



Bedford Borough Council

Adults' ContrOCC Provider Portal Implementation

Provider Portal Navigation for Providers

SCHEDULED PAYMENTS

Contents

Introduction.....	1
Scheduled Payments.....	2
Actions & Care Package Line Items	5
Actions and Change Requests	8
Email Notifications.....	11
Reports	12
Purchase Orders	14
Invoiced Payments.....	16

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 Residential and Nursing Providers confirming their care delivery via the Scheduled Payments. The portal is entirely web-based and can be accessed using any modern browser such as Microsoft Edge or Google Chrome.

Scheduled Payments

Description

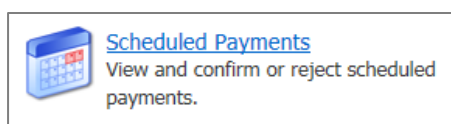
This area enables the Care Home to view past and future schedules. Service providers can use the portal to check and confirm schedules, as well as see that they have been authorised and finalised without the need to contact the Finance Team.

Directions of use

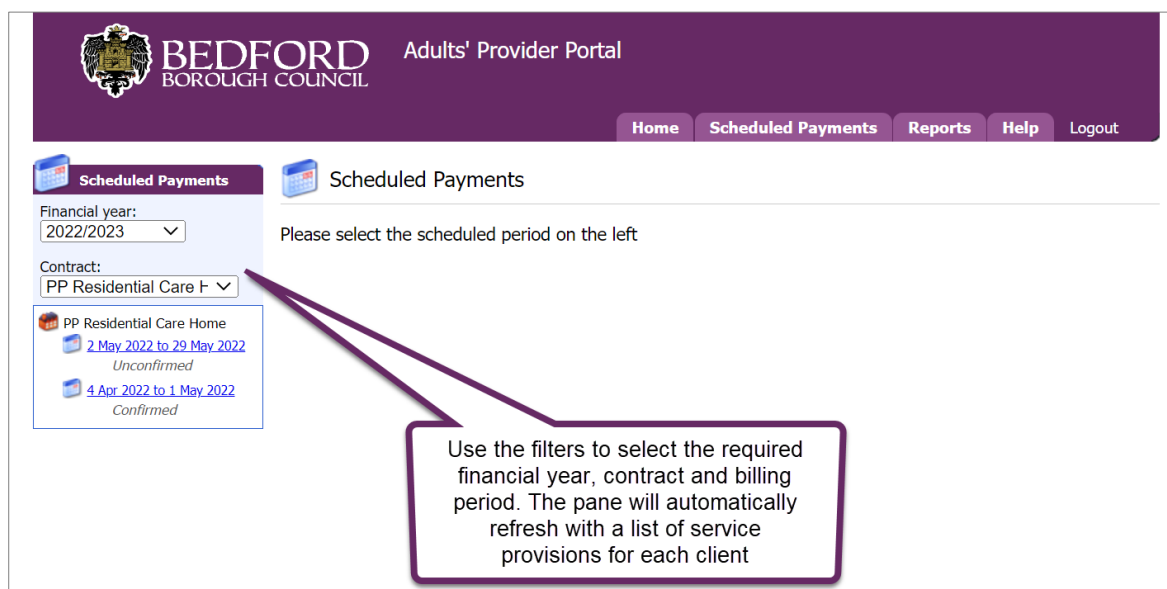
The scheduled payments page will show a breakdown of clients related to the specific time-period with an Unconfirmed Status.

Use the filters on the left to select the required financial year, contract and billing period. The pane will automatically refresh with a list of service provisions for each client.

1. From the Home Page click on the **Scheduled Payments** hyperlink.



2. From under **Scheduled Payments** select the relevant scheduled period.



The screenshot shows the Bedford Borough Council Adults' Provider Portal. The header includes the council logo and navigation links: Home, Scheduled Payments, Reports, Help, and Logout. The main content area is titled "Scheduled Payments" and contains a filter panel on the left. The filter panel includes a "Financial year:" dropdown set to "2022/2023", a "Contract:" dropdown set to "PP Residential Care Home", and a list of scheduled periods. The first period is "2 May 2022 to 29 May 2022" with an "Unconfirmed" status. The second period is "4 Apr 2022 to 1 May 2022" with a "Confirmed" status. A callout box points to the filter panel with the text: "Use the filters to select the required financial year, contract and billing period. The pane will automatically refresh with a list of service provisions for each client".



