Bedford Borough Council

Adults' ContrOCC Provider Portal Implementation

Provider Portal Day Opportunities & Extra Care Guide

INVOICE BASED ON ACTUALS

Contents

Provider Portal URL:

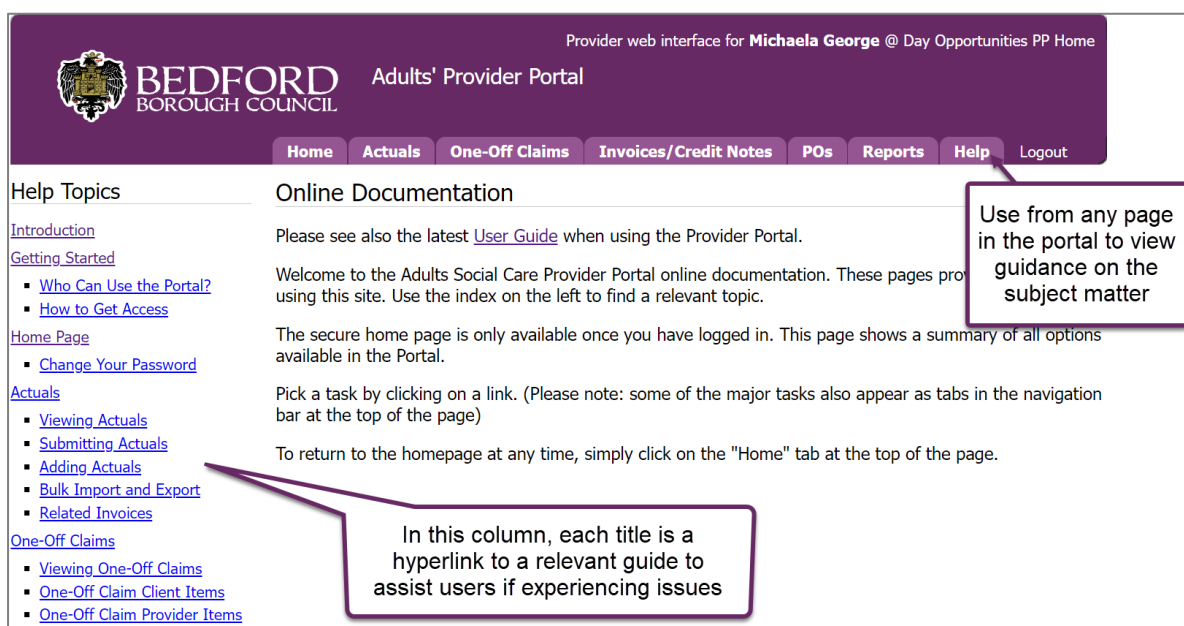https://bedfordproviderportal.syhapp.com/ProviderPortal_IAS_Live/

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.

