



Bedford Borough Council

Adults' ContrOCC Provider Portal Implementation

Provider Portal Navigation for Providers

ACTUALS MODULE

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Provider Portal URL:

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

Introduction

This document contains guidance for using ContrOCC's Provider Portal in line with Adult Social Care. This guide is specifically tailored to Homecare Providers submitting their care delivery via the Actuals Module. The portal is entirely web-based and can be accessed using any modern browser such as Microsoft Edge or Google Chrome.

Actuals

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.



[Actuals/Visits](#)
Submit your actuals/visits to Adults' using the online form or bulk import facility

2. From here you can **Generate Actuals** to view and edit the planned delivery of services for the week selected from the **Actual Weeks Calendar**.



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

for **Michaela George** PP HomeCare

Notes
POs
Reports
Help
Logout

Actual Weeks

August 2022

M	T	W	T	F	S	S
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31	1	2	3	4

<< Prev | This Week | Next >>

Actuals/Visits for PP Home Care

Week Beginning 29 August

Visits

Service Level: [All Service Levels] Client: [All Clients]

Visit Type: [All Visit Types] Status: New Matched Unmatched Missing Data

There are no Actuals

Pages: 1

Actuals

Service Level: [All Service Levels] Client: [All Clients]

Show Clients with Actuals: [No Selection] Actuals: Unplanned Planned Intermittent Locked

Actual	Service Level	PI	Frstd	Msd	Xtr	Vst	Total Cost	Comments				
Mrs Daniel Craig A5282147 £698.16 of £698.16 <input type="button" value="Add/Edit"/> <input type="button" value="Confirm"/>												
Home Care - (Scheduled Timed)												
Mon	Tue	Wed	Thu	Fri	Sat	Sun	Entry	Exit	Spans Night?	Cost	Comments	Frustrated?
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	20:00	20:30	<input type="checkbox"/>	£84.82		<input type="checkbox"/>
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	08:00	08:45	<input type="checkbox"/>	£117.74		<input type="checkbox"/>
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	12:00	13:00	<input type="checkbox"/>	£146.52		<input type="checkbox"/>
Home Care - (Scheduled Timed) 2nd Worker												
Mon	Tue	Wed	Thu	Fri	Sat	Sun	Entry	Exit	Spans Night?	Cost	Comments	Frustrated?
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	08:00	08:45	<input type="checkbox"/>	£117.74		<input type="checkbox"/>
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	12:00	13:00	<input type="checkbox"/>	£146.52		<input type="checkbox"/>
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	20:00	20:30	<input type="checkbox"/>	£84.82		<input type="checkbox"/>
Total: £698.16 of £698.16												

Pages: 1

Use the filters to define Actuals viewed

To edit the delivery for an individual client click on the 'Add/Edit' button. If actual delivery matches the planned click 'Confirm'

This button generates the planned Actuals for all clients receiving services in the selected week

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.



Bedford BOROUGH Adults' Provider Portal

Provider web interface for **Michaela George** [PP HomeCare]

Home Care - (Scheduled Timed)

