



Bedford Borough Council

Adults' ContrOCC Provider Portal Implementation

Provider Portal Day Opportunities & Extra Care Guide

INVOICE BASED ON ACTUALS

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Provider Portal URL:

<https://bedfordproviderportal.syhapp.com/ProviderPortal IAS Live/>

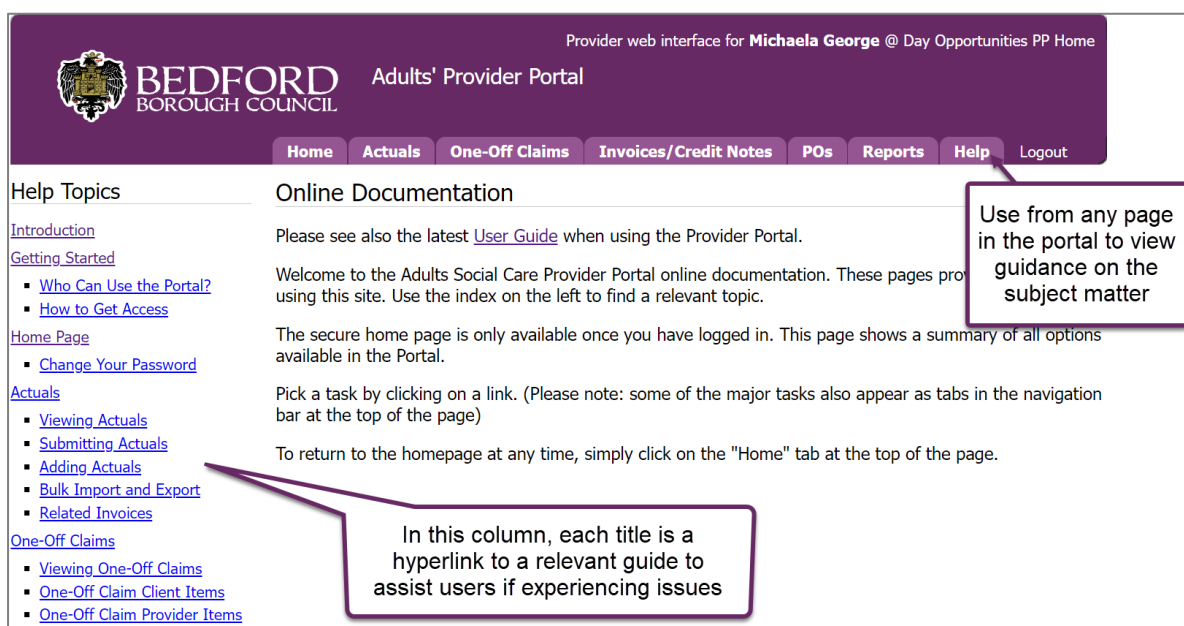
Navigating the Provider Portal

1. If you are the Contact for multiple Organisations, you can view the details for a particular Organisation by selecting from the drop down menu at the top of the page.



2. You can find lots of useful links and answers to common queries by clicking **Help** from the Main Menu at the top of the page.

Useful Tip: The Main Menu tabs mirror many of the icons shown on the Home Page.



Provider web interface for **Michaela George** @ Day Opportunities PP Home

BEDFORD BOROUGH COUNCIL Adults' Provider Portal

Home Actuals One-Off Claims Invoices/Credit Notes POs Reports Help Logout

Help Topics

Introduction

Getting Started

- [Who Can Use the Portal?](#)
- [How to Get Access](#)

Home Page

- [Change Your Password](#)

Actuals

- [Viewing Actuals](#)
- [Submitting Actuals](#)
- [Adding Actuals](#)
- [Bulk Import and Export](#)
- [Related Invoices](#)

One-Off Claims

- [Viewing One-Off Claims](#)
- [One-Off Claim Client Items](#)
- [One-Off Claim Provider Items](#)

Online Documentation

Please see also the latest [User Guide](#) when using the Provider Portal.

Welcome to the Adults Social Care Provider Portal online documentation. These pages provide information on using this site. Use the index on the left to find a relevant topic.

The secure home page is only available once you have logged in. This page shows a summary of all options available in the Portal.

Pick a task by clicking on a link. (Please note: some of the major tasks also appear as tabs in the navigation bar at the top of the page)

To return to the homepage at any time, simply click on the "Home" tab at the top of the page.

Use from any page in the portal to view guidance on the subject matter

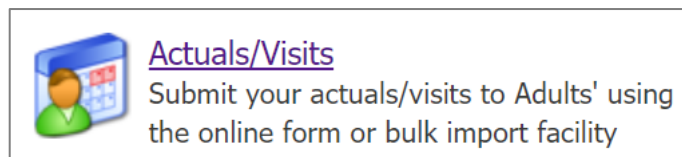
In this column, each title is a hyperlink to a relevant guide to assist users if experiencing issues

The Home Page Tasks/Icons are configured specifically to your Organisation, you will only be able to view icons that are relevant to you and this can be amended as required.