Scheduled Payments

Financial year:
2022/2023

Contract:
PP Residential Care

- PP Residential Care Home
2 May 2022 to 29 May 2022
Unconfirmed
- 4 Apr 2022 to 1 May 2022
Confirmed

Scheduled Payments

Please select the scheduled period on the left

This is an example of the list which will be present

To view details of the scheduled payment, click the link attached to the dates of the payment, shown in the list

The Italics writing shows the status of the scheduled payment, either 'Confirmed' or 'Unconfirmed', as shown above



This provides a summary of the tabs below

Scheduled Payments

Financial year:
2022/2023

Contract:
PP Residential Care

- PP Residential Care Home
2 May 2022 to 29 May 2022
Unconfirmed
- 4 Apr 2022 to 1 May 2022
Confirmed

PP Residential Care Home - 2 May 2022 to 29 May 2022

CURRENT

Start Date:	02 May 2022		Total	£6520.00
End Date:	29 May 2022		Payable	£6520.00
			Non-Payable	£0.00

Status: **Unconfirmed**

These tabs allow for details to be presented of the scheduled payments

This page will appear once this link is selected

Each scheduled payment is broken down into clients

Cost / Income	Reason for Payment	Applicable Dates	Amount	Status
PP Residential Care Home 2022/2023				
Max Blythe (A6203464) (Total: £3400.00)				
Cost	Residential Home Long Term (Placement), Spot.	02/05/2022 - 29/05/2022	£3400.00	Pay
Clara Smith (A6203460) (Total: £3120.00)				
Cost	Residential Home Long Term (Placement), Spot.	02/05/2022 - 29/05/2022	£3120.00	Pay

Confirm/Reject

This button is used to Confirm or Reject the scheduled payment

Service providers should check the data contained in the scheduled period and confirm or reject to ensure payments are processed. For all payment disputes or queries a **New Action** should be created from Actions and Change Requests or Care Package Line Items (fields will automatically populate from the CPLI).

For outstanding raised Actions, the provider should record details of the outstanding Actions in the conversation and confirm the scheduled period.

Provider web interface for Michaela George @ PP Residential Care Home

BEDFORD BOROUGH COUNCIL Adults' Provider Portal

This is the page that follows from the 'Confirm/Reject' button

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

Scheduled Payments PP Residential Care Home - 27 Jun 2022 to 24 Jul 2022 CURRENT

Financial year: 2022/2023
 Contract: PP Residential Care Hc

PP Residential Care Home
 27 Jun 2022 to 24 Jul 2022 *Rejected*
 30 May 2022 to 26 Jun 2022 *Confirmed*
 2 May 2022 to 29 May 2022 *Confirmed*
 4 Apr 2022 to 1 May 2022 *Confirmed*

Start Date:	27 Jun 2022	Payable	Total
End Date:	24 Jul 2022		£6520.00
Status:	Rejected	Non-Payable	£0.00

Comment: Reject

Comments:
 Open action against A6203464. Confirming on the basis that this be dealt with as agreed.

Confirm Reject Use the relevant button Cancel

Care Package Line Items

SSRef	Client	Service	Service Level	Start Date	End Date	Cost	Pricing	CPLI ID
A6203464	Blythe, Max	PP Residential Care Home	Residential Home Long Term	04/04/2022	-	£850.00 Weekly	1 x Placement at £850.00 (Spot)	29513
A6203460	Smith, Clara	PP Residential Care Home	Residential Home Long Term	04/04/2022	-	£780.00 Weekly	1 x Placement at £780.00 (Spot)	29509

A comment justifying the choice of Confirming or Rejecting is required here. Outstanding Actions should also be recorded

Each scheduled will need to be Confirmed or Rejected no later than 3 days prior to the period end date. 3 consecutive unconfirmed schedules results in payment suspension.

Should 3 consecutive scheduled periods be left unconfirmed, payments will be **automatically suspended**.

