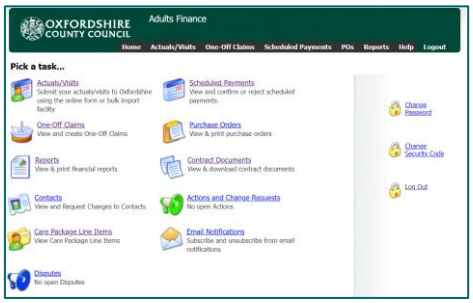
OXFORDSHIRE COUNTY COUNCIL

Adult Social Care Finance Provider Portal

Extra Care Housing
(Orders of St John Care Trust)
User Guide



V1.0 November 2023

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Setting up the Planned Care in your system

Your care system needs to be kept up to date with the care to be delivered to a service user. In the Provider Portal you will see the term Care Package Line Item (CPLI) – this will be the support package we have in our system for a service user. It is important that the *notional* agreed times of visits and hours of support is reflected in your care system.

A service requisition form is used to notify providers of a care package that needs to be sourced. The timetable of care on this form is to be used to set up the number and duration of visits for the person on your care system.

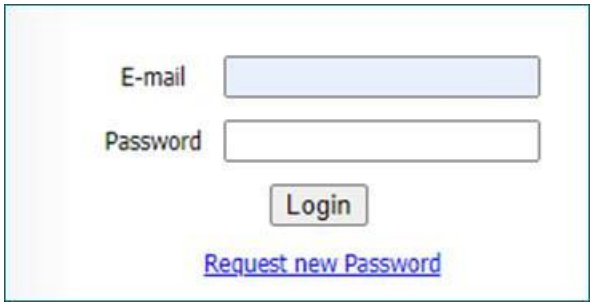
Where a permanent change is needed to a care package once it has started, the Adult Social Care Team will send you a variation form. You can use the information on this form to update your care system.

Where a temporary change is needed (for two weeks or less, where someone needs extra visits or extended visits, for instance to administer short term course of medication) this will need to be agreed with Adult Social Care. Changes need to be agreed via call/email with Adult Social Care.

You need to update your care system if there is a change to the Care Package Line Item.

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.



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:

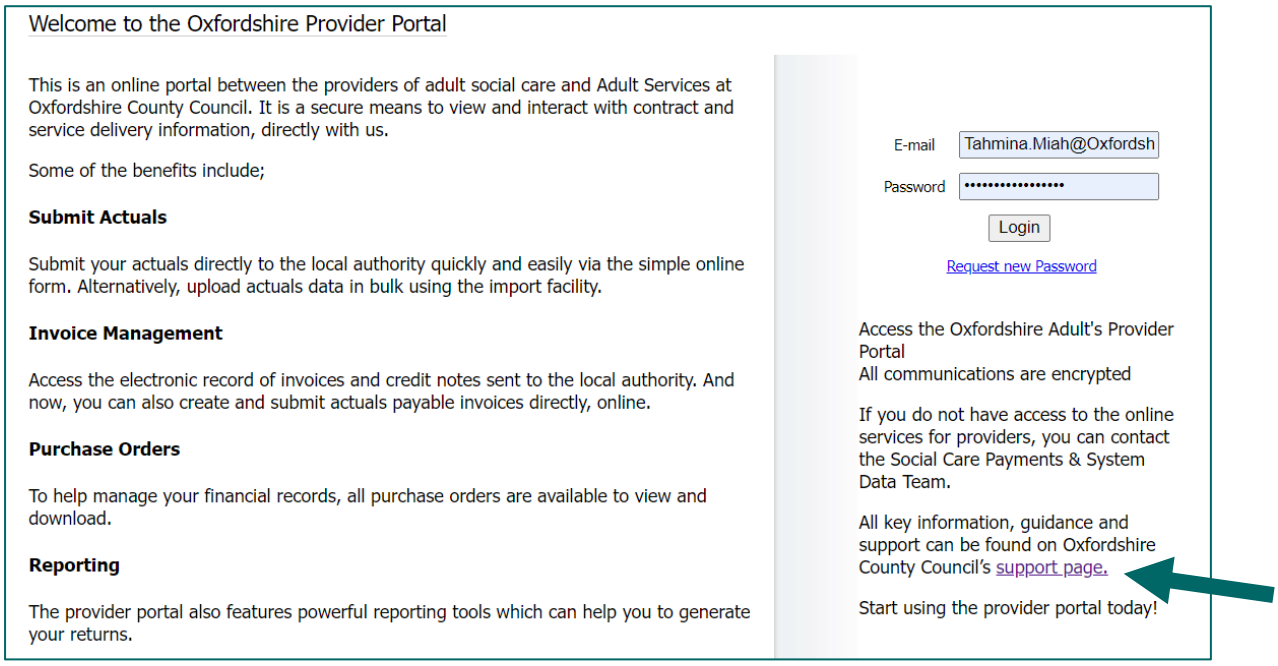
- ☑ Enter your password
- ☑ Enter at random two digits of your six-digit security code

