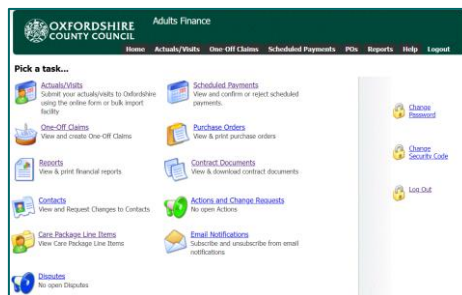


# Adult Social Care Finance Provider Portal

## Care Home Placements Residential & Nursing

### (Orders of St John Care Trust) User Guide



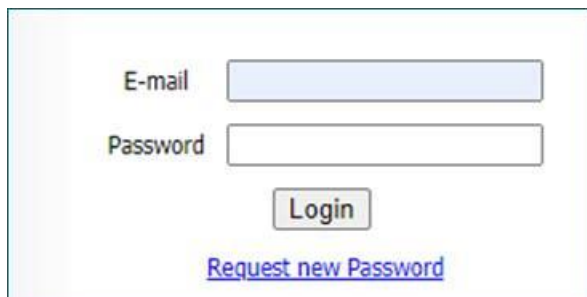
V1.1 March 2023

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## Logging On and Password Reset

You can [access the portal](#) online using your email address and password. You will only be able to access the portal once an account has been created for you. Once we have set you up on the system, we will email you your username and password. If you require access, contact the Social Care Payments and System Data Team [Carepaymentqueries@oxfordshire.gov.uk](mailto:Carepaymentqueries@oxfordshire.gov.uk).



The image shows a login form with two input fields: 'E-mail' and 'Password'. Below the 'Password' field is a 'Login' button. At the bottom of the form is a blue link that says 'Request new Password'.

If this is your first-time logging in, your password will have been supplied to you and 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.

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 from the homepage. Complete the form and click Submit. Or contact the Social Care Payments and System Data Team [Carepaymentqueries@oxfordshire.gov.uk](mailto:Carepaymentqueries@oxfordshire.gov.uk)



Name

Organisation Name

E-mail

Telephone Number

The Helpdesk staff will email the new password to your email address. There can be a delay in resetting passwords and accounts, therefore please do not send in multiple requests.

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



You can **access our support pages** from the landing / logging in page. Click on the support page link:

**Welcome to the Oxfordshire Provider Portal**

This is an online portal between the providers of adult social care and Adult Services at Oxfordshire County Council. It is a secure means to view and interact with contract and service delivery information, directly with us.

Some of the benefits include;

**Submit Actuals**

Submit your actuals directly to the local authority quickly and easily via the simple online form. Alternatively, upload actuals data in bulk using the import facility.

**Invoice Management**

Access the electronic record of invoices and credit notes sent to the local authority. And now, you can also create and submit actuals payable invoices directly, online.

**Purchase Orders**

To help manage your financial records, all purchase orders are available to view and download.

**Reporting**

The provider portal also features powerful reporting tools which can help you to generate your returns.

E-mail

Password

[Request new Password](#)

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.

All key information, guidance and support can be found on Oxfordshire County Council's [support page](#).

Start using the provider portal today!

Here you will find the user guide and other useful information.

## Welcome Page & Home Screen

On the **Welcome page**, you may see several red buildings. This depends on whether you need access to one care home or several care homes.

The screenshot shows the top navigation bar with the Oxfordshire County Council logo, the text 'ContrOCC Adults Finance Provider Portal', and the subtitle 'Provider web interface for Oxfordshire social services'. There are 'Home' and 'Help' buttons in the top right. Below the header, it says 'Welcome!' followed by a personalized message: 'Welcome **Tahmina Miah**. You are a registered Contact for more than one Provider. Before you can start using the Provider Portal, you must pick a Provider. You can change your selection later by using the drop down list in the top right hand corner of the screen.'

Under the heading 'Pick a Provider...', there is a grid of red building icons, each with a link to a specific provider:

- Order Of Saint John Care Trust
- OSJ - Chilterns Court
- OSJ - Contract Void Payments
- OSJ - Henry Cornish House
- OSJ - Isis Centre
- OSJ - Lake House
- OSJ - Langford View
- OSJ - Larkrise
- OSJ - Longlands
- OSJ - Madley Park
- OSJ - Marston Court
- OSJ - Meadowcroft
- OSJ - Old Station House
- OSJ - Outside of Oxfordshire

All ECH schemes are listed under one red building (organisation): Order Of Saint John Care Trust.