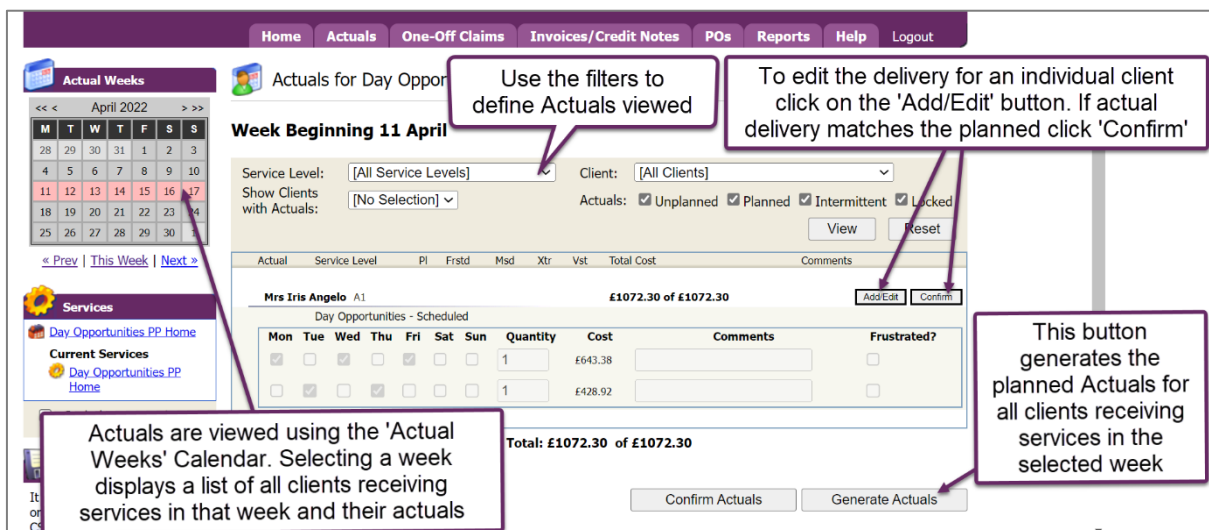
Actuals

Day Opportunities and Extra Care services are invoice based and paid on actuals. This refers to the actual services delivered by the provider as opposed to the planned delivery recorded on the client's support plan. Actuals should be submitted on a weekly basis until the end of the 4-week period, on which date the invoice can be created from the Provider Portal. The system will automatically calculate the **invoice amounts based on entered actuals**, and includes any client contributions collected. The provider can view and edit actuals (**actual delivery of services**) and submit them directly to Bedford's Finance Team for processing.

1. From the Home Page click on the **Actuals** hyperlink.



2. From here you can **Generate Actuals** (this will populate planned actuals for newly added Care Package Line Items) to view and edit the planned delivery of services for the week selected from the **Actual Weeks Calendar**.



The screenshot shows the 'Actuals for Day Oppor' interface. It includes a navigation bar with 'Home', 'Actuals', 'One-Off Claims', 'Invoices/Credit Notes', 'POs', 'Reports', 'Help', and 'Logout'. A sidebar on the left shows 'Actual Weeks' with a calendar for April 2022, where the week of the 11th is selected. Below the calendar is a 'Services' section with 'Day Opportunities PP Home' and 'Current Services'.

The main content area displays filters for 'Service Level' (set to '[All Service Levels]'), 'Client' (set to '[All Clients]'), and 'Show Clients with Actuals' (set to '[No Selection]'). There are checkboxes for 'Actuals' types: 'Unplanned', 'Planned', 'Intermittent', and 'Locked'. A 'View' button and a 'Reset' button are present.

Below the filters is a table for 'Mrs Iris Angelo A1' with a total cost of £1072.30. The table has columns for 'Actual', 'Service Level', 'PI', 'Fstd', 'Msd', 'Xtr', 'Vst', 'Total Cost', and 'Comments'. The table shows two rows of data with columns for days of the week (Mon-Sun), 'Quantity', 'Cost', 'Comments', and 'Frustrated?'. There are 'Add/Edit' and 'Confirm' buttons for each row.

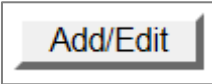
At the bottom, there are 'Confirm Actuals' and 'Generate Actuals' buttons.

Callouts in the image provide the following instructions:

- 'Use the filters to define Actuals viewed' (pointing to the filter dropdowns)
- 'To edit the delivery for an individual client click on the 'Add/Edit' button. If actual delivery matches the planned click 'Confirm'' (pointing to the 'Add/Edit' and 'Confirm' buttons)
- 'Actuals are viewed using the 'Actual Weeks' Calendar. Selecting a week displays a list of all clients receiving services in that week and their actuals' (pointing to the calendar)
- 'This button generates the planned Actuals for all clients receiving services in the selected week' (pointing to the 'Generate Actuals' button)

Useful Tip: If you see the message “There are no actuals for this week”, it is because no clients received services in that week. If the message appears under a particular client, the client is suspended and you will need to contact the social worker/create an Action requesting services be unsuspending.

3. Clicking the **Add/Edit** button will load the following page and allow editing of planned service delivery for an individual client.



Edit Actuals for Day Opportunities PP Home, Mrs Iris Angelo (A1)

Week Beginning 11 Apr 2022

Actual	Service Level	PI	Frstd	Msd	Xtr	Vst	Total Cost	Comments		
Day Opportunities - Scheduled										
Mon	Tue	Wed	Thu	Fri	Sat	Sun	Quantity	Cost	Comments	Frustrated?
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	1	£643.38	<input type="text"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	1	£428.92	<input type="text"/>	<input type="checkbox"/>
<input type="button" value="Add Row"/>										

Week Total: £1072.30

Comments should be used to evidence changes

To Remove Sessions:

Edit Actuals for Day Opportunities PP Home, Mrs Iris Angelo (A1)

Week Beginning 04 Apr 2022

Actual	Service Level	PI	Frstd	Msd	Xtr	Vst	Total Cost	Comments		
Day Opportunities - Scheduled										
Mon	Tue	Wed	Thu	Fri	Sat	Sun	Quantity	Cost	Comments	Frustrated?
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	1	£214.46	Client cancelled with advan	<input type="checkbox"/>
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	1	£428.92	<input type="text"/>	<input type="checkbox"/>
<input type="button" value="Add Row"/>										

Week Total: £643.38

To record Missed delivery, untick the day this relates to on the relevant service delivery line. To record the whole week as missed click the 'Delete' button

Red indicates entered Actuals are less than the Planned Service Delivery

Adding/Amending Sessions:

Edit Actuals for Day Opportunit

Week Beginning 18 Apr 2022

Actual	Service Level	PI	Frstd	Msd	Xtr	Vst	Total Cost	Comments		
Day Opportunities - Scheduled										
Mon	Tue	Wed	Thu	Fri	Sat	Sun	Quantity	Cost	Comments	Frustrated?
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	1	£643.38	<input type="text"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	1	£428.92	<input type="text"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	1	£214.46	<input type="text"/>	<input type="checkbox"/>
<input type="button" value="Add Row"/>										

Week Total: £1286.76

For existing sessions, the day the session relates to can be changed by unticking and ticking as appropriate

Green indicates entered Actuals exceed the Planned Service Delivery

To add a new session, click on 'Add Row'. Then tick on the day this relates to and enter the quantity (number of sessions) on the new line

Extra Sessions should NOT be added via the Actuals screen. If additional sessions were delivered, this would need to be agreed between the Provider and the Social Worker, which will result in a new care plan being issued.

