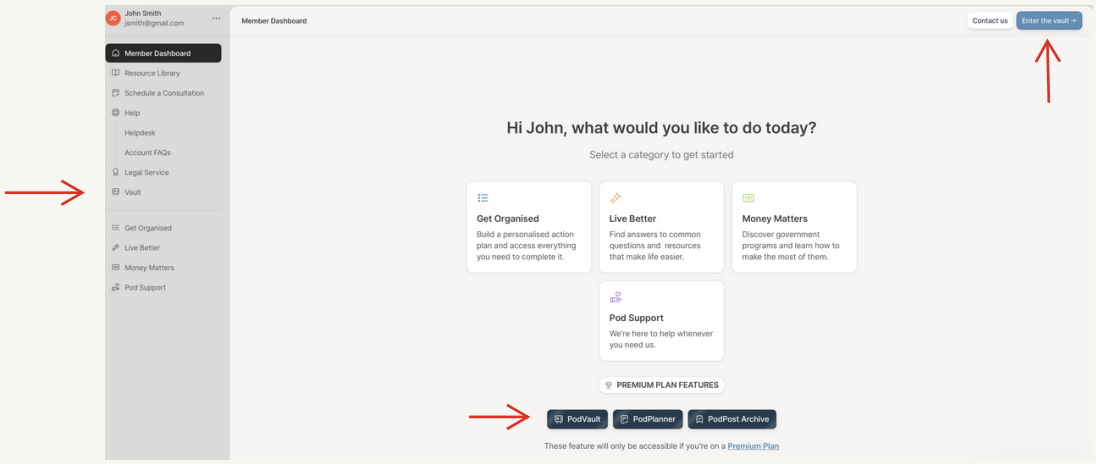
PodVault - Getting Started Guide

Create a useful guide to your important information, then decide who you would like to be able to see it.

> PodVault records where documents and information are kept. It does not store copies of your documents.

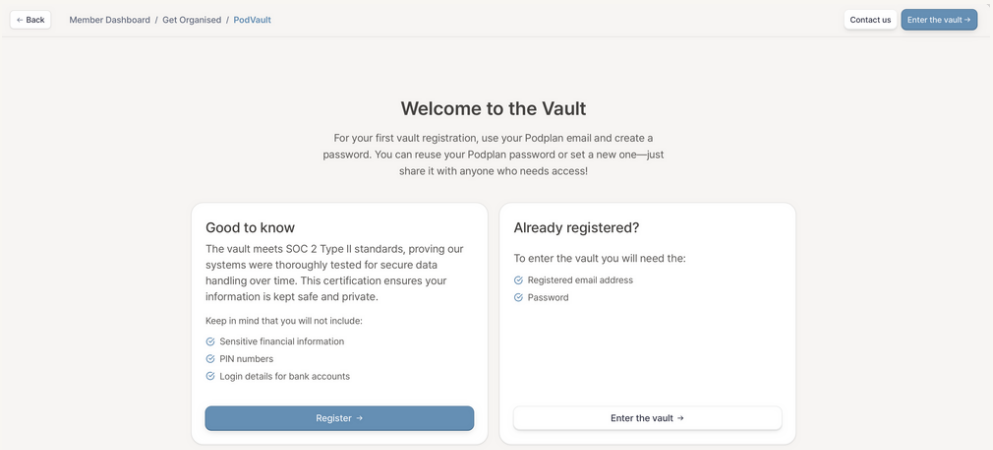
1. Open PodVault from your dashboard

Sign in to your own Podplan account, then open PodVault. The existing dashboard example below shows where vault access was located.



2. Choose register or log in

If this is your first visit, choose the registration option. If you already have a vault, choose Enter the vault instead. Avoid creating a second vault if you cannot remember your details; ask PodSupport for help.

