

RSA ID Number or Passport No:

Request Status:

All Status

Period Start Date:

Period End Date:

Requested From Debt Counsellor:

Select Debt Counsellor...

Requested By Debt Counsellor:

Select Debt Counsellor...

Order By:

Select Order By Column

ASCENDING

DESCENDING

ACTION

Preview Withdraw

IDENTITY No

FULL NAME

Lynn Liza Niewenhuis

GENDER

Female

STATUS

B

CURRENT DC

DAY(S) COUNTER

REQUEST STATUS

Re-Instated

ACTION

Preview Withdraw

IDENTITY No

FULL NAME

Toynette Van Niekerk

GENDER

Female

STATUS

F2

CURRENT DC

DAY(S) COUNTER

REQUEST STATUS

Re-Instated

ACTION

Preview Withdraw

IDENTITY No

FULL NAME

Madala Raymond Nkhwashu

GENDER

Male

STATUS

A

CURRENT DC

DAY(S) COUNTER

REQUEST STATUS

Accepted

ACTION

Preview Withdraw

IDENTITY No

FULL NAME

Tau Johannes Mafereka

GENDER

Male

STATUS

A

CURRENT DC

DAY(S) COUNTER

REQUEST STATUS

Withdrawn

ACTION

Preview Withdraw

IDENTITY No

FULL NAME

Michael Sokolo

GENDER

Not Stated

STATUS

G

CURRENT DC

DAY(S) COUNTER

REQUEST STATUS

Accepted

6.1 Request New Transfer

The Debt Counsellor can request a transfer by clicking **Request Transfer** Button as highlighted below.

Request & Manage Consumer Transfer(s)

Go Back to Dashboard

Apply Filter + Request Transfer

More Filter Options

RSA ID Number or Passport No:

