

# Adult Social Care Provider Portal – A User Guide for Managed Direct Payment Providers

This guide will cover how to use OCC's Provider Portal. With the Provider Portal:

- You can view all clients you are providing support to as well as the basic details of the commissioned direct payment
- You will receive their support plans and direct payment details
- You will be able to view payments due to you
- You will be able to view previous payments made to you
- You will be able to download Remittances

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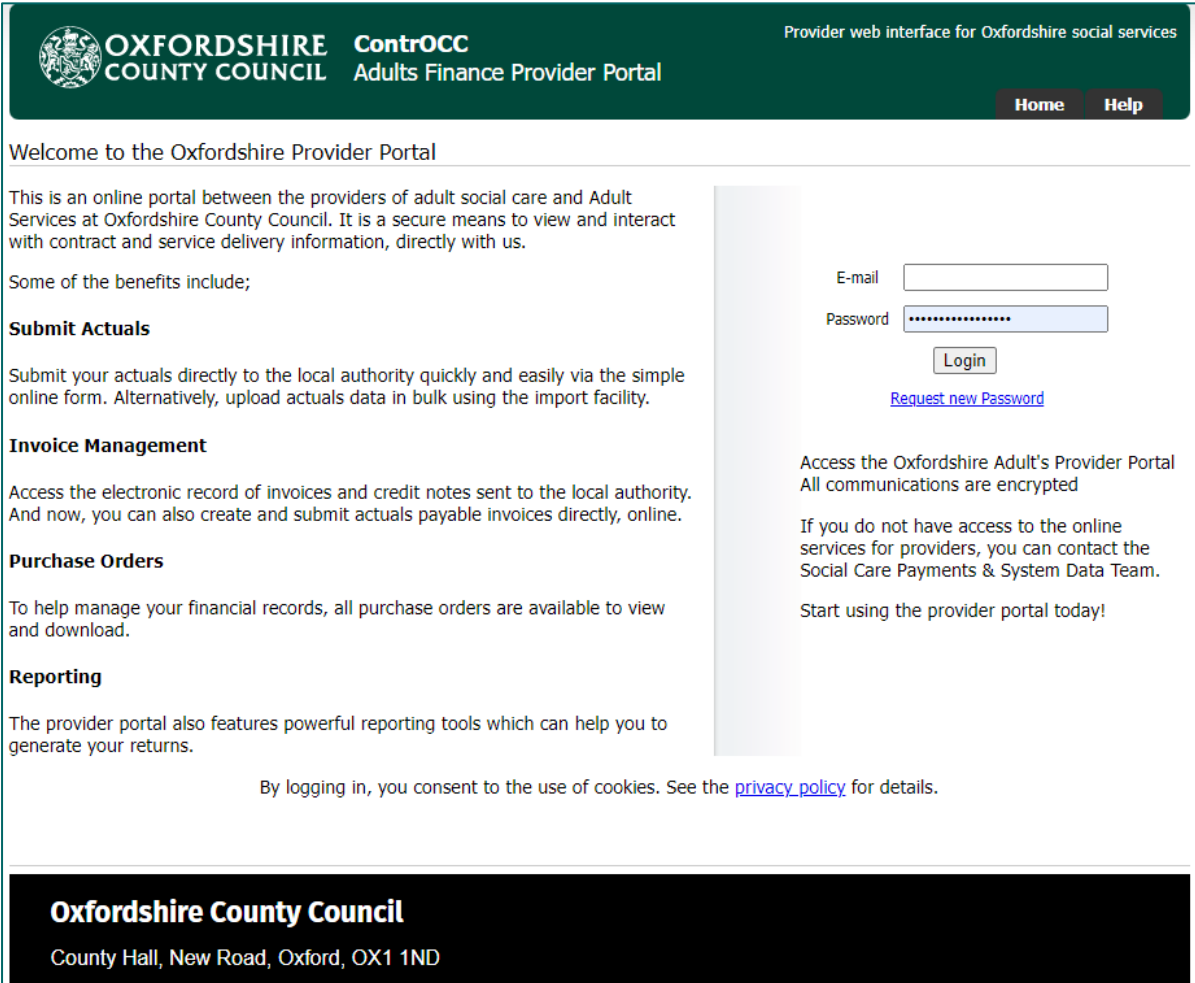
# 1. Introduction

The Adult Finance Provider Portal is a secure web interface that allows Oxfordshire County Council (OCC) and its social care providers to exchange information and documents safely, quickly and easily.

The Portal allows you to view details of clients and their packages, receive documents, view payments (due and historical) as well as access standard reports.

To access the Live Provider Portal, click the following link: [Provider Portal \(oxfordshire.gov.uk\)](https://providerportal.oxfordshire.gov.uk)

We recommend saving the link to your favourites.



The screenshot shows the login page for the Oxfordshire Adult Finance Provider Portal. At the top, there is a dark green header with the Oxfordshire County Council logo and the text 'OXFORDSHIRE COUNTY COUNCIL ContrOCC Adults Finance Provider Portal'. To the right of the header, it says 'Provider web interface for Oxfordshire social services' and has 'Home' and 'Help' buttons. Below the header, the page says 'Welcome to the Oxfordshire Provider Portal'. The main content area is divided into two columns. The left column contains several sections: 'Submit Actuals' (submitting actuals directly or via import), 'Invoice Management' (accessing electronic records and submitting invoices), 'Purchase Orders' (managing financial records), and 'Reporting' (powerful reporting tools). The right column contains a login form with fields for 'E-mail' and 'Password', a 'Login' button, and a link for 'Request new Password'. Below the login form, there is a message: 'Access the Oxfordshire Adult's Provider Portal All communications are encrypted. If you do not have access to the online services for providers, you can contact the Social Care Payments & System Data Team. Start using the provider portal today!'. At the bottom of the main content area, there is a note: 'By logging in, you consent to the use of cookies. See the [privacy policy](#) for details.' The footer of the page is black with white text: 'Oxfordshire County Council' and 'County Hall, New Road, Oxford, OX1 1ND'.

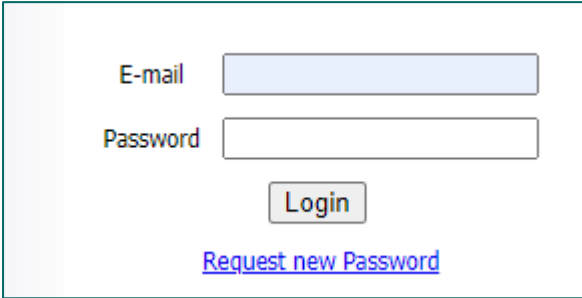
In the [appendix](#) you will find the payment cycle dates as well as a short glossary.

The IBC portal and the Adults Provider Portal are two separate systems. The IBC portal works with our corporate finance system. Whereas the Adults Provider Portal works with our social care finance system.

Please note that currently this is only for Adults Direct Payments and not Children's. This is to follow in the future.

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## 2. Log On & Password Reset



E-mail

Password

[Request new Password](#)

Enter your email address and the password. If this is your first time logging in, your password will have been supplied to you.

If this is your first time logging in, you will be asked to change your password. Ensure it meets the following criteria:

- 9 characters long
- Includes uppercase and lowercase
- Includes at least one numerical character

Once you have changed your password, you will be required to enter a six-digit security code. Please make sure this is memorable.



Change Security Code

You must enter a six-digit security code before you can continue using the Provider Portal.

New Security Code

Confirm Security Code

Your security code must follow these rules:

- Exactly 6 digits
- Only 0-9
- Must be different from the previous security code
- No digit appears more than 4 times
- No sequences of more than three consecutive digits up or down (e.g. security codes containing 1234 or 4321 are not allowed)

 Security code cannot contain a sequence of more than 3 digits.

Whenever you login from here on, you will be asked to:

- Enter your password
- Enter at random two digits of your six-digit security code

If you forget your password or you have entered your password incorrectly too many times, you can request a new password. Complete the form and click Submit.

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Name



Organisation Name

E-mail

Telephone Number

The Helpdesk staff will email the new password to your email address.








You can also change your password and your security code at any point by clicking on the relevant links:

-  [Change Password](#)
-  [Change Security Code](#)
-  [Log Out](#)

### 3. Home Screen

When you log in, you will see the following icons on the left:

**Pick a task...**

 <a href="#">Scheduled Payments</a> View and confirm or reject scheduled payments.	 <a href="#">Reports</a> View & print financial reports
 <a href="#">Organisation Details</a> View and Request Changes to Organisation Details	 <a href="#">Service Details</a> View and Request Changes to Service Details
 <a href="#">Contacts</a> View and Request Changes to Contacts	 <a href="#">Actions and Change Requests</a> No open Actions
 <a href="#">Care Package Line Items</a> View Care Package Line Items	

There will also be tabs along the top for some of the icons:



**OXFORDSHIRE COUNTY COUNCIL** **ContrOCC** Adults Finance Provider Portal

Provider web interface for **Tahmina Miah** | Happy Training ▼

[Home](#) [Scheduled Payments](#) [Reports](#) [Help](#) [Logout](#)

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The following will allow you to view data that is in ContrOCC:

1. **Care Package Line Items (CPLI)** – these are the service provisions (support or care packages) that are commissioned for service users. The service provisions will be a Direct Payment service. It is possible to filter the list by client and service level. On the screen you will see the following:

- ⇒ SSRef – this is the Service User’s reference number
- ⇒ Client – the name of the Service User or Client Name
- ⇒ Service – the name of the provider
- ⇒ Service Level – the service is that has been commissioned for the service user
- ⇒ Start Date – when the service has been commissioned to start
- ⇒ End Date – if applicable
- ⇒ Cost – the cost of the service or payment amount
- ⇒ Care Package Ref – unique ID
- ⇒ Authorised – this shows if the CPLI has been authorised (in OCC’s finance system) and not still a draft service


SSRef	Client	Service	Service Level	Start Date	End Date	Cost	Pricing	CPLI ID	Auth	
A332536		Managed Direct Payment	Direct Payments - to Service User	04/10/2021	-	£822.77 Weekly	1 x Payment at £822.77 (Spot)	146657	<input checked="" type="checkbox"/>	<a href="#">Submit Action</a>
A349596		Managed Direct Payment	Direct Payments - to Service User	04/10/2021	-	£79.77 Weekly	1 x Payment at £79.77 (Spot)	145939	<input checked="" type="checkbox"/>	<a href="#">Submit Action</a>
A283177		Managed Direct Payment	Direct Payments - to Service User	04/10/2021	-	£452.77 Weekly	1 x Payment at £452.77 (Spot)	146469	<input checked="" type="checkbox"/>	<a href="#">Submit Action</a>
A216941		Managed Direct Payment	Direct Payments - to Service User	04/10/2021	-	£218.22 Weekly	1 x Payment at £218.22 (Spot)	145590	<input checked="" type="checkbox"/>	<a href="#">Submit Action</a>
A378825		Managed Direct Payment	Direct Payments - to Service User	28/09/2021	-	£254.56 Weekly	1 x Payment at £254.56 (Spot)	150483	<input checked="" type="checkbox"/>	<a href="#">Submit Action</a>
A173357		Managed Direct Payment	Direct Payments - to Service User	04/10/2021	-	£284.77 Weekly	1 x Payment at £284.77 (Spot)	145591	<input checked="" type="checkbox"/>	<a href="#">Submit Action</a>
A201553		Managed Direct Payment	Direct Payments - to Service User	01/11/2021	-	£380.77 Weekly	1 x Payment at £380.77 (Spot)	148795	<input checked="" type="checkbox"/>	<a href="#">Submit Action</a>

2. **Organisation Details & Service Details** – this will show the details of your address and contact details OCC hold in their social care finance system:


	<a href="#">Organisation Details</a> View and Request Changes to Organisation Details		<a href="#">Service Details</a> View and Request Changes to Service Details
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- Organisation is usually the details of the Head Office of the company.
- The Service holds the details of the actual point of delivery of the service, for instance the local office.

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 Happy Training - Organisation Details


<b>Name</b>	Happy Training
<b>Address 1</b>	123 Bespoke Road
<b>Address 2</b>	
<b>Address 3</b>	
<b>Town</b>	Oxford
<b>County</b>	
<b>Postcode</b>	OX1 4AB
<b>Country</b>	
<b>UPRN</b>	
<b>USRN</b>	
<b>Mobile</b>	
<b>Telephone</b>	01294 123456
<b>Fax</b>	
<b>Email</b>	happytraining@gmail.com

 Happy Training - Managed Direct Payment - Service Details

Name	Happy Training - Managed Direct Payment
Address 1	123 Bespoke Road
Address 2	
Address 3	
Town	Oxford
County	
Postcode	OX1 4AB
Country	
UPRN	
USRN	
Telephone	01294 123456
Fax	
Email	happytraining@gmail.com

You can let us know of any changes by clicking on the relevant icon, then clicking the Edit button and updating the relevant field.

 Happy Training - Managed Direct Payment - Service Details

 Edit





Name	Happy Training - Managed Direct Payment
Address 1	123 Bespoke Road
Address 2	
Address 3	
Town	Oxford
County	
Postcode	OX1 4AB
Country	
UPRN	
USRN	
Telephone	01294 123456
Fax	
Email	happytraining@gmail.com

Go to the Actions & Change Request Icon to check if OCC have accepted and processed your change in detail:

- A green status circle = accepted by the local authority
- An amber status circle = change request is still pending
- A red status circle = rejected by the local authority. See rejection reason in the last column.

**Change Requests**

Include Historical [View](#)

Status	Submitted	Last Updated	Type	Entity Name	Details	Rejection Reason
	21/07/2022	21/07/2022	Update Service	Happy Training - Managed Direct Payment		Other: address is not valid
	21/07/2022	21/07/2022	Update Organisation	Happy Training		

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The following will allow you to carry out a function:

1. Schedule Payments: here you can view current payments due as well as past/historical payments made. See [section 4](#) for further details.
2. Reports: there are two reports that you can run and export the information. See [section 5](#) for further details.
3. Actions and Change Requests: this is the area where you will receive Support Plans. See [section 6](#) for further details.
4. Contacts: this area is used to update details for existing contacts, request new contacts are set up or request removal of contacts. If a member of staff leaves or a new member of staff joins the team, you can use this feature to inform the Helpdesk. They can remove access or set up a new contact. See [section 7](#) for further details.

## 4. Scheduled Payments

This will list the payments listed in OCC's finance system based on all the care package line items. You would need to select the payment period of interest from the left:

**Scheduled Payments**

Financial year: 2021/2022

Contract:

21 Mar 2022 to 17 Apr 2022  
 21 Feb 2022 to 20 Mar 2022  
 24 Jan 2022 to 20 Feb 2022  
 27 Dec 2021 to 23 Jan 2022  
 29 Nov 2021 to 26 Dec 2021  
 1 Nov 2021 to 28 Nov 2021  
 4 Oct 2021 to 31 Oct 2021  
 6 Sep 2021 to 3 Oct 2021  
 9 Aug 2021 to 5 Sep 2021  
 12 Jul 2021 to 8 Aug 2021  
 14 Jun 2021 to 11 Jul 2021  
 17 May 2021 to 13 Jun 2021  
 19 Apr 2021 to 16 May 2021  
 22 Mar 2021 to 18 Apr 2021

**Managed Direct Payment - 21 Mar 2022 to 17 Apr 2022** CURRENT

Start Date: 21 Mar 2022  
 End Date: 17 Apr 2022

<b>Payable</b>	<b>Total</b>
<b>Non-Payable</b>	£1005390.05
	-£2383.06

Remittance Notes:

Payable	Non-payable	
Cost / Income	Reason for Payment	Applicable Dates
<b>Managed Direct Payment 2021/2022</b>		
<b>(A332536) (Total: £1292.92)</b>		
Cost	Direct Payments - to Service User (Payment), 21/03/2022 - 31/03/2022	£1292.92 Pay
<b>(A349596) (Total: £125.35)</b>		
Cost	Direct Payments - to Service User (Payment), 21/03/2022 - 31/03/2022	£125.35 Pay
<b>(A283177) (Total: £711.50)</b>		
Cost	Direct Payments - to Service User (Payment), 21/03/2022 - 31/03/2022	£711.50 Pay

**Note:** OCC's four-weekly payment cycles are listed in the [Appendix](#).

On the right-hand corner, it will state 'Current' to indicate current and latest period to be paid or 'Finalised' for historical and paid periods.

**Managed Direct Payment - 21 Mar 2022 to 17 Apr 2022** CURRENT

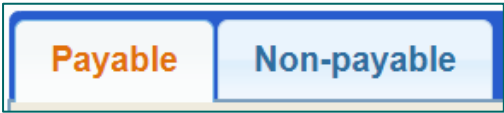
Start Date: 21 Mar 2022  
 End Date: 17 Apr 2022

<b>Payable</b>	<b>Total</b>
<b>Non-Payable</b>	£1005390.05
	-£2383.06

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Managed Direct Payment - 21 Feb 2022 to 20 Mar 2022		FINALISED	
Start Date:	21 Feb 2022	<b>Payable</b>	<b>Total</b>
End Date:	20 Mar 2022	<b>Non-Payable</b>	£1055261.50
			-£19017.30

There are two tabs Payable and Non-payable.



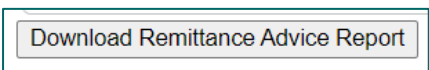
By default, the Payable tab is on display and this will be a list of items being paid for in the current period (including any payments being made in instalments). Payments in OCC's finance system can be made non-payable if they have the following statuses:

- ⇒ Cancel – the payment has been cancelled and will not be made
- ⇒ Suspend – the payment has been paused this period, but can still be made in future periods
- ⇒ Carried forward – the payment has been moved to the next period

OCC will use these functions to manage changes in Direct Payment payments and ensure payments are more seamless.

Payable		Non-payable			
Cost / Income	Reason for Payment	Applicable Dates	Amount	Status	
<b>Managed Direct Payment 2021/2022</b>					
(A173357) (Total: £447.50)					
Cost	Direct Payments - to Service User (Payment),	21/03/2022 - 31/03/2022	£447.50	Cancel	
	Spot.				
(A322645) (Total: -£1981.03)					
Cost	Direct Payments - to Service User (Payment),	01/11/2021 - 28/11/2021	-£349.59	Suspend	
	Spot.				
Cost	Direct Payments - to Service User (Payment),	29/11/2021 - 26/12/2021	-£1631.44	Suspend	
	Spot.				
(A338110) (Total: -£402.03)					
Cost	Direct Payments - to Service User (Payment),	24/01/2022 - 20/02/2022	-£70.95	Suspend	
	Spot.				
Cost	Direct Payments - to Service User (Payment),	21/02/2022 - 20/03/2022	-£331.08	Suspend	
	Spot.				
<b>Managed Direct Payment 2022/2023</b>					
(A216941) (Total: £529.96)					
Cost	Direct Payments - to Service User (Payment),	01/04/2022 - 17/04/2022	£529.96	Carry forward	
	Spot.				

If you scroll to the bottom of the page there is a button to download a remittance advice report in PDF format:



You can also download remittances as a csv spreadsheet, please refer to the section on [Reports](#).

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## Weekly Payment Runs:

Ordinarily payments will be made every four weeks, for a four-week period according to the payment cycles (listed in the [appendix](#)), however we also make weekly catch-up payment runs. There will be occasions where some service users need to receive their Direct Payment sooner than the next payment cycle, especially if it is their first payment.

Every Tuesday OCC will process a weekly payment run in our finance system. This will be for new clients or payments that need to catch up with the main four weekly run. You will then be able to download your remittance advice report in the Provider Portal on Wednesday. You can then expect payment in your bank account by Friday.

<b>Weekly Payment Authorised</b>	Tuesday
<b>Remittance in Provider Portal</b>	Wednesday
<b>Payment Received in Bank</b>	Friday

The IBC portal and the Adults Provider Portal are two separate systems. The IBC portal works with our corporate finance system. Whereas the Adults Provider Portal works with our social care finance system.

You will still receive the remittance from IBC which confirms the BACS run has completed. However, in addition you can now download remittances from the Provider Portal.

## Payments made off system & Surpluses:

Certain reconciliation payments are currently not completed through our finance system ContrOCC, and therefore will not appear in the Provider Portal. The process in these cases is very much the same and reiterated below. However, for further information contact the Direct Payment Audit Team [directpaymentaudit@oxfordshire.gov.uk](mailto:directpaymentaudit@oxfordshire.gov.uk).

### **1. Direct Payment Surplus**

For Adult Health and Social Care, Direct Payment Users can retain eight weeks' worth of Direct Payment funding. Any balance above that should be repaid to OCC. E.g.,

- DP is £100 per week
- Balance currently is £1,800 (8 weeks \* 100 = £800)
- Surplus £1,000 - this is what we call surplus funds

Where there are Direct Payment surpluses, these are dealt with as part of OCC's audit process. As OCC audit the accounts, we ask for any surplus to be returned at this point. It will be an ongoing process throughout the year.

Account balances for individual clients are checked with the Managed DP Provider and you will be requested to refund or return anything above 8 weeks' worth of Direct Payment funds for each client. OCC will send a letter to the person managing the Direct Payment to inform them of the amount of surplus being requested. In the case of managed accounts this will be copied to the managed account provider. They have 2 weeks to contact us to advise if they do not believe this surplus should be recovered.

Contact the Direct Payment Audit [directpaymentaudit@oxfordshire.gov.uk](mailto:directpaymentaudit@oxfordshire.gov.uk) team if you need to discuss further. Surplus funds can be received by:

- Bank Transfer
- Cheque

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Raising an invoice for money to be returned to us: the invoice should always be in the name of the person who signed the Direct Payment Agreement and is named as the person managing the Direct Payment. This would be the person that we have paid the money to, or in the case of a managed account paid to on behalf of the person who is managing the Direct Payment.

## 2. Ceased Cases or Deceased Cases

In the case of ceased services or deceased clients, all of the balance is reclaimed or returned to Oxfordshire County Council by the Managed DP Provider. When a Direct Payment ends, OCC will ask for the final accounts and once audited we will request the balance is returned. The returned or received funds are logged onto our social care case management system where the Direct Payment Audit Team track it.

You may contact the Direct Payment Advice team for any advice on payments that still need to be made [directpaymentadvice@Oxfordshire.gov.uk](mailto:directpaymentadvice@Oxfordshire.gov.uk).

## 3. Outstanding Invoices

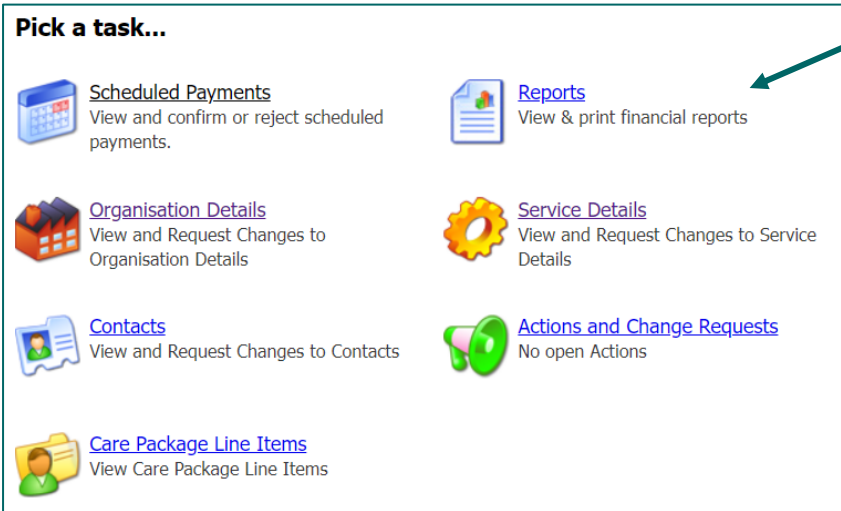
Where you receive invoices after you have returned funds back to Oxfordshire County Council or where the Direct Payment has ended and there are insufficient funds in the account to settle all outstanding debts, you need to request funds be repaid/paid to you as you are holding unpaid invoices for the client.

Contact the Direct Payment Advice Team [directpaymentadvice@Oxfordshire.gov.uk](mailto:directpaymentadvice@Oxfordshire.gov.uk), they will work with the locality team/allocated social worker to arrange final payments.








You will be notified once the payment has been processed so that you can allocate appropriately via an email from the Payments Team. You will also receive a remittance from OCC's corporate finance system.

## 5. Reports

There are two standard reports that can be run in the provider portal, and the results can be exported. Click on the Reports icon or access it from the tab:




**Pick a task...**


 <a href="#">Scheduled Payments</a> View and confirm or reject scheduled payments.	 <a href="#">Reports</a> View & print financial reports
 <a href="#">Organisation Details</a> View and Request Changes to Organisation Details	 <a href="#">Service Details</a> View and Request Changes to Service Details
 <a href="#">Contacts</a> View and Request Changes to Contacts	 <a href="#">Actions and Change Requests</a> No open Actions
 <a href="#">Care Package Line Items</a> View Care Package Line Items	


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The two reports are as follows:

 **Reports**

The following reports are currently available. Click to view.


 [Pending Scheduled Payments](#)

 [Remittance Advice Provider Payments](#)

### Pending Scheduled Payments:

There is a section in the portal where you can list the cost/payment for all CPLIs (see [section 4](#)), however, to export the data from the portal, you would need to run this report.

You can enter the date criteria (this ought to match the [payment cycle](#)), otherwise leave the date fields blank and click on View (this will list the current period):

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

Organisation:

Status:

Date From:

Date To:

This report requires parameters. Please complete the fields above and press the View or Download Data button.

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For all dates

Type	Direct Payments		
Provider	Contract		
For Period	Due		
21/03/2022 - 17/04/2022	12 March 2022		
Client	Service	Amount (ex. VAT)	VAT Amount
Item Notes	Item Dates	Status	
<b>(A349596)</b>	<b>Managed Direct Payment</b>	<b>£319.08</b>	<b>£0.00</b>
Direct Payments - to Service User (Payment), Spot. Budget 'SACC20-5899'	21/03/2022 - 31/03/2022	Pay	£125.35
Direct Payments - to Service User (Payment), Spot. Budget 'SACC20-5899'	01/04/2022 - 17/04/2022	Pay	£193.73
<b>(A283177)</b>	<b>Managed Direct Payment</b>	<b>£1,811.08</b>	<b>£0.00</b>
Direct Payments - to Service User (Payment), Spot. Budget 'SACP20-5899'	21/03/2022 - 31/03/2022	Pay	£711.50
Direct Payments - to Service User (Payment), Spot.	01/04/2022 -	Pay	£1,099.58


If required hover over the report and choose to save, print, or zoom in/out of the report data.

Payment Method:

Period (\* Partially finalised payment periods):

Summary:

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Click on Download Data to export the report into a spreadsheet:

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[View](#) [Download Data](#)

### **Remittance Advice Provider Payments:**

This report breaks down the payments made in a particular period. You can select a payment period from the dropdown. You can also choose to have a summary version of the report:

Period (\* Partially finalised payment periods) \* 21/03/2022 - 17/04/2022

Summary

Payment items for the same client, are aggregated into one line in the report. For example, some backdated changes lead to pairs of positive and negative items. (If these pairs cancel each other out, they are not shown in the report at all.) Any manual adjustments made in OCC's financial system are always shown individually.

Each line shows:

- whether the payment item is a cost item or an income item (deduction)
- reason for the payment
- applicable dates of the payment
- value of the payment

Any remittance notes are listed at the bottom.

**Note:** weekly payments are made on a Tuesday and you can run your report on Wednesday to view what payment is being made to you that week.

Click on Download Data to export the report into a spreadsheet:

[View](#) [Download Data](#)

**Note:** if you would like the report in a PDF format, go to the Scheduled Payments screen, scroll to the bottom and click on the Download Remittance Advice Report:

[Download Remittance Advice Report](#)


## **6. Actions**

You will be sent the following documents via the Provider Portal:


1. a copy of the Support Plan for new adult service users
2. a copy of the Support Plan for children service users
3. ending notifications - the purpose of this document is to allow you to know when a direct payment is paid up to but also give 4 weeks' notice (as per the contract) that admin charges are to be ceased and your involvement is ending. This will be sent out for both Adults and Children's direct payment packages.

You can pick these up via the Actions icon:

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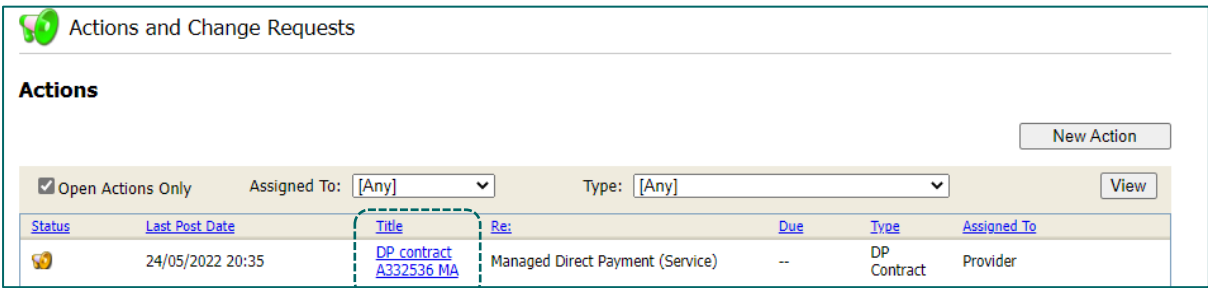
[Actions and Change Requests](#)  
No open Actions



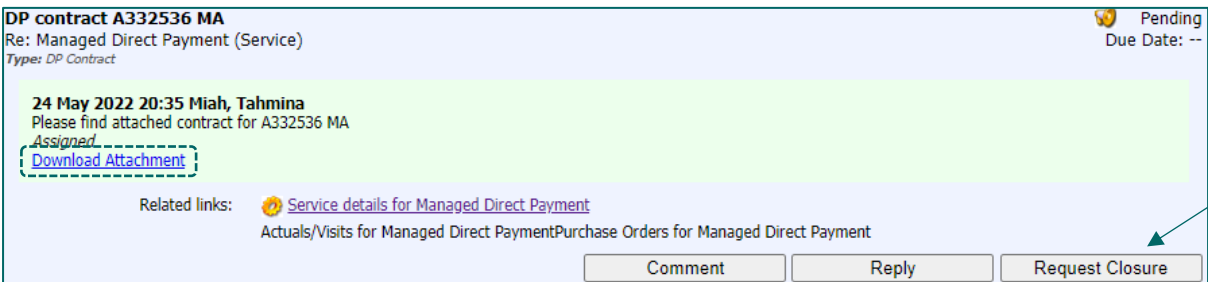
[Actions and Change Requests](#)  
9 open Actions (6 overdue)

Please note: existing/historical support plans will not already be on the Provider Portal, as we cannot migrate these. Please refer to the [FAQs](#) should you need a support plan for an existing/historical case.

- A green megaphone = no pending actions
- An amber megaphone = actions due
- A red megaphone = actions overdue



Click on the hyperlink in the title column. Download the attachment. Once you have downloaded the document, you can click on the Request Closure button, and the Care Payments team will close this action down. This will ensure only the latest pending actions are shown.



Assign to the System Team.

**Request Closure**

Comment: all received, thank you.  
Happy Training

Attachment:  No file chosen

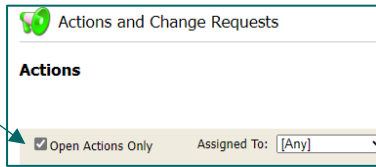
Assign To:

Due Date:

If you do not request closure of the action, the Care Payments team will close it down automatically after 7 days of sending the action.

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**Note:** you can still view closed actions by unticking the 'Open Actions Only' box and download the attachment.



The status will indicate 'Done' (green megaphone):

Status	Last Post Date	Title	Re:	Due	Type	Assigned To
	28/07/2022 11:31	<a href="#">Copy of Support Plan</a>	Mr Kent Brockman (Client)	29/07/2022	DP Support Plan Spend Summary	
	28/07/2022 11:29	<a href="#">Copy of Support Plan</a>	Krusty The Clown (Client)	29/07/2022	DP Support Plan Spend Summary	

An internal comment will indicate that OCC have closed the action:

**Copy of Support Plan**  
 Re: Krusty The Clown (Client)  
 Type: DP Support Plan Spend Summary

**30 Jun 2022 13:28 Miah, Tahmina**  
 Please find attached a copy of the service user's support plan. Please review and request closure within 7 days.  
 Assigned to Happy Training  
 Due Date set to 15 Jul 2022

**21 Jul 2022 11:31 Miah, Tahmina** Closed  
 No response received, assumed ok and closed

If you have downloaded the document, and you have a query with the support plan (see [FAQs](#)), then click on the Comment button > add a comment so that the Care Payments Team are aware.

**DP contract A332536 MA**  
 Re: Managed Direct Payment (Service)  
 Type: DP Contract

**24 May 2022 20:35 Miah, Tahmina**  
 Please find attached contract for A332536 MA  
 Assigned  
[Download Attachment](#)

Related links: [Service details for Managed Direct Payment](#)  
 Actuals/Visits for Managed Direct PaymentPurchase Orders for Managed Direct Payment

Comment Reply Request Closure

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**Comment**

Comment

querying something with DP advice team re support plan  
happy training

Attachment  No file chosen

Due Date

 **Action Details**


---

**Copy of Support Plan**  
 Re: Ms Edna Krabappel (Client)  
 Type: DP Support Plan Spend Summary

**30 Jun 2022 13:12 Miah, Tahmina**  
 Please find attached a copy of the service user's support plan. Please review and request closure within 7 days.  
 Assigned to Happy Training  
 Due Date set to 15 Jul 2022  
[Download Attachment](#)


**28 Jul 2022 11:28 Tahmina Miah (Happy Training)**  
 querying something with DP advice team re support plan  
 happy training

**Ending Notifications Example:**

24/10/2022 11:14	<a href="#">Ending Package</a>		31/10/2022	DP Support Plan Spend Summary (Adults)	Provider
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**Children's Support Plans Example:**

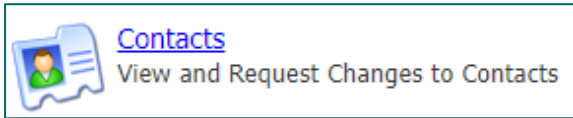
As with Adults Support plan, this details the breakdown of how the direct payment should be spent so you, as the managed provider, will be able to identify easier when you receive invoices more than what is detailed. As with the Adults Support Plans and Ending Notifications, these will appear in the same screen (Action and Change Request) but will have the title DP Support Plan Spend Summary (Children's) as below. The text in the comment will detail the child and the date of birth to allow you to identify who the support plan is for. The action will be kept open for 7 days to allow you to pick it up, then will be closed unless we are aware you have raised queries with the Direct Payment Advice Team.

25/10/2022 12:23	<a href="#">Support Plan</a>		01/11/2022	DP Support Plan Spend Summary (Childrens)	Provider
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**7. New Contacts or Updating Contacts**

This area is used to update details for existing contacts, request new contacts are set up or request removal of contacts. If a member of staff leaves or a new member of staff joins the team, you can use this feature to inform the Helpdesk. They will either remove access or set up a new contact.

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On the left will be a list of all staff with access and a login:

**Contacts**  
OCC - Community Support Service

- 01\_Trainer
- 02\_Trainer
- 03\_Trainer
- 04\_Trainer
- 05\_Trainer
- 06\_Trainer
- 07\_Trainer
- 08\_Trainer
- 09\_Trainer
- 10\_Trainer
- Miah, Tahmina
- New Contact

**Trainer 01 - Contact Details**

**Title**

**Forename** Trainer

**Surname** 01

**Address 1** County Hall

**Address 2**

**Address 3**

**Town** Oxford

**County**

**Postcode** OX1 8JJ

**Country**

**UPRN**

**USRN**

**Mobile**

**Telephone**

**Fax**

**Email** trainer01@oxfordshire.gov.uk

**Roles**

For	Role	
Organisation: OCC - Community Support Service	Finance Clerk	<input type="button" value="Request Role Removal"/>
Organisation: OCC - Community Support Servi	Accounts Payable	<input type="button" value="Request Role Addition"/>

**If a contact needs to be updated:**

Select them from the list on the left.

Click Edit at the top if it just their details that need updating:

**Trainer 01 - Contact Details**

**Title**

**Forename** Trainer

**Surname** 01

**Address 1** County Hall

**Address 2**

**Address 3**

**If you need to request access removal:**

Select them from the list on the left.

Click on the 'Request Role Removal' button:

**Roles**

For	Role	
Organisation: OCC - Community Support Service	Finance Clerk	<input type="button" value="Request Role Removal"/>
Organisation: OCC - Community Support Servi	Accounts Payable	<input type="button" value="Request Role Addition"/>

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 team's responsibility to request the removal of employees. The

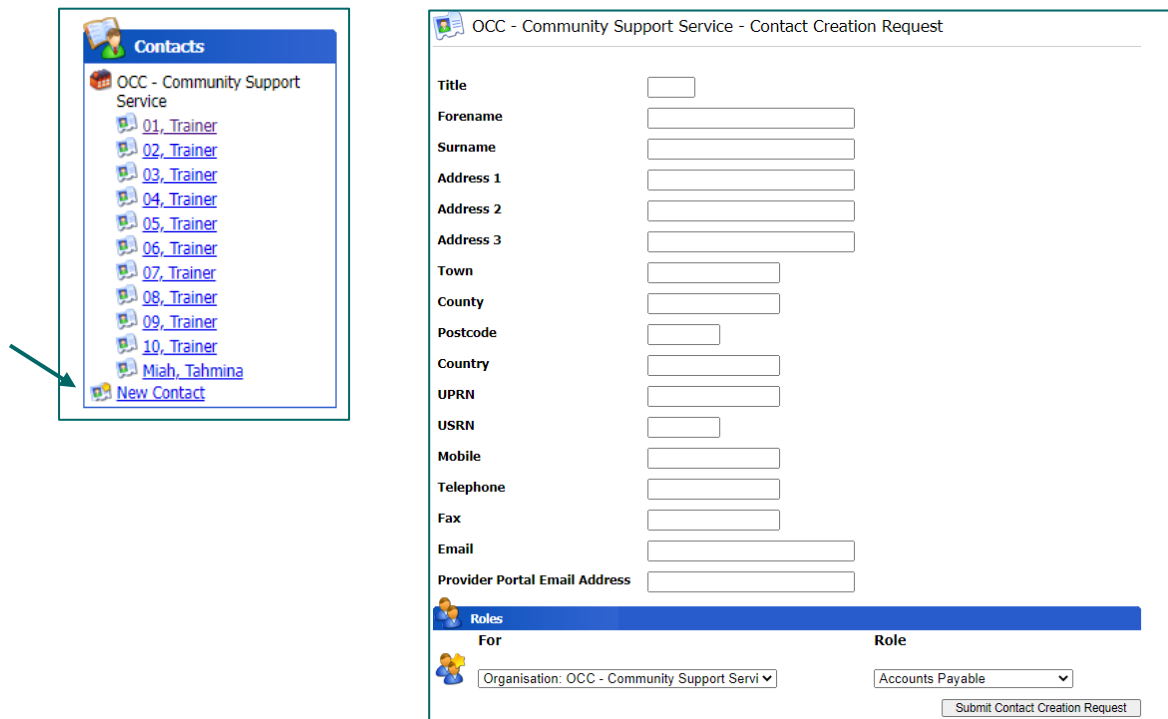
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Helpdesk staff will remove the Contacts access from the Provider Portal from the Change Request received once the Role Removal button has been pressed.

**If a new contact needs adding:**

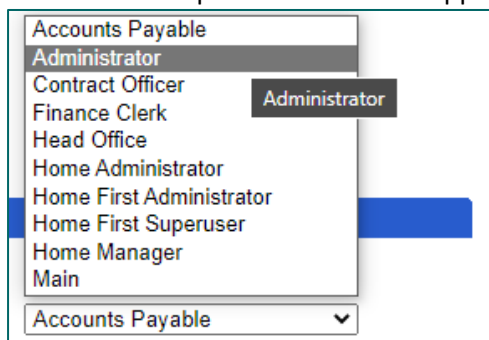
Click on the New Contact link on the left:



This will allow you to request a new user. Fill in the following fields:

- Forename
- Surname
- Full Address
- Telephone
- Email

In the 'Role' dropdown – select the applicable role for that contact.



Then click the Submit Contact Creation Request button:

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**Roles**

**For**

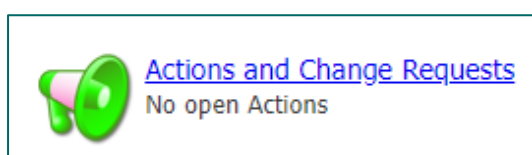
**Role**

Organisation: OCC - Community Support Servi ▼

Administrator ▼

The helpdesk will create the user and contact them with their login details.

You can then monitor your requests by clicking on the Actions and Change Requests icon on the homepage, and checking in the Change Requests section:



**Change Requests**

Include Historical

Status	Submitted	Last Updated	Type	Entity Name	Details	Rejection Reason
●	24/05/2022	--	New Contact		i	

**Change Requests**

Include Historical

Status	Submitted	Last Updated	Type	Entity Name	Details	Rejection Reason
●	21/07/2022	21/07/2022	Delete Contact Role	Mr DP New Job	i	
●	21/07/2022	21/07/2022	New Contact		i	
●	21/07/2022	21/07/2022	Update Contact	Tahmina Miah	i	

A green status circle = accepted by the local authority

An amber status circle = change request is still pending

A red status circle = rejected by the local authority. See rejection reason in the last column.

## A0. APPENDIX

### A.1. Direct Payment – Payment Cycles

4-weekly Period	Due Date	Date of Finalisation	Date of Payment in provider account
18/04/2022 - 15/05/2022	09/04/2022	12/04/2022	15/04/2022
16/05/2022 - 12/06/2022	07/05/2022	10/05/2022	13/05/2022
13/06/2022 - 10/07/2022	04/06/2022	07/06/2022	10/06/2022
11/07/2022 - 07/08/2022	02/07/2022	05/07/2022	08/07/2022
08/08/2022 - 04/09/2022	30/07/2022	02/08/2022	05/08/2022
05/09/2022 - 02/10/2022	27/08/2022	30/08/2022	02/09/2022
03/10/2022 - 30/10/2022	24/09/2022	27/09/2022	30/09/2022
31/10/2022 - 27/11/2022	22/10/2022	25/10/2022	28/10/2022
28/11/2022 - 25/12/2022	19/11/2022	22/11/2022	25/11/2022

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26/12/2022 - 22/01/2023	17/12/2022	20/12/2022	23/12/2022
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**Due Date:** this is the system (ContrOCC) calculated due date. This is when the system will prompt the Payment Team to make the payment. You will see this due date shown on the Scheduled Payments report:

Pending Scheduled Payments by Provider			
For all dates			
<b>Type</b>	Direct Payments		
<b>Provider</b>		<b>Contract</b>	Managed Direct Payment
<b>For Period</b>	21/03/2022 - 17/04/2022		<b>Due</b> 12 March 2022

**Date of Finalisation:** this is the date the Payments Team will process the payment in the system. You can see that a payment run has been finalised as the status on the schedule payment screen will reflect this.

Managed Direct Payment - 24 Jan 2022 to 20 Feb 2022			FINALISED
Start Date:	24 Jan 2022		<b>Total</b>
End Date:	20 Feb 2022		
		<b>Payable</b>	£1062748.13
		<b>Non-Payable</b>	£1988.87

**Date of Payment in Provider Account:** this is the date you will receive the payment in your bank account.

Every Tuesday OCC will process a weekly payment run in our finance system. This will be for new clients or payments that need to catch up with the main four weekly run. You will then be able to download your remittance advice report in the Provider Portal on Wednesday. You can then expect payment in your bank account by Friday.

<b>Weekly Payment Authorised</b>	Tuesday
<b>Remittance in Provider Portal</b>	Wednesday
<b>Payment Received in Bank</b>	Friday

## A.2. Glossary

Term	Description
<b>CPLI</b>	Care Package Line Item – this is a service provision in OCC’s system, the package of care and support a client is receiving. For instance, the CPLI will show a weekly payment of £500 for a service user.
<b>Scheduled Payment</b>	Schedule payments in ContrOCC indicate a contract/provider that does not need to send in an invoice. The payment amount is calculated based on what is on the CPLI.
<b>Service Level</b>	This is the type of service recorded in OCC’s finance system for as service user. The service type may be a one-off DP or an ongoing DP.

## A.3. FAQs

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**Q. Why has my password not been reset yet; I have sent several requests?**

**A:** Password resets are not automatic. Once you make a request using the portal, we receive an email. There may be a delay in your password reset as a team member will pick up your request from the generated email and will then contact you to let know it has been reset. Please do not send multiple requests.

**Q. Will I receive referrals via the provider portal?**

**A.** Referrals will continue to be emailed to you. It is only the support plan that will be sent to you via the Provider Portal.

**Q. I have received a referral, but why is the information not yet on the portal?**

**A.** There will be a delay in between a referral and the provider portal system updating, as we need to process various paperwork before the service and payment goes into our financial system. If the information is not reflected on the provider portal within two weeks contact the Direct Payment Advice Team: [directpaymentadvice@Oxfordshire.gov.uk](mailto:directpaymentadvice@Oxfordshire.gov.uk) or call their helpdesk on 01865 898989.

**Q. What if we do not agree with information within the Support Plan that has been sent to us?**

**A.** Please contact the Direct Payment Advice Team: [directpaymentadvice@Oxfordshire.gov.uk](mailto:directpaymentadvice@Oxfordshire.gov.uk) or call their helpdesk on 01865 898989 with your query. You can respond to the action in the provider portal indicating that you are querying the support plan with the Direct Payment Advice Team.

**Q. What if I need the Support Plan for an existing service user or historical case?**

**A.** Please contact the Direct Payment Advice Team: [directpaymentadvice@Oxfordshire.gov.uk](mailto:directpaymentadvice@Oxfordshire.gov.uk) or call their helpdesk on 01865 898989 with your query. They will arrange this for you. Please do not send an action via the Provider Portal for this particular query, as these may not be picked up.

**Q. What if a service user's direct payment amount has changed but has not been reflected in the Provider Portal?**

**A.** Please contact the Direct Payment Advice Team: [directpaymentadvice@Oxfordshire.gov.uk](mailto:directpaymentadvice@Oxfordshire.gov.uk) or call their helpdesk on 01865 898989 with the details.

**Q. What if a service user is running out of their direct payment monies?**

**A.** Please contact the Direct Payment Advice Team: [directpaymentadvice@Oxfordshire.gov.uk](mailto:directpaymentadvice@Oxfordshire.gov.uk) or call their helpdesk on 01865 898989 and they will advise you.

**Q. How do we inform OCC that a service user has passed away, but we can see that the payment or service is still open on the provider portal?**

**A.** Please contact the Direct Payment Advice Team: [directpaymentadvice@Oxfordshire.gov.uk](mailto:directpaymentadvice@Oxfordshire.gov.uk) and we can ensure the service is closed down.

**Q. We are increasing our management fees, who do we discuss this with?**

**A.** Please contact the Direct Payment Advice Team and they can advise you [directpaymentadvice@Oxfordshire.gov.uk](mailto:directpaymentadvice@Oxfordshire.gov.uk).

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**Q. Are the Direct Payments being uplifted for our clients?**

**A.** Direct Payment uplifts will be subject to review on a client-by-client basis. You can enquire with the Direct Payment Advice Team [directpaymentadvice@Oxfordshire.gov.uk](mailto:directpaymentadvice@Oxfordshire.gov.uk) if you would like to discuss a case.

**Q. How are the invoices/adjustments for clawbacks and deceased service users processed?**

**A.** See [section 4](#) – covering payments made off system.

**Q. How do I request a new service is set up (we have a new local office, where a different set of service users will be supported)?**

**A.** Contact the [Carepaymentqueries@oxfordshire.gov.uk](mailto:Carepaymentqueries@oxfordshire.gov.uk) mailbox, a member of the team will advise you as to what form needs to be filled in?

**Q. Do we still use the IBC portal?**

**A.** The IBC portal allows you to change your bank details and organisation details, you will also continue to receive the automatically generated remittances from the IBC portal.