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

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:

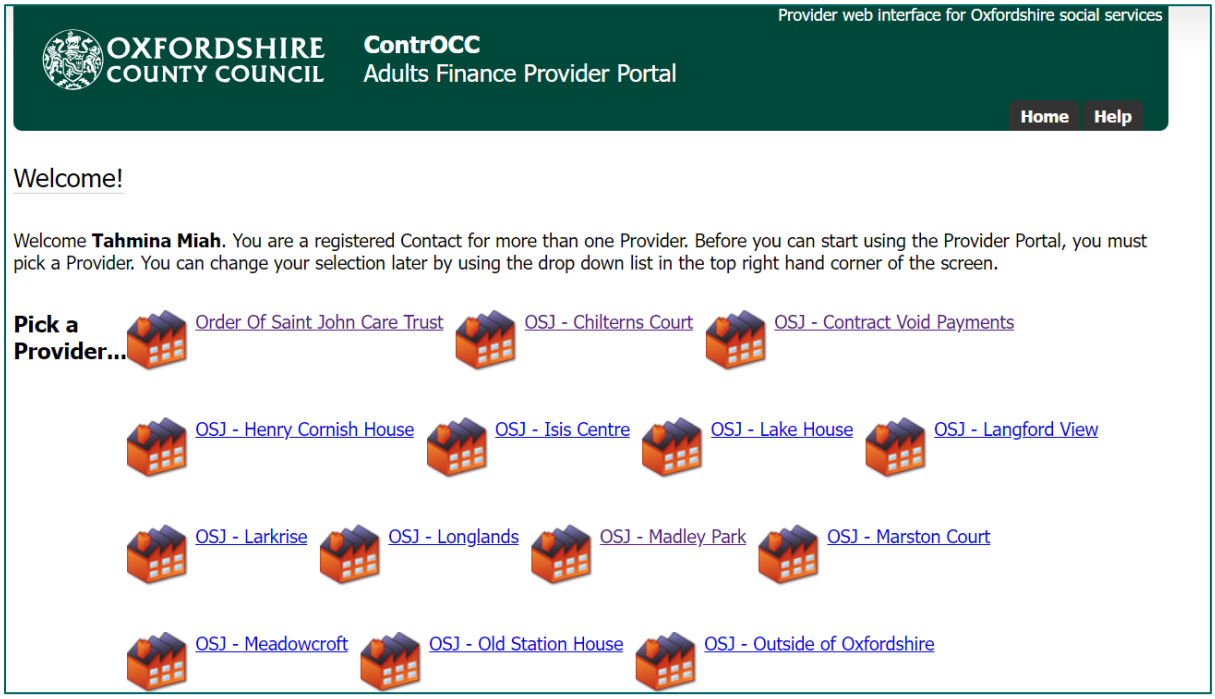
You can **access our support pages** from the landing / logging in page. Click on the support page link:



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, as well as the ECH schemes.