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 automaticall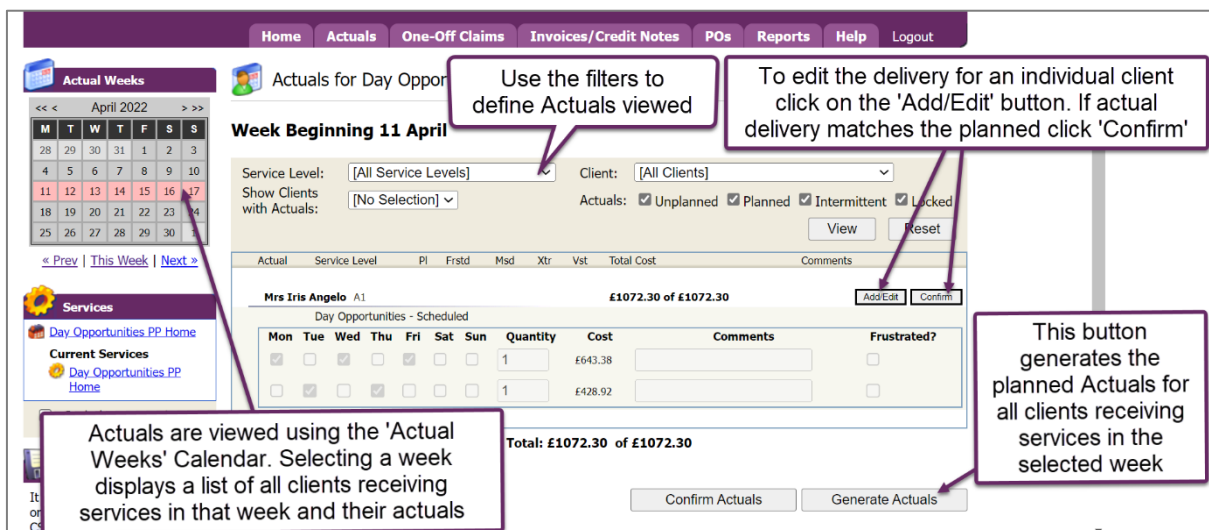y calculate the **invoice amounts based on entered actuals**, and includes any client contributions collected. The provider can view and edit actuals (**actual delivery of services**) and submit them directly to Bedford's Finance Team for processing.

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

Actuals/Visits
Submit your actuals/visits to Adults' using the online form or bulk import facility
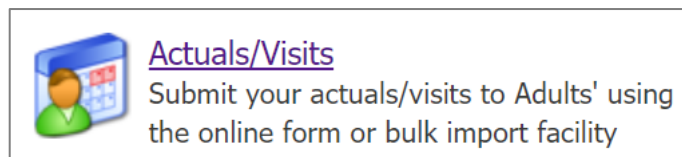
2. From here you can **Generate Actuals** (this will populate planned actuals for newly added Care Package Line Items) to view and edit the planned delivery of services for the week selected from the **Actual Weeks Calendar**.

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 unsuspended.

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

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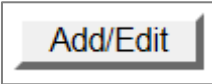
Edit Actuals for Day Opportunities PP Home, Mrs Iris Angelo (A1)

Week Beginning 11 Apr 2022

Comments should be used to evidence changes

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?	
☑	☐	☑	☐	☑	☐	☐	1	£643.38						☐	Delete
☐	☑	☐	☑	☐	☐	☐	1	£428.92						☐	Delete
							Add Row								

Week Total: £1072.30

To Remove Sessions:

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

Week Beginning 04 Apr 2022

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

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?	
☑	☐	☐	☐	☑	☐	☐	1	£214.46			Client cancelled with advan			☐	Delete
☐	☑	☐	☑	☐	☐	☐	1	£428.92						☐	Delete
							Add Row								

Week Total: £643.38

Red indicates entered Actuals are less than the Planned Service Delivery

Save   Undo

Back

Adding/Amending Sessions:

Edit Actuals for Day Opportunit

Week Beginning 18 Apr 2022

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

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?	
☑	☐	☑	☐	☑	☐	☐	1	£643.38						☐	Delete
☐	☑	☐	☑	☐	☐	☐	1	£428.92						☐	Delete
☐	☐	☐	☐	☐	☑	☐	1	£214.46						☐	Delete
							Add Row								

Week Total: £1286.76

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

Save   Undo

Back

Extra Sessions should <u>NOT</u> be added via the Actuals screen. If additional sessions where 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.