Actual	Service Level	PI	Frstd	Msd	Xtr	Vst	Total Cost	Comments	Frustrated?																																																																	
<table border="1"> <tr> <th>Mon</th> <th>Tue</th> <th>Wed</th> <th>Thu</th> <th>Fri</th> <th>Sat</th> <th>Sun</th> </tr> <tr> <td><input checked="" type="checkbox"/></td> <td><input type="checkbox"/></td> <td><input type="checkbox"/></td> <td><input type="checkbox"/></td> <td><input type="checkbox"/></td> <td><input type="checkbox"/></td> <td><input type="checkbox"/></td> </tr> </table>	Mon	Tue	Wed	Thu	Fri	Sat	Sun	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Home Care - (Scheduled Timed)		08:00	08:45	<input type="checkbox"/>	£14.75	Test	<input type="checkbox"/>																																																									
Mon	Tue	Wed	Thu	Fri	Sat	Sun																																																																				
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>																																																																				
<table border="1"> <tr> <th>Mon</th> <th>Tue</th> <th>Wed</th> <th>Thu</th> <th>Fri</th> <th>Sat</th> <th>Sun</th> <th>Entry</th> <th>Exit</th> <th>Spans Night?</th> <th>Cost</th> <th>Comments</th> <th>Frustrated?</th> </tr> <tr> <td><input checked="" type="checkbox"/></td> <td>08:00</td> <td>08:45</td> <td><input type="checkbox"/></td> <td>£103.25</td> <td></td> <td><input type="checkbox"/></td> </tr> <tr> <td><input checked="" type="checkbox"/></td> <td>12:00</td> <td>13:00</td> <td><input type="checkbox"/></td> <td>£128.52</td> <td></td> <td><input type="checkbox"/></td> </tr> <tr> <td><input checked="" type="checkbox"/></td> <td>20:00</td> <td>20:30</td> <td><input type="checkbox"/></td> <td>£74.41</td> <td></td> <td><input type="checkbox"/></td> </tr> <tr> <td><input checked="" type="checkbox"/></td> <td>16:00</td> <td>17:00</td> <td><input type="checkbox"/></td> <td>£128.52</td> <td></td> <td><input type="checkbox"/></td> </tr> </table>										Mon	Tue	Wed	Thu	Fri	Sat	Sun	Entry	Exit	Spans Night?	Cost	Comments	Frustrated?	<input checked="" type="checkbox"/>	08:00	08:45	<input type="checkbox"/>	£103.25		<input type="checkbox"/>	<input checked="" type="checkbox"/>	12:00	13:00	<input type="checkbox"/>	£128.52		<input type="checkbox"/>	<input checked="" type="checkbox"/>	20:00	20:30	<input type="checkbox"/>	£74.41		<input type="checkbox"/>	<input checked="" type="checkbox"/>	16:00	17:00	<input type="checkbox"/>	£128.52		<input type="checkbox"/>																								
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<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	20:00	20:30	<input type="checkbox"/>	£74.41		<input type="checkbox"/>																																																														
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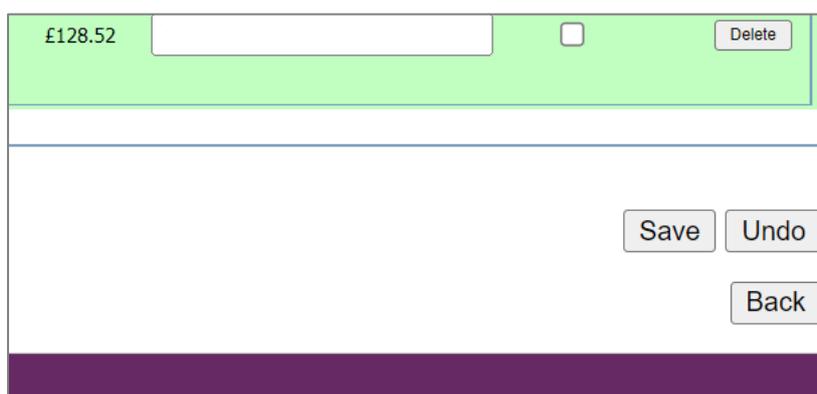
Week Total: £449.45

Callouts:

- Red indicates entered Actuals are less than the Planned Service
- 'Frustrated' visits record when the Carer attends, but was unable to provide services to the Client. To enter Frustrated delivery, untick the day this relates to and then click 'Add Row'. On the new line tick on the corresponding day and enter times, then tick on 'Frustrated?'
- 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'
- Comments should be used to evidence
- Green indicates entered Actuals exceed the Planned Service Delivery
- To add a new delivery time, click on 'Add Row'. Then tick on the day this relates to and enter times on the new line

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.



Actuals Summary

Extra Hours **should NOT** be added via the Actuals screen. If additional hours 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.

To Remove Hours:

The screenshot shows a table with columns: Mon, Tue, Wed, Thu, Fri, Sat, Sun, Entry, Exit, Spans Night?, Cost, Comments, Frustrated?, and Delete. Three rows of data are visible. A callout box with a purple border contains the text: "If there are missing hours, untick the relevant days and time, add any relevant comments and select 'Save'". An arrow points from the callout box to the 'Add Row' button.

Mon	Tue	Wed	Thu	Fri	Sat	Sun	Entry	Exit	Spans Night?	Cost	Comments	Frustrated?	Delete
<input checked="" type="checkbox"/>	08:00	08:45	<input type="checkbox"/>	£103.25		<input type="checkbox"/>	Delete						
<input checked="" type="checkbox"/>	12:00	13:00	<input type="checkbox"/>	£128.52		<input type="checkbox"/>	Delete						
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	20:00	20:30	<input type="checkbox"/>	£42.52		<input type="checkbox"/>	Delete

Week Total: £580.47

Buttons: Save, Undo, Back

To Delete a Week of Hours:

The screenshot shows the Bedford Borough Council Adults' Provider Portal. The page title is "Edit Actuals for PP Home Care, Mrs Daniel Craig (A5282147)". The week beginning is "02 May 2022". A callout box with a purple border contains the text: "Select 'Delete' to delete a whole row". An arrow points from the callout box to the 'Delete' button in the 'Frustrated?' column of the table.

Actual	Service Level	PI	Frstd	Msd	Xtr	Vst	Total Cost	Comments	Frustrated?	Delete
	Home Care - (Scheduled Timed)									
<input checked="" type="checkbox"/>							£84.82		<input type="checkbox"/>	Delete
<input checked="" type="checkbox"/>							£117.74		<input type="checkbox"/>	Delete
<input checked="" type="checkbox"/>							£146.52		<input type="checkbox"/>	Delete

Previously referred to as 'short notice cancellations', occasions when the carer attends, but is unable to provide services to the client are recorded as **Frustrated** in the portal.

