



Provider Portal

User Guide

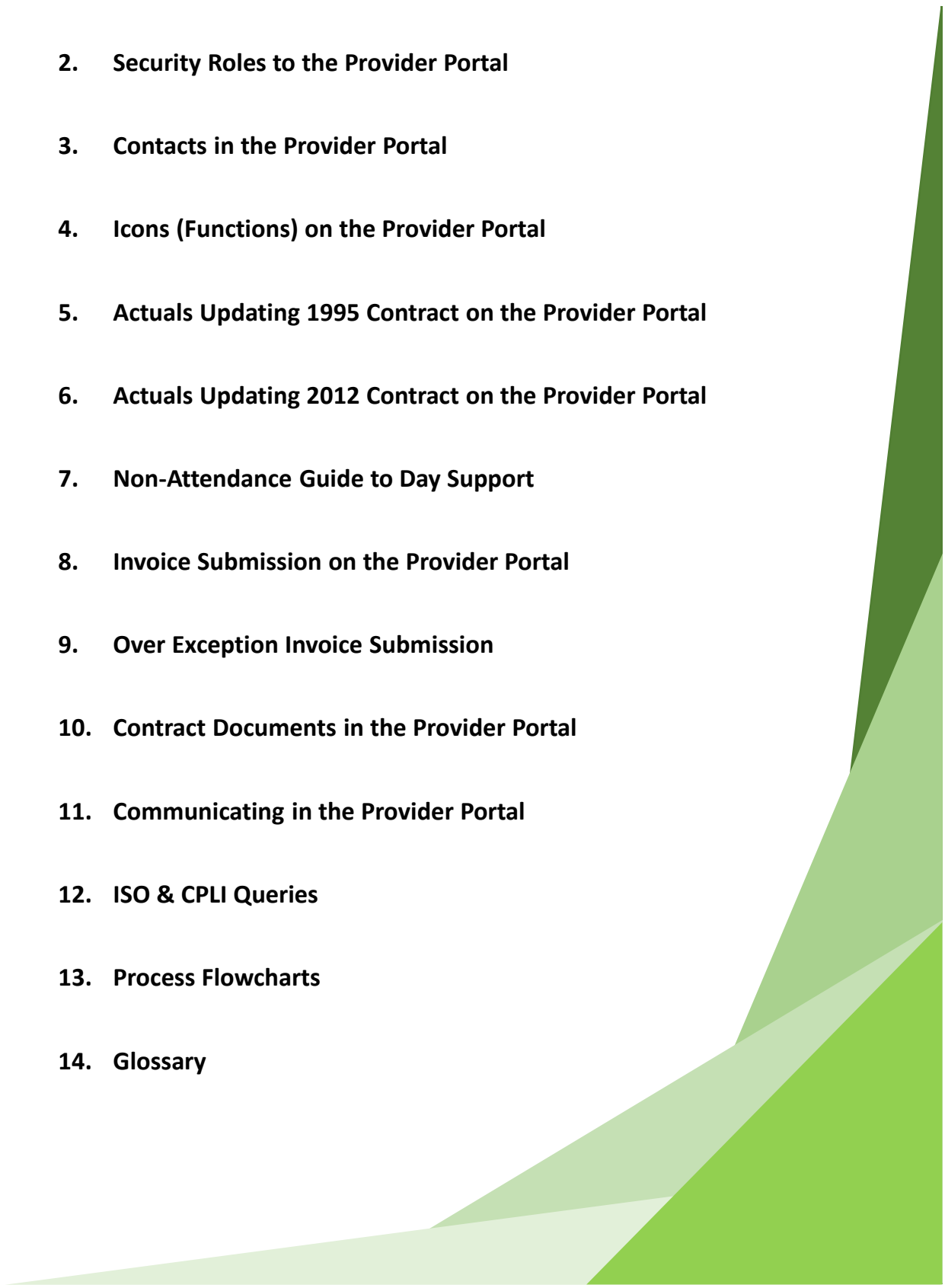
For

Day Opportunities

Providers



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1. Access to the Provider Portal

You will receive an email with the Provider Portal Website Address (URL) with your Username which will be your email address.

You will then receive a phone call from the Provider Portal Helpdesk with your Password.

Once you log in to the portal with your email address and NCC generated password, you will be prompted to change your password.

- Please use a strong password. Your Password must contain a minimum of 9 characters, a capital letter, at least one alphabetic character and two numeric value characters.
- You will then need to create a 6 digit numeric passcode as a second line of security. You are unable to use ascending numbers of more than three or descending numbers of more than three. Please do not use your birthday or easily guessed dates, make it secure.

Passwords protect your business – Never share your login IDs or passwords, never write them down.

Make it harder to guess – Reduce the level of risk by using random words. Don't use names and ages that make it easy to guess, think outside the box.

Act on suspicions – If you suspect that someone knows your password, change it immediately on all systems.

Never store on your system – Every time you are prompted to store a password reject it. If your initial login details are hacked it then becomes easier to access these systems.

If you enter an incorrect password 3 times you will be locked out of the portal and you will need to request your password to be reset.

Your password will expire after 12 months and you will need to choose a new password. The portal will prompt you to do this.

If you do not use the Portal for 60 days, your access will be suspended.

For Password and Security code resets you can either:

Telephone: 01603 495702 and select Option 1

Email: adults.providerportal@norfolk.gov.uk

Each Contact that is added to the system for Provider Portal Access has a Security role which is based on what functions (Icons) they can use in the Portal.