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.
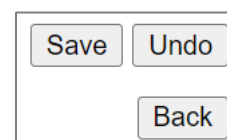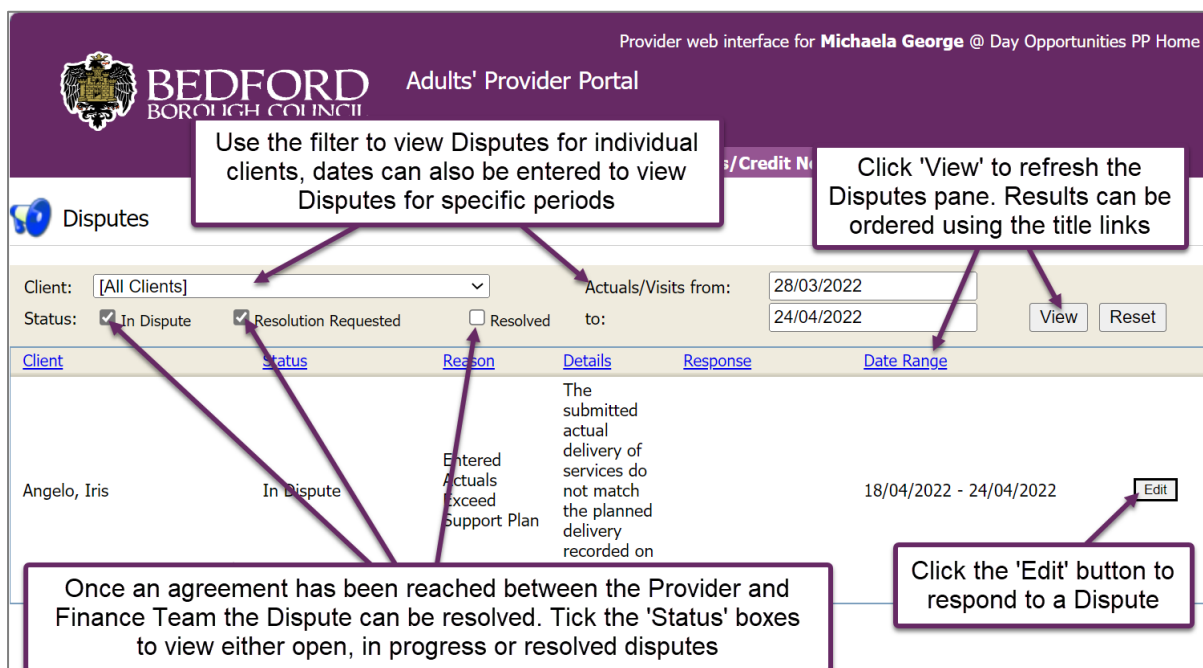
Disputes

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.

Disputes
2 open Disputes (1 awaiting action)

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

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

Disputes

| Client: | [All Clients] | | | Actuals/Visits from: | 28/03/2022 | | |
| Status: | ☑ In Dispute | ☑ Resolution Requested | ☐ Resolved | to: | 24/04/2022 | View | Reset |

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 where delivered, please get in contact with the Social Worker. Once agreed, a new support plan will then be issued to reflect the additonal 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	Pl	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?
☑	☐	☑	☐	☑	☐	☐	1	£643.38		☐
☐	☑	☐	☑	☐	☐	☐	1	£428.92		☐
☐	☐	☐	☐	☐	☑	☐	1	£214.46		☐

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

Week Beginning 18 Apr 2022

Actual	Service Level	Pl	Frstd	Msd	Xtr	Vst	Total Cost	Comments
Day Opportunities - Scheduled								

Mon	Tue	Wed	Thu	Fri	Sat	Sun	Quantity	Cost	Comments	Frustrated?	
☑	☐	☑	☐	☑	☐	☐	1	£643.38		☐	Delete
☐	☑	☐	☑	☐	☐	☐	1	£428.92		☐	Delete
☐	☐	☐	☐	☐	☐	☐	1	£214.46		☐	Delete
Add Row				Saturday							

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

Week Total: £1286.76

> Correct disputed actuals

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

Save   Undo

Back

Actual	Service Level	Pl	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?
☑	☐	☑	☐	☑	☐	☐	1	£643.38		☐
☐	☑	☐	☑	☐	☐	☐	1	£428.92		☐

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.

