

# Top Tips for using EPOAR...



**Agent administrator's when setting up a new user account**, create the username and password and then notify your colleague of them both. The new user should then log in using this username and password. They will be asked to create a password of their own and provide details of a memorable place. This step must be completed by the user and **not** by the agent administrator.



**Locked EPOAR accounts can be unlocked by your local agent administrator**. You should contact this person in the first instance.



**Block capitals shouldn't be used** when entering names and addresses. This causes problems when searching for our database and ultimately affects the data on the certificate of registration.



**Email address for granter should be entered if the granter** wishes to receive their copy of the PoA via email. If the granter doesn't have an email address, leave the field blank and they will receive a paper copy. Your firm's email address should not be provided as an alternative.



**If a company, such as Trustees, is appointed as the continuing attorney**, the fields on the attorney screen should be completed as follows:

1. Title: Other
2. Title if Other: The
3. First name: Test
4. Middle name: Trustees
5. Surname: Limited
6. Sex: Other



**The details for all attorneys, including substitute attorneys**, should be entered in the 'attorney' section of EPOAR. Within the attorney details screen there is a drop down box for you to specify whether an attorney is a principal or substitute.

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**If a substitute is on the deed make sure you have entered their details in the substitute role in EPOAR.** If these details are omitted the OPG will have no record of the appointment. Please remember the OPG do not check your data input.



**Only tick the specified person box** on the attorney screen if the attorney is to receive a copy of the deed and there is an instruction with the PoA deed advising the Public Guardian to send a copy.



**The POA deed and schedule 1 certificate** of capacity need to be scanned together and uploaded into EPOAR as one deed. It's not possible to upload two separate documents.



**Check your scanned image before submitting** the case for registration. Check that there are no blank, squint or upside down pages.



**To make payments for registrations in EPOAR** the user has to have a data entry role. Make sure this role is selected when setting up the user account.



**Rejected registrations can't be accessed and amended on EPOAR.** You will need to create a new registration. Remember the payment can be transferred from the rejected registration.

Further information is available on the [EPOAR](#) page of the website or by e-mailing [epoar@scotcourts.gov.uk](mailto:epoar@scotcourts.gov.uk)