Bedford Borough Council

Adults' ContrOCC Provider Portal Implementation

Provider Portal Navigation for Providers
SCHEDULED PAYMENTS

Contents

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.
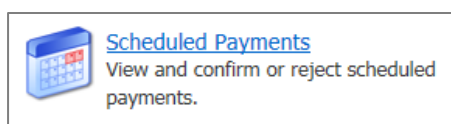
Scheduled Payments

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.
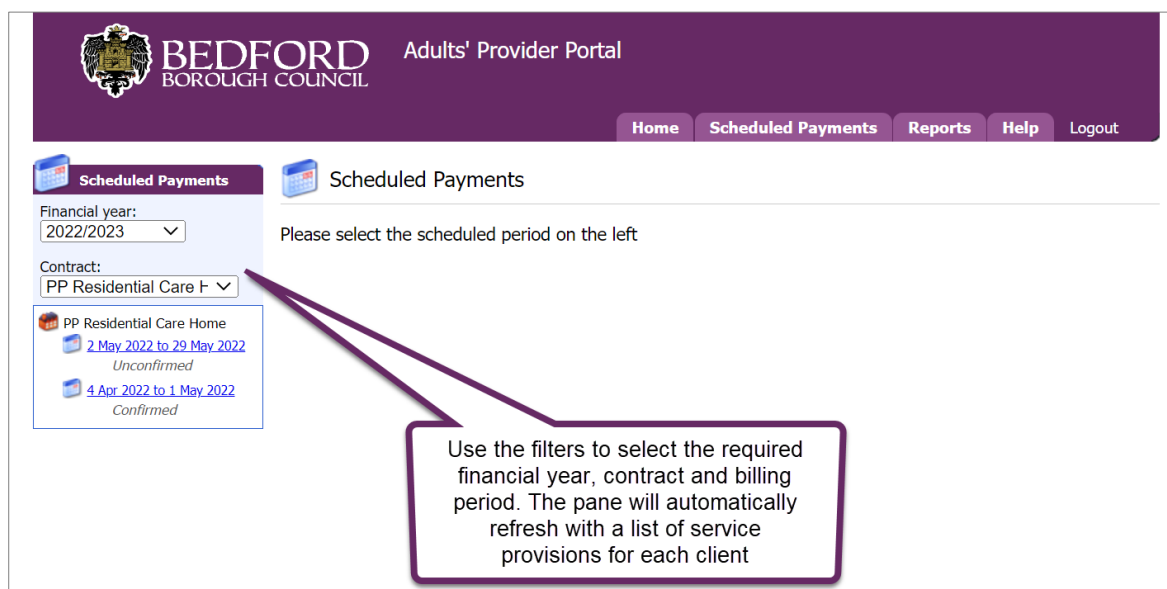
Directions of use

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.

Scheduled Payments

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Adults' Provider Portal

Home | Scheduled Payments | Reports | Help | Logout

Scheduled Payments

Please select the scheduled period on the left

Scheduled Payments

Financial year:
2022/2023

Contract:
PP Residential Care H

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

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

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Adults' Provider Portal

This provides a summary of the tabs below

Home | Scheduled Payments | Reports | Help | Logout

Scheduled Payments

Financial year:
2022/2023

Contract:
PP Residential Care H

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**
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

Payable | **Non-payable**

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 page will appear once this link is selected

Each scheduled payment is broken down into clients

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.

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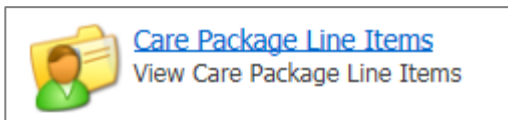
2. From here you can be notified of and view commissioned care. You can filter results by **Service**, **Client** or **Service Level** and click **View** to generate.

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

Entity:
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

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New Action

Type: 1. Placement - End Date
Related To: Client
Entity:
[Please Select]
Contract
Spot Commitment
Client
Service
Contact
Provider
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.
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.

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

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.

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 Serivces
	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 Serivces
	5. Service Variation
Assign to:	6. Respite
	7. Deceased Client

Actions and Change Requests

1. 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

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

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.

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

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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

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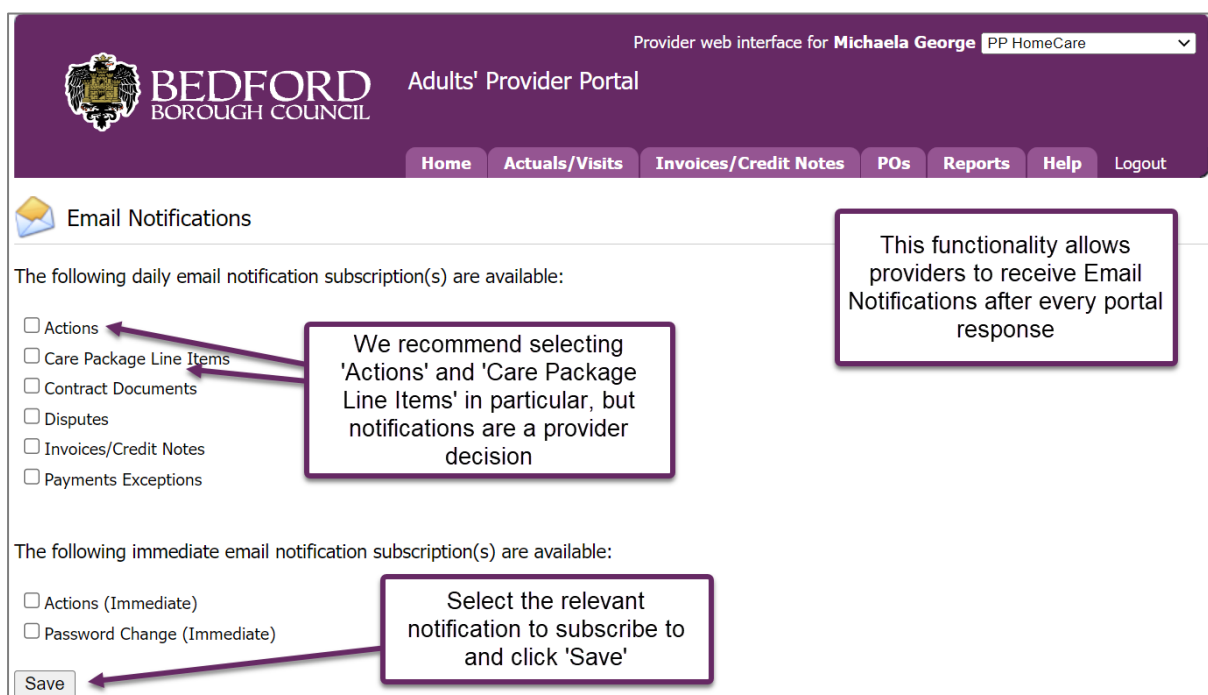
Email Notifications

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

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

Email Notifications
Subscribe and unsubscribe from email notifications
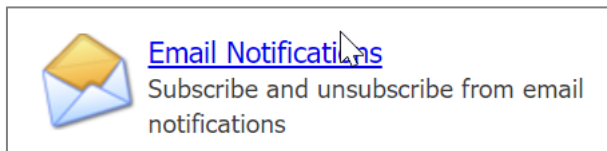
2. Select and **Save** subscriptions.

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 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.

Reports
View & print financial reports
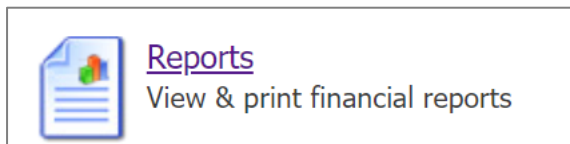
2. Here you can navigate to the relevant report by clicking on the blue hyperlink.

Reports

The following reports are currently available. Click to view.

Commissioned Vs Actuals

Pending Payments Exceptions

Pending Scheduled Payments

Remittance Advice Provider Payments
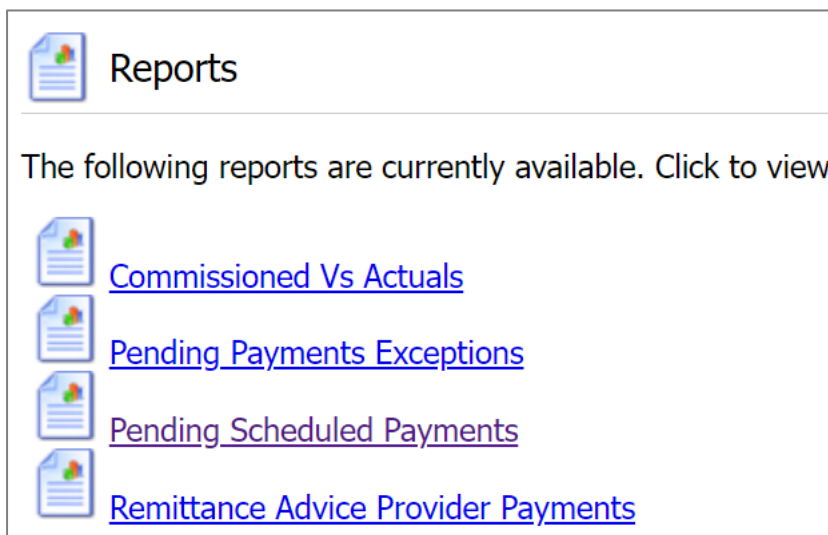
3. You can define the parameters of the Report by **Contract**, **Payment Method** or **Summary** and click **View** to generate.

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

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.
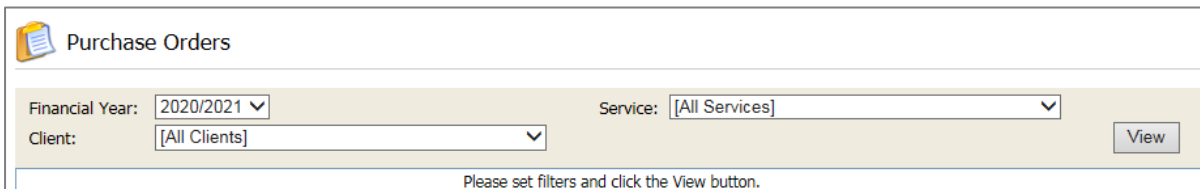
Directions of use

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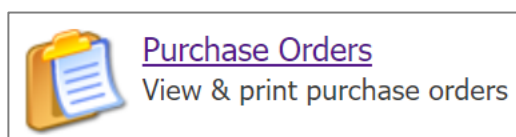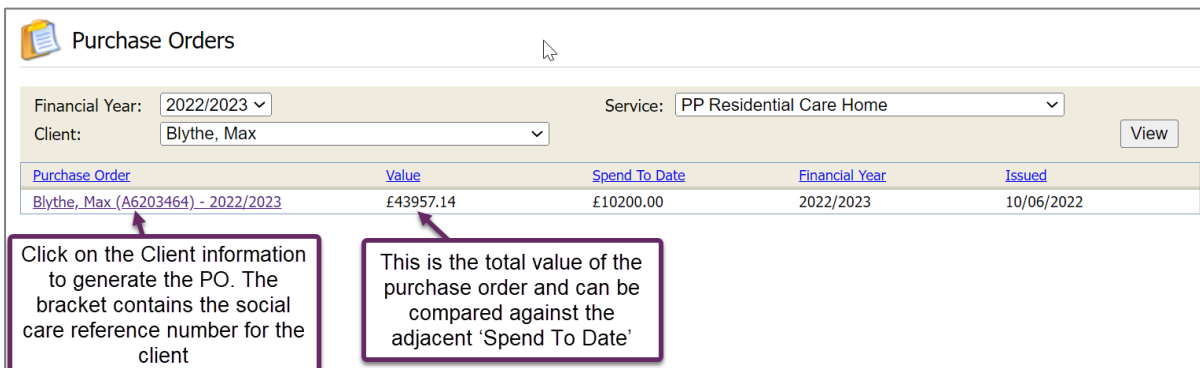
2. You can filter results by **Financial Year**, **Client** or **Service** and click **View** to generate.

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.

Invoiced Payments

Only providers receiving invoice-based payments need to refer to this section of the guide.
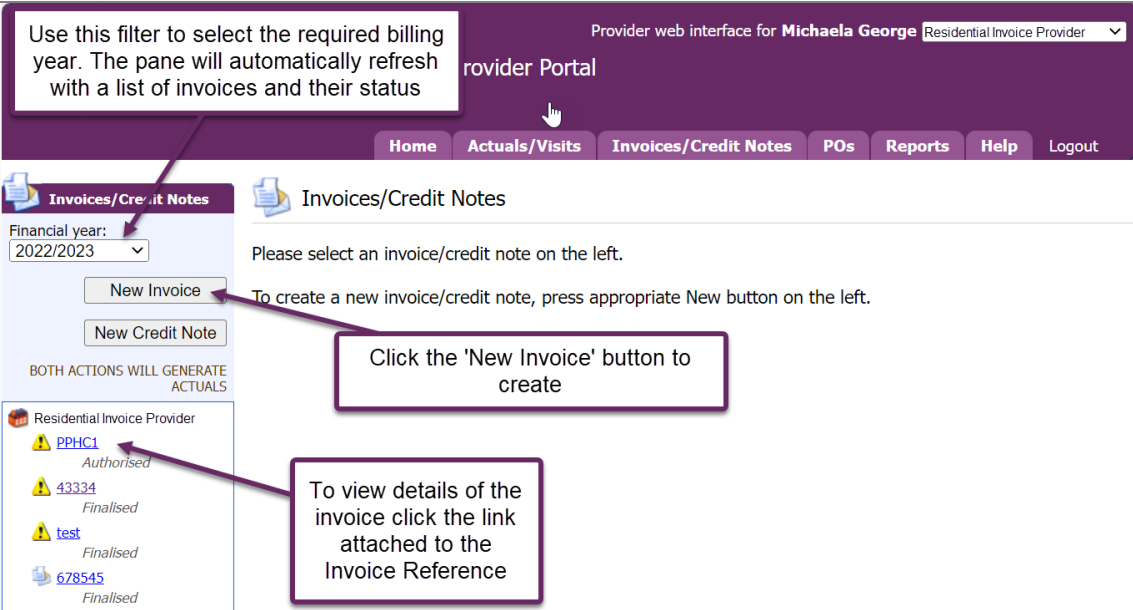
For applicable providers, when submitting your electronic invoices, please ensure to attach a supporting VAT invoice including the VAT registration number or Bedford Borough Council will not pay any VATable amounts.

1. From the Homepage click Invoice/Credit Notes.

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

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.

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.