Invoices/Credit Notes
View and create your invoices/credit notes online
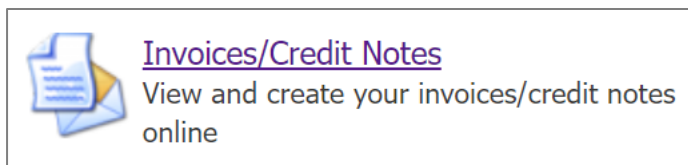
2. The **Invoice/Credit Notes** list on the left shows a list of all invoices and/or credit notes in ContrOCC. Click 'New Invoice'.
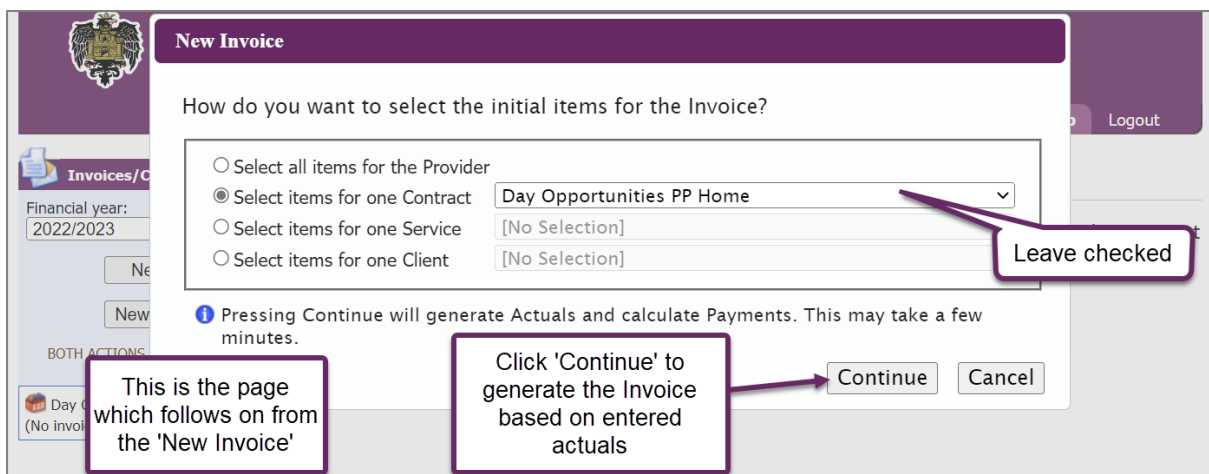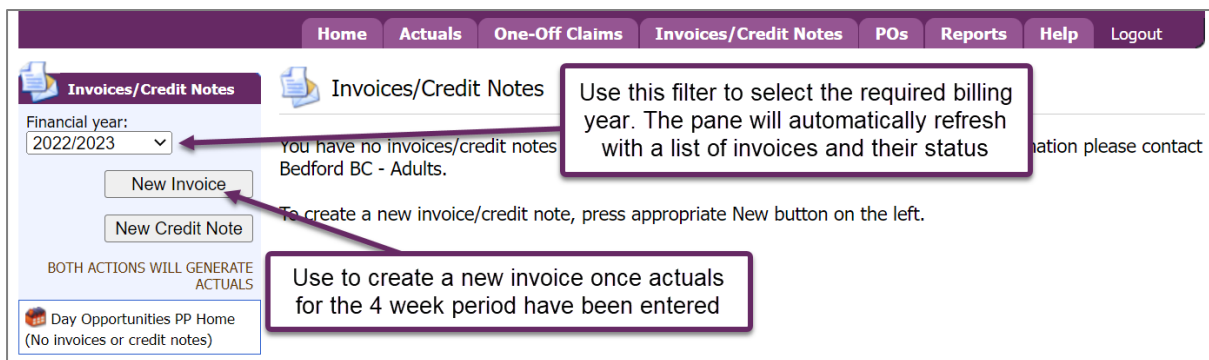
Useful Tip: If the invoice generated is blank with no invoice items, do not create or submit, as this will not be processed. Create an Action requesting support.

3. Once complete, click **Create**. This will create the invoice.
If applicable, attach a VAT supporting invoice including the VAT registration number.

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.