Actions & Care Package Line Items

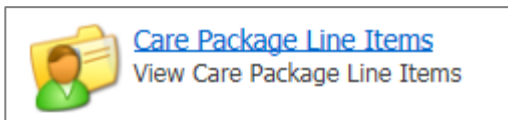
Description

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 Residential Care Home

BEDFORD BOROUGH COUNCIL Adults' Provider Portal

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

Care Package Line Items

Use filters to view specific CPLIs

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

Service: [All Services] Include Historical:
Client: [All Clients] Include Unauthorised:
Service Level: [All Service Levels] 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	
A6203464	Max Blythe	PP Residential Care Home	Residential Home Long Term	04/04/2022	-	£850.00 Weekly	1 x Placement at £850.00 (Spot)	29513	<input checked="" type="checkbox"/>	Submit Action
A6203460	Clara Smith	PP Residential Care Home	Residential Home Long Term	04/04/2022	-	£780.00 Weekly	1 x Placement at £780.00 (Spot)	29509	<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] ▾

Related To: Client ▾

Entity: Blythe, Max ▾

Due Date:

Assign to: [Please Select] ▾

Title:

Text: Re: Care Package Line Item for Max Blythe. Residential Home Long Term (Placement) from PP Residential Care Home, Starts 04/04/2022.

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] ▾

Related To: [Please Select] ▾

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 Max Blythe. Residential Home Long Term (Placement) from PP Residential Care Home, Starts 04/04/2022.

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: 1. Placement - End Date ▾

Related To: Client ▾

Entity: [Please Select] ▾

Contract

Spot Commitment

Client

Assign to: Service

Contact

Provider

Title:

Text: Re: Care Package Line Item for Max Blythe. Residential Home Long Term (Placement) from PP Residential Care Home, Starts 04/04/2022. Placement ended 17/06/2022.

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: 1. Placement - End Date

Related To: Client

Entity: Blythe, Max

Due Date: 06/09/2022

Assign to: Finance Team

Title: Placement End 17/06/2022

Text:
 Re: Care Package Line Item for Max Blythe. Residential Home Long Term (Placement) from PP Residential Care Home, Starts 04/04/2022.
 Placement ended 17/06/2022.

Buttons: Create Action, Cancel

Annotations:

- Enter the due date as a week from the Action creation date
- This will be actioned by the Finance Team, ensure to select
- 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.

For all **Respite** and **Other Local Authority Placements**, an Action should be submitted by using the process outlined above and selecting the drop down options below.

New Action

Type: 6. Respite

Related To: [Please Select]
 1. Placement - End Date

Entity: 2. Placement - Query
 3. Placement - Start Date

Due Date: 4. Missing Services
 5. Service Variation

Assign to: 6. Respite
 7. Deceased Client

New Action

Type: 3. Placement - Start Date

Related To: [Please Select]
 1. Placement - End Date

Entity: 2. Placement - Query
 3. Placement - Start Date

Due Date: 4. Missing Services
 5. Service Variation

Assign to: 6. Respite
 7. Deceased Client

Actions and Change Requests

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



[Actions and Change Requests](#)
10 open Actions (4 overdue)

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

Actions

Open Actions Only

Assigned To: [Any]

Type: [Any]

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

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.

Provider web interface for **Michaela George** PP Residential Care Home

BEDFORD BOROUGH COUNCIL Adults' Provider Portal

Home Actuals/Visits Invoices/Credit Notes Scheduled Payments POs 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 need to be completed to create the Action

Once all details have been entered use this button to create and send the Action to the Finance Team

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

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

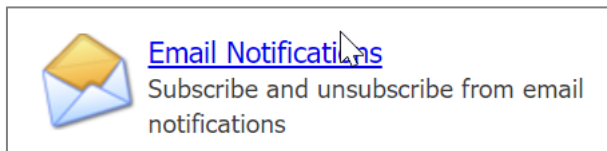
Press 'Submit' once the comment is complete