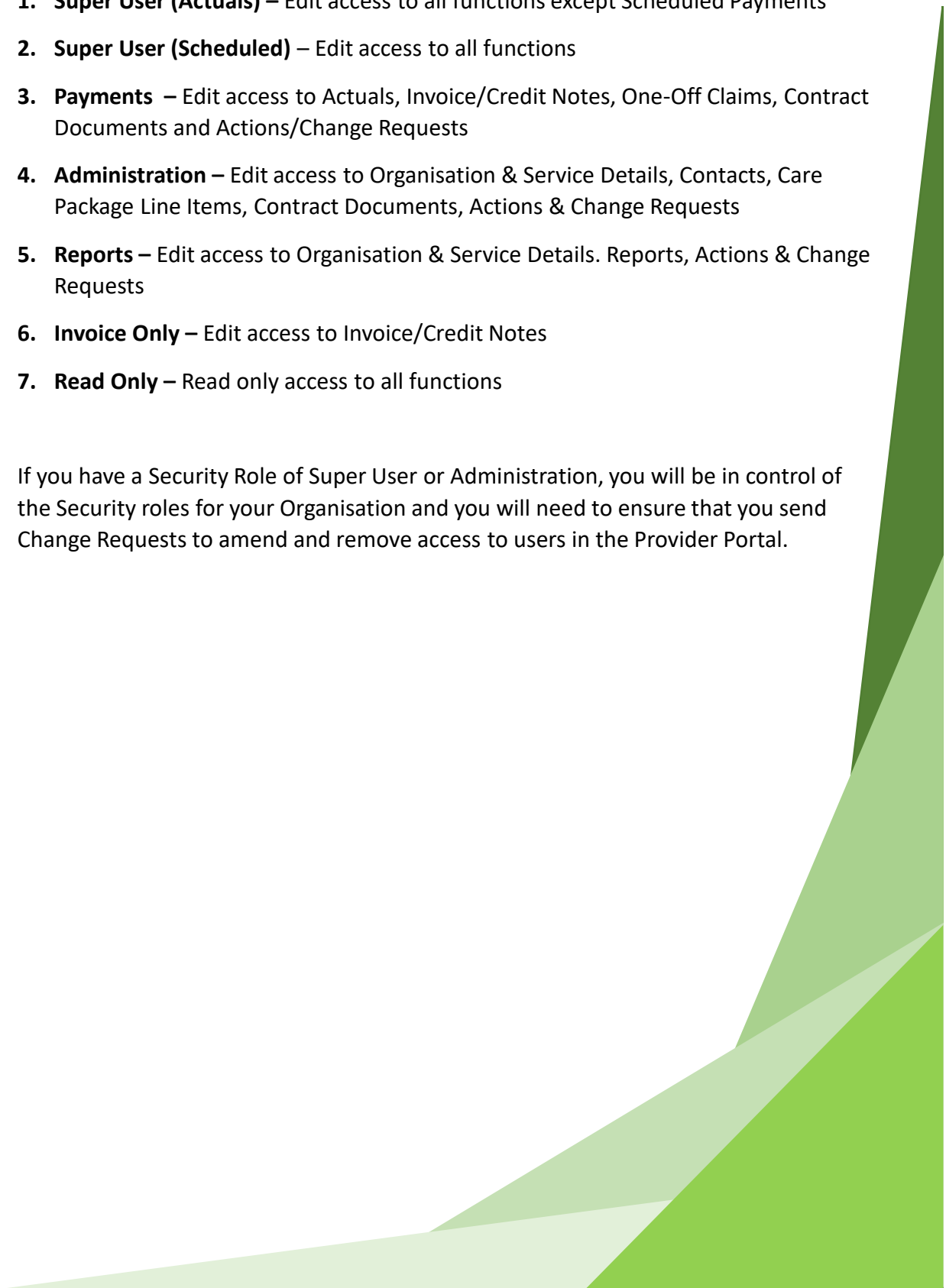


2. Security Roles to the Provider Portal

The Security Roles available to you in the Portal are:

1. **Super User (Actuals)** – Edit access to all functions except Scheduled Payments
2. **Super User (Scheduled)** – Edit access to all functions
3. **Payments** – Edit access to Actuals, Invoice/Credit Notes, One-Off Claims, Contract Documents and Actions/Change Requests
4. **Administration** – Edit access to Organisation & Service Details, Contacts, Care Package Line Items, Contract Documents, Actions & Change Requests
5. **Reports** – Edit access to Organisation & Service Details. Reports, Actions & Change Requests
6. **Invoice Only** – Edit access to Invoice/Credit Notes
7. **Read Only** – Read only access to all functions

If you have a Security Role of Super User or Administration, you will be in control of the Security roles for your Organisation and you will need to ensure that you send Change Requests to amend and remove access to users in the Provider Portal.




3. Contacts in the Provider Portal

Adding / Amending / Removing Contacts


The Security Roles of Super User and Administration will allow you to Add, Amend and Remove Contacts for your Organisation.

When adding a new Contact you will need to provide:

Name Address Telephone Numbers Email address Security Role

 Oasis Care and Support - Contact Creation Request

Title	<input type="text" value="Mr"/>
Forename	<input type="text" value="John"/>
Surname	<input type="text" value="Smith"/>
Address 1	<input type="text" value="1 Oasis Street"/>
Address 2	<input type="text"/>
Address 3	<input type="text"/>
Town	<input type="text" value="Ipswich"/>
County	<input type="text"/>
Postcode	<input type="text" value="IP1 2TN"/>
Country	<input type="text"/>
UPRN	<input type="text" value="1"/>
USRN	<input type="text"/>
Mobile	<input type="text" value="07726 022369"/>
Telephone	<input type="text" value="01473 225566"/>
Fax	<input type="text"/>
Email	<input type="text" value="jsmith@testsystem.co.uk"/>
Provider Portal Email Address	<input type="text" value="jsmith@testsystem.co.uk"/>

Roles	
For	Role
 Organisation: Oasis Care and Support	Finance Assistant
<input type="button" value="Submit Contact Creation Request"/>	

Please put the email address in both the *Email* and *Provider Portal Email Address* fields.

Please use the **UPRN** or **USRN** field to select what Security Role you wish to allocate the Contact. Please see **Section 2** for Profiles and the number associated with Profile required.

Once a Contact is listed to your Organisation you can update any details that change by using the Edit function.

If an Employee leaves the Organisation or does not require access to the Portal you need to select the "Removal Role" function. It is the Providers responsibility to request the removal of employees. The Provider Portal Helpline staff will remove the Contacts access from the Provider Portal from the Change Request received once the Role Removal button has been pressed.

4. Icons (Functions) on the Provider Portal

1. Contract Documents (ISO's)

The ability to view and manage ISO's. There is a function to download into a PDF document and ability to Accept and Reject authorisation.

2. Care Package Line Items (Service Agreements)

The ability to view all Care Package Line Items and download into an Excel Spreadsheet displaying cost and breakdown of care.

3. Contacts

The ability to add/amend/remove employees to use various functions of the Portal for information and payment.

4. Organisation & Service Details

The ability to manage contact information like address, phone and email details for your organisation and Services.

5. Actuals

- a) The ability to manually Upload Actuals to a Service Users Care Package Line Item on a weekly basis via the Calendar screen.
- b) The ability to Download Actuals on a 4-weekly basis for all services into an Excel spreadsheet to manually update the actuals.
- c) The ability to Upload Actuals after you have downloaded the file from the Portal or the ability to upload actuals straight from your own systems.

6. Invoice & Credit Notes

The ability to create and submit an Invoice/Credit Note for payment electronically after uploading actuals.

7. Reports

The ability to view and download a detailed Remittance Advice for services provided after the payment has been processed.

8. Actions and Change Requests


The ability to communicate with various Norfolk County Council teams regarding payments, care documentation and Procurement Contracts.

5. Actuals Updating 1995 Contract on the Provider Portal

The system will generate an Actual for each Care Package Line Item on a 4-weekly basis. The Actual is the Commissioned/Planned Service that is on the ISO.

You will need to update the Actual if the Service User has had more or less sessions/hours of care for a particular week. There are two ways in which you can update Actuals.

Firstly you can change an Actual in the Calendar Screen by selecting Actuals Icon in the Main Menu and using the Calendar to find the week to update.

 Actuals for Oasis Day Support


Week Beginning 09 April

Service Level: [All Service Levels] Client: [All Clients]
 Show Clients with Actuals: [No Selection] Actuals: Unplanned Planned Intermittent Locked
 View Reset

Actual	Service Level	PI	Frstd	Msd	Xtr	Vst	Total Cost	Comments
Mrs Faye Ford 100013503 £250.00 of £250.00								
5 x Sessions	Day Opportunities (Sessional Charge) Contract Rate	5	0	0	0	5	£250.00 = 5 (Actual + Frstd) Sessions x £50.00	Add/Edit
Mr George Gilmore 100013504 £200.00 of £200.00								
4 x Sessions	Day Opportunities (Sessional Charge) Contract Rate	4	0	0	0	4	£200.00 = 4 (Actual + Frstd) Sessions x £50.00	Add/Edit
Miss Hannah Hill 100013505 £150.00 of £150.00								
3 x Sessions	Day Opportunities (Sessional Charge) Contract Rate	3	0	0	0	3	£150.00 = 3 (Actual + Frstd) Sessions x £50.00	Add/Edit
Mr Idris Ink 100013506 £100.00 of £100.00								
2 x Sessions	Day Opportunities (Sessional Charge) Contract Rate	2	0	0	0	2	£100.00 = 2 (Actual + Frstd) Sessions x £50.00	Add/Edit
Mrs Jemima Jones 100013507 £375.00 of £375.00								
5 x Sessions	Day Opportunities (Sessional Charge) Full day: Standard	5	0	0	0	5	£375.00 = 5 (Actual + Frstd) Sessions x £75.00	Add/Edit
		Total: £1,075.00 of £1,075.00						

Pages: 1 [Generate Actuals](#)

By pressing the *Add/Edit* button on the Service Users CPLI line, you will drill down into the CPLI to be able to edit.

 Edit Actuals for Oasis Day Support, Mrs Jemima Jones (100013507)

Week Beginning 09 Apr 2018

Actual	Service Level	PI	Frstd	Msd	Xtr	Vst	Total Cost	Comments
<input type="text" value="5"/> x Sessions	Day Opportunities (Sessional Charge) Full day: Standard	5	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="5"/>	£375.00 = 5 (Actual + Frstd) Sessions x £75.00	<input type="text"/>

Add Actual: Unplanned [No selection] [Add](#)

Week Total: £375.00 [Save](#) [Undo](#) [Back](#)

You need to change the Actual to the amount of Sessions/Hours (decimal) the Service User has received for that particular week. Please do not use the Missed, Extra or Visits boxes, they are not required. If the Actual for the week is '0' please leave a comment as to why there was no service delivered for that week.