ACTION

Preview Withdraw

IDENTITY No

FULL NAME

Lynn Liza Niewenhuis

GENDER

Female

STATUS

B

CURRENT DC

DAY(S) COUNTER

REQUEST STATUS

Re-Instated

ACTION

Preview Withdraw

IDENTITY No

FULL NAME

Toynette Van Niekerk

GENDER

Female

STATUS

F2

CURRENT DC

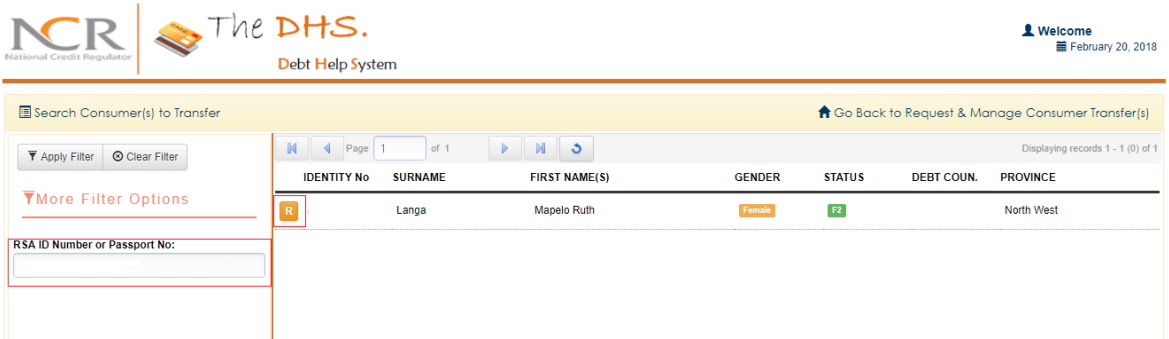
DAY(S) COUNTER

REQUEST STATUS

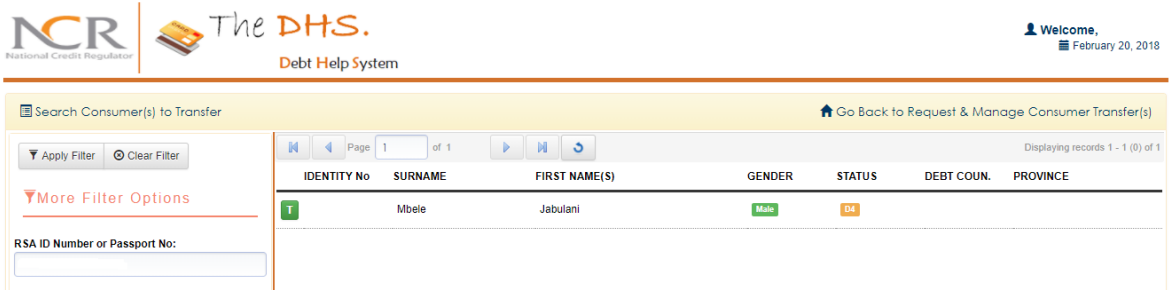
Re-Instated

The below screen will be displayed allowing the Debt Counsellor to log a transfer request. It will require the Debt Counsellor to type in the Consumer`s RSA ID or Passport, then click Apply Filter to retrieve the consumer`s profile. Once the consumer`s profile is loaded for Reinstatement or a transfer, the Debt Counsellor will have to click a button associated with the record e.g **R for Re-Instate** if the consumer is current on an inactive status or **T for Transfer** if the consumer profile is on an active status.

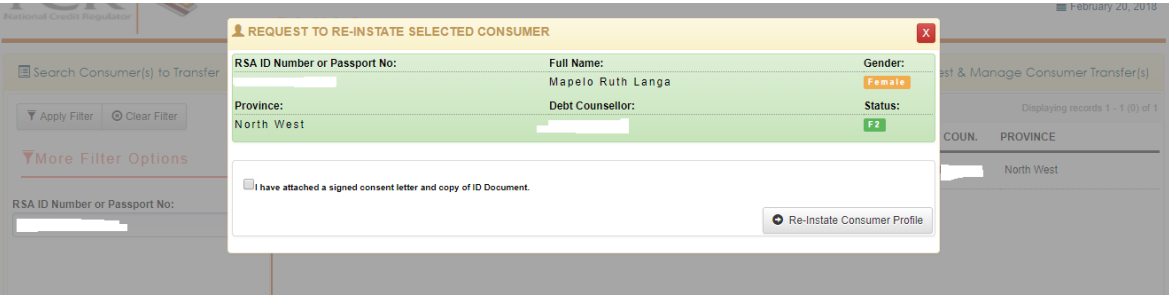
e.g. for the below profile, Consumer will be Reinstated.



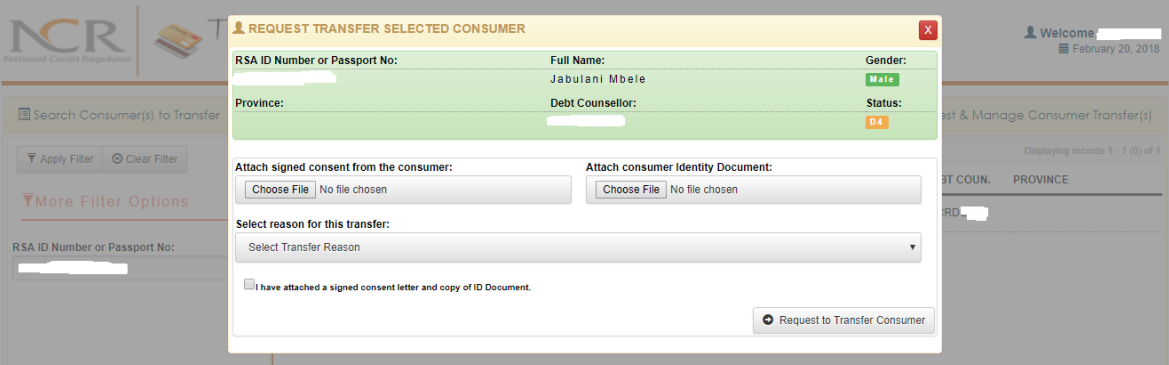
Or



If the Consumer`s profile is on an inactive status, the below screen will be displayed allowing the Debt Counsellor to request the reinstatement for the consumer.



If the consumer`s profile is on an active status, the below screen will be displayed allowing the Debt Counsellor to Request for transfer. For the transfer request to be logged successfully, the Debt Counsellor will have to attach the required documents.