Frustrated Hours:

Provider web interface for Dean Cooke PP HomeCare

BEDFORD BOROUGH COUNCIL Adults' Provider Portal

Home Actuals/Visits Invoices/Credit Notes POs Reports Help Logout

Edit Actuals for PP Home Care, Mrs Daniel Craig (A5282147)

Week Beginning 09 May 2022

Actual	Service Level							PI	Frstd	Msd	Xtr	Vst	Total Cost	Comments	Frustrated?
Home Care - (Scheduled Timed)															
Mon	Tue	Wed	Thu	Fri	Sat	Sun	Entry	Exit	Spans Night?	Cost	Comments	Frustrated?			
<input checked="" type="checkbox"/>	20:00	20:30	<input type="checkbox"/>	£74.41		<input type="checkbox"/>	Delete								
<input checked="" type="checkbox"/>	08:00	08:45	<input type="checkbox"/>	£103.25		<input type="checkbox"/>	Delete								
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	12:00	13:00	<input type="checkbox"/>	£91.80		<input type="checkbox"/>	Delete						
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	12:00	13:00	<input type="checkbox"/>	£36.72		<input checked="" type="checkbox"/>	Delete						

Add Row

For Frustrated Hours, untick the actual hours

Provider web interface for Dean Cooke PP HomeCare

BEDFORD BOROUGH COUNCIL Adults' Provider Portal

Home Actuals/Visits Invoices/Credit Notes POs Reports Help Logout

Edit Actuals for PP Home Care, Mrs Daniel Craig (A5282147)

Week Beginning 09 May 2022

Actual	Service Level							PI	Frstd	Msd	Xtr	Vst	Total Cost	Comments	Frustrated?
Home Care - (Scheduled Timed)															
Mon	Tue	Wed	Thu	Fri	Sat	Sun	Entry	Exit	Spans Night?	Cost	Comments	Frustrated?			
<input checked="" type="checkbox"/>	20:00	20:30	<input type="checkbox"/>	£74.41		<input type="checkbox"/>	Delete								
<input checked="" type="checkbox"/>	08:00	08:45	<input type="checkbox"/>	£103.25		<input type="checkbox"/>	Delete								
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	12:00	13:00	<input type="checkbox"/>	£91.80		<input type="checkbox"/>	Delete						
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	12:00	13:00	<input type="checkbox"/>	£36.72		<input checked="" type="checkbox"/>	Delete						

Add Row

Then select 'Add Row' as shown above. Tick the relevant days and time

Provider web interface for Dean Cooke PP HomeCare

BEDFORD BOROUGH COUNCIL Adults' Provider Portal

Home Actuals/Visits Invoices/Credit Notes POs Reports Help Logout

Edit Actuals for PP Home Care, Mrs Daniel Craig (A5282147)

Week Beginning 09 May 2022

Actual	Service Level							PI	Frstd	Msd	Xtr	Vst	Total Cost	Comments	Frustrated?
Home Care - (Scheduled Timed)															
Mon	Tue	Wed	Thu	Fri	Sat	Sun	Entry	Exit	Spans Night?	Cost	Comments	Frustrated?			
<input checked="" type="checkbox"/>	20:00	20:30	<input type="checkbox"/>	£74.41		<input type="checkbox"/>	Delete								
<input checked="" type="checkbox"/>	08:00	08:45	<input type="checkbox"/>	£103.25		<input type="checkbox"/>	Delete								
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	12:00	13:00	<input type="checkbox"/>	£91.80		<input type="checkbox"/>	Delete						
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	12:00	13:00	<input type="checkbox"/>	£36.72		<input checked="" type="checkbox"/>	Delete						

Add Row

Ensure 'Frustrated?' is ticked, before selecting 'Save'

Actions & Care Package Line Items

Description

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.

Directions of use

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. 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** PP HomeCare

BEDFORD Adults' Provider Portal
BOROUGH COUNCIL

Use filters to view specific CPLIs

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

Automatically order data by the selecting a title link

Include Historical:
Include Unauthorised:

View Reset

SSRef	Client	Service	Service Level	Start Date	End Date	Cost	Pricing	CPLI ID	Auth	
A5282147	Mrs Daniel Craig	PP Home Care	Home Care - (Scheduled Timed)	04/02/2021	-	£306.18 Weekly (Timetabled)	15.75 x Timetabled Hours (Timetabled Pricing) (Spot)	26133	<input checked="" type="checkbox"/>	Submit Action
A5282147	Mrs Daniel Craig	PP Home Care	Home Care - (Scheduled Timed) 2nd Worker	04/02/2021	-	£306.18 Weekly (Timetabled)	15.75 x Timetabled Hours (Timetabled Pricing) (Spot)	26134	<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 service for a client.