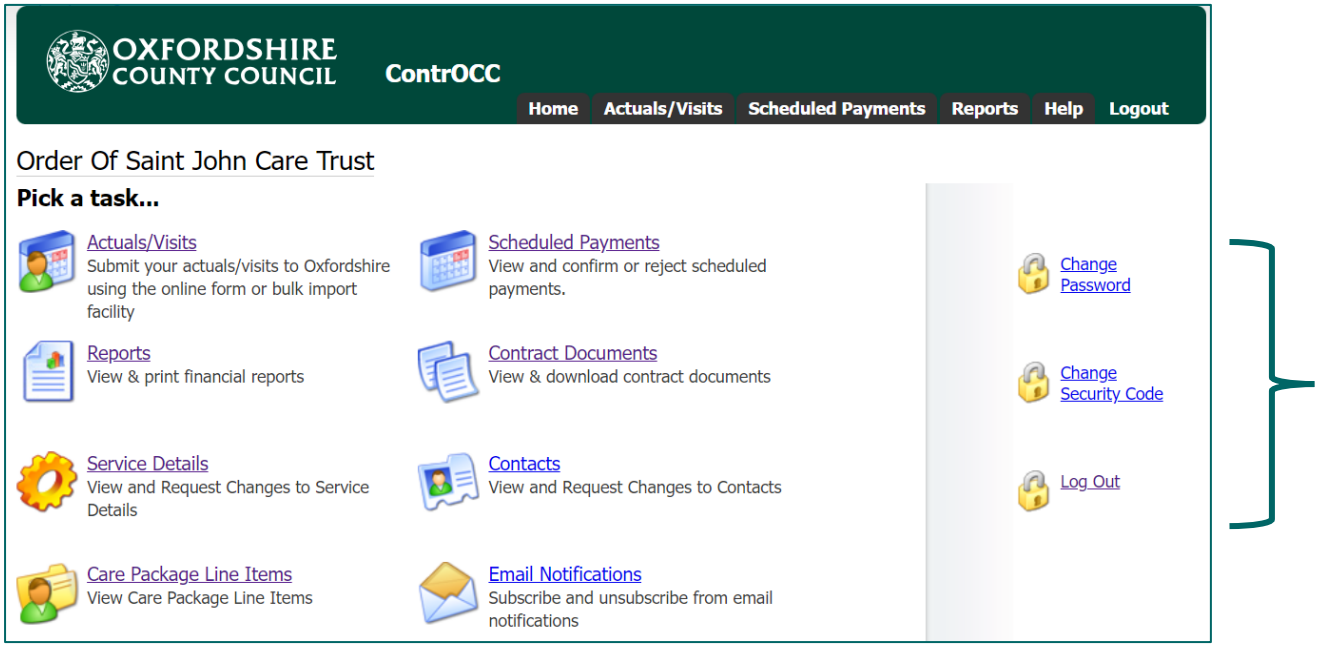
All ECH schemes are listed under one red building (organisation): Order Of Saint John Care Trust.

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.

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.

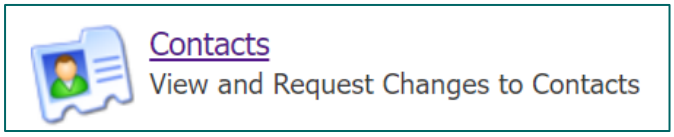
You would click on an icon to access that area of the portal:



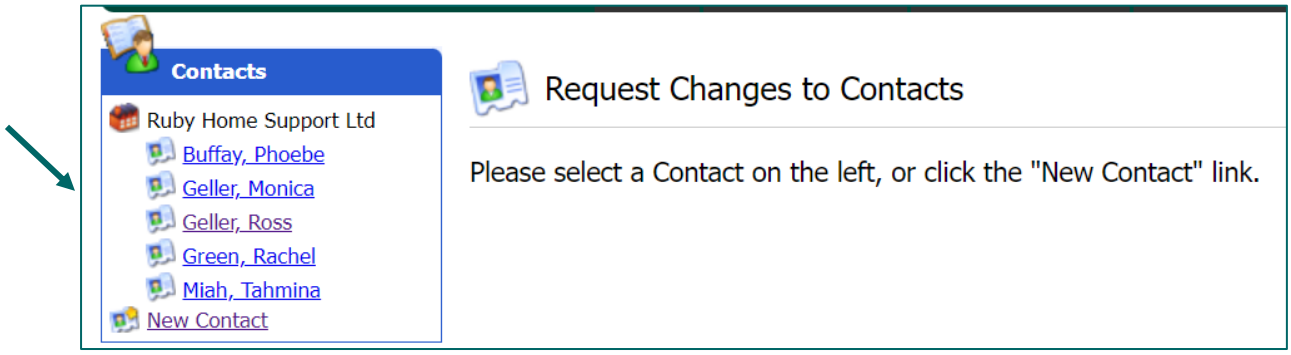
On the right you have the option to change your security code or password.