**Care homes** are listed separately. So, you would need to select the relevant care home from this screen, to view the details specific to this home. If you need access to more care homes, please contact us [Carepaymentqueries@oxfordshire.gov.uk](mailto:Carepaymentqueries@oxfordshire.gov.uk).

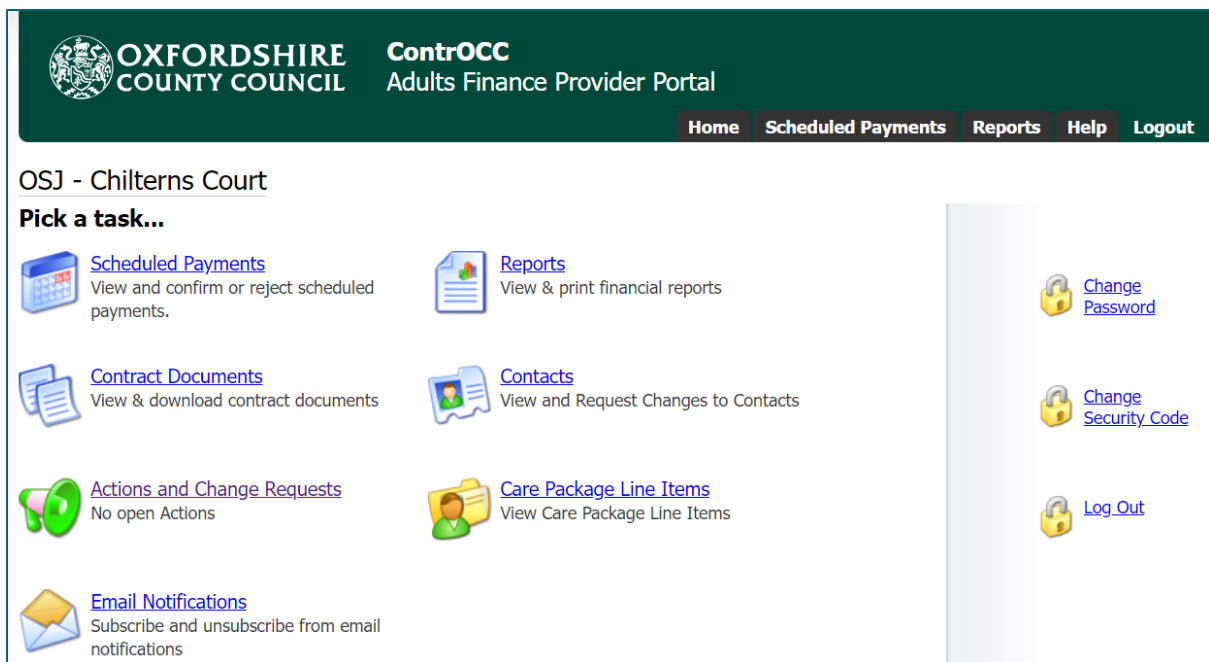


Void payments are also listed separately.



On the **Home screen** there are a set of icons, and the guide covers each. There are also a set of tabs along the top that repeat some of the icons.

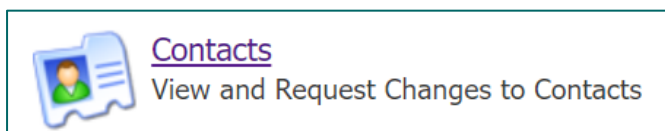
You would click on an icon to access that area of the portal:



On the right you have the option to change your security code or password.