New Action

Type: [Please Select] v

Related To: Client v

Entity: Craig, Daniel v

Due Date:

Assign to: [Please Select] v

Title:

Text: Re: Care Package Line Item for Mrs Daniel Craig. Home Care - (Scheduled Timed) (Timetabled Hour) from PP Home Care, Starts 04/02/2021.

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

New Action

Type: [Please Select] v

Related To: [Please Select] v

Entity: 1. Placement - End Date
2. Placement - Query
3. Placement - Start Date
4. Missing Services
5. Service Variation
6. Respite
7. Deceased Client

Due Date:

Assign to:

Title:

Text: Re: Care Package Line Item for Mrs Daniel Craig. Home Care - (Scheduled Timed) (Timetabled Hour) from PP Home Care, Starts 04/02/2021.

Use this filter 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: 5. Service Variation v

Related To: Client v

Entity: [Please Select]
Contract
Due Date: Spot Commitment
Value Commitment
Assign to: Client
Service v

Title: Invoice

Text: Provider Craig. Home Care - (Scheduled Timed) (Timetabled Hour) from PP Home Care, Starts 04/02/2021.
Client received additional hours due to accident and needed further services/support.

Change the 'Related To' filter to 'Service'. This is because Bedford's Finance Team staff are each responsible for different services. Sending Actions in this way will streamline the pick-up process

New Action

Type: 5. Service Variation

Related To: Service

Entity: PP Home Care

Due Date: 06/09/2022

Assign to: Finance Team

Title: Additional Hours

Text:
 Re: Care Package Line Item for Mrs Daniel Craig. Home Care - (Scheduled Timed) (Timetabled Hour) from PP Home Care, Starts 04/02/2021.
 Client received additional hours due to ambulance being called. Tuesday 28/06 12:00 - 14:00.

Callout 1: Enter the due date as a week from the Action creation date

Callout 2: This will be actioned by the Finance Team, ensure to select

Callout 3: 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

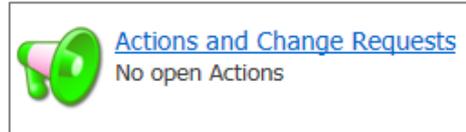
Callout 4: The 'Create Action' button will send this to the Finance Team to be actioned. Alternatively, the 'Cancel' button can be used to delete and close the Action

Buttons: Create Action, Cancel

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: [Any] v

Type: [Any] v

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.

BEDFORD BOROUGH COUNCIL Adults' Provider Portal

Home Scheduled Payments Reports Help Logout

New Action

Type: [Please Select]

Related To: [Please Select]

Entity:

Due Date:

Assign to: [Please Select]

Title:

Text:

Create Action Cancel

This is the page which will appear once the 'New Action' button is pressed

These drop downs are required to create a new

Once all details have been entered, this button needs to be pressed to create a

Initially the **Action** will read **LA (Finance Team)** under the **Assigned To** column, once the Finance Team 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

A colour code system is used to show status

Click the link of the title to view an action

Status Submitted Last Updated Type Entity Name Details Rejection Reason

BEDFORD BOROUGH COUNCIL Adults' Provider Portal

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 CatService 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