Secondly, you can download Actuals into an Excel Spreadsheet “CSV” format and amend in bulk by pressing the *Actuals Bulk Export* Link. Select the 4-week period you want to update and press Export.

A	B	C	D	E	F	G	H	I	J	K	L	M	N
Service	ServiceLevel	Name	SSRef	Date	Weekly Planned Quantity	Weekly Actual Quantity	Weekly Frustrated Quantity	Weekly Missed Quantity	Weekly Extra Quantity	Weekly Number Of Visits	Comments	Care Package Ref	Care Package Line Item ID
1													
2	OASISDC Day Opportunities (Sessional Charge) Contract Rate	Ford Faye	100013503	20180409	5			0	0	0		AP100013503	128830
3	OASISDC Day Opportunities (Sessional Charge) Contract Rate	Ford Faye	100013503	20180416	5			0	0	0		AP100013503	128830
4	OASISDC Day Opportunities (Sessional Charge) Contract Rate	Ford Faye	100013503	20180423	5			0	0	0		AP100013503	128830
5	OASISDC Day Opportunities (Sessional Charge) Contract Rate	Ford Faye	100013503	20180430	5			0	0	0		AP100013503	128830
6	OASISDC Day Opportunities (Sessional Charge) Contract Rate	Gilmore George	100013504	20180409	4			0	0	0		AP100013504	128831
7	OASISDC Day Opportunities (Sessional Charge) Contract Rate	Gilmore George	100013504	20180416	4			0	0	0		AP100013504	128831
8	OASISDC Day Opportunities (Sessional Charge) Contract Rate	Gilmore George	100013504	20180423	4			0	0	0		AP100013504	128831
9	OASISDC Day Opportunities (Sessional Charge) Contract Rate	Gilmore George	100013504	20180430	4			0	0	0		AP100013504	128831
10	OASISDC Day Opportunities (Sessional Charge) Contract Rate	Hill Hannah	100013505	20180409	3			0	0	0		AP100013505	128832
11	OASISDC Day Opportunities (Sessional Charge) Contract Rate	Hill Hannah	100013505	20180416	3			0	0	0		AP100013505	128832
12	OASISDC Day Opportunities (Sessional Charge) Contract Rate	Hill Hannah	100013505	20180423	3			0	0	0		AP100013505	128832
13	OASISDC Day Opportunities (Sessional Charge) Contract Rate	Ink Idris	100013506	20180409	2			0	0	0		AP100013506	128833
14	OASISDC Day Opportunities (Sessional Charge) Contract Rate	Ink Idris	100013506	20180416	2			0	0	0		AP100013506	128833
15	OASISDC Day Opportunities (Sessional Charge) Contract Rate	Ink Idris	100013506	20180423	2			0	0	0		AP100013506	128833
16	OASISDC Day Opportunities (Sessional Charge) Contract Rate	Ink Idris	100013506	20180430	2			0	0	0		AP100013506	128833
17	OASISDC Day Opportunities (Sessional Charge) Full day: Standard	Jones Jemima	100013507	20180409	5			0	0	0		AP100013507	128834
18	OASISDC Day Opportunities (Sessional Charge) Full day: Standard	Jones Jemima	100013507	20180416	5			0	0	0		AP100013507	128834
19	OASISDC Day Opportunities (Sessional Charge) Full day: Standard	Jones Jemima	100013507	20180423	5			0	0	0		AP100013507	128834
20	OASISDC Day Opportunities (Sessional Charge) Full day: Standard	Jones Jemima	100013507	20180430	5			0	0	0		AP100013507	128834
21													

You need to enter the amount of Sessions/Hours the Service User has received for that particular week in the Actual column. Please do not use the Extra, Missed or Visits columns, they are not required.

A	B	C	D	E	F	G	H	I	J	K	L	M	N
Service	ServiceLevel	Name	SSRef	Date	Weekly Planned Quantity	Weekly Actual Quantity	Weekly Frustrated Quantity	Weekly Missed Quantity	Weekly Extra Quantity	Weekly Number Of Visits	Comments	Care Package Ref	Care Package Line Item ID
1													
2	OASISDC Day Opportunities (Sessional Charge) Contract Rate	Ford Faye	100013503	20180409	5	4		0	0	0		AP100013503	128830
3	OASISDC Day Opportunities (Sessional Charge) Contract Rate	Ford Faye	100013503	20180416	5	5		0	0	0		AP100013503	128830
4	OASISDC Day Opportunities (Sessional Charge) Contract Rate	Ford Faye	100013503	20180423	5	5		0	0	0		AP100013503	128830
5	OASISDC Day Opportunities (Sessional Charge) Contract Rate	Ford Faye	100013503	20180430	5	5		0	0	0		AP100013503	128830
6	OASISDC Day Opportunities (Sessional Charge) Contract Rate	Gilmore George	100013504	20180409	4	3		0	0	0		AP100013504	128831
7	OASISDC Day Opportunities (Sessional Charge) Contract Rate	Gilmore George	100013504	20180416	4	4		0	0	0		AP100013504	128831
8	OASISDC Day Opportunities (Sessional Charge) Contract Rate	Gilmore George	100013504	20180423	4	4		0	0	0		AP100013504	128831
9	OASISDC Day Opportunities (Sessional Charge) Contract Rate	Gilmore George	100013504	20180430	4	4		0	0	0		AP100013504	128831
10	OASISDC Day Opportunities (Sessional Charge) Contract Rate	Hill Hannah	100013505	20180409	3	3		0	0	0		AP100013505	128832
11	OASISDC Day Opportunities (Sessional Charge) Contract Rate	Hill Hannah	100013505	20180416	3	3		0	0	0		AP100013505	128832
12	OASISDC Day Opportunities (Sessional Charge) Contract Rate	Hill Hannah	100013505	20180423	3	3		0	0	0		AP100013505	128832
13	OASISDC Day Opportunities (Sessional Charge) Contract Rate	Ink Idris	100013506	20180409	2	2		0	0	0		AP100013506	128833
14	OASISDC Day Opportunities (Sessional Charge) Contract Rate	Ink Idris	100013506	20180416	2	2		0	0	0		AP100013506	128833
15	OASISDC Day Opportunities (Sessional Charge) Contract Rate	Ink Idris	100013506	20180423	2	2		0	0	0		AP100013506	128833
16	OASISDC Day Opportunities (Sessional Charge) Contract Rate	Ink Idris	100013506	20180430	2	0		0	0	0	On Holiday	AP100013506	128833
17	OASISDC Day Opportunities (Sessional Charge) Full day: Standard	Jones Jemima	100013507	20180409	5	3		0	0	0		AP100013507	128834
18	OASISDC Day Opportunities (Sessional Charge) Full day: Standard	Jones Jemima	100013507	20180416	5	5		0	0	0		AP100013507	128834
19	OASISDC Day Opportunities (Sessional Charge) Full day: Standard	Jones Jemima	100013507	20180423	5	5		0	0	0		AP100013507	128834
20	OASISDC Day Opportunities (Sessional Charge) Full day: Standard	Jones Jemima	100013507	20180430	5	5		0	0	0		AP100013507	128834
21													


If the Actual for the week is ‘0’ please can you leave a comment to why there was no service delivered for that week.

6. Actuals Updating for 2012 Contract on the Provider Portal

The system will generate an Actual for each Care Package Line Item on a 4-weekly basis. The Actual is the Commissioned/Planned Service that is on the ISO.

You will need to update the Actual if the Service User has had more or less sessions/hours of care for a particular week. There are two ways in which you can update Actuals.

Firstly you can change an Actual in the Calendar Screen by selecting Actuals Icon in the Main Menu and using the Calendar to find the week to update.