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

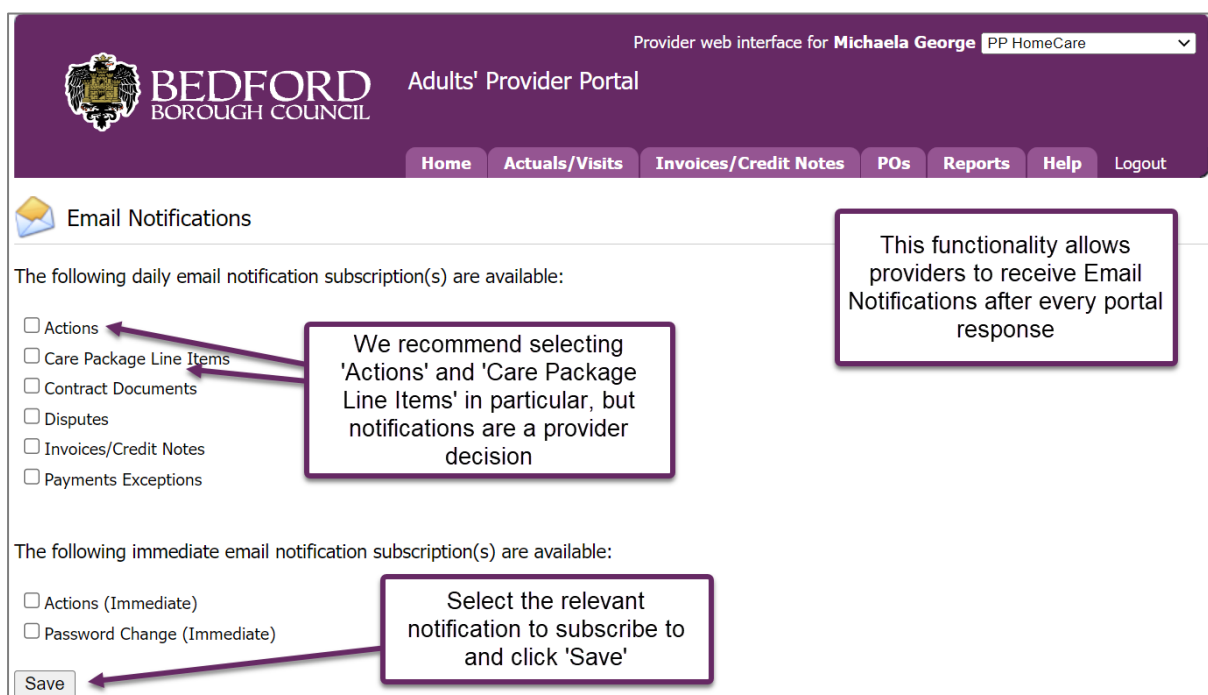
Email Notifications

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 is purple and contains the council logo, the name 'BEDFORD BOROUGH COUNCIL', and the title 'Adults' Provider Portal'. There is a dropdown menu for the user 'Michaela George' with 'PP HomeCare' selected. Below the header is a navigation bar with 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 at the bottom left. Three callout boxes provide instructions: one points to 'Actions' and 'Care Package Line Items' with the text 'We recommend selecting 'Actions' and 'Care Package Line Items' 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:

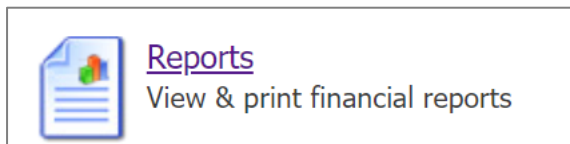
Commissioned Vs Actuals: Compares planned service delivery with actual service delivery for any selected time period.

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

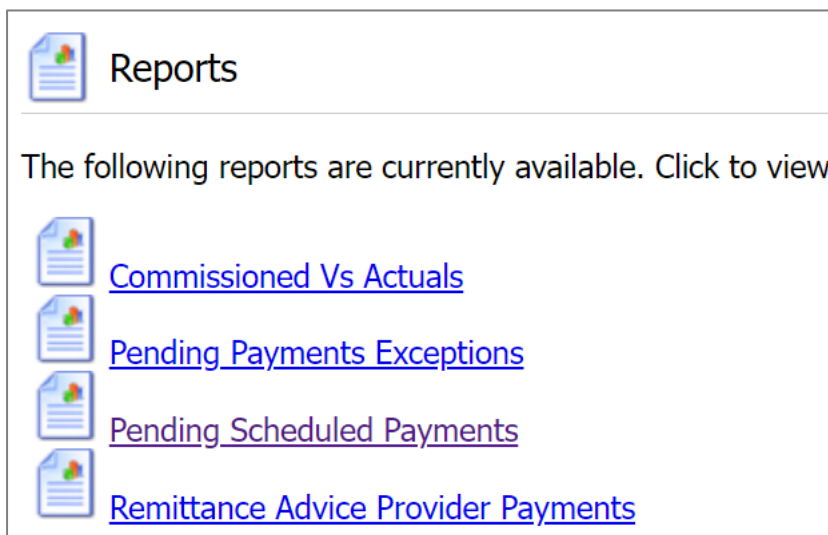
Pending Scheduled Payments: Displays the payment status for scheduled payments.