If Actuals appear green, this is an indicator that the entered actual delivery exceeds the planned delivery and will need to be amended before submitting.

Frustrated Sessions:

Previously referred to as ‘short notice cancellations’, for cancelled planned services that meet the threshold for full charge, record a ‘frustrated’ actual in the portal. Include the **Cancellation Code in the Comments** along with the cancellation notice period given i.e. within 12 hours of planned delivery.

To record frustrated visits, untick the day this relates to and then 'Add Row'

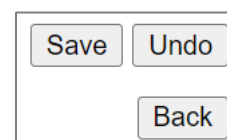
Actual	Service Level	PI	Frstd	Msd	Xtr	Vst	Total Cost	Comments	Frustrated?
<input checked="" type="checkbox"/> Mon <input type="checkbox"/> Tue <input checked="" type="checkbox"/> Wed <input type="checkbox"/> Thu <input type="checkbox"/> Fri <input type="checkbox"/> Sat <input type="checkbox"/> Sun	Day Opportunities - Scheduled		Quantity	Cost	Comments				<input type="checkbox"/>
<input type="checkbox"/> Mon <input checked="" type="checkbox"/> Tue <input type="checkbox"/> Wed <input checked="" type="checkbox"/> Thu <input type="checkbox"/> Fri <input type="checkbox"/> Sat <input type="checkbox"/> Sun			1	£643.38					<input type="checkbox"/>
<input type="checkbox"/> Mon <input type="checkbox"/> Tue <input type="checkbox"/> Wed <input checked="" type="checkbox"/> Thu <input type="checkbox"/> Fri <input type="checkbox"/> Sat <input type="checkbox"/> Sun			1	£428.92					<input type="checkbox"/>

On the new line, tick on the corresponding day and enter the number of sessions under quantity. Ensure 'Frustrated?' is also checked

Actual	Service Level	PI	Frstd	Msd	Xtr	Vst	Total Cost	Comments	Frustrated?
<input checked="" type="checkbox"/> Mon <input type="checkbox"/> Tue <input checked="" type="checkbox"/> Wed <input type="checkbox"/> Thu <input type="checkbox"/> Fri <input type="checkbox"/> Sat <input type="checkbox"/> Sun	Day Opportunities - Scheduled		Quantity	Cost	Comments				<input type="checkbox"/>
<input type="checkbox"/> Mon <input checked="" type="checkbox"/> Tue <input type="checkbox"/> Wed <input checked="" type="checkbox"/> Thu <input type="checkbox"/> Fri <input type="checkbox"/> Sat <input type="checkbox"/> Sun			1	£428.92					<input type="checkbox"/>
<input type="checkbox"/> Mon <input type="checkbox"/> Tue <input type="checkbox"/> Wed <input checked="" type="checkbox"/> Thu <input type="checkbox"/> Fri <input type="checkbox"/> Sat <input type="checkbox"/> Sun			1	£214.46	Cancelled within 12 hours c				<input checked="" type="checkbox"/>

4. Once updated, click **Save** at the bottom right corner; this will submit the information directly into Bedford’s management systems (ContrOCC). The Total Cost and Week Total values will be updated automatically.

Useful Tip: Clicking **Undo** will revert all changes made since the last save. **Back** returns you to the Actuals View page.



Disputes

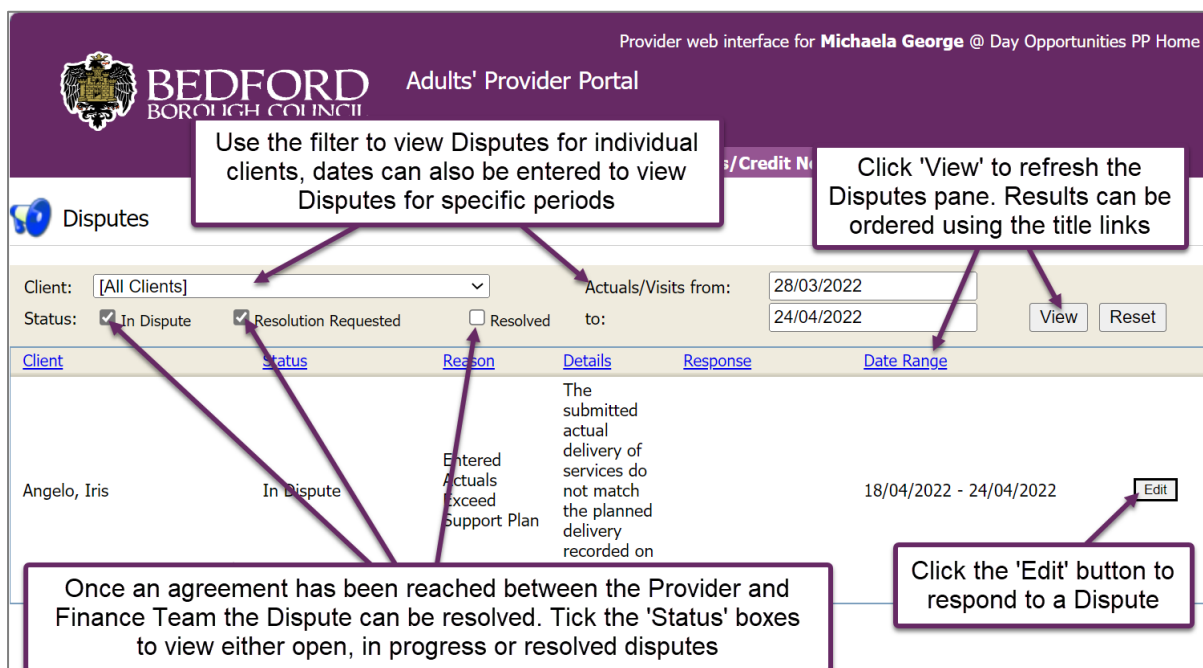
Descriptions

If submitted Actual service delivery differs from the planned, the Finance Team will dispute the received Actuals, these disputes can be managed within the Provider Portal.