Request Closure

Comment

Due Date 19/06/2022

Submit Cancel

A comment is required in this field

Press 'Submit' once the comment is complete

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

Disputes

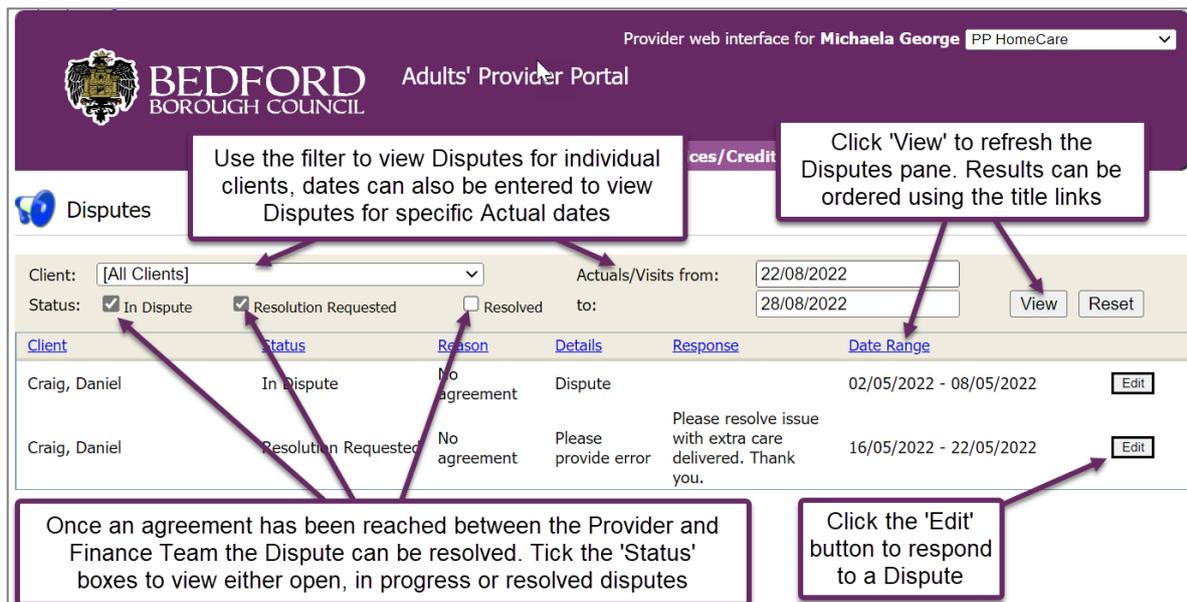
Descriptions

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** PP HomeCare

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 Actual dates

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

Client: [All Clients] Actuals/Visits from: 22/08/2022 to: 28/08/2022 View Reset

Status: In Dispute Resolution Requested Resolved

Client	Status	Reason	Details	Response	Date Range	
Craig, Daniel	In Dispute	No agreement	Dispute		02/05/2022 - 08/05/2022	Edit
Craig, Daniel	Resolution Requested	No agreement	Please provide error	Please resolve issue with extra care delivered. Thank you.	16/05/2022 - 22/05/2022	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

Invoice/Credit Notes

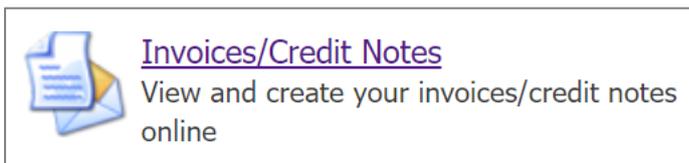
Description

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 imported actuals, and includes any client contributions collected by the provider.

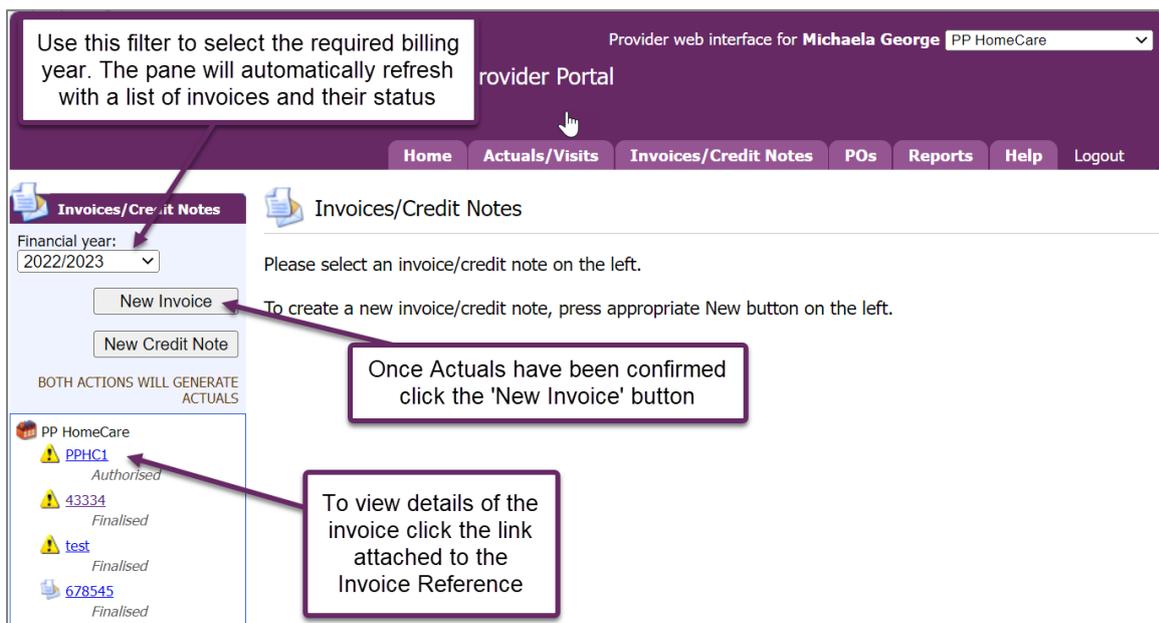
Directions of use

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.