## 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.



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

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:

If you need to request access removal:

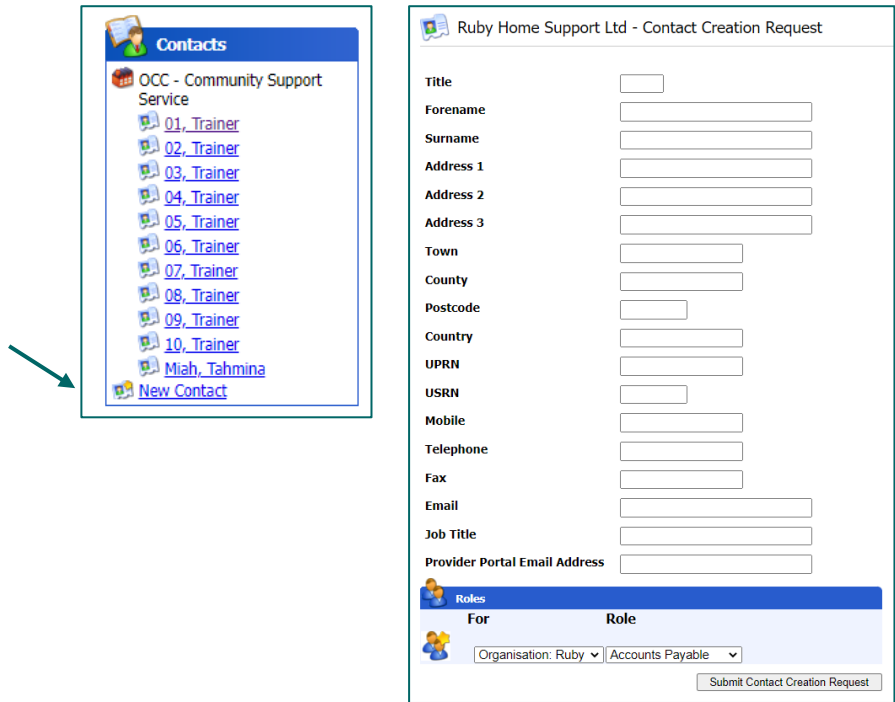
Select them from the list on the left.

Click on the 'Request Role Removal' button:

If an Employee leaves the Organisation or does not require access to the Portal, you need to select the "Removal Role" function. You will need to click on the button twice, to ensure you do not remove someone's access in error. The 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:

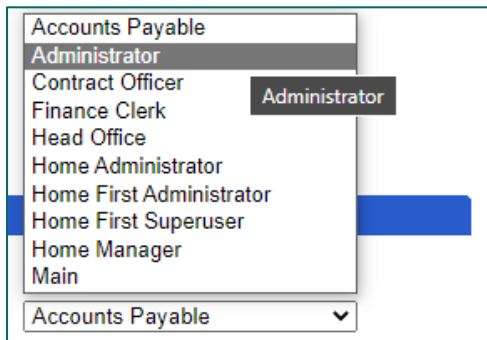
Click on the New Contact link on the left:



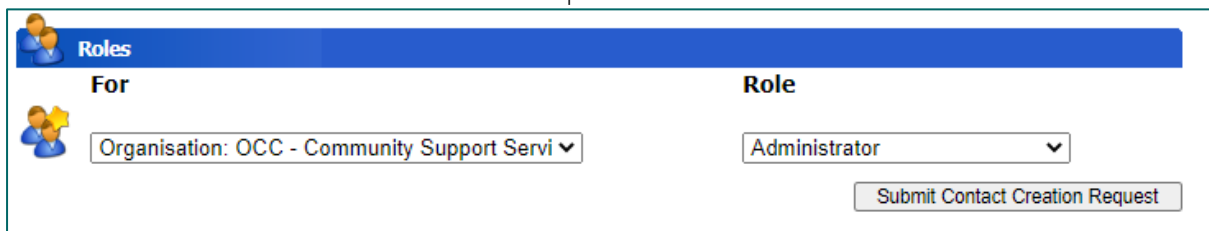
This will allow you to request a new user. Fill in the following fields:

- Forename
- Surname
- Full Address
- Telephone
- Email and the Provider Portal Email Address

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




Then click the Submit Contact Creation Request button:



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:







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

**Change Requests**

Include Historical View

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

**Change Requests**


Include Historical View

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

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/Actions

Change Requests - contain a list of requests sent to the Council requesting changes within The Provider Portal by the provider. By default, the list shows all Change Requests that are not older than a month or in a pending state.