1. From the Home Page click on the **Disputes** hyperlink.



2. You can filter Disputed Actuals by **Client**, **Actuals/Visits from, to** or **Status** and click **View** to generate.



Provider web interface for **Michaela George** @ Day Opportunities PP Home

BEDFORD BOROUGH COUNCIL Adults' Provider Portal

Disputes

Use the filter to view Disputes for individual clients, dates can also be entered to view Disputes for specific periods

Click 'View' to refresh the Disputes pane. Results can be ordered using the title links

Client: [All Clients] Actuals/Visits from: 28/03/2022 to: 24/04/2022 View Reset

Status: In Dispute Resolution Requested Resolved

Client	Status	Reason	Details	Response	Date Range
Angelo, Iris	In Dispute	Entered Actuals exceed Support Plan	The submitted actual delivery of services do not match the planned delivery recorded on		18/04/2022 - 24/04/2022 Edit

Once an agreement has been reached between the Provider and Finance Team the Dispute can be resolved. Tick the 'Status' boxes to view either open, in progress or resolved disputes

Click the 'Edit' button to respond to a Dispute

3. This is the page which follows from the 'Edit' button. From here you can provide evidence for the difference in the **Response** free text box and **Add/Edit** the Actuals. Once complete click **Update Request Resolution**.

Dispute

Client: Angelo, Iris
Status: In Dispute
Reason: Entered Actuals Exceed Support Plan
Details: The submitted actual delivery of services do not match the planned delivery recorded on the client's support plan. Please remove additional sessions as this care package will not be processed until completed.
 If additional sessions were delivered, please get in contact with the Social Worker. Once agreed, a new support plan will then be issued to reflect the additional sessions.

Response:

The following fields detail who and what the dispute relates to

Enter a response here

Use to amend the actuals in relation to the dispute details

Actual	Service Level	PI	Frstd	Msd	Xtr	Vst	Total Cost	Comments		
Week Beginning 18 Apr 2022 (Day Opportunities PP Home)							£1286.76 of £1286.76	Add/Edit		
Day Opportunities - Scheduled										
Mon	Tue	Wed	Thu	Fri	Sat	Sun	Quantity	Cost	Comments	Frustrated?
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text" value="1"/>	£643.38	<input type="text"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text" value="1"/>	£428.92	<input type="text"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="text" value="1"/>	£214.46	<input type="text"/>	<input type="checkbox"/>

Edit Actuals for Day Opportunities PP Home, Mrs Iris Angelo (A1)

Week Beginning 18 Apr 2022

Actual	Service Level	PI	Frstd	Msd	Xtr	Vst	Total Cost	Comments			
Day Opportunities - Scheduled											
Mon	Tue	Wed	Thu	Fri	Sat	Sun	Quantity	Cost	Comments	Frustrated?	
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text" value="1"/>	£643.38	<input type="text"/>	<input type="checkbox"/>	Delete
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text" value="1"/>	£428.92	<input type="text"/>	<input type="checkbox"/>	Delete
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="text" value="1"/>	£214.46	<input type="text"/>	<input type="checkbox"/>	Delete
Add Row						<input type="text" value="Saturday"/>					

Week Total: £1286.76

Correct disputed actuals

If a new line was added this will need to be deleted

Use to save changes, then click 'Back' to return to the Dispute

[Save](#) [Undo](#) [Back](#)

Actual	Service Level	PI	Frstd	Msd	Xtr	Vst	Total Cost	Comments		
Week Beginning 18 Apr 2022 (Day Opportunities PP Home)							£1072.30 of £1072.30	Add/Edit		
Day Opportunities - Scheduled										
Mon	Tue	Wed	Thu	Fri	Sat	Sun	Quantity	Cost	Comments	Frustrated?
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text" value="1"/>	£643.38	<input type="text"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text" value="1"/>	£428.92	<input type="text"/>	<input type="checkbox"/>

Pages: 1

Use to request the disputed actual be resolved

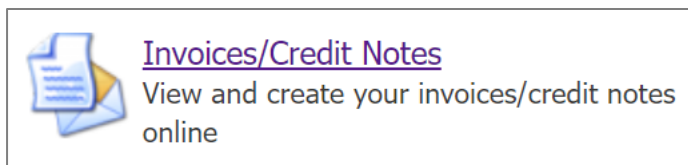
[Request Resolution](#) [Back](#)