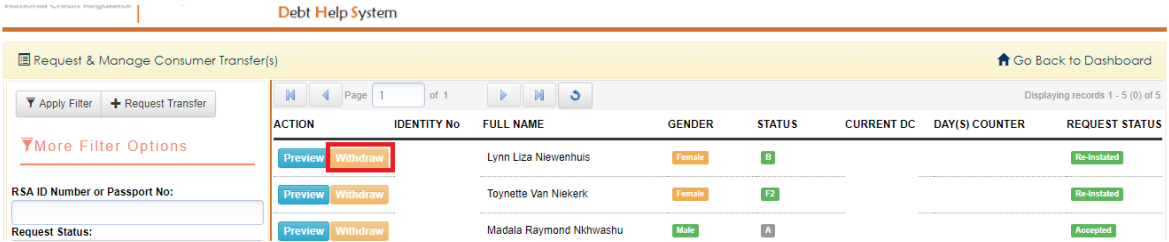


6.2 Preview Requested Transfer

The Debt Counsellor can preview previously requested transfers. This can be achieved by selecting **Preview Menu** button as highlighted below.

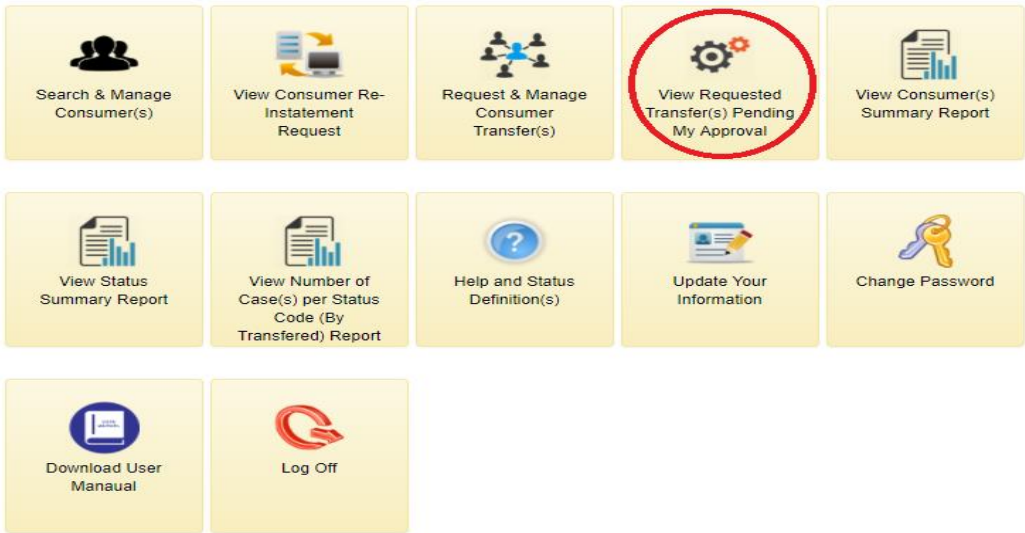
6.3 Withdraw Requested Transfer

The Debt Counsellor can Withdraw previously requested transfer(s). This can be achieved by selecting **Withdraw Menu** button as highlighted below.

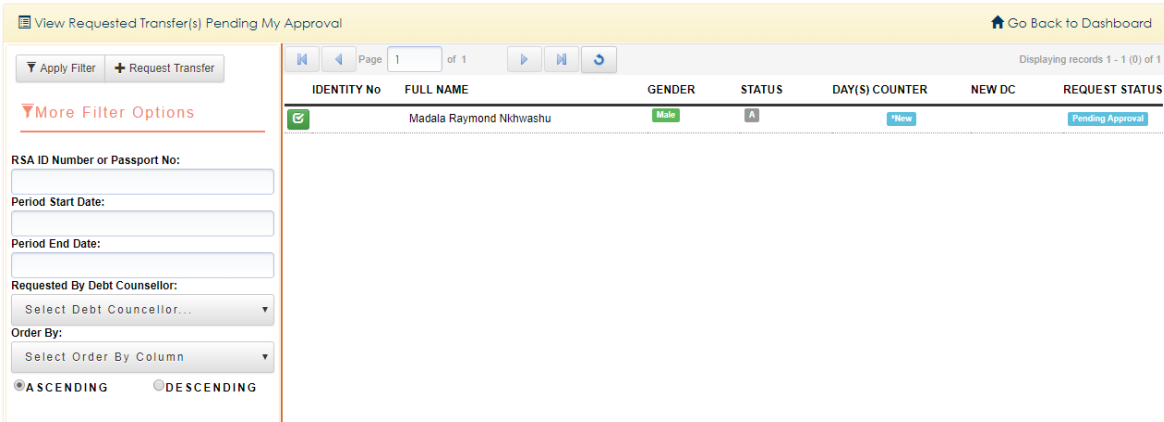


7. View Requested Transfer(s) Pending My Approval

To view requested transfers by other Debt Counsellors for approval, this can be achieved by clicking menu as highlighted below.