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.



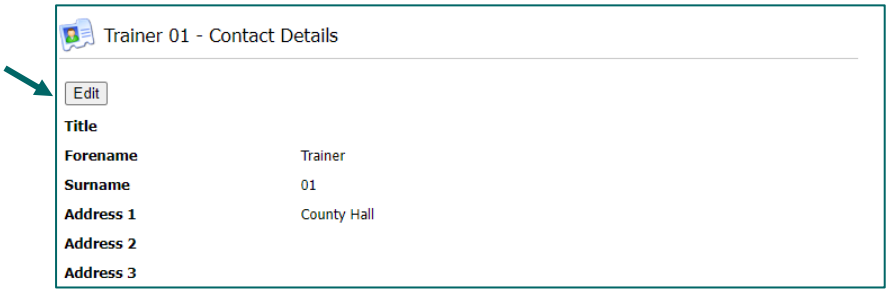
On the left will be a list of all staff with access and a login:



If a contact needs to be updated:

Select them from the list on the left.

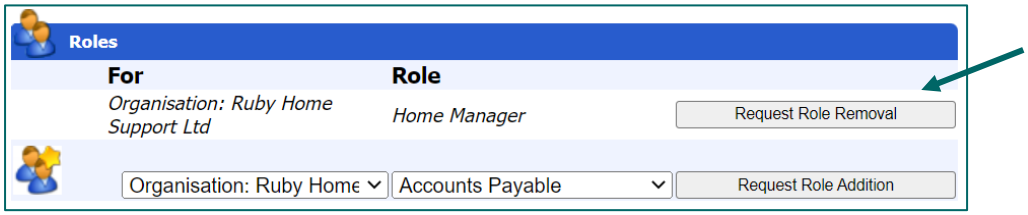
Click Edit at the top if it just their details that need updating:



If you need to request access removal:

Select them from the list on the left.

Click on the 'Request Role Removal' button:

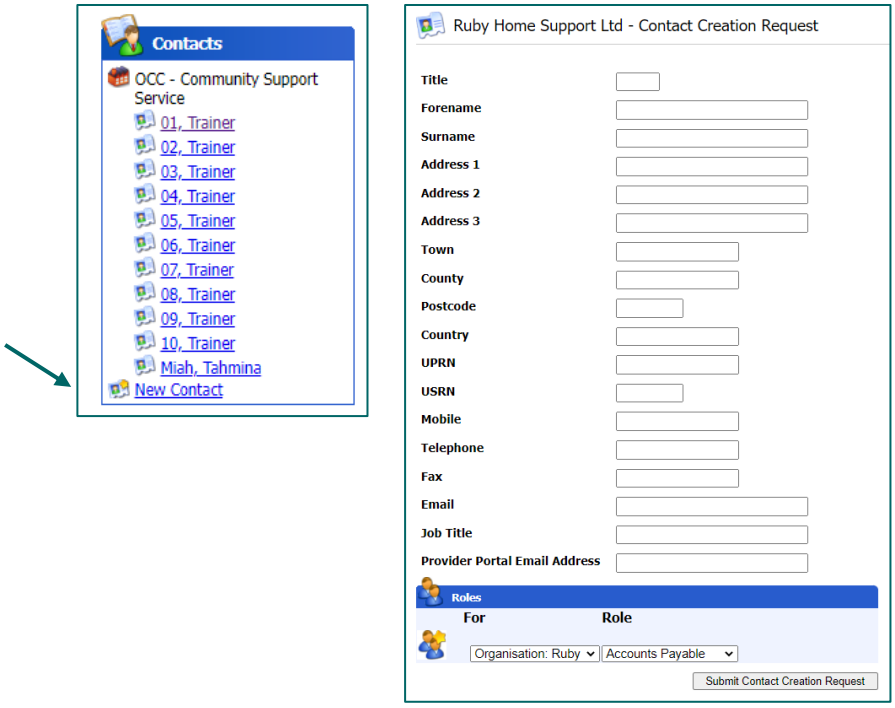


If an Employee leaves the Organisation or does not require access to the Portal, you need to select the "Removal Role" function. You will need to click on the button twice, to ensure