 Actuals for Oasis Day Support


Week Beginning 09 April

Service Level: [All Service Levels] Client: [All Clients]
 Show Clients with Actuals: [No Selection] Actuals: Unplanned Planned Intermittent Locked
 [View] [Reset]

Actual	Service Level	Pl	Frstd	Msd	Xtr	Vst	Total Cost	Comments
Mrs Faye Ford 100013503 Add/Edit								
5 x Sessions	Day Opportunities (Sessional Charge) Contract Rate	5	0	0	0	5	£250.00 = 5 (Actual + Frstd) Sessions x £50.00	
Mr George Gilmore 100013504 Add/Edit								
4 x Sessions	Day Opportunities (Sessional Charge) Contract Rate	4	0	0	0	4	£200.00 = 4 (Actual + Frstd) Sessions x £50.00	
Miss Hannah Hill 100013505 Add/Edit								
3 x Sessions	Day Opportunities (Sessional Charge) Contract Rate	3	0	0	0	3	£150.00 = 3 (Actual + Frstd) Sessions x £50.00	
Mr Idris Ink 100013506 Add/Edit								
2 x Sessions	Day Opportunities (Sessional Charge) Contract Rate	2	0	0	0	2	£100.00 = 2 (Actual + Frstd) Sessions x £50.00	
Mrs Jemima Jones 100013507 Add/Edit								
5 x Sessions	Day Opportunities (Sessional Charge) Full day: Standard	5	0	0	0	5	£375.00 = 5 (Actual + Frstd) Sessions x £75.00	
		Total: £1,075.00 of £1,075.00						

Pages: 1 [Generate Actuals]

By pressing the *Add/Edit* button on the Service Users CPLI line, you will drill down into the CPLI to be able to edit.

 Edit Actuals for Oasis Day Support, Mrs Jemima Jones (100013507)

Week Beginning 09 Apr 2018

Actual	Service Level	Pl	Frstd	Msd	Xtr	Vst	Total Cost	Comments
<input type="text" value="4"/> Sessions	Day Opportunities (Sessional Charge) Full day: Standard	5	<input type="text" value="1"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="5"/>	£375.00 = 5 (Actual + Frstd) Sessions x £75.00	Did not attend on Wed

Add Actual: Unplanned [No selection] [Add]

Week Total: £375.00 [Save] [Undo] [Back]

You need to change the Actual to the amount of Sessions / Hours (decimal) the Service User has received for that particular week. Please do not use the Missed, Extra or Visits boxes, they are not required. The 2012 Day Opportunities contract allows the Provider to claim for Non-Attendance of Sessions / Hours. You will need to reduce the Actual and put a value in the Frustrated Box to claim for Non-Attendance. The above example demonstrates that the Service User has 5 sessions a week but did

not attend on a Wednesday. The Actual box is reduced to “4” sessions and “1” session is placed in the Frustrated Box. A comment is entered detailing the frustrated session when entering data into the Frustrated Box.

The sum of the Actual and Frustrated values is what you will be paid for that Service User for that week.

Secondly, you can download Actuals into an Excel Spreadsheet “CSV” format and amend in bulk by pressing the *Actuals Bulk Export* Link. Select the 4-week period you want to update and press Export.

A	B	C	D	E	F	G	H	I	J	K	L	M	N
Service	ServiceLevel	Name	SSRef	Date	Weekly Planned Quantity	Weekly Actual Quantity	Weekly Frustrated Quantity	Weekly Missed Quantity	Weekly Extra Quantity	Weekly Number Of Visits	Comments	Care Package Ref	Care Package Line Item ID
1													
2	OASISDC	Day Opportunities (Sessional Charge) Contract Rate	Ford Faye	100013503	20180409	5		0	0	0		API00013503	128830
3	OASISDC	Day Opportunities (Sessional Charge) Contract Rate	Ford Faye	100013503	20180416	5		0	0	0		API00013503	128830
4	OASISDC	Day Opportunities (Sessional Charge) Contract Rate	Ford Faye	100013503	20180423	5		0	0	0		API00013503	128830
5	OASISDC	Day Opportunities (Sessional Charge) Contract Rate	Ford Faye	100013503	20180430	5		0	0	0		API00013503	128830
6	OASISDC	Day Opportunities (Sessional Charge) Contract Rate	Gilmore George	100013504	20180409	4		0	0	0		API00013504	128831
7	OASISDC	Day Opportunities (Sessional Charge) Contract Rate	Gilmore George	100013504	20180416	4		0	0	0		API00013504	128831
8	OASISDC	Day Opportunities (Sessional Charge) Contract Rate	Gilmore George	100013504	20180423	4		0	0	0		API00013504	128831
9	OASISDC	Day Opportunities (Sessional Charge) Contract Rate	Gilmore George	100013504	20180430	4		0	0	0		API00013504	128831
10	OASISDC	Day Opportunities (Sessional Charge) Contract Rate	Hill Hannah	100013505	20180409	3		0	0	0		API00013505	128832
11	OASISDC	Day Opportunities (Sessional Charge) Contract Rate	Hill Hannah	100013505	20180416	3		0	0	0		API00013505	128832
12	OASISDC	Day Opportunities (Sessional Charge) Contract Rate	Hill Hannah	100013505	20180423	3		0	0	0		API00013505	128832
13	OASISDC	Day Opportunities (Sessional Charge) Contract Rate	Ink Idris	100013506	20180409	2		0	0	0		API00013506	128833
14	OASISDC	Day Opportunities (Sessional Charge) Contract Rate	Ink Idris	100013506	20180416	2		0	0	0		API00013506	128833
15	OASISDC	Day Opportunities (Sessional Charge) Contract Rate	Ink Idris	100013506	20180423	2		0	0	0		API00013506	128833
16	OASISDC	Day Opportunities (Sessional Charge) Contract Rate	Ink Idris	100013506	20180430	2		0	0	0		API00013506	128833
17	OASISDC	Day Opportunities (Sessional Charge) Full day: Standard	Jones Jemima	100013507	20180409	5		0	0	0		API00013507	128834
18	OASISDC	Day Opportunities (Sessional Charge) Full day: Standard	Jones Jemima	100013507	20180416	5		0	0	0		API00013507	128834
19	OASISDC	Day Opportunities (Sessional Charge) Full day: Standard	Jones Jemima	100013507	20180423	5		0	0	0		API00013507	128834
20	OASISDC	Day Opportunities (Sessional Charge) Full day: Standard	Jones Jemima	100013507	20180430	5		0	0	0		API00013507	128834
21													

You need to enter the amount of Sessions/Hours the Service User has received for that particular week in the Actual column. Please do not use the Extra, Missed or Visits columns, they are not required.