Invoice/Credit Notes

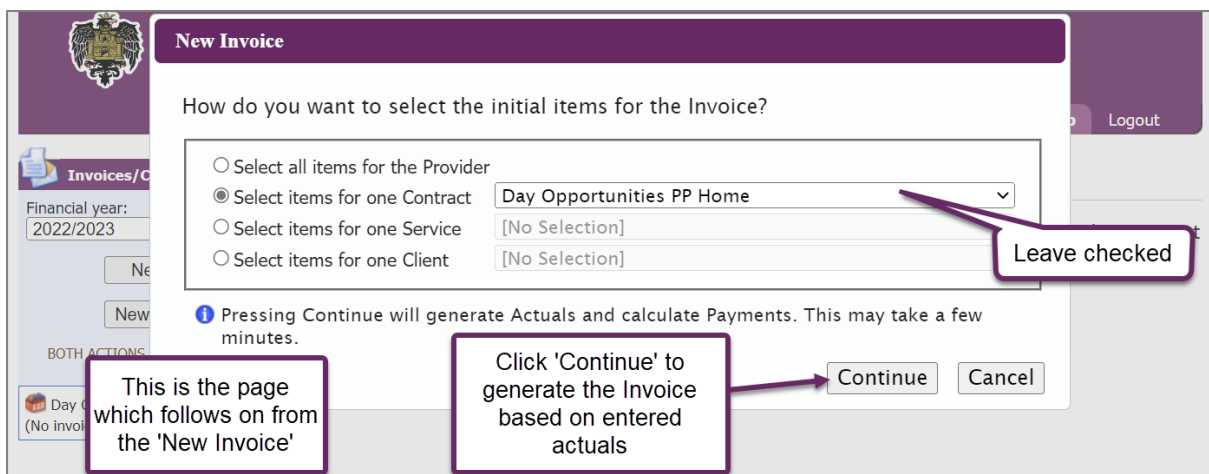
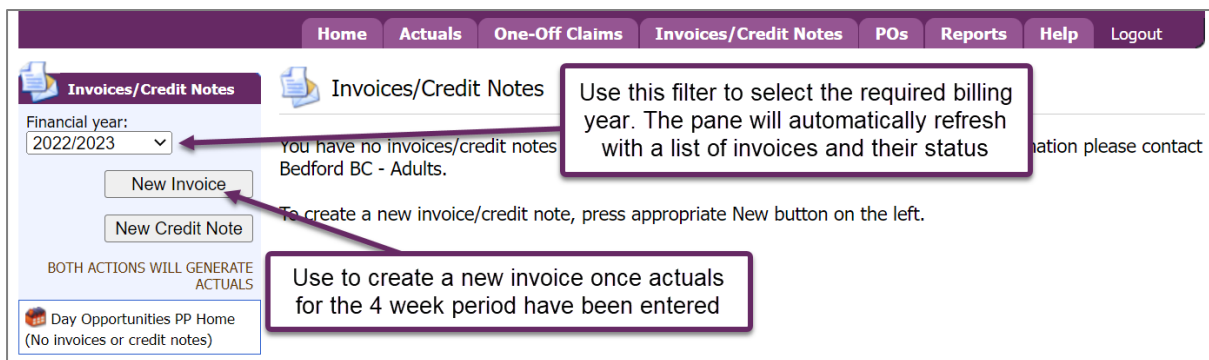
Providers can view, create and submit electronic copies of invoices and credit notes directly to Bedford's Finance Team. The system automatically calculates invoice amounts based on commissioned services or entered actuals, and includes any client contributions collected by the provider.

Once the provider has submitted the actuals for the 4-week period the invoice can be created. Changes made to actuals will be reflected in 'Unsubmitted' and 'Pending' Invoices once payment items have been recalculated on the server. This usually occurs overnight.

1. From the Home Page click on the **Invoices/Credit Notes** hyperlink.



2. The **Invoice/Credit Notes** list on the left shows a list of all invoices and/or credit notes in ContrOCC. Click 'New Invoice'.



Useful Tip: If the invoice generated is blank with no invoice items, do not create or submit, as this will not be processed. Create an Action requesting support.

3. Once complete, click **Create**. This will create the invoice.

If applicable, attach a VAT supporting invoice including the VAT registration number.

Enter the Invoice Reference

Invoice totals and items are based on entered Actuals

Use the relevant buttons

Use to attach a supporting VAT invoice if applicable

Use to add or remove invoice items

Reference:	123456	Total:	£ 3860.28	£ 772.06
Date on Invoice:	09/10/2022	Items Total:	£ 3860.28	£ 772.06
Created:	09/10/2022	Short by:	£ 0.00	£ 0.00
Total Payable:		£ 4632.34		

Add?	Commitment	Value	VAT	Contribution	Contract	Period
<input checked="" type="checkbox"/>	Angelo, Iris (A1) - 2021/2022	£ 857.84	£ 171.57	£ 0.00	Day Opportunities PP Home	28/03/2022 - 24/04/2022
<input checked="" type="checkbox"/>	Angelo, Iris (A1) - 2022/2023	£ 3002.44	£ 600.49	£ 0.00	Day Opportunities PP Home	28/03/2022 - 24/04/2022

4. If correct, click **Submit Invoice** to send to Bedford’s Finance Team for processing.

The Invoice is now pending approval with the Finance Team. The status (top right) will change at each stage; Pending, Authorised and Finalised.

Use 'Submit Invoice' to submit for processing, alternatively the invoice can be deleted at this stage

You can make changes and click 'Update' to save

An Action linked to the Invoice can be created

'Suggest' invoice items to add to the generated invoice using this button

Reference:	123456	Total:	£ 3860.28	£ 772.06
Date on Invoice:	09/10/2022	Items Total:	£ 3860.28	£ 772.06
Created:	09/10/2022	Short by:	£ 0.00	£ 0.00
Total Payable:		£ 4632.34		

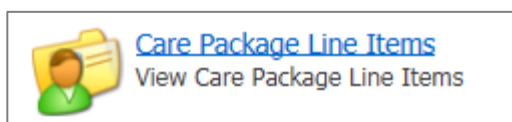
Commitment	Value	VAT	Contribution	Contract	Period	
Angelo, Iris (A1) - 2021/2022	£ 857.84	£ 171.57	£ 0.00	Day Opportunities PP Home	28/03/2022 - 24/04/2022	Remove
Angelo, Iris (A1) - 2022/2023	£ 3002.44	£ 600.49	£ 0.00	Day Opportunities PP Home	28/03/2022 - 24/04/2022	Remove

Actions & Care Package Line Items

Care Package Line Items (CPLIs) are the individual care services for a client and are the key building blocks for payments and charges. The list of CPLIs will usually be long, particularly as there will be a record for every client receiving each service.

Any amendments to the care being provided to a client are to be agreed between the Provider and the Social Worker, which will result in a new care plan being issued with the new CPLI. Providers should periodically view and quality check CPLI data, if incorrect the Provider should submit an Action.

1. From the Home Page click on the **Care Package Line Items** hyperlink.



2. From here you can be notified of and view commissioned care. You can filter results by **Service**, **Client** or **Service Level** and click **View** to generate.