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:

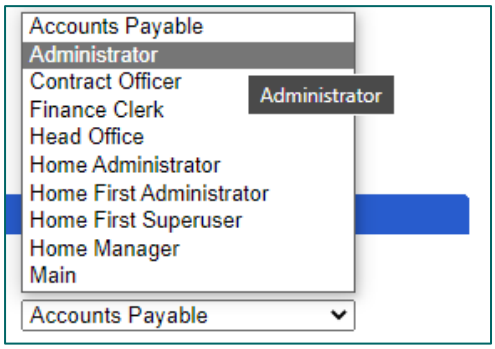
Click on the New Contact link on the left:



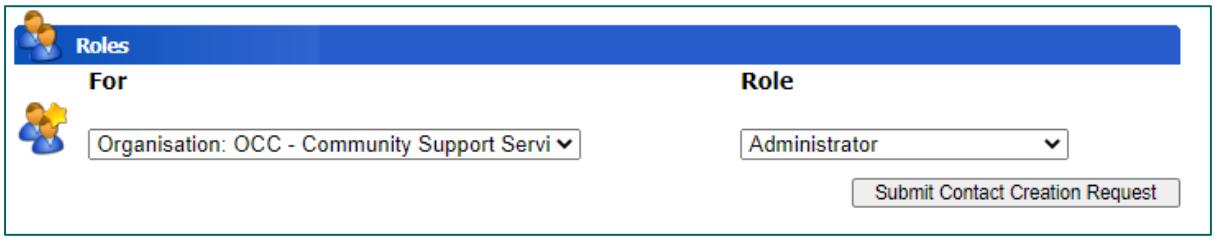
This will allow you to request a new user. Fill in the following fields:

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

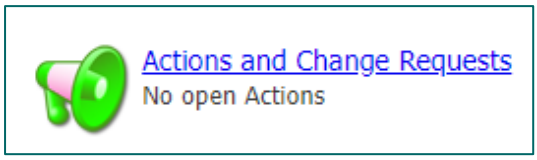
In the 'Role' dropdown – select the applicable role for that contact.

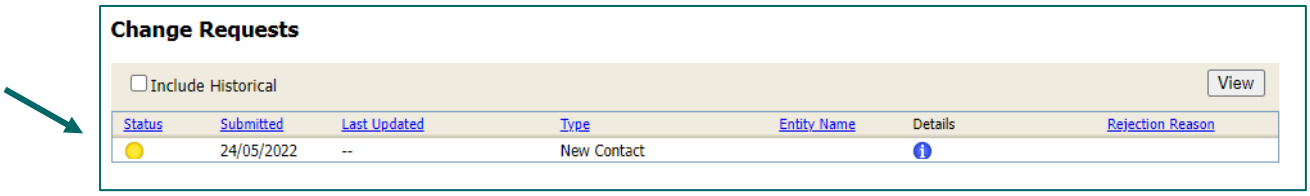


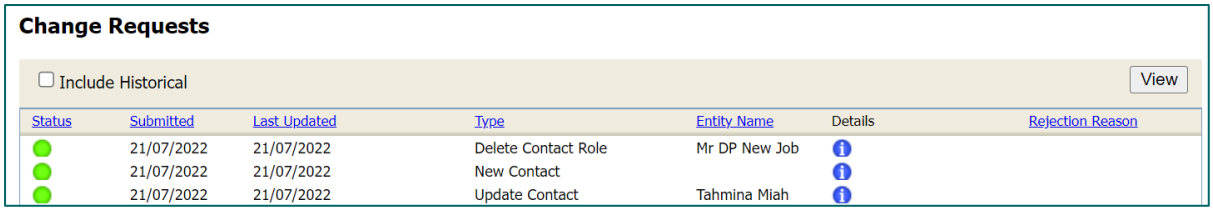
Then click the Submit Contact Creation Request button:



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:



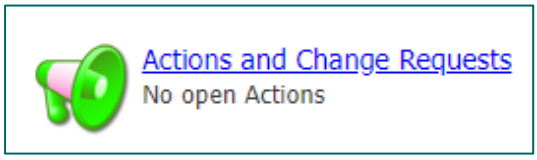




A green status circle = accepted by the local authority
An amber status circle = change request is still pending
A red status circle = rejected by the local authority. See rejection reason in the last column.

Change Requests

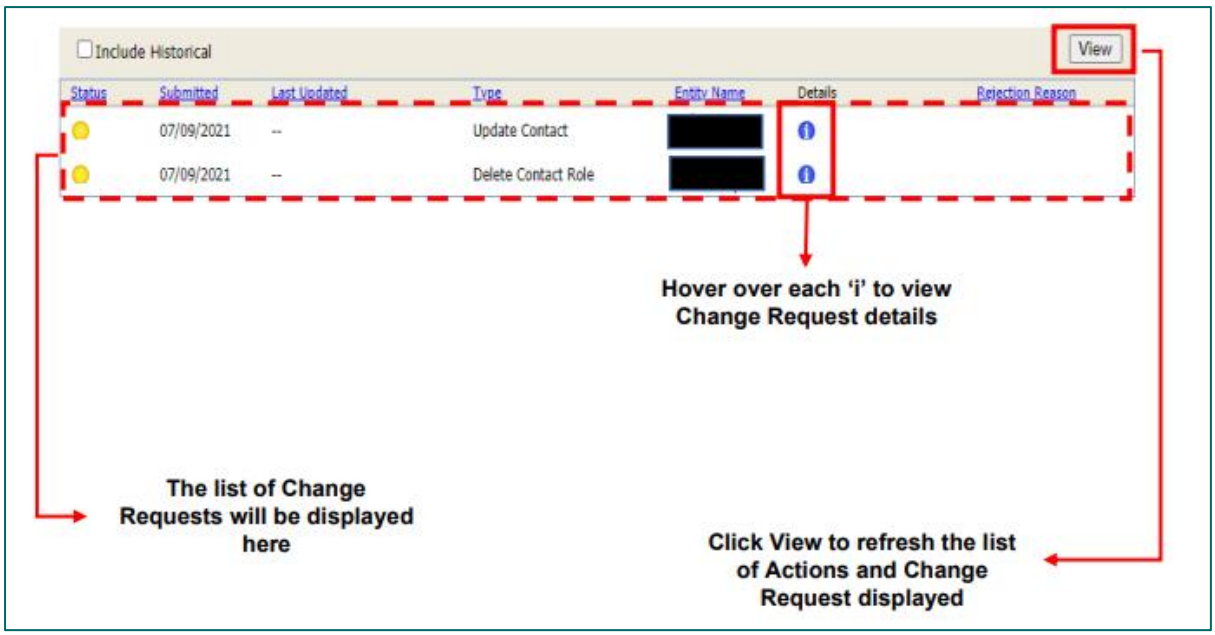
Change Requests - contain a list of requests sent to the Council requesting changes within The Provider Portal by the provider. By default, the list shows all Change Requests that are not older than a month or in a pending state.



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

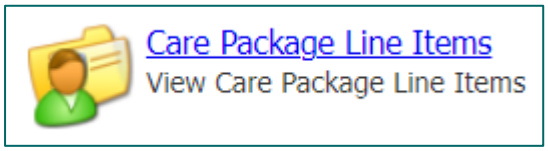


Communication:

Your ECH query is best sent to the carepaymentqueries@oxfordshire.gov.uk mailbox.

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 package of care is sourced by our Brokerage Team, once picked up by a provider – 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 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 screen not only confirms that we have set up the package of care but holds key information that you require for your actuals file.