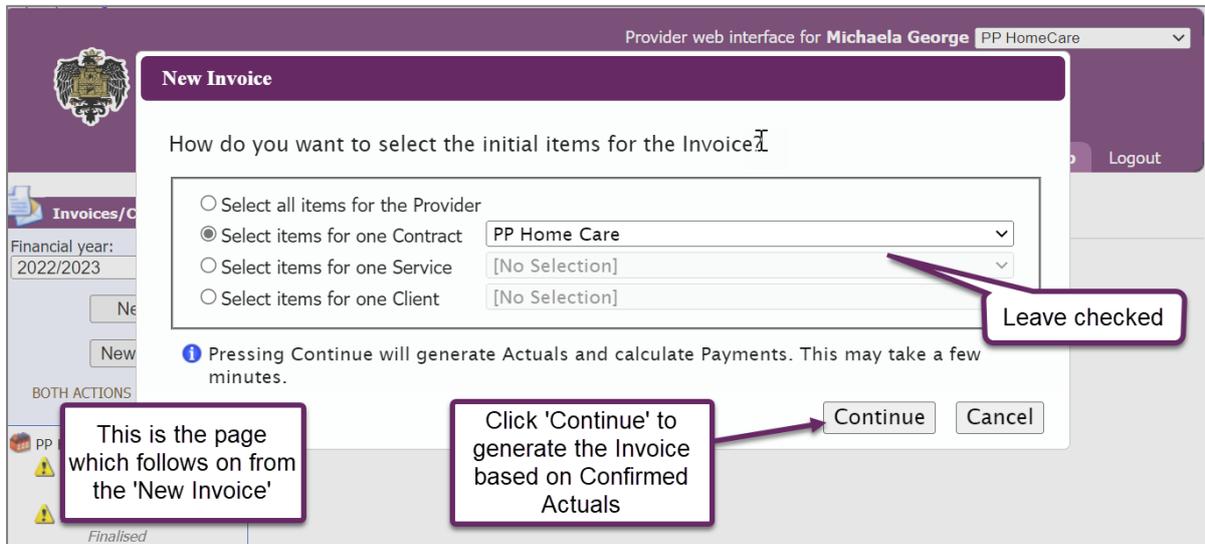
1. From the Home Page click on the **Invoices/Credit Notes** hyperlink.



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



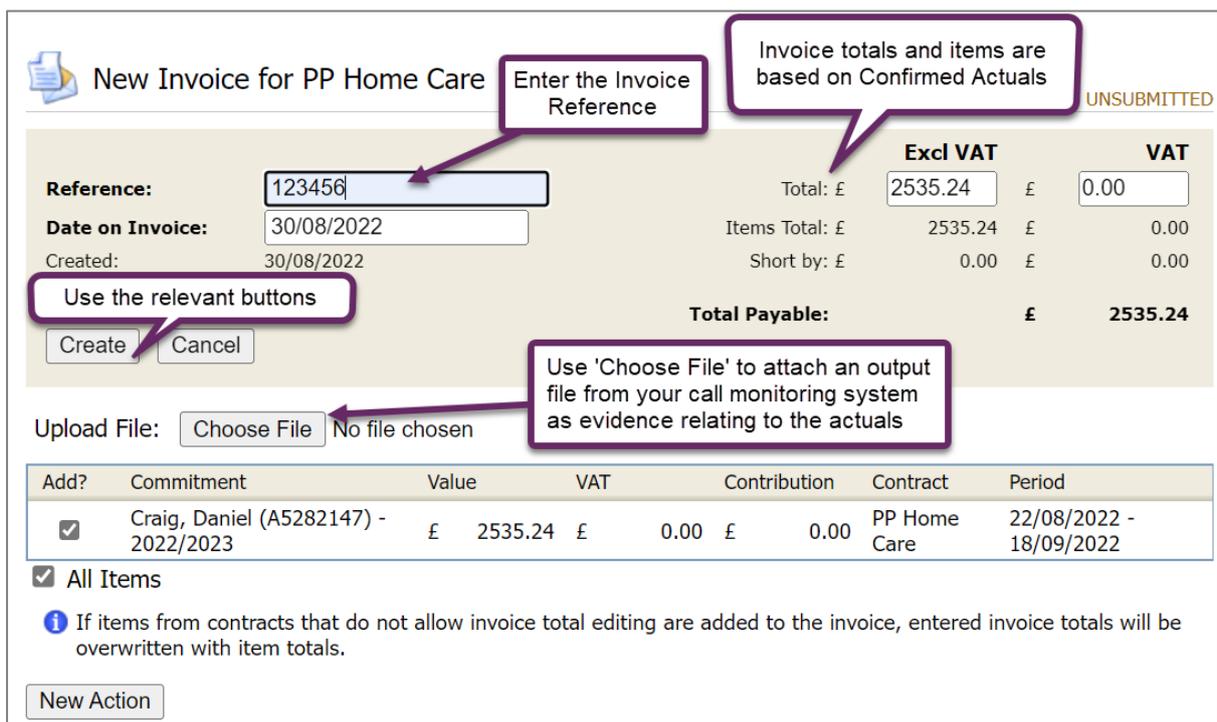
The screenshot shows the 'Provider Portal' interface for 'Michaela George' at 'PP HomeCare'. The top navigation bar includes 'Home', 'Actuals/Visits', 'Invoices/Credit Notes', 'POs', 'Reports', 'Help', and 'Logout'. The main content area is titled 'Invoices/Credit Notes' and contains a 'Financial year:' dropdown menu set to '2022/2023'. Below this are 'New Invoice' and 'New Credit Note' buttons. A list of invoices is shown on the left, including 'PP HomeCare', 'PPHC1', '43334', 'test', and '678545'. Annotations with arrows point to various elements: 'Use this filter to select the required billing year. The pane will automatically refresh with a list of invoices and their status' points to the financial year dropdown; 'To create a new invoice/credit note, press appropriate New button on the left.' points to the 'New Invoice' button; 'Once Actuals have been confirmed click the 'New Invoice' button' points to the 'New Invoice' button; and 'To view details of the invoice click the link attached to the Invoice Reference' points to the 'PPHC1' entry in the list.