A	B	C	D	E	F	G	H	I	J	K	L	M	N	
Service	ServiceLevel	Name	SSRef	Date	Weekly Planned Quantity	Weekly Actual Quantity	Weekly Frustrated Quantity	Weekly Missed Quantity	Weekly Extra Quantity	Weekly Number Of Visits	Comments	Care Package Ref	Care Package Line Item ID	
1														
2	OASISDC	Day Opportunities (Sessional Charge) Contract Rate	Ford Faye	100013503	20180409	5	4	1	0	0	5	Did not attend on Tue	API00013503	128830
3	OASISDC	Day Opportunities (Sessional Charge) Contract Rate	Ford Faye	100013503	20180416	5	5	0	0	0	5		API00013503	128830
4	OASISDC	Day Opportunities (Sessional Charge) Contract Rate	Ford Faye	100013503	20180423	5	5	0	0	0	5		API00013503	128830
5	OASISDC	Day Opportunities (Sessional Charge) Contract Rate	Ford Faye	100013503	20180430	5	5	0	0	0	5		API00013503	128830
6	OASISDC	Day Opportunities (Sessional Charge) Contract Rate	Gilmore George	100013504	20180409	4	3	1	0	0	4	Did not attend on Mon	API00013504	128831
7	OASISDC	Day Opportunities (Sessional Charge) Contract Rate	Gilmore George	100013504	20180416	4	4	0	0	0	4		API00013504	128831
8	OASISDC	Day Opportunities (Sessional Charge) Contract Rate	Gilmore George	100013504	20180423	4	4	0	0	0	4		API00013504	128831
9	OASISDC	Day Opportunities (Sessional Charge) Contract Rate	Gilmore George	100013504	20180430	4	4	0	0	0	4		API00013504	128831
10	OASISDC	Day Opportunities (Sessional Charge) Contract Rate	Hill Hannah	100013505	20180409	3	3	0	0	0	3		API00013505	128832
11	OASISDC	Day Opportunities (Sessional Charge) Contract Rate	Hill Hannah	100013505	20180416	3	3	0	0	0	3		API00013505	128832
12	OASISDC	Day Opportunities (Sessional Charge) Contract Rate	Hill Hannah	100013505	20180423	3	3	0	0	0	3		API00013505	128832
13	OASISDC	Day Opportunities (Sessional Charge) Contract Rate	Ink Idris	100013506	20180409	2	2	0	0	0	2		API00013506	128833
14	OASISDC	Day Opportunities (Sessional Charge) Contract Rate	Ink Idris	100013506	20180416	2	2	0	0	0	2		API00013506	128833
15	OASISDC	Day Opportunities (Sessional Charge) Contract Rate	Ink Idris	100013506	20180423	2	2	0	0	0	2		API00013506	128833
16	OASISDC	Day Opportunities (Sessional Charge) Contract Rate	Ink Idris	100013506	20180430	2	0	2	0	0	2	On Holiday	API00013506	128833
17	OASISDC	Day Opportunities (Sessional Charge) Full day: Standard	Jones Jemima	100013507	20180409	5	3	2	0	0	5	Did not attend Mon & Tue	API00013507	128834
18	OASISDC	Day Opportunities (Sessional Charge) Full day: Standard	Jones Jemima	100013507	20180416	5	5	0	0	0	5		API00013507	128834
19	OASISDC	Day Opportunities (Sessional Charge) Full day: Standard	Jones Jemima	100013507	20180423	5	5	0	0	0	5		API00013507	128834
20	OASISDC	Day Opportunities (Sessional Charge) Full day: Standard	Jones Jemima	100013507	20180430	5	5	0	0	0	5		API00013507	128834
21														

The 2012 Day Opportunities contract allows the Provider to claim for Non-Attendance of Sessions / Hours. You will need to reduce the Actual and put a value in the Frustrated Box to claim for Non-Attendance. The above example demonstrates that the Service User has 5 sessions a week but did not attend on a Wednesday. The Actual box is reduced to “4” sessions and “1” session is placed in the Frustrated Box. A comment is entered detailing the frustrated session when entering data into the Frustrated Box.

The sum of the Actual and Frustrated values is what you will be paid for that Service User for that week.



7. Non-Attendance Guide

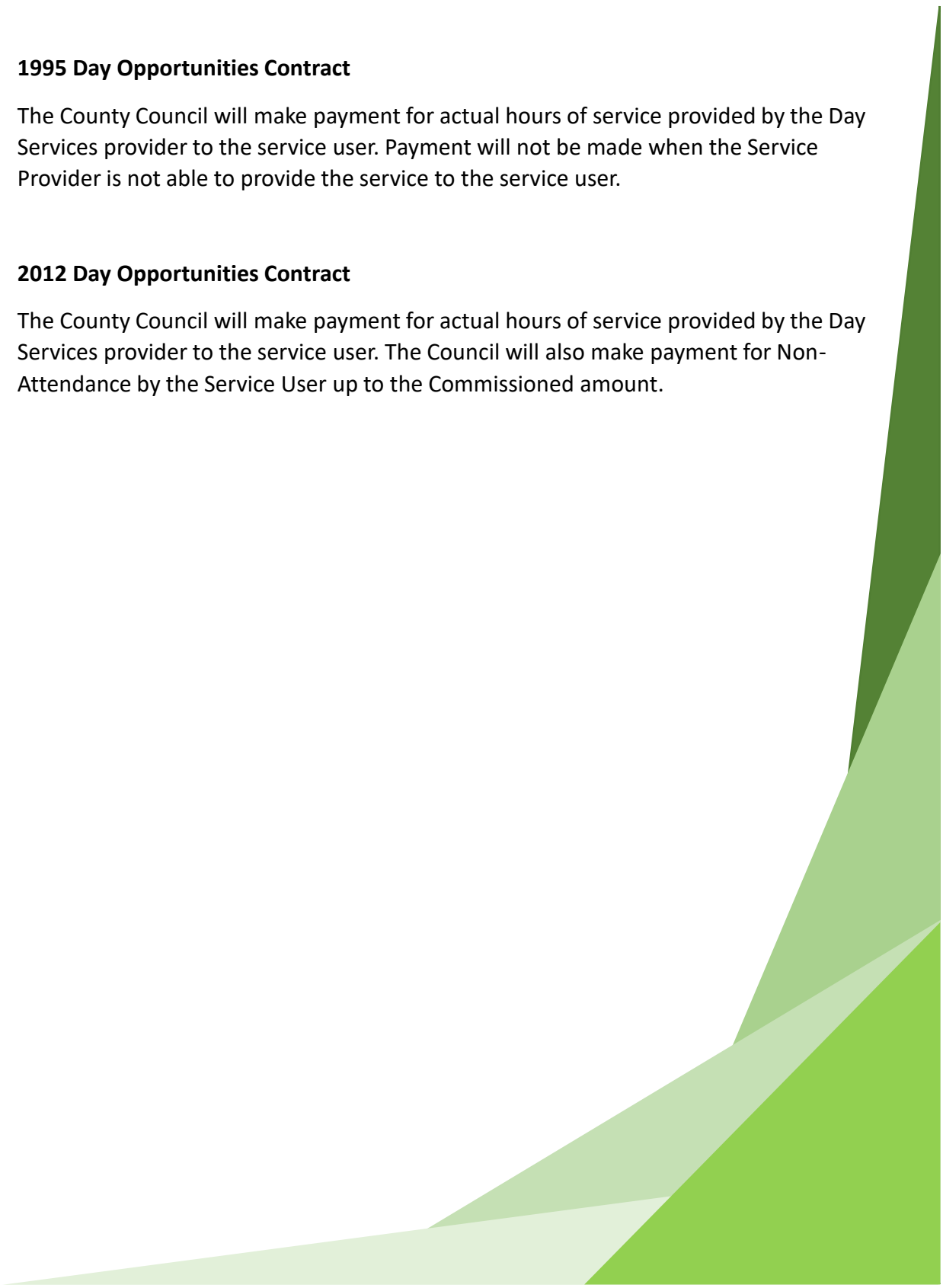
Below is an explanation of the different contracts and how you should apply Non-Attendance to the Provider Portal when updating the Actuals for Service delivered.

1995 Day Opportunities Contract

The County Council will make payment for actual hours of service provided by the Day Services provider to the service user. Payment will not be made when the Service Provider is not able to provide the service to the service user.

2012 Day Opportunities Contract

The County Council will make payment for actual hours of service provided by the Day Services provider to the service user. The Council will also make payment for Non-Attendance by the Service User up to the Commissioned amount.



8. Invoice Submission on the Provider Portal

Once you have updated the Actuals for a four week period you can use the Invoice creation wizard to create an invoice for the 4 week period you have just updated the Actuals for. You will need to create the Invoice at Service Level.

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 [No Selection] ▼

Select items for one Service Oasis Day Support ▼

Select items for one Client [No Selection] ▼

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

Continue
Cancel

The Portal will calculate all available CPLI's to include in the invoice and create a pre-invoice template. You will need to enter an Invoice Number in the Reference Field and give the pre-invoice template a date. You have the ability to untick any CPLI's you do not wish to be included in the Invoice. By pressing the *Create* button the Portal will produce an electronic Invoice.