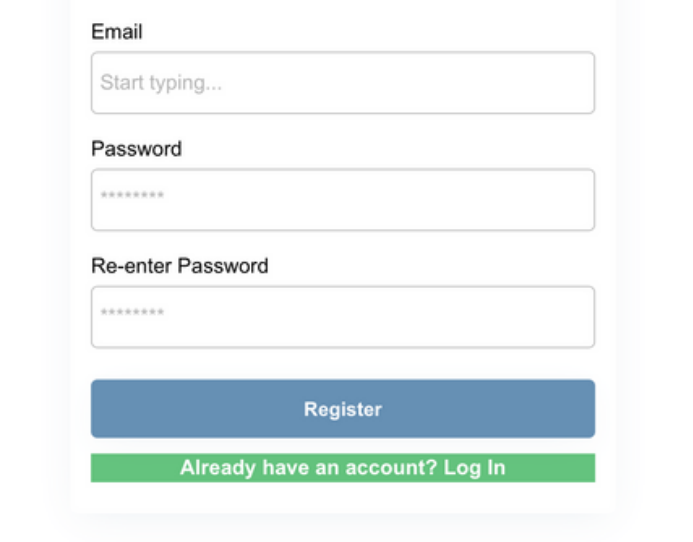


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Register and find your way around

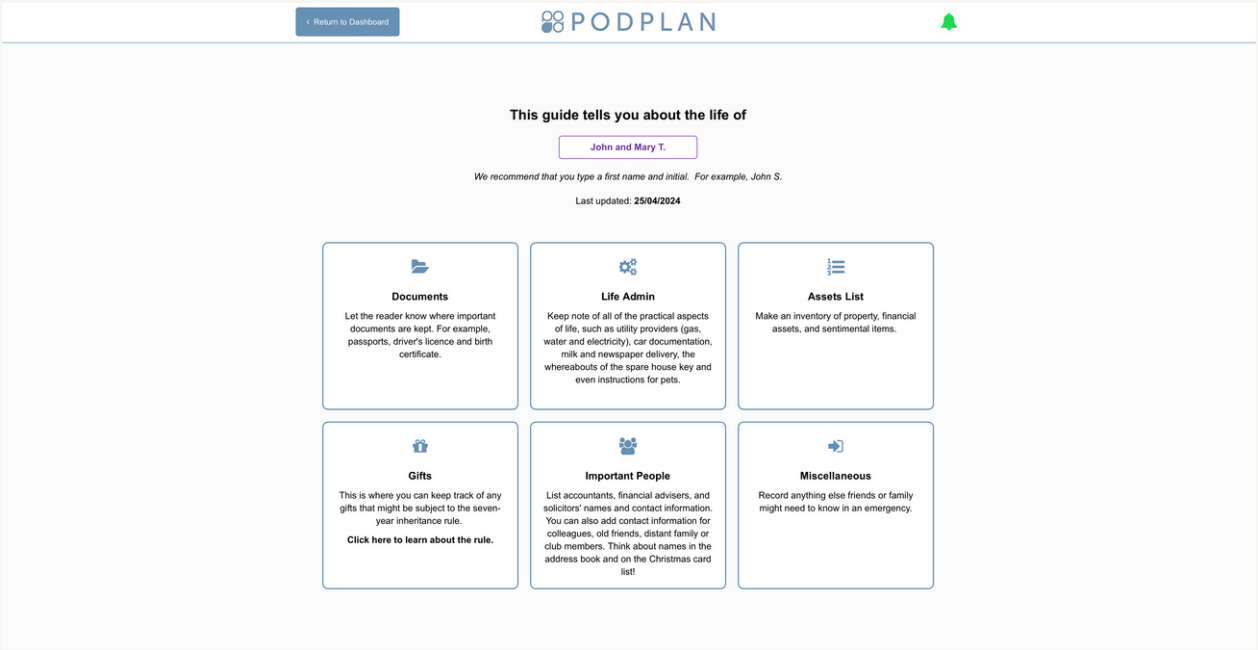
3. Create your vault login

Register with the email address linked to your Podplan account. Set a separate, strong vault password and keep a record of it somewhere safe. Do not reuse your main Podplan password.