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

### Change Requests:

This section is linked to the Contact area and displays any changes to Contacts you have raised. You can review the list of change requests and their statuses:

- Red = declined
- Orange = pending
- Green = accepted

Include Historical View

Status	Submitted	Last Updated	Type	Entity Name	Details	Rejection Reason
●	07/09/2021	--	Update Contact	[REDACTED]	i	
●	07/09/2021	--	Delete Contact Role	[REDACTED]	i	

**Hover over each 'i' to view Change Request details**

**The list of Change Requests will be displayed here**

**Click View to refresh the list of Actions and Change Request displayed**

Communication:

Your query is best sent to the [carepaymentqueries@oxfordshire.gov.uk](mailto:carepaymentqueries@oxfordshire.gov.uk) mailbox. However, if you want to notify OCC of the following issues via Actions, see the steps below:

- Death notification.
- Package of care ended.

For all other queries, please email the [carepaymentqueries@oxfordshire.gov.uk](mailto:carepaymentqueries@oxfordshire.gov.uk) mailbox.

For Death notifications: click on New Action.

**Actions and Change Requests**

**Actions**

New Action

Assigned To: [Any] Type: [Any] View Actions

Include Done Actions

Status	Last Post Date	Title	Re:	Due	Type	Assigned To
There are no actions that match your filter criteria						

Select 'Death Notification' in the type dropdown:

**New Action**

**Type:** Death Notification

**Related To:** Client

Enter the date of death in the title.

Add any additional relevant information in the text box.

If you have any documentation, email or evidence that can be attached, click on the choose file button to add it to the action.

**Assign to:** System Team

**Title:** DOD 22.11.23

**Text:** Client went into hospital 19.11.23. Sadly passed away on 22.11.23.

**Attachment:** Choose File No file chosen

Click Create Action at the bottom of the form.

You can also create Actions from the CPLI page. Next to each CPLI is a button 'Submit Action'. You can use this to let us know if a CPLI should have an end date:

**Care Package Line Items**

Service: [All Services] Client: [All Clients]  
Service Level: [All Service Levels] Include Historical:

View Reset

SSRef	Client	Service	Service Level	Start Date	End Date	Cost	Pricing	CPLI ID	Auth	
A272433	Miss Wednesday Adams	(Block) Lake House - Residential (Band 3)	Permanent - Residential	03/08/2022	-	£865.46 Weekly	1 x Placement at £865.46 (Spot)	164628	<input checked="" type="checkbox"/>	Submit Action
A380197	Mrs Betty Boop	(Spot) Lake House	Permanent - Residential	01/04/2023	-	£1,295.00 Weekly	1 x Placement at £1,295.00 (Spot)	183846	<input checked="" type="checkbox"/>	Submit Action

New Action

Type:

Related To:

Entity:

Due Date:

Assign to:

Title:

Text:

Re: Care Package Line Item for Miss Wednesday Adams. Permanent - Residential (Placement) from (Block) Lake House - Residential (Band 3), Starts 03/08/2022.

Attachment:

No file chosen

**Actions:**

You can review the actions raised and their statuses:

Actions and Change Requests

**Actions**

Assigned To:

Type:

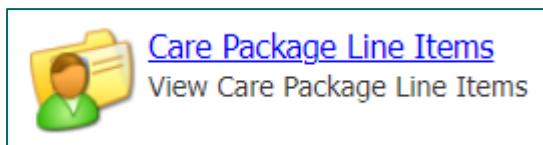
Include Done Actions

Status	Last Post Date	Title	Re:	Due	Type	Assigned To
	08/03/2024 15:12	<a href="#">CPLI cost incorrect</a>	Mr Charlie Brown (Client)	15/03/2024	Care Package Query	LA (System Team)
	08/03/2024 15:09	<a href="#">DOD 06/03/2024</a>	Mr Fred Flinstone (Client)	15/03/2024	Death Notification	LA (System Team)

## Care Package Line Items

Care Package Line Items (CPLI) – these are the service provisions (support or care packages) that are commissioned for service users. When a placement is sourced by our Brokerage Team – the Systems Team will add the care package in our finance system, and this is called a CPLI. The portal therefore allows you to view all care packages/placements for OCC service users that you are supporting. The information you see in the portal is a direct copy of what is in our finance system.

This allows you to check start dates for placements, as well as inform us if a CPLI/placement needs closing.