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.



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

Invoice 123456 UNSUBMITTED

for Contract PP Home Care

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

Reference: 123456		Excl VAT	VAT
Date on Invoice: 30/08/2022	Total: £	2535.24	£ 0.00 i
Created: 30/08/2022	Items Total: £	2535.24	£ 0.00
	Short by: £	0.00	£ 0.00
Total Payable:		£	2535.24

You can make amendments and click 'Update' to save

Upload File: No file chosen

Commitment	Value	VAT	Contribution	Contract	Period
Craig, Daniel (A5282147) - 2022/2023	£ 2535.24	£ 0.00	£ 0.00	PP Home Care	22/08/2022 - 18/09/2022

An Action linked to the Invoice can be created

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

Invoice 123456 PENDING

for Contract PP Home Care

This Invoice has now been sent to the Finance Team and is pending approval. The status will change at each stage; Authorised and Finalised

Reference: 123456		Excl VAT	VAT
VAT Number:	Total: £	2535.24	£ 0.00
Date on Invoice: 30/08/2022	Items Total: £	2535.24	£ 0.00
Created: 30/08/2022	Short by: £	0.00	£ 0.00
Submitted: 30/08/2022	Total Payable:	£	2535.24

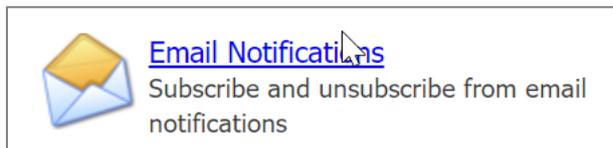
Upload File:

Commitment	Value	VAT	Contribution	Contract	Period
Craig, Daniel (A5282147) - 2022/2023	£ 2535.24	£ 0.00	£ 0.00	PP Home Care	22/08/2022 - 18/09/2022