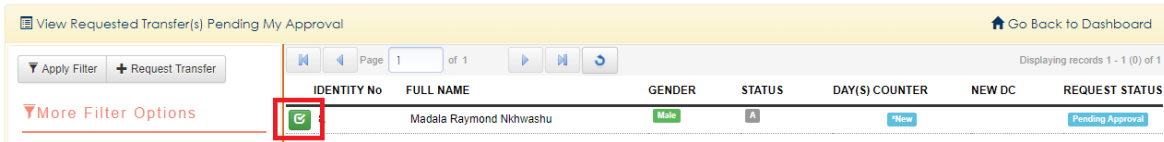


The below screen will appear listing all pending requests for the Debt Counsellor`s approval.



7.1 Approve Pending Request

To approve the requested transfers, the Debt Counsellor will be required to click on the button as highlighted below.



The below screen will appear allowing the Debt Counsellor to either Approve the transfer request. When the Debt Counsellor clicks on **Accept Request** , the consumer will be transferred to the new Debt Counsellor. If this request is not attended to within 5 working days, the system will automatically transfer the consumer to the new Debt Counsellor.

View Requested Transfer

Apply Filter

Request Transfer

More Filter Options

RSA ID Number or Passport No:

Period Start Date:

Period End Date:

Requested By Debt Counsellor:

Select Debt Counsellor

Order By:

Select Order By Criteria

ASCENDING

Approval or Decline Transfer Request

Consumer Profile:

RSA ID Number or Passport No:

Full Name:

Gender:

Province:

Debt Counsellor:

Status:

Madala Raymond Nkhwashu

Male

Kwazulu-Natal

Requesting Debt Counsellor Profile:

Reg No:

RSA ID/Passport:

Full Name(s):

Title:

Operation Name:

Mrs:

Office Tel:

Fax:

Mobile Tel:

Selloane Macala

TTS Consultancy

012 6570544

012 6570466

0823018901

Reason for this transfer:

Consumer not happy with the service they are getting from the Debt Counsellor.

☒ I accept the transfer and Form 17.7 will be communicated to the new Debt Counsellor.

Accept Request

Decline Request

7.2 Decline Pending Request

To decline transfer`s requests, the Debt Counsellor will be required to click the button as highlighted below.

View Requested Transfer(s) Pending My Approval

Go Back to Dashboard

Apply Filter

Request Transfer

More Filter Options

Page 1 of 1

Displaying records 1 - 1 (0) of 1

IDENTITY No	FULL NAME	GENDER	STATUS	DAY(S) COUNTER	NEW DC	REQUEST STATUS
	Madala Raymond Nkhwashu	Male	A	New		Pending Approval

When the Debt Counsellor clicks decline transfer request, the below screen will appear requiring the Debt Counsellor to provide the reason for declining the request.

View Requested Transfer

Apply Filter

Request Transfer

More Filter Options

RSA ID Number or Passport No:

Period Start Date:

Period End Date:

Requested By Debt Counsellor:

Select Debt Counsellor

Order By:

Select Order By Criteria

ASCENDING

Approval or Decline Transfer Request

Consumer Profile:

RSA ID Number or Passport No:

Full Name:

Gender:

Province:

Debt Counsellor:

Status:

Madala Raymond Nkhwashu

Male

Kwazulu-Natal

Requesting Debt Counsellor Profile:

Reg No:

RSA ID/Passport:

Full Name(s):

Title:

Operation Name:

Mrs:

Office Tel:

Fax:

Mobile Tel:

Selloane Macala

TTS Consultancy

012 6570544

012 6570466

0823018901

Reason for this transfer:

Consumer not happy with the service they are getting from the Debt Counsellor.

☒ I accept the transfer and Form 17.7 will be communicated to the new Debt Counsellor.