Care Package Line Items

Service: [All Services]

Client: [All Clients]

Service Level: [All Service Levels]

Include Historical: ☐

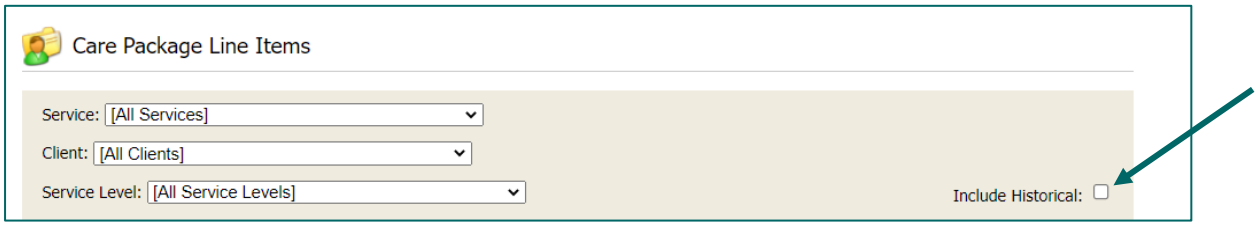
View Reset

SSRef	Client	Service	Service Level	Start Date	End Date	Cost	Pricing	CPLI ID	Auth
A4839		ECH - OSJ Shotover View	Extra Care Housing (OSJ) - Core Charge	01/04/2023	-	£53.00 Weekly	1 x Charge at £53.00 (Spot)	178723	☑
A4839		ECH - OSJ Shotover View	Extra Care Housing (OSJ) - Planned Care	01/03/2023	-	£650.88 Weekly (Timetabled)	30 x Hours (Timetabled Pricing) (Spot)	176359	☑
A2354		ECH - OSJ Isis Court	Extra Care Housing (OSJ) - Core Charge	01/04/2023	-	£47.83 Weekly	1 x Charge at £47.83 (Spot)	178736	☑
A23544		ECH - OSJ Isis Court	Extra Care Housing (OSJ) - Planned Care	11/01/2021	-	£130.18 Weekly (Timetabled)	6 x Hours (Timetabled Pricing) (Spot)	131930	☑
A3237		ECH - OSJ Isis Court	Extra Care Housing (OSJ) - Core Charge	01/04/2023	-	£47.83 Weekly	1 x Charge at £47.83 (Spot)	178688	☑
A3237		ECH - OSJ Isis Court	Extra Care Housing (OSJ) - Planned Care	16/01/2023	-	£249.50 Weekly (Timetabled)	11.5 x Hours (Timetabled Pricing) (Spot)	173803	☑
A39774		ECH - OSJ Mayott House	Extra Care Housing (OSJ) - Planned Care	18/02/2023	-	£309.17 Weekly (Timetabled)	14.25 x Hours (Timetabled Pricing) (Spot)	176232	☑

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 (will include the scheme name)
- ☐ **Service Level** – the service type that has been commissioned for the service user. There is a fixed list of service level options, this is covered in a later section.
- ☐ 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

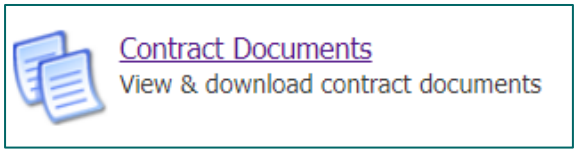
Care packages do end and once we close a CPLI, it will drop off from this list. This does not however, mean you lose this information. You can tick the include historical box to view ended CPLIs.



You can filter your CPLIs. You can also filter by service level and ECH scheme.