Provider web interface for **Michaela George** @ Day Opportunities PP Home

Bedford BOROUGH Adults' Provider Portal

Use filters to view specific CPLIs

Actuals One-Off Claims Invoices/Credit Notes POs Reports Help Logout

Care Package Line Items

Select these boxes to include either 'Historical' and or 'Unauthorised' Care Package Line Items in the search

Service: Day Opportunities PP Home
 Client: Angelo, Iris
 Service Level: Day Opportunities - Scheduled

Include Historical:
 Include Unauthorised:

Automatically order data by the selecting a title link

View Reset

SSRef	Client	Service	Service Level	Start Date	End Date	Cost	Pricing	CPLI ID	Auth
A1	Mrs Iris Angelo	Day Opportunities PP Home	Day Opportunities - Scheduled	28/03/2022	-	£1,072.30 Weekly (Timetabled)	5 x Sessions (Timetabled Pricing) (Spot)	1	<input checked="" type="checkbox"/>

Submit Action

Once the 'View' button is selected it will present a list of client services

Use the 'Submit Action' buttons to contact Bedford's Finance Team regarding individual care services for a client

New Action

Type: [Please Select]

Related To: Client

Entity: Angelo, Iris

Due Date:

Assign to: [Please Select]

Title:

Text: Re: Care Package Line Item for Mrs Iris Angelo. Day Opportunities - Scheduled (Session) from Day Opportunities PP Home, Starts 28/03/2022.

Attachment: Choose File No file chosen

Create Action Cancel

This is the page that will appear once the 'Submit Action' button is pressed

These fields will automatically populate with data taken from the CPLI

Use to attach supporting evidence to the Action

New Action

Type: [Please Select]

Related To: [Please Select]

Entity: 11. Missing Invoice Period - Chaser

Due Date: 3. Service Provision - Start Date

Assign to: 5. Deceased Client

Title: 6. Other Local Authority Placement

Text: 9. Reminder to confirm payment periods (2 unconfirmed) Day Opportunities - Scheduled (Session) from Day Opportunities PP Home, Starts 28/03/2022.

Attachment: Choose File No file chosen

Create Action Cancel

Use this drop down to assign the Action 'Type', this makes notes easily identifiable by the Finance Team

Enter a title, this will appear when viewing from Actions & Change Requests and will be the link to open the Action

Additional text can be entered to clarify what needs to be actioned

New Action

Type: 3. Service Provision - Start Date

Related To: Service

Entity: [Please Select]
Contract
Spot Commitment
Client

Assign to: Service

Title: Invoice
Contact
Provider

Text: Re: Care Package Line Item for Mrs Iris Angelo. Day Opportunities - Scheduled (Session) from Day Opportunities PP Home, Starts 28/03/2022.

Service start date needs to be amended to 04/04/2022, delayed start due to hospitalisation. This has already been agreed with the social worker.

Attachment: No file chosen

Change the **Related To** drop down menu to **'Service'**, this will automatically populate the **Entity**. This is because different departments are responsible for individual organisations. Sending Actions in this way will streamline the pick-up process in ContrOCC

Actions not linked to the Service will be returned

New Action

Type: 3. Service Provision - Start Date

Related To: Service

Entity: Day Opportunities PP Home

Due Date: 15/10/2022

Assign to: Provider Portal Finance Team

Title: Incorrect Start Date

Text: Re: Care Package Line Item for Mrs Iris Angelo. Day Opportunities - Scheduled (Session) from Day Opportunities PP Home, Starts 28/03/2022.

Service start date needs to be amended to 04/04/2022, delayed start due to hospitalisation. This has already been agreed with the social worker.

Attachment: No file chosen

Enter the due date as a week from the Action creation date

Payments Team should be selected for all Action 'Types' except for two. For 'Uplift Query' assign to **Commissioning** and for 'Set up additional contacts' select **System Admin**

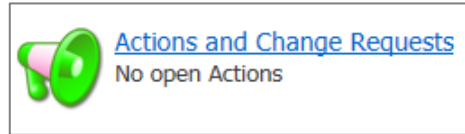
With 'Related To' selected as Service, the data taken from the CPLI will remain and provide the Finance Team with the Client's service information

The 'Create Action' button will send this to the Finance Team to be actioned. Alternatively, the 'Cancel' button can be used to delete and close the Action

To view the details of this Action and others, open the **Actions and Change Requests** pane. From here you can sort through and view all open and historic Actions.

Actions and Change Requests

1. To view open and assigned Actions click on the **Actions and Change Requests** hyperlink.



The change request list shows all the change requests which have occurred. It is based in chronological order with the latest response at the bottom.

Colour Code System	
Red	Rejected
Amber	Pending
Green	Confirmed

Actions and Change Requests

New actions can be raised by this button

Actions

Deselect to see only open actions

Refine the list by using

Open Actions Only

Assigned To:

Type:

Status	Last Post Date	Title	Re:	Due	Type	Assigned To
	08/06/2022 23:02	Test	Thunder Cat (Client)	19/06/2022	2. Placement - Query	LA (Finance Team)
	07/06/2022 12:03	Test	Thunder Cat (Client)	19/06/2022	3. Placement - Start Date	LA (Finance Team)
	06/06/2022 15:07	Test	Storm Blaize (Client)	09/06/2022	5. Service Variation	LA (Finance Team)
	04/06/2022 00:54	Missing placement	Storm Blaize (Client)	10/06/2022	1. Placement - End Date	LA (Finance Team)
	07/06/2022 12:02	Test	Storm Blaize (Client)	28/06/2022	1. Placement - End Date	LA (Finance Team)
	07/06/2022 10:40	Test	Storm Blaize (Client)	29/06/2022	2. Placement - Query	LA (Finance Team)
	07/06/2022 10:32	Test	Storm Blaize (Client)	29/06/2022	2. Placement - Query	LA (Finance Team)
	07/06/2022 10:22	Test	Thunder Cat (Client)	30/06/2022	2. Placement - Query	LA (Finance Team)
	31/05/2022 12:48	Placement Query	Eden Care Home (Contract)	26/08/2022	Provider Test	Provider