SSRef	Client	Service	Service Level	Start Date	End Date	Cost	Pricing	CPLI ID	Auth	
A394645		(Block) Madley Park - Residential (Band 3)	Non-Permanent - Residential	23/10/2023	27/10/2023	£865.46 Weekly	1 x Placement at £865.46 (Spot)	188367	<input checked="" type="checkbox"/>	<input type="button" value="Submit Action"/>
A365739		(Block) Madley Park - Residential (Band 3)	Permanent - Residential	11/09/2023	-	£865.46 Weekly	1 x Placement at £865.46 (Spot)	188631	<input checked="" type="checkbox"/>	<input type="button" value="Submit Action"/>
A287514		(Block) Madley Park - Residential (Band 2)	Permanent - Residential	15/06/2021	-	£783.71 Weekly	1 x Placement at £783.71 (Spot)	142576	<input checked="" type="checkbox"/>	<input type="button" value="Submit Action"/>
A360881		(Block) Madley Park - Residential (Band 3)	Permanent - Residential	29/11/2021	-	£865.46 Weekly	1 x Placement at £865.46 (Spot)	154905	<input checked="" type="checkbox"/>	<input type="button" value="Submit Action"/>
A346881		(Block) Madley Park - Residential (Band 3)	Permanent - Residential	29/09/2022	-	£865.46 Weekly	1 x Placement at £865.46 (Spot)	168613	<input checked="" type="checkbox"/>	<input type="button" value="Submit Action"/>
A287042		(Block) Madley Park - Residential	Permanent - Residential	24/07/2023	-	£865.46 Weekly	1 x Placement at £865.46 (Spot)	185858	<input checked="" type="checkbox"/>	<input type="button" value="Submit Action"/>

On the screen you will see the following:

- SSRef** – this is the Service User’s reference number, our identifier for a person
- Client** – the name of the Service User or Client Name
- Service** – the service name, the provider/care home
- Service Level** – the service type that has been commissioned for the service user.
- Start Date** – when the service has been commissioned to start
- End Date** – if applicable
- Cost** – the weekly cost of the package of care
- Care Package Ref** – unique ID for that CPLI, automatically generated by our finance system
- Authorised** – this shows if the CPLI has been authorised (in OCC’s finance system) and not still a draft service

Care packages do end and once we close a CPLI, it will drop off from this list. This does not however, mean you lose this information. You can tick the include historical box to view ended CPLIs.

Care Package Line Items

Service: [All Services] ▼

Client: [All Clients] ▼

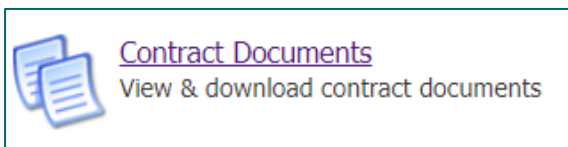
Service Level: [All Service Levels] ▼

Include Historical:

You can filter your CPLIs.

## Contract Documents

The Service Request form that is sent to you will include details of the service user, medical conditions, as well as their specific needs and requirements. This will be sent to you by OCC's Brokerage Team. Once a provider has agreed to pick up a package of care, the Brokerage Team will send a confirmation.



In addition to the above documentation, when a new care package has been set up in our finance system or a care package has ended, OCC will send you a document to confirm we have set up the care package in the system via the provider portal. This is known as a Contract Document within the portal. These are individual client provision agreements, which confirm details around service type, start date and cost, as previously agreed. The only purpose of these documents is to confirm that the package of care has been set up in the system.

You can download these documents as well as **accept or reject** them through the Provider Portal. Accepting the document indicates that you agree with the details provided. If you reject the document, you must provide a reason as to why and we can then investigate. There may be a mistake with the start date for instance.

We require you to accept or reject the agreement within 7 days otherwise Oxfordshire County Council will assume you are in agreement with the contract sent and therefore the details within. If you do not accept or reject it within 7 days, OCC will manually accept it for you.