Accept Request

Decline Request

Reason Why Transfer Request is Declined

Decline Request

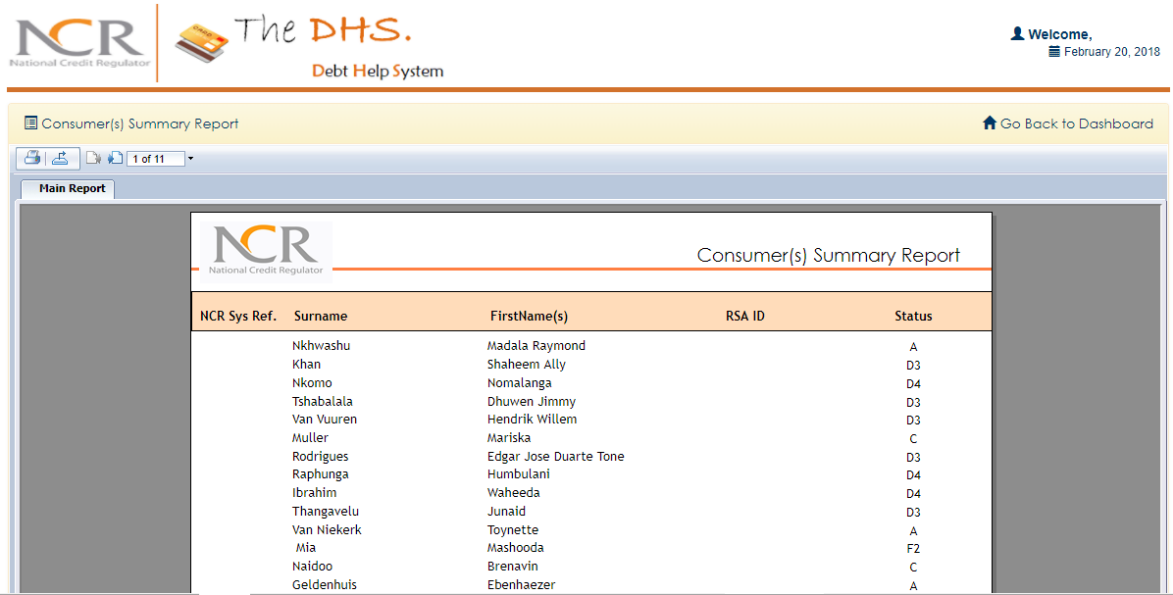
8. Reports Management

The Debt Counsellor can pull the reports by selecting on highlighted menu options as illustrated below.