Change Requests

A colour code system is used to show status

Click the link of the title to view an action

Include Historical

Status	Submitted	Last Updated	Type	Entity Name	Details	Rejection Reason
	07/06/2022	--	New Contact		i	
	07/06/2022	--	Update Contact	dean cooke	i	
	07/06/2022	--	Add Contact Role	dean cooke	i	
	07/06/2022	--	Update Contact	dean cooke	i	
	07/06/2022	--	Add Contact Role	dean cooke	i	
	07/06/2022	--	Update Organisation	Eden Care Home	i	
	01/06/2022	--	Add Contact Role	Mr Eden Cooke	i	
	31/05/2022	--	New Contact		i	
	31/05/2022	--	Update Contact	Mr Eden Cooke	i	
	31/05/2022	--	Add Contact Role	Mr Eden Cooke	i	
	31/05/2022	31/05/2022	Update Organisation	Eden Care Home	i	
	31/05/2022	31/05/2022	New Contact		i	
	31/05/2022	31/05/2022	Update Contact	Mr Eden Cooke	i	
	31/05/2022	31/05/2022	Add Contact Role	Mr Eden Cooke	i	Other: More detail required

2. Once **New Action** has been selected the page shown below will populate.

Useful Tip: View further guidance on creating Actions under Actions & Care Package Line Items.

The screenshot shows the 'New Action' form with the following fields:

- Type: [Please Select] (dropdown)
- Related To: [Please Select] (dropdown)
- Entity: [Please Select] (dropdown)
- Due Date: [] (text input)
- Assign to: [Please Select] (dropdown)
- Title: [] (text input)
- Text: [] (text area)

Callouts:

- A box points to the form area: "This is the page which will appear once the 'New Action' button is pressed"
- A box points to the dropdown menus: "These drop downs are required to create a new"
- A box points to the 'Create Action' button: "Once all details have been entered, this button needs to be pressed to create a"

Buttons: Create Action, Cancel

Initially the **Action** will read **LA (Payments Team)** under the **Assigned To** column, once Bedford respond to the action; this will change to **Provider** indicating that this is now with the Provider to provide further information.

It may be worth periodically using the 'Assigned To' filter to show only those actions which are assigned to the Provider. To access the Action, click on the title link.

	07/06/2022 10:22	Test	Thunder Cat (Client)	30/06/2022	2. Placement - Query	LA (Finance Team)
	31/05/2022 12:48	Placement Query	Eden Care Home (Contract)	26/08/2022	Provider Test	Provider

Change Requests

Include Historical View

Callouts:

- A box points to the status codes: "A colour code system is used to show status"
- A box points to the title link: "Click the link of the title to view an action"

Table Headers: Status, Submitted, Last Updated, Type, Entity Name, Details, Rejection Reason

Home Scheduled Payments Reports Help Logout

Action Details

This page will appear once clicking the link connected to the title of the action

Back

Test
 Re: Thunder Cat (Client)
 Type: 2. Placement - Query
 Overdue
 Due Date: 19 Jun 2022

08 Jun 2022 23:02 Dean Cooke (Eden Care Home)
 Test
 Assigned to Finance Team
 Due Date set to 19 Jun 2022

Related links: Purchase Orders for Thunder Cat Service details for Eden Care Home

Comment Request Closure

A comment can be added at this stage to be sent to the finance team directly relating to a specific action

If the query has been resolved this button closes the action. All actions, once resolved need to be closed using this method

This is the page that will follow pressing the **Comment** button.

Request Closure

Logout

Comment

Due Date 19/06/2022

Submit Cancel

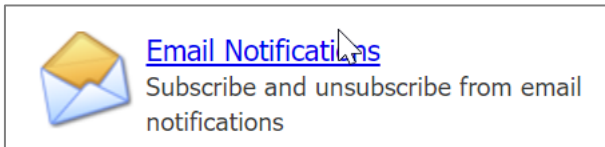
A comment is required in this field

Press 'Submit' once the comment is complete

Email Notifications

Emails will be issued to the same email address registered to the Provider Portal.

1. From the Homepage click on the **Email Notifications** hyperlink.



2. Select and **Save** subscriptions.

A screenshot of the Bedford Borough Council Adults' Provider Portal. The header is purple with the council logo and name on the left, and navigation links (Home, Actuals/Visits, Invoices/Credit Notes, POs, Reports, Help, Logout) on the right. The main content area is titled 'Email Notifications' and contains two sections of subscription options. The first section, 'The following daily email notification subscription(s) are available:', lists 'Actions', 'Care Package Line Items', 'Contract Documents', 'Disputes', 'Invoices/Credit Notes', and 'Payments Exceptions'. The second section, 'The following immediate email notification subscription(s) are available:', lists 'Actions (Immediate)' and 'Password Change (Immediate)'. A 'Save' button is at the bottom left. Three callout boxes provide instructions: one points to 'Actions' and 'Disputes' with the text 'We recommend selecting 'Actions' and 'Disputes' in particular, but notifications are a provider decision'; another points to the 'Save' button with the text 'Select the relevant notification to subscribe to and click 'Save''; and a third on the right states 'This functionality allows providers to receive Email Notifications after every portal response'.

Actions (Immediate): An email will be sent immediately if an Action is assigned to the Provider, or if there is a response to an existing Action conversation.

Password Change (Immediate): If the Contact's password is changed, an email will be sent immediately.

The other options send an email for any new or amendments made, and in applicable circumstances for responses.

Reports

A number of useful reports are provided in the Reports area. Each report has filters to allow customisation. Reports are displayed on screen, but it is also possible to download the data generated for off-system analysis.

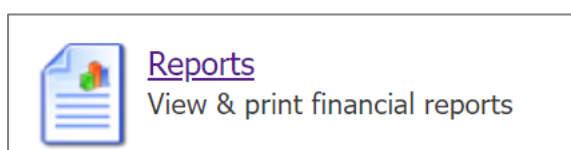
Summaries of each report are as follows:

Commissioned Vs Actuals: Compares planned service delivery with actual service delivery for any selected period.