Contract Documents						
Service: [No Selection]		Client: [No Selection]				
Status: [No Selection]	Updated Since: 01/11/2022			View		Reset
Doc. Type	Client	SSRef	Care Pkg Ref	Service	Date Range	Notes
<a href="#">Home First Home Support - Service Provision</a>	Simpson, Bart	A283177		Diamond Home Care - Zone 7 - Farringdon		Published by oxfordshire\fg607381 on 07/11/2022 <input type="button" value="Agree"/> <input type="button" value="Reject"/>
<a href="#">Home First Home Support - Service Provision</a>	Simpson, Homer	A332536		Diamond Home Care - Zone 6 - Oxford		Published by oxfordshire\fg607381 on 07/11/2022 <input type="button" value="Agree"/> <input type="button" value="Reject"/>
<a href="#">Home First Home Support - Service Provision</a>	Simpson, Lisa	A216941		Diamond Home Care - Zone 7 - Farringdon		Published by oxfordshire\fg607381 on 07/11/2022 <input type="button" value="Agree"/> <input type="button" value="Reject"/>
<a href="#">Home First Home Support - Service Provision</a>	Simpson, Marge	A349596		Diamond Home Care - Zone 6 - Oxford		Published by oxfordshire\fg607381 on 07/11/2022 <input type="button" value="Agree"/> <input type="button" value="Reject"/>

Click on the link in the Doc Type column and a PDF will download. Review the document and either press the Agree or Reject button as applicable. The Notes column will update accordingly. The notes column will indicate when we have made the document available to you.


**OXFORDSHIRE COUNTY COUNCIL**

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### Block Agreement Form (OSJ)


This admission form sets out the details of a block placement being utilised by Oxfordshire County Council under the block contract agreement. Please refer to the main terms and conditions within the block contract.

<b>1. Person's details:</b>	
<b>Name: Mr Homer Simpson</b>	<b>Date of Birth: 10 Aug 1941</b>
<b>Social Care Reference No: A123456</b>	


  

<b>2. Placement details:</b>
<b>Name of care home: (Block) Isis Centre - Nursing</b>
<b>Address: Cornwallis Road,</b>
<b>Oxford,</b>
<b>Oxon,</b>
<b>OX4 3NH.</b>

Agree: you will then need to enter your password and hit the Agree button at the bottom.

 [Agree Document - Home First Home Support - Service Provision](#) [Download Document](#)

By entering your password below and clicking 'Agree' you agree to this document. This is contractually binding.




Password

You can see the Notes column has updated:


<a href="#">Home First</a> <a href="#">Home</a> <a href="#">Support -</a> <a href="#">Service</a> <a href="#">Provision</a>	Simpson, Bart	A283177	Diamond Home Care - Zone 7 - Farringdon	Agreed by Tahmina Miah on 28/11/2022
---	---------------	---------	--	--------------------------------------

Reject: you will need to enter a rejection reason within the box. NB: some web browsers pre-fill this box with your email address or other information, please delete this. Enter your password and hit the Reject button at the bottom. Please provider clear reasons within the rejection reason box.

 [Reject Document - Home First Home Support - Service Provision](#) [Download Document](#)

By entering your password below and clicking 'Reject' you reject this document. You must specify a reason.

**Rejection Reason:**



Password

You can see the Notes column has updated:

<a href="#">Home First</a> <a href="#">Home</a> <a href="#">Support -</a> <a href="#">Service</a> <a href="#">Provision</a>	Simpson, Marge	A349596	Diamond Home Care - Zone 6 - Oxford	Rejected by Tahmina Miah on 28/11/2022. Reason: The start date is incorrect, it should be 03.10.2022.
---	----------------	---------	--	--

If it has been manually agreed by OCC, you will be able to see this in the Notes column:

<a href="#">Home First</a> <a href="#">Home</a> <a href="#">Support -</a> <a href="#">Service</a> <a href="#">Provision</a>	Van Houten, Milhouse	A43622	Pearl Carers - Zone 6 - Oxford	Agreed Manually by oxfordshire\fg607381 on 24/11/2022
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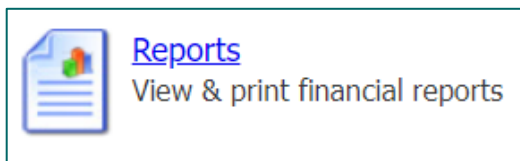


By default, you will see current, open contract documents. You can use the filters to view contract documents that have been agreed or rejected in the past. You can also filter by zone or client.