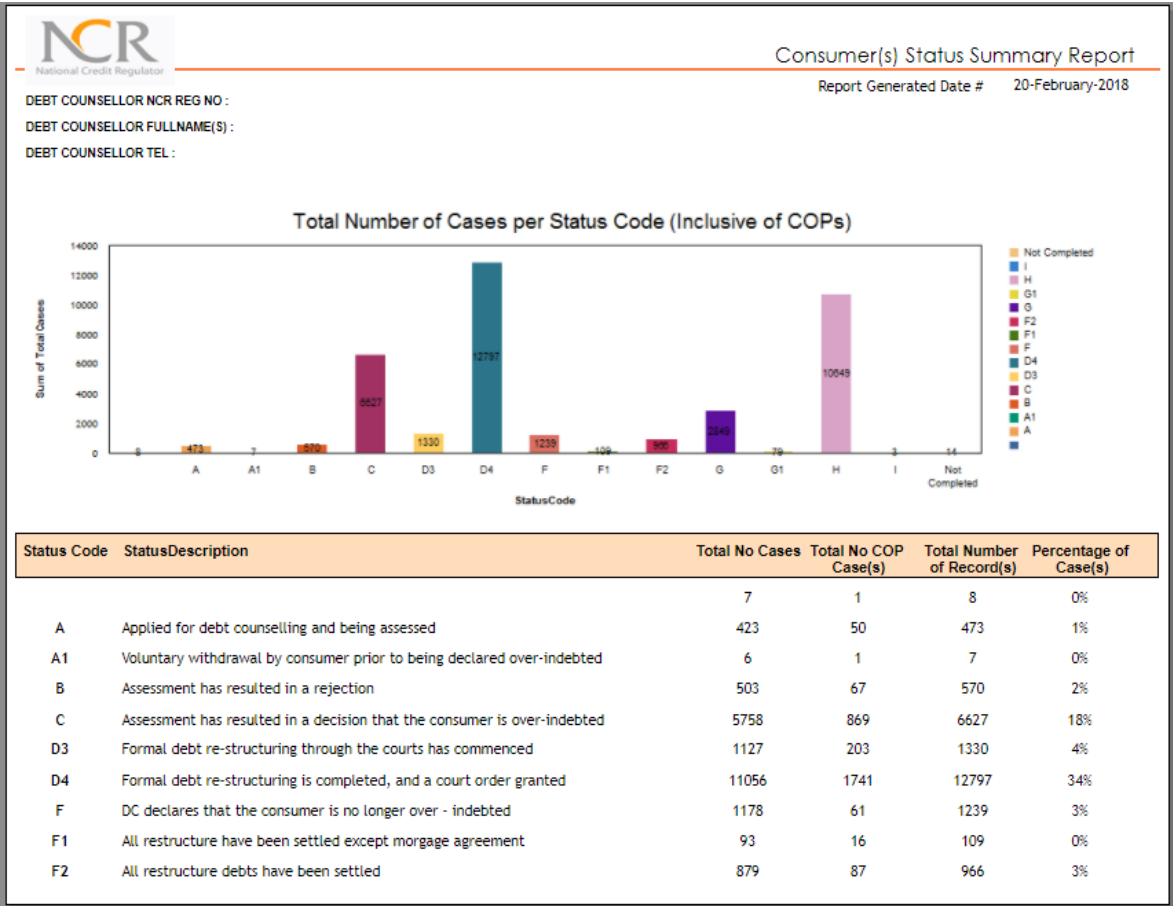
8.1 View Consumer(s) Summary Report

The Debt Counsellor can view Consumer Summary Report by selecting **View Consumer(s) Summary Report Menu** on Dashboard.



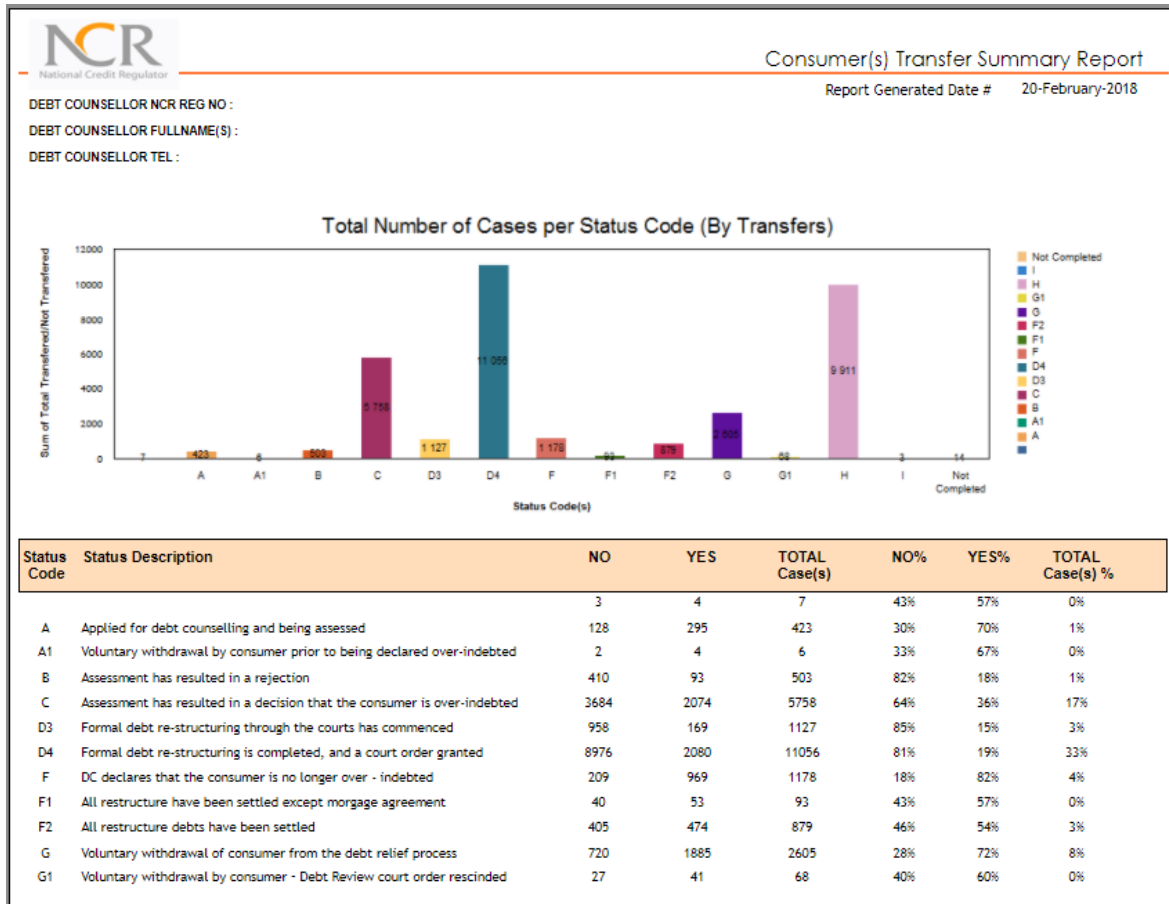
8.2 View Status Summary Report

The Debt Counsellor can view Consumer Status Report by selecting **View Consumer(s) Status Report Menu** on Dashboard.