Contract Documents

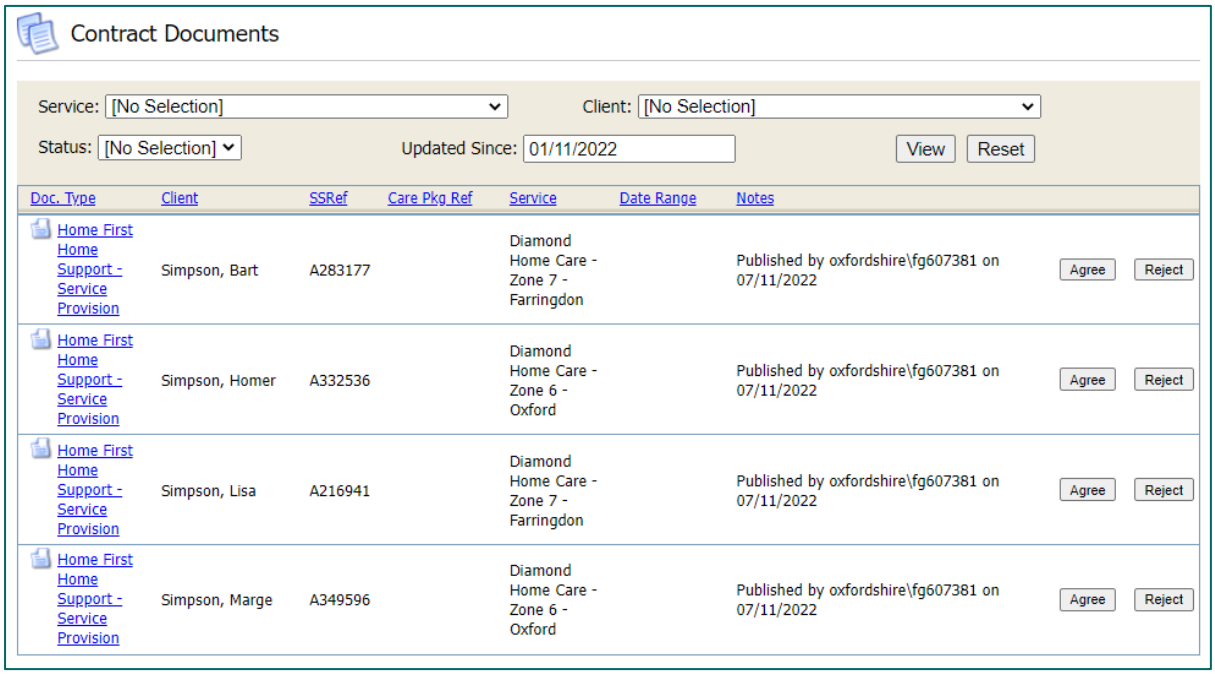
The Service Request form that is sent to you will include details of the service user, medical conditions, timetable of care as well as their specific needs and requirements. This will be sent to you by OCC's Brokerage Team. Once a provider has agreed to pick up a package of care, the Brokerage Team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



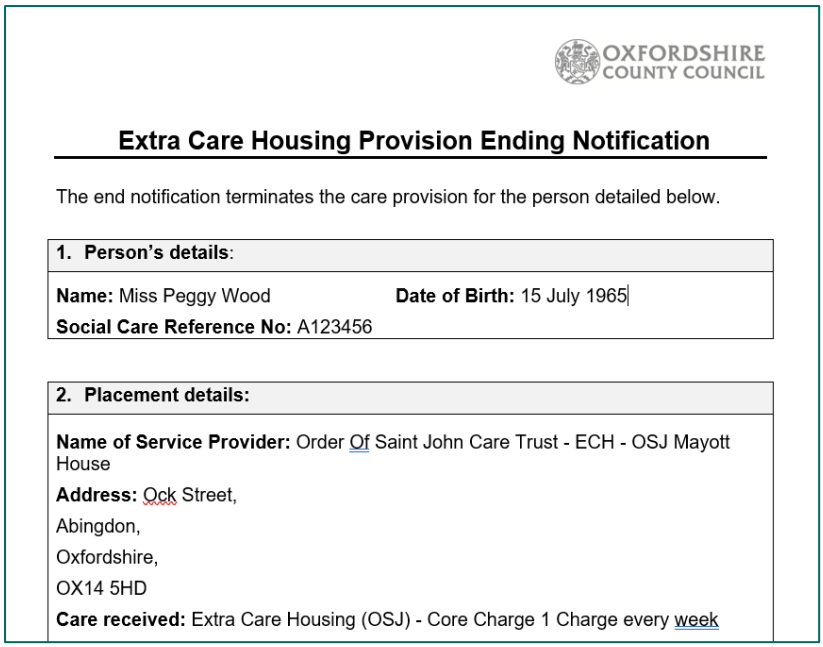