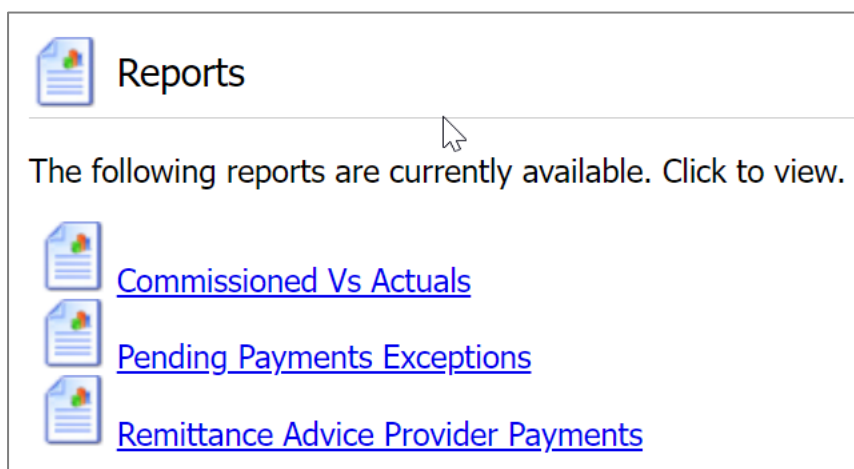
Pending Payments Exceptions: Displays detail on adjustments due in the next payment run.

Remittance Advice Provider Payments: Replicates the detailed remittance advices.

1. From the Home Page click on the **Reports** hyperlink.



2. Here you can navigate to the relevant report by clicking on the blue hyperlink.



3. You can define the parameters of the Report by **the drop down menus** and click **View** to generate.

Useful Tip: You can click on the **Close and Return** hyperlink to return to the Home Page.

The screenshot shows the 'Commissioned Vs Actuals Report' interface. At the top, there are filter dropdowns for 'Service Group Class' (set to '[All Service Group Classes]'), 'Organisation' (set to 'Day Opportunities PP Home'), and 'Client' (set to '[All Clients]'). Date filters are set for 'Date From' (28/02/2022) and 'Date To' (24/04/2022). There are checkboxes for 'Differences Only' (checked) and 'Include Weeks Without Actuals' (unchecked). A 'View' button is highlighted with a callout: 'This will generate the report'. A 'Download Data' button is highlighted with a callout: 'The report can be downloaded as a CSV file'. A 'Close and return' link is in the top right. A callout points to the filter dropdowns: 'Define the report using the filters'. Below the filters, a table titled 'Commissioned Vs Actual Differences Report' is displayed, showing data for 'Day Opportunities PP Home' and 'Day Opportunities' between 28/02/2022 and 24/04/2022.

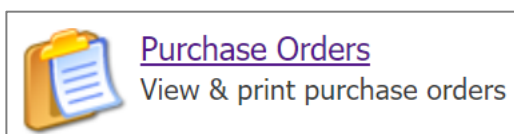
Commissioned Vs Actual Differences Report													
Dates between 28/02/2022 and 24/04/2022, Service Group Class = ANY, Provider = Day Opportunities PP Home, Client = ANY													
Day Opportunities PP Home										Day Opportunities			
Day Opportunities PP Home										Day Opportunities			
Day Opportunities - Scheduled										Service Start 28/03/2022			
Angelo, Iris (A1)													
					Quantity				Cost				
Actual Week	Gen.	Visits	Cost Centre	Subjective	Comm.	Actual	Frust.	Diff.	Comm.	Actual	Frust.	Diff.	
04/04/2022	N	3	Physical Support 65+	Day Care	5	3	0	-2	£1,072.30	£643.38	£0.00	£-428.92	
11/04/2022	N	5	Physical Support 65+	Day Care	5	4	1	0	£1,072.30	£857.84	£214.46	£0.00	
Client Totals					10.00	7.00	1.00	-2.00	£2,144.60	£1,501.22	£214.46	£-428.92	
Service Level Totals					10.00	7.00	1.00	-2.00	£2,144.60	£1,501.22	£214.46	£-428.92	

Purchase Orders

Purchase Orders (POs) are a legally binding documentation of the services and prices that were agreed for an individual client per financial year.

Providers can view, save or print POs held on the portal in real time.

1. From the Home Page click on the **Purchase Orders** hyperlink.



2. You can filter results by **Financial Year**, **Client** or **Service** and click **View** to generate.

Purchase Orders

Financial Year: Service:
Client:

Please set filters and click the View button.

3. To render and view a Purchase Order click on the individual Client (blue text) under the **Purchase Order Column**.

Purchase Orders

Financial Year: Service:
Client:

Purchase Order	Value	Spend To Date	Financial Year	Issued
Angelo, Iris (A1) - 2022/2023	£55974.06	£0.00	2022/2023	06/10/2022

Click on the Client information to generate the PO. The bracket contains the social care reference number for the client

This is the total value of the purchase order and can be compared against the adjacent 'Spend To Date'

4. From here you can view and print the Purchase order.

Useful Tip: Use the 3 dots on the top right hand corner of the Purchase Order View to print or save the document.

Adults Social Care Provider Portal

Provider Address:
1 Skylander Road

Information:
Purchase Order: 2 - 1
Financial Year: 01/04/2022 - 31/03/2023
Date Printed: 09/10/2022

Payment Information:

Date	Model	Period	Slack	Direct Payment
01/04/2022 - 31/03/2023	Invoiced (Pay on actuals: Always)	Four-weekly	-28	<input type="checkbox"/>

Items:
Angelo, Iris (A1) - 2022/2023, Day Opportunities PP Home

Details	Date	Disc (%)	Amount
Service 'Day Opportunities PP Home', Level 'Day Opportunities - Scheduled (Session)', 5 Sessions every week. Weekly cost £1,072.30	01/04/2022 - 31/03/2023		£55,974.06
Total (ex VAT):			£55,974.06

Use to return to the PO rendering page [Close and return to list](#)

This is the unique PO number, the number after the dash is an iteration number showing the PO version. A new version will be created for every care package variation