8.3 View Number of Case(s) per Status Code (By Transferred) Report

The Debt Counsellor can view Number of Cases(s) per Status Code (By Transferred) Report by selecting **View Number of Cases(s) per Status Code (By Transferred) Menu** on Dashboard.



9. Update Your Profile

The Debt Counsellor can be able to update their current profile by Clicking on "Update your Information" on the Dashboard screen and below screen will be shown. It will allow user to update their information as illustrated below.

NCR
National Credit Regulator

The DHS

Welcome, [Name]
February 19, 2018

Update Your Profile Information

X

Update Your Profile

Debt Counsellor Personal Info

Contact Details

Business Operating Address

NCR Registration No

[Empty Field]

Surname:

Wason

Initial(s):

IER

RSA ID No/Passport:

[Empty Field]

First Name(s):

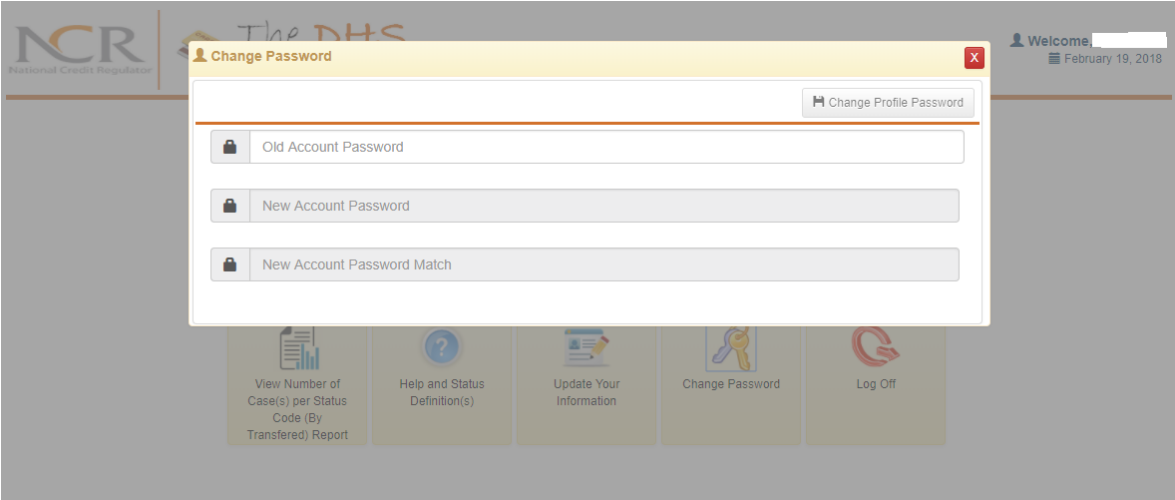
Ian

Title:

Mr.

10. Change Password

The Debt Counsellor can also change their current password whenever they want, below screen will appear allowing user to change password.



NB: The system will require Debt Counsellor to change their password every month.

11. Status Code Description

Status Descriptions and System Manuals		Go Back to Dashboard
Status Code : A	Applied for debt counselling and being assessed	
Status Code : A1	Voluntary withdrawal by consumer prior to being declared over-indebted	
Status Code : B	Assessment has resulted in a rejection	
Status Code : C	Assessment has resulted in a decision that the consumer is over-indebted	
Status Code : D3	Formal debt re-structuring through the courts has commenced	
Status Code : D4	Formal debt re-structuring is completed, and a court order granted	
Status Code : F	DC declares that the consumer is no longer over - indebted	
Status Code : F1	All restructure have been settled except mortgage agreement	
Status Code : F2	All restructure debts have been settled	
Status Code : G	Voluntary withdrawal of consumer from the debt relief process	
Status Code : G1	Voluntary withdrawal by consumer – Debt Review court order rescinded	
Status Code : H	Application for debt review withdrawn by debt counselor	
Status Code : I	Consumer deceased	
Status Code : J	Consumer sequestrated	