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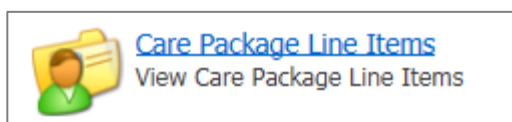
2. From here you can be notified of and view commissioned care. You can filter results by **Service**, **Client** or **Service Level** and click **View** to generate.

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:	
Entity:	
Due Date:	
Assign to:	
Title:	
Text:	

Dropdown list:
- [Please Select]
- 1. Service Provision - End Date
- 11. Missing Invoice Period – Chaser
- 2. Service Provision - Query
- 3. Service Provision - Start Date
- 4. Missing Services
- 5. Deceased Client
- 6. Other Local Authority Placement
- 7. Respite Periods (Start/End Dates)
- 8. Invoice Query
- 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 / Service / Invoice / Contact / Provider
Due Date:	
Assign to:	
Title:	
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:	Choose File 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

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

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:	Choose File No file chosen

Create Action   Cancel

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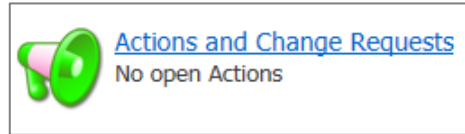
The change request list shows all the change requests which have occurred. It is based in chronological order with the latest response at the bottom.

Colour Code System					
Red	**Rejected**	**Amber**	**Pending**	**Green**	**Confirmed**

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.

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.

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

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

Request Closure

Comment

Logout

Action D

Back

Test
Re: Thunder Ca
Type: 2. Placement

Overdue
te: 19 Jun 2022

08 Jun 2022
Test
Assigned to F
Due Date set to 19 Jun 2022

Due Date   19/06/2022

Submit | Cancel

details for Eden Care Home

Comment | Request Closure

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.

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.
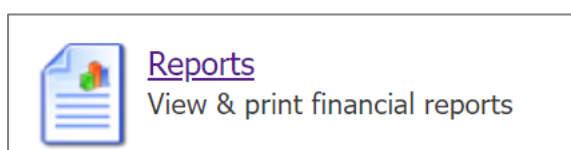
2. Here you can navigate to the relevant report by clicking on the blue hyperlink.
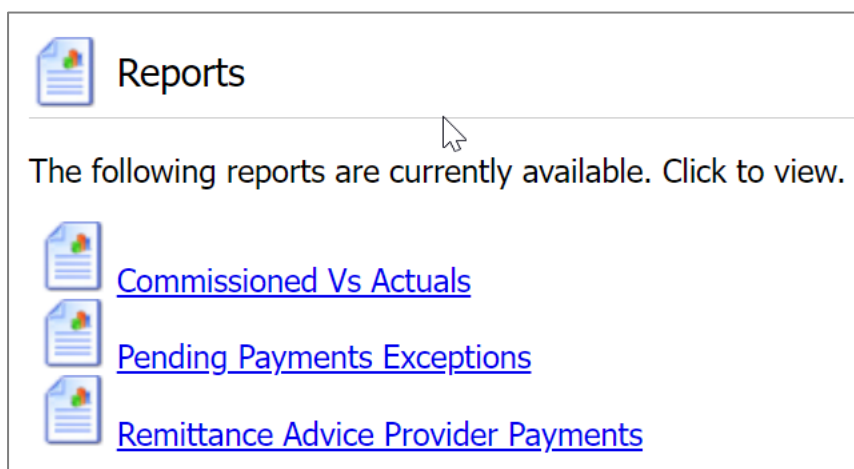
3. You can define the parameters of the Report by **the drop down menus** and click **View** to generate.

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

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.

Purchase Orders
View & print purchase orders
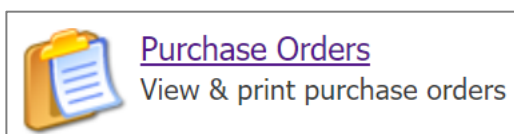
2. You can filter results by **Financial Year**, **Client** or **Service** and click **View** to generate.

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

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.