4. Explore the sections

The example below shows six sections: Documents, Life Admin, Assets List, Gifts, Important People and Miscellaneous. Labels may differ in your vault.



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Add information that helps

Documents

Record where important paperwork is kept, rather than uploading it. Include clear directions, such as the room, cabinet and folder.

Life Admin

Note household providers, deliveries, pet-care arrangements and useful contacts. For keys or other sensitive access arrangements, describe who to ask rather than recording security codes.

Assets List and Gifts

Record an overview of property, savings providers and important possessions, and where supporting records are held. Keep a factual record of gifts and where fuller details can be found; ask an adviser about any tax questions.

Important People

Add contact details for people who may need to help, including family, friends and professional advisers such as accountants, financial advisers or solicitors.

Miscellaneous

Use this for practical notes, preferences and directions to other records that do not fit elsewhere. Avoid adding information simply because there is space.

> Record locations, provider names and useful contacts. Do not enter passwords, PINs, security codes or full bank or card numbers. If you are unsure what to include, ask PodSupport.

A useful first entry

“Passport - blue folder, top drawer of the study cabinet. Ask me if you cannot find it.”

PodVault is an organising aid. It does not replace your will, power of attorney documents or formal records of treatment decisions.

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Share access and keep it current

5. Choose who can see your vault

Family members should sign in to Podplan using their own accounts. You can choose to give trusted family members who have signed up to Podplan access to your vault by sharing the separate vault password you set. Do not share your Podplan account password.

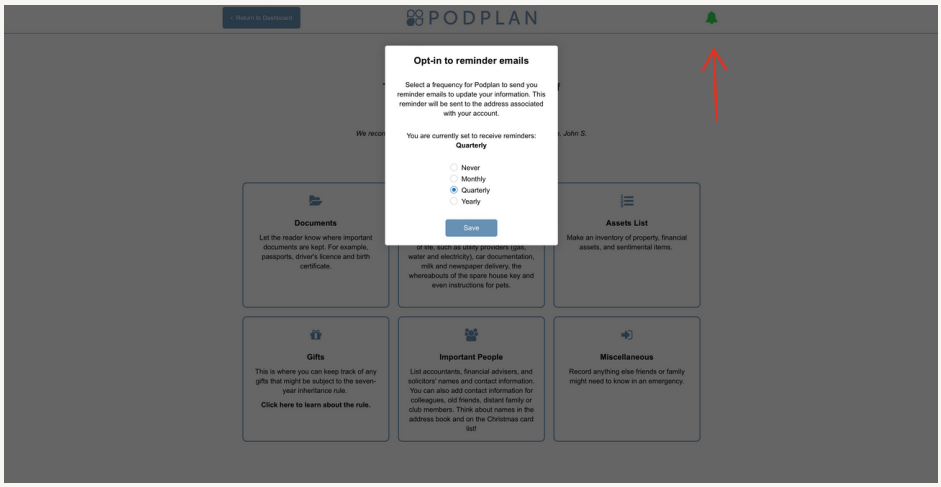
You can invite up to four family members to Podplan. Each person signs up with their own account. Joining Podplan does not automatically give them access to your vault.

Tell the person you choose which email address identifies your vault and give them the vault password separately. They should open PodVault from their own Podplan account and use the vault login option.

Only share with people you trust to handle the information carefully. If you want to change or withdraw access, contact PodSupport for help with the available options.

6. Review your information

Update your entries when something changes and check them at least once a year. Your vault includes a green reminder bell shown below, use it to choose an update reminder. You can also set a reminder in your own calendar.



A recent login does not necessarily mean every entry has been checked. Review the information itself and tell anyone with access about important changes.

Need a hand?

Contact support@mypodplan.co.uk if you cannot find your vault, are unsure what to include or need help with access.

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