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 Residential Care Home

BEDFORD BOROUGH COUNCIL Adults' Provider Portal

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

Pending Scheduled Payments Report [Close and return](#)

Organisation: PP Residential Care Home
 Status: Pay
 Date From: 01/06/2022
 Date To: 31/07/2022

View Download Data

Pending Scheduled Payments by Provider
 From 01/06/2022 to 31/07/2022

Client	Service	Amount (ex. VAT)	VAT Amount
Type Nursing & Residential Care			
Provider PP Residential Care Home	Contract PP Residential Care Home		
For Period 27/06/2022 - 24/07/2022	Due 8 July 2022		
Item Notes	Item Dates	Status	
Blythe, Max (A6203464)	PP Residential Care Home		
Residential Home Long Term (Placement), Spot. Budget '51207-5632'	27/06/2022 - 24/07/2022	Pay	
			£3,400.00
			£0.00
Smith, Clara (A6203460)	PP Residential Care Home		
Residential Home Long Term (Placement), Spot. Budget	27/06/2022 - 24/07/2022	Pay	
			£3,120.00
			£0.00

Purchase Orders

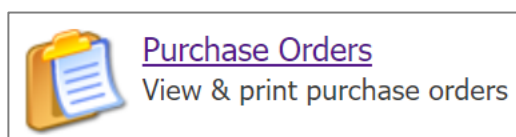
Description

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

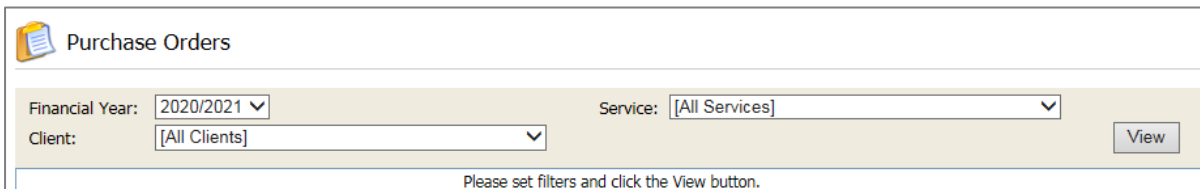
Directions of use

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.



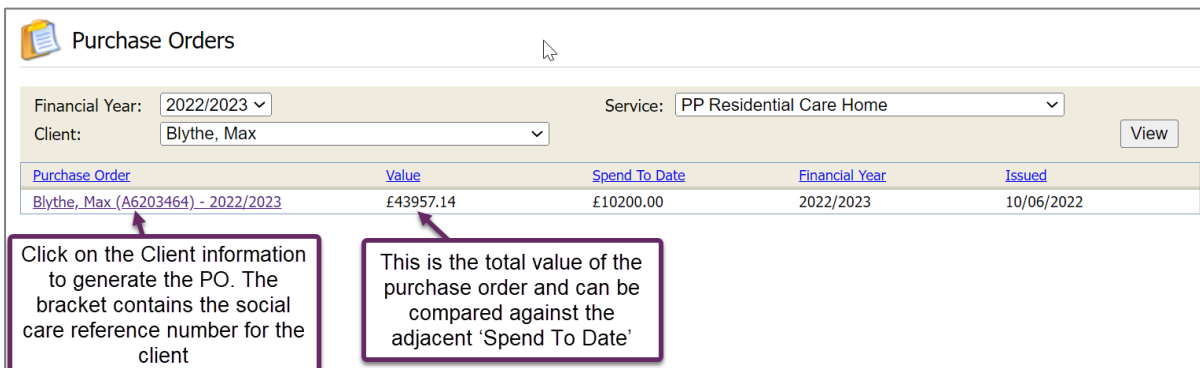
2. You can filter results by **Financial Year**, **Client** or **Service** and click **View** to generate.

A screenshot of the "Purchase Orders" filter form. It includes dropdown menus for "Financial Year" (set to 2020/2021), "Client" (set to [All Clients]), and "Service" (set to [All Services]). A "View" button is on the right. A message at the bottom says "Please set filters and click the View button."/>

Financial Year:	2020/2021	Service:	[All Services]	View
Client:	[All Clients]			

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**.

A screenshot of the "Purchase Orders" table. The filter form is set to "Financial Year: 2022/2023", "Client: Blythe, Max", and "Service: PP Residential Care Home". The table has columns: Purchase Order, Value, Spend To Date, Financial Year, and Issued. A row is shown for "Blythe, Max (A6203464) - 2022/2023" with a value of £43957.14 and a spend to date of £10200.00. Two callout boxes provide instructions: one points to the client name in the "Purchase Order" column, and the other points to the "Value" column.