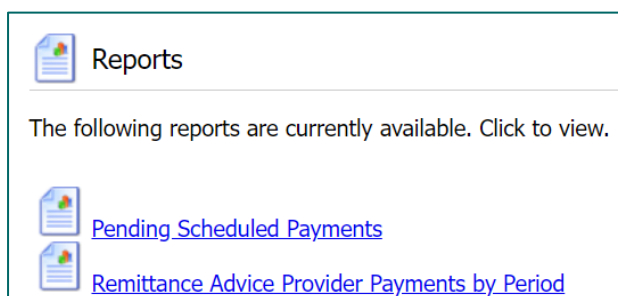
The image shows three dropdown menus for filtering contract documents. The 'Service' dropdown is currently set to '[No Selection]'. The 'Status' dropdown is open, showing options: '[No Selection]', '[Not Service Specific]', 'Diamond Home Care - Zone 6 - Oxford', and 'Diamond Home Care - Zone 7 - Farringdon'. The 'Client' dropdown is also open, showing options: '[No Selection]', '[Not Client Specific]', 'Bob, Sideshow', 'Simpson, Bart', 'Simpson, Grampa', 'Simpson, Homer', 'Simpson, Lisa', and 'Simpson, Marge'.

## 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:



The reports are as follows:



The reports are fixed in their content and layout and are supplied as standard with the provider portal.

### 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	<input type="checkbox"/>

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.

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

<a href="#">View</a>	<a href="#">Download Data</a>
----------------------	-------------------------------


If you would like the report in a PDF format, you can click on the save icon or go to the Scheduled Payments screen, scroll to the bottom and click on the Download Remittance Advice Report:

<a href="#">Download Remittance Advice Report</a>
---

This will replace the remittance report we email to OSJ.

## Scheduled Payments


This will list the payments 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, it will select the current financial year by default. Then in the contract dropdown, select the relevant contract (note, legacy ones remain in view):





**Scheduled Payments**


Financial year:  
2022/2023

Contract:  
Pearl Carers (Home Fir

 Pearl Carers Ltd

 [31 Oct 2022 to 27 Nov 2022](#)

 [3 Oct 2022 to 30 Oct 2022](#)



**Scheduled Payments**

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Please select the scheduled period on the left

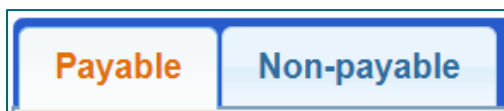
**Note:** OCC's four-weekly payment cycles are listed on our support page: [Orders of St John Care Trust | Oxfordshire County Council](#)

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.

Pearl Carers (Home First) - 31 Oct 2022 to 27 Nov 2022		CURRENT
Start Date:	31 Oct 2022	<b>Total</b>
End Date:	27 Nov 2022	£2246.27
	<b>Payable</b>	
	<b>Non-Payable</b>	£0.00

Pearl Carers (Home First) - 3 Oct 2022 to 30 Oct 2022		FINALISED
Start Date:	03 Oct 2022	<b>Total</b>
End Date:	30 Oct 2022	£2995.02
	<b>Payable</b>	
	<b>Non-Payable</b>	£0.00

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 certain situations.

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

[Download Remittance Advice Report](#)

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

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.

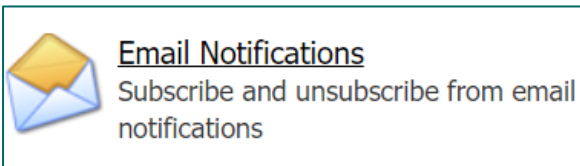
You will still receive the remittance from IBC which confirms the BACS run has completed. However, in addition you can now download remittances from the Provider Portal.

## Adjustments

OCC's finance system will automatically adjust the payment amount. Adjustments occur in the main due to the following reasons:

- Retrospective change to a Care Package Line Item – it was ended, opened or changed after the relevant payment period was finalised.
- Retrospective change to actuals data – actuals data was supplied late or changed after the relevant payment period was finalised.
- Void payments reconciliation.

## Email Notifications



You can choose to be notified of certain areas by email. Tick the relevant sections. Then click Save.



## Email Notifications

The following daily email notification subscription(s) are available:

- Actions
- Care Package Line Items
- Contract Documents
- Scheduled Payments

The following immediate email notification subscription(s) are available:

- Actions (Immediate)
- Password Change (Immediate)

Save