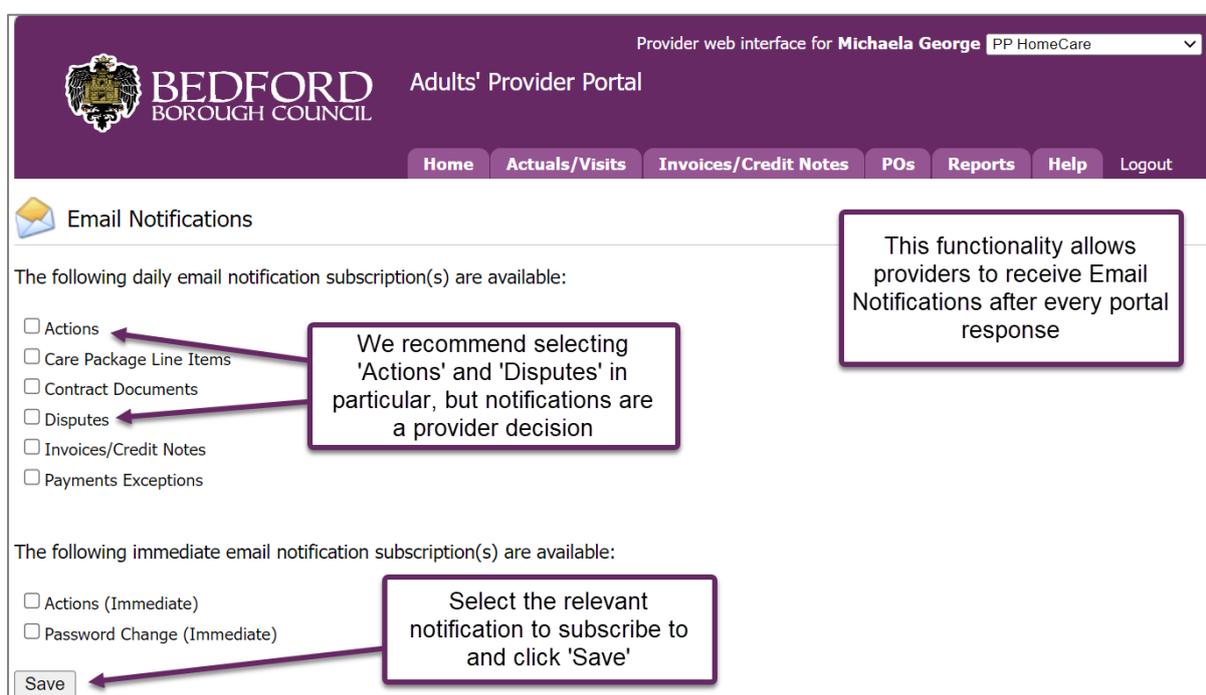
Email Notifications

Emails will be issued to the same email address registered to the provider.

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 includes the council logo, the name "BEDFORD BOROUGH COUNCIL", and the title "Adults' Provider Portal". A navigation menu contains links for Home, Actuals/Visits, Invoices/Credit Notes, POs, Reports, Help, and Logout. 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 located 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 box 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.

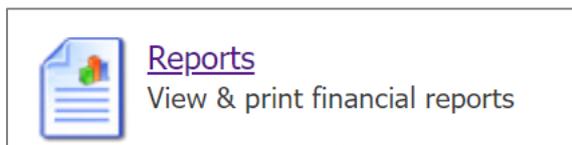
Summaries of each report are as follows:

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

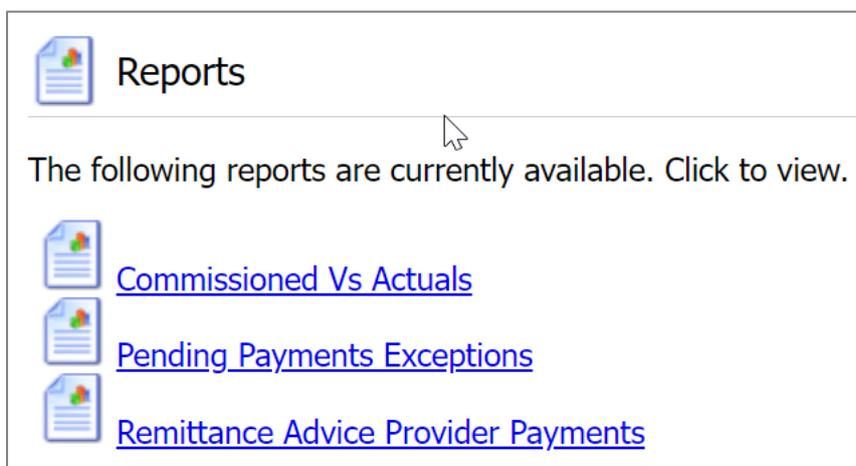
Pending Payments Exceptions: Displays detail on adjustments due in the next payment run.

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 **Contract, Payment Method** or **Summary** and click **View** to generate.

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

Provider web interface for **Michaela George** PP HomeCare

BEDFORD BOROUGH COUNCIL Adults' Provider Portal

Home Actuals/Visits Invoices/Credit Notes POs Reports Help Logout

Commissioned Vs Actuals Report [Close and return](#)

Service Group Class [All Service Group Classes]

Organisation PP HomeCare

Client [All Clients]

Date From 27/06/2022

Date To 30/08/2022

Differences Only

Include Weeks Without Actuals

View Download Data

Define the report using the filters and boxes

This will generate the report

The report can be downloaded as a CSV file

Commissioned Vs Actual Differences Report
Dates between 27/06/2022 and 30/08/2022, Service Group Class = ANY, Provider = PP HomeCare, Client = ANY

PP HomeCare Homecare

PP Home Care

Home Care - (Scheduled Time-specific)
Craig, Daniel (A5282147) Service Start 04/02/2021

Actual Week	Gen.	Visits	Cost Centre	Subjective	Quantity				Cost			
					Comm.	Actual	Frust.	Diff.	Comm.	Actual	Frust.	Diff.
27/06/2022	N	1	Physical Support 65+	Home Care	15.75	0.75	0	-15	£306.18	£14.75	£0.00	£-291.43
11/07/2022	N	14	Physical Support 65+	Home Care	15.75	12.25	0	-3.5	£306.18	£231.77	£0.00	£-74.41
18/07/2022	N	21	Physical Support 65+	Home Care	15.75	13.75	2	0	£306.18	£269.46	£36.72	£0.00
25/07/2022	N	20	Physical Support 65+	Home Care	15.75	13.25	2	-0.5	£306.18	£258.83	£36.72	£-10.63
Client Totals					63.00	40.00	4.00	-19.00	£1,224.72	£774.81	£73.44	£-376.47
Service Level Totals					63.00	40.00	4.00	-19.00	£1,224.72	£774.81	£73.44	£-376.47

Home Care - (Scheduled Time-specific) 2nd Worker