Financial Year:	2022/2023	Service:	PP Residential Care Home	View
Client:	Blythe, Max			

Purchase Order	Value	Spend To Date	Financial Year	Issued
Blythe, Max (A6203464) - 2022/2023	£43957.14	£10200.00	2022/2023	10/06/2022

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.

Provider web interface for **Michaela George** PP Residential Care Home

BEDFORD BOROUGH COUNCIL Adults' Provider Portal

Home Actuals/Visits Invoices/Credit Notes **Scheduled Payments** POs Reports Help Logout

Purchase Order View [Close and return to list](#)

Bedford Borough Council
Adults' Social Care Provider Portal

Provider Address:
skylander

Information:
Purchase Order: 32844 - 2
Financial Year: 01/04/2022 - 31/03/2023
Date Printed: 04/09/2022
Payment Terms: All returns submitted via provider portal

Invoice Address:
All Invoices submitted via provider portal

Delivery Address:
Via Provider Portal

Payment Information:

Date	Model	Period	Slack	Direct Payment
04/04/2022 - 31/03/2023	Scheduled (Pay on actuals: Never)	Four-weekly	-14	<input type="checkbox"/>

Items:
Blythe, Max (A6203464) - 2022/2023, PP Residential Care Home

Details	Date	Disc (%)	Amount
Service 'PP Residential Care Home', Level 'Residential Home Long Term (Placement)', 1 Placement every week @ £850.00/Placement	04/04/2022 - 31/03/2023		£43,957.14
Total (ex VAT):			£43,957.14

Use to return to the PO rendering page


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

Invoiced Payments

Only providers receiving invoice-based payments need to refer to this section of the guide.

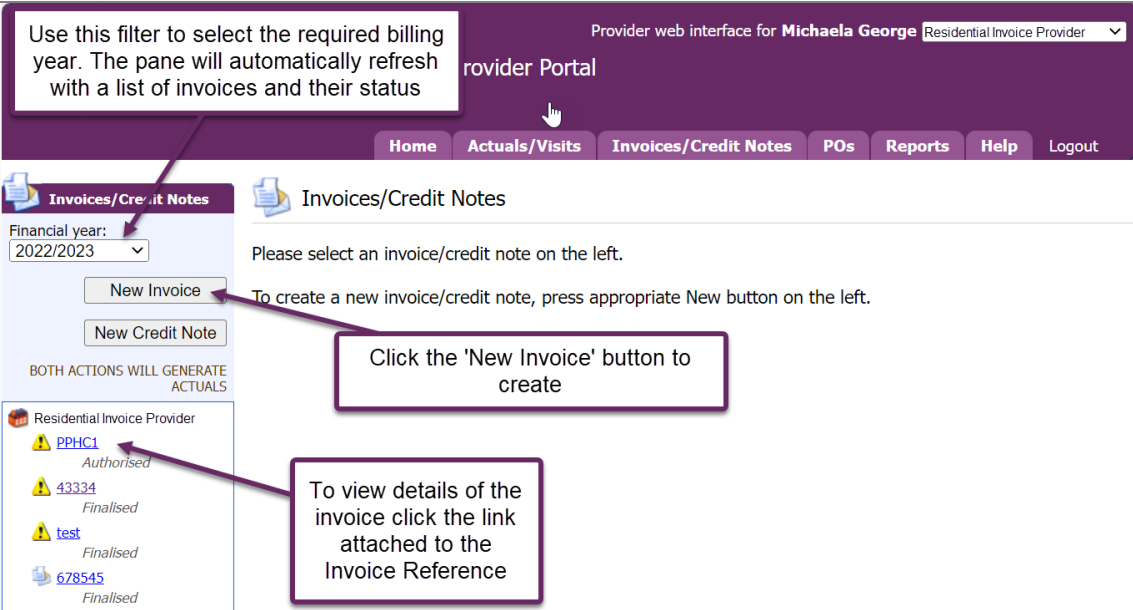
For applicable providers, when submitting your electronic invoices, please ensure to attach a supporting VAT invoice including the VAT registration number or Bedford Borough Council will not pay any VATable amounts.

1. From the Homepage click Invoice/Credit Notes.



[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.



Use this filter to select the required billing year. The pane will automatically refresh with a list of invoices and their status

Provider web interface for **Michaela George** Residential Invoice Provider

Provider Portal

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

Invoices/Credit Notes

Financial year: 2022/2023

New Invoice

New Credit Note

BOTH ACTIONS WILL GENERATE ACTUALS

Residential Invoice Provider

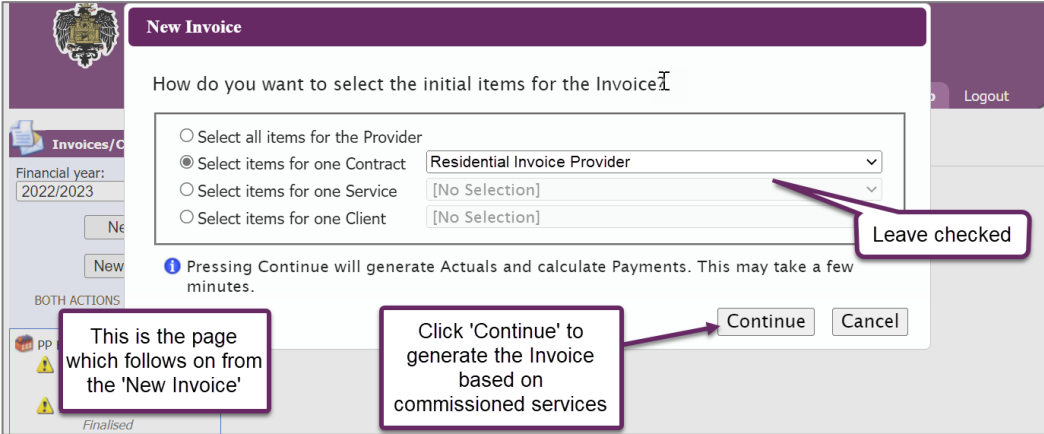
- PPHC1 Authorised
- 43334 Finalised
- test Finalised
- 678545 Finalised

Please select an invoice/credit note on the left.

To create a new invoice/credit note, press appropriate New button on the left.

Click the 'New Invoice' button to create

To view details of the invoice click the link attached to the Invoice Reference



New Invoice

How do you want to select the initial items for the Invoice?

Select all items for the Provider

Select items for one Contract Residential Invoice Provider

Select items for one Service [No Selection]

Select items for one Client [No Selection]

Pressing Continue will generate Actuals and calculate Payments. This may take a few minutes.

Continue Cancel

Leave checked

This is the page which follows on from the 'New Invoice'

Click 'Continue' to generate the Invoice based on commissioned services

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

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

New Invoice UNSUBMITTED

Reference: Enter the Invoice Reference

Date on Invoice:

Created: 30/08/2022

Invoice totals and items are based on Commissioned Services

	Excl VAT	VAT
Total: £	2535.24	0.00
Items Total: £	2535.24	0.00
Short by: £	0.00	0.00
Total Payable:	£ 2535.24	

Use the relevant buttons Create Cancel

Upload File: Choose File No file chosen Use to attach a supporting VAT invoice if applicable

Add?	Commitment	Value	VAT	Contribution	Contract	Period
<input checked="" type="checkbox"/>	Craig, Daniel (A5282147) - 2022/2023	£ 2535.24	£ 0.00	£ 0.00	Residential Invoice	22/08/2022 - 18/09/2022

All Items

i If items from contracts that do not allow invoice total editing are added to the invoice, entered invoice totals will be overwritten with item totals.

New Action

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

Invoice 123456 UNSUBMITTED

for Contract

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

Submit Invoice Delete Invoice

Reference:

Date on Invoice:

Created: 30/08/2022

	Excl VAT	VAT
Total: £	2535.24	0.00 i
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 Update Cancel

Upload File: Choose File No file chosen

Commitment	Value	VAT	Contribution	Contract	Period
Craig, Daniel (A5282147) - 2022/2023	£ 2535.24	£ 0.00	£ 0.00	Residential Invoice	22/08/2022 - 18/09/2022 Remove

An Action linked to the Invoice can be created New Action

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

 Invoice 123456

for Contract

PENDING

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	Total: £		2535.24	£	Excl VAT	VAT
VAT Number:		Items Total: £		2535.24	£		0.00
Date on Invoice:	30/08/2022	Short by: £		0.00	£		0.00
Created:	30/08/2022						
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	Residential Invoice	22/08/2022 - 18/09/2022

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.