Invoice Oasis 02

UNSUBMITTED

for Service Oasis Day Support

Submit Invoice
Delete Invoice

Reference:	Oasis 02		Excl VAT	VAT	
Date on Invoice:	01 / 10 / 2018	Total: £	4,150.00	£	0.00 i
Created:	08/10/2018	Items Total: £	4,150.00	£	0.00
		Short by: £	0.00	£	0.00
Total Payable:			£	4,150.00	

Update
Cancel

Commitment	Value	VAT	Contribution	Contract	Period	Browse...
Ford, Faye (100013503) - 2018/2019	£ 1,000.00	£	0.00	£ 0.00	BAN987654 09/04/2018 - 06/05/2018	Remove
Gilmore, George (100013504) - 2018/2019	£ 800.00	£	0.00	£ 0.00	BAN987654 09/04/2018 - 06/05/2018	Remove
Hill, Hannah (100013505) - 2018/2019	£ 450.00	£	0.00	£ 0.00	BAN987654 09/04/2018 - 06/05/2018	Remove
Ink, Idris (100013506) - 2018/2019	£ 400.00	£	0.00	£ 0.00	BAN987654 09/04/2018 - 06/05/2018	Remove
Jones, Jemima (100013507) - 2018/2019	£ 1,500.00	£	0.00	£ 0.00	BAN987654 09/04/2018 - 06/05/2018	Remove

New Action
Suggest

There is no facility to download a copy of the Invoice, but if you wish to create a copy of the Invoice, you can drag the mouse across the Invoice (highlighting all fields) and you can use the "Copy & Paste" facility to produce an Excel Document of the Invoice.



Invoice Oasis 02

UNSUBMITTED

for Service Oasis Day Support

		Excl VAT		VAT
Reference: Oasis 02	Total: £	4,150.00	£	0.00
Date on Invoice: 01 / 10 / 2018	Items Total: £	4,150.00	£	0.00
Created: 08/10/2018	Short by: £	0.00	£	0.00
Total Payable:		£ 4,150.00		

Commitment	Value	VAT	Contribution	Contract	Period	
Ford, Faye (100013503) - 2018/2019	1,000.00	0.00	0.00	BAN987654	09/04/2018 - 06/05/2018	Remove
Gilmore, George (100013504) - 2018/2019	800.00	0.00	0.00	BAN987654	09/04/2018 - 06/05/2018	Remove
Hill, Hannah (100013505) - 2018/2019	450.00	0.00	0.00	BAN987654	09/04/2018 - 06/05/2018	Remove
Ink, Idris (100013506) - 2018/2019	400.00	0.00	0.00	BAN987654	09/04/2018 - 06/05/2018	Remove
Jones, Jemima (100013507) - 2018/2019	1,500.00	0.00	0.00	BAN987654	09/04/2018 - 06/05/2018	Remove


	A	B	C	D	E	F	G	H
1	Reference:		Total:	£	4,150.00		£	0.00
2	Date on Invoice: //		Items Total:	£	4,150.00		£	0.00
3	Created:	08/10/2018	Short by:	£	0.00		£	0.00
4								
5			Total Payable:				£	4,150.00
6								
7								
8		Commitment	Value	VAT	Contribution	Contract	Period	
9		Ford, Faye (100013503) - 2018/2019	£1,000.00	£0.00	£0.00	BAN987654	09/04/2018 - 06/05/2018	Remove
10		Gilmore, George (100013504) - 2018/2019	£800.00	£0.00	£0.00	BAN987654	09/04/2018 - 06/05/2018	Remove
11		Hill, Hannah (100013505) - 2018/2019	£450.00	£0.00	£0.00	BAN987654	09/04/2018 - 06/05/2018	Remove
12		Ink, Idris (100013506) - 2018/2019	£400.00	£0.00	£0.00	BAN987654	09/04/2018 - 06/05/2018	Remove
13		Jones, Jemima (100013507) - 2018/2019	£1,500.00	£0.00	£0.00	BAN987654	09/04/2018 - 06/05/2018	Remove

Press the Submit button to send the Invoice through to the Payments Team to process the invoice.

If there is a dispute on an Invoice that has been submitted through, the Payments Team have the option to place the Invoice on hold. This allows for the next 4 week period to open for editing while the dispute is resolved.


8. Over Exception Invoice Submission







Once you have updated the Actuals for a four week period and have used the Invoice Wizard to create an Invoice Template, you will have to remove any Care Package Line Items (CPLI's) on the Invoice Template that have a yellow exception triangle next to them by clicking on "Remove". The yellow triangle appears when the CPLI been increased from the Planned amount of Sessions / Hours.

 Invoice Oasis 02

UNSUBMITTED

for Service Oasis Day Support

	Excl VAT	VAT	
Reference: <input type="text" value="Oasis 02"/>	Total: £ 4,200.00	£ 0.00	
Date on Invoice: <input type="text" value="01 / 10 / 2018"/>	Items Total: £ 4,200.00	£ 0.00	
Created: 08/10/2018	Short by: £ 0.00	£ 0.00	
Total Payable:		£ 4,200.00	

Commitment	Value	VAT	Contribution	Contract	Period	
Ford, Faye (100013503) - 2018/2019	£ 1,000.00	£ 0.00	£ 0.00	BAN987654	09/04/2018 - 06/05/2018	
Gilmore, George (100013504) - 2018/2019	£ 800.00	£ 0.00	£ 0.00	BAN987654	09/04/2018 - 06/05/2018	
Hill, Hannah (100013505) - 2018/2019	£ 450.00	£ 0.00	£ 0.00	BAN987654	09/04/2018 - 06/05/2018	
 Ink, Idris (100013506) - 2018/2019	£ 450.00	£ 0.00	£ 0.00	BAN987654	09/04/2018 - 06/05/2018	
Jones, Jemima (100013507) - 2018/2019	£ 1,500.00	£ 0.00	£ 0.00	BAN987654	09/04/2018 - 06/05/2018	

Once the Exceptions have been removed press the Update button and you can now submit the Invoice through for Payment. You will then need to send a Conversation/Action through to the Service Brokerage Team giving full details of the Care provided to the Service User(s) CPLI that has breached the 0% Exception level. The Service Brokerage Team will communicate with Locality Staff to arrange for a Temporary CPLI to be generated on the system. If this is successful, an ISO will appear in the Contract Documents part of the Portal. Once the Temporary CPLI is viewable in the Contract Documents screen it will appear as a CPLI in the Actual Screens.

By selecting the week beginning in the Calendar screen in Actuals you will need to find the Service User and press the Add/Edit button to drill down into the weeks Actual. By pressing the Add Actual you will be able to select the Temporary CPLI and add the line. Please amend the original CPLI back to the planned service.






You can now create an Invoice and include the original CPLI and the Temporary CPLI and submit for payment.

9. Contract Documents (The Individual Service Order)

You will receive new ISO's from within the Provider Portal. By using the filters you can view all the latest ISO's that have been activated by selecting the status "Published" and selecting an "Updated Since" date.

Contract Documents

Service: Client:
 Status: Updated Since: / /

Document Type	Client	SSRef	Care Pkg Ref	Service	Notes		
 NCC ISO	Ford, Faye	100013503		Oasis Day Support	Published by james.beiley on 08/10/2018	<input type="button" value="Agree"/>	<input type="button" value="Reject"/>
 NCC ISO	Gilmore, George	100013504		Oasis Day Support	Published by james.beiley on 08/10/2018	<input type="button" value="Agree"/>	<input type="button" value="Reject"/>
 NCC ISO	Hill, Hannah	100013505		Oasis Day Support	Published by james.beiley on 08/10/2018	<input type="button" value="Agree"/>	<input type="button" value="Reject"/>
 NCC ISO	Ink, Idris	100013506		Oasis Day Support	Published by james.beiley on 08/10/2018	<input type="button" value="Agree"/>	<input type="button" value="Reject"/>
 NCC ISO	Jones, Jemima	100013507		Oasis Day Support	Published by james.beiley on 08/10/2018	<input type="button" value="Agree"/>	<input type="button" value="Reject"/>

All Published ISO's will have the option to be Agreed or Rejected. The Rejected ISO function is to highlight any errors on the document and not to refuse Care Packages.

You have the ability to open up the ISO into a PDF document to view or to download for your records.

You can use the *Status* field to view all Published, Accepted or Rejected ISO's.

In the Portal the ISO translates to a Care Package Line Item (CPLI). These can be viewed in bulk by selecting the Care Package Line Item Icon.

Care Package Line Items

Service: Include Historical:
 Client:
 Service Level:

SSRef	Client	Service	Service Level	Start Date	End Date	Cost	Pricing	CarePackageRef	
100013503	Ford, Faye	Oasis Day Support	Day Opportunities (Sessional Charge) Contract Rate	09/04/2018	-	£250.00 Weekly	5 x Sessions at £50.00 (Spot)	AP100013503	<input type="button" value="Submit Action"/>
100013504	Gilmore, George	Oasis Day Support	Day Opportunities (Sessional Charge) Contract Rate	09/04/2018	-	£200.00 Weekly	4 x Sessions at £50.00 (Spot)	AP100013504	<input type="button" value="Submit Action"/>
100013505	Hill, Hannah	Oasis Day Support	Day Opportunities (Sessional Charge) Contract Rate	09/04/2018	29/04/2018	£150.00 Weekly	3 x Sessions at £50.00 (Spot)	AP100013505	<input type="button" value="Submit Action"/>
100013506	Ink, Idris	Oasis Day Support	Day Opportunities (Sessional Charge) Contract Rate	09/04/2018	-	£100.00 Weekly	2 x Sessions at £50.00 (Spot)	AP100013506	<input type="button" value="Submit Action"/>
100013507	Jones, Jemima	Oasis Day Support	Day Opportunities (Sessional Charge) Full day: Standard	09/04/2018	-	£375.00 Weekly	5 x Sessions at £75.00 (Spot)	AP100013507	<input type="button" value="Submit Action"/>

10. Communicating with NCC Teams with Actions in the Portal

When Creating a New Conversation, you will need to select a “Type”

Below is a guide to using the different Types.

To pass on Death Notification details

Type: Death Notification

Related to: Client

Entity: Service User Name

Assign to: Service Brokerage Team

To share information with NCC Teams

Type: Information

Related to: The options are: Contract, Spot Commitment, Value Commitment, Client, Service, Contact & Provider

Entity: This is linked to the Related to field and the options will relate to what is chosen above.

Assign to: The teams that you can communicate within the Portal.

To raise a query relating to functions of the Portal

Type: Query

Related to: Options are: Contract, Spot Commitment, Value Commitment, Client, Service, Contact & Provider

Entity: This is linked to the Related to field and the options will relate to what is chosen above.

Assign to: The teams that you can communicate within the Portal.


To pass on Respite Stay details

Type: Respite Stay

Related to: Client

Entity: Service User Name

Assign to: Service Brokerage Team



The “Related to” and “Entity” fields are linked and work in tandem to what you select in Related to.

Selecting Contract will give you the option to select the different Contracts you have with the Procurement Team.

Selecting Spot Commitment will allow you to select the different Spot Commitments you have in the system.

Selecting Value Commitment will allow you to select the Block Top Up and Unplanned Absence levels if applicable to your Organisation.

Selecting Client will allow to select a Service User you are providing service for.

Selecting Service will allow you to select the Services you provide that sit under the Contract level.

Selecting Invoice will allow you to select any invoices that you have created in the Portal.

Selecting Contact will allow you to select any contact name you have given access to the Portal.

Selecting Provider will allow you to select your Organisation name.

The Teams that you can send conversations to are:

The Billing Team

The Financial Assessment Team

The Payments Team

The Procurement Team

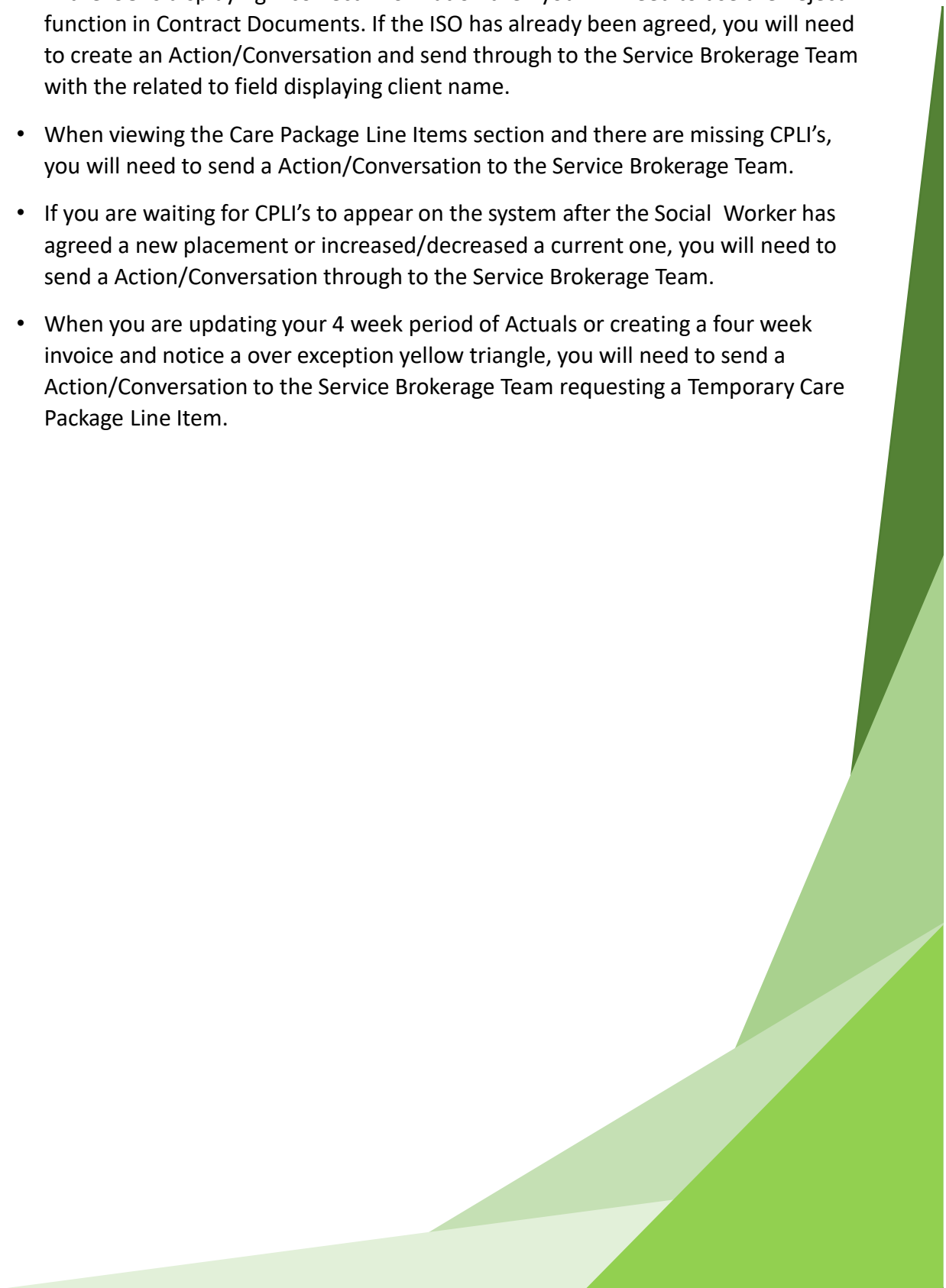
The Service Brokerage Team

FES System Administration Team (For issues regarding the Portal)

Please **DO NOT** assign any Conversations to **Z Information Messaging – Internal Use Only** as these conversations will not be read. This function is for the Service Brokerage Team to send through the Care documentation forms to you from the Liquid Logic System. If you need to reply to these conversations, please select the Service Brokerage Team in the Assign to: drop down list.

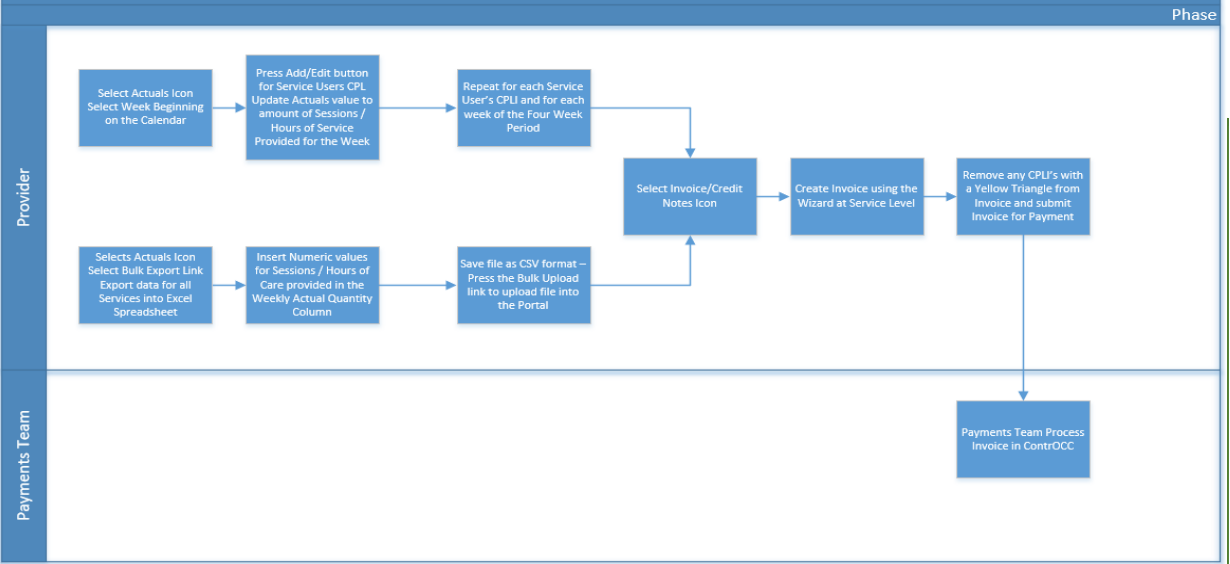


11. ISO & CPLI Queries

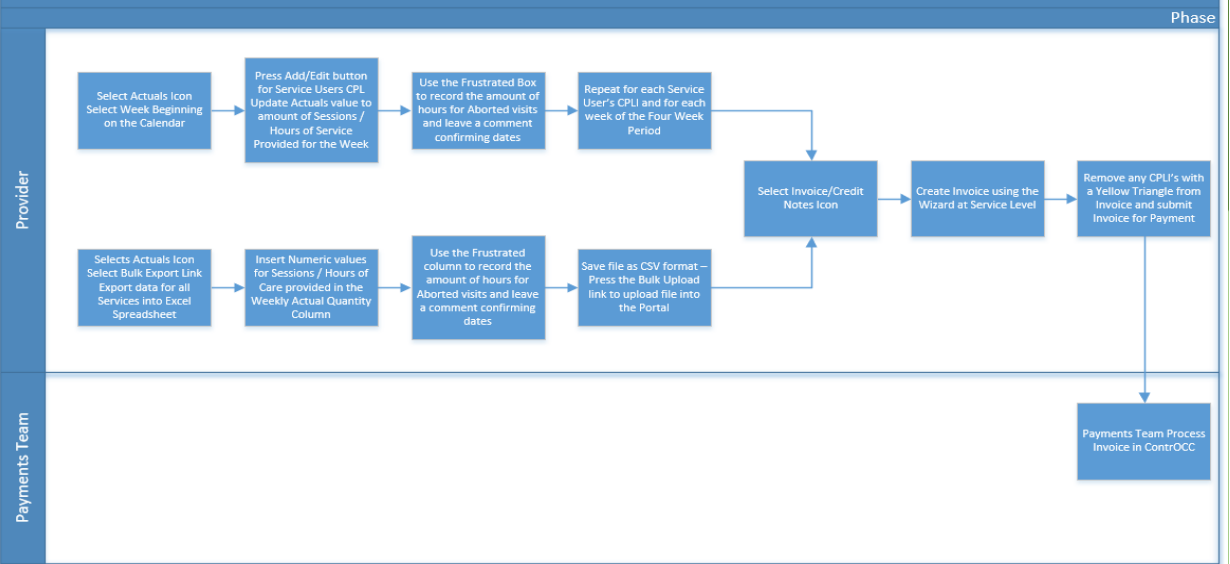
- If the ISO is displaying incorrect Information then you will need to use the Reject function in Contract Documents. If the ISO has already been agreed, you will need to create an Action/Conversation and send through to the Service Brokerage Team with the related to field displaying client name.
 - When viewing the Care Package Line Items section and there are missing CPLI's, you will need to send a Action/Conversation to the Service Brokerage Team.
 - If you are waiting for CPLI's to appear on the system after the Social Worker has agreed a new placement or increased/decreased a current one, you will need to send a Action/Conversation through to the Service Brokerage Team.
 - When you are updating your 4 week period of Actuals or creating a four week invoice and notice a over exception yellow triangle, you will need to send a Action/Conversation to the Service Brokerage Team requesting a Temporary Care Package Line Item.
- 

12. Process Flowcharts

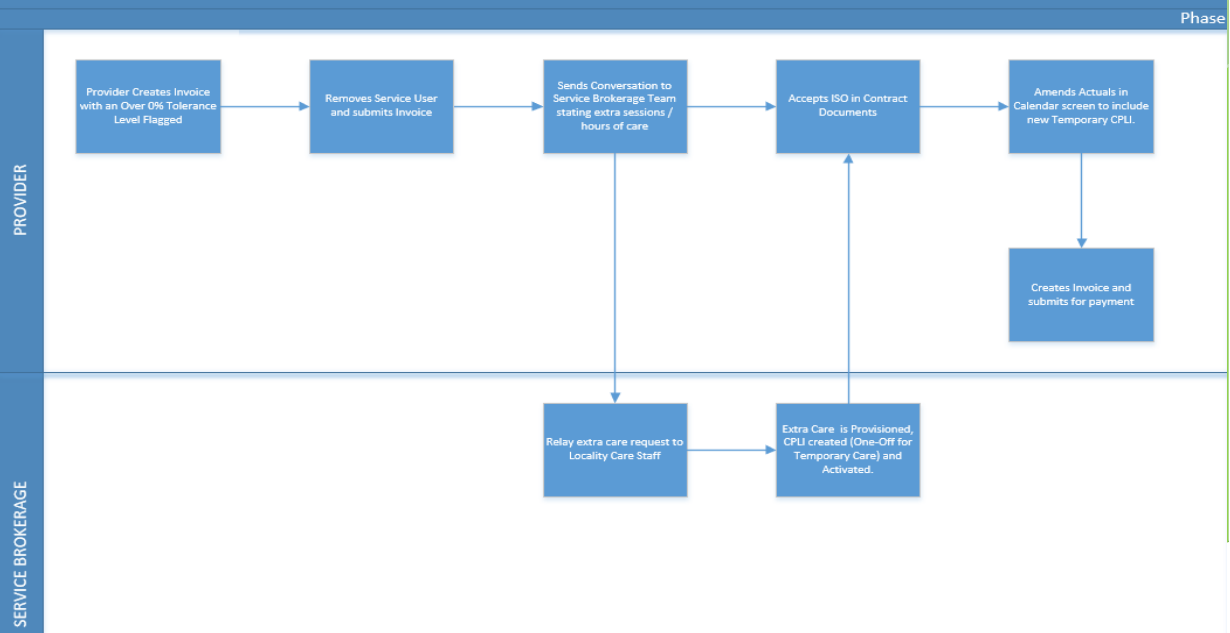
Updating Actuals in the Portal (1995 Contract)



Updating Actuals in the Portal (2012 Contract)



Provider Portal Over Exception Level Invoice Submission





13. Glossary

Actuals – Service Delivered for Invoiced based Payments

Care Package Line Item – Service Agreement

Change Requests – When a Provider updates a Contact, Organisation or Service details that are sent through to NCC staff to accept

Contract – The Overarching Contract for Services provided issued by the Procurement Team

Contract Documents – Where the ISO appears in the Portal

ContrOCC – The Payments system used by Norfolk County Council staff that the Provider Portal links too.

Conversations – The method to communicate in the Portal with various NCC Teams

Frustrated – To claim for Commissioned Sessions / Hours for Non-Attendance

Over 0% Exception Yellow Triangle – The Portal will display a yellow triangle next to a Care Package Line Item when updating Actuals if the Care Provided is more than 0% of the Commissioned Service

Scheduled Payments – 4 weekly automatic payment paid 2 weeks in advanced and 2 weeks in arrears

Service Level – The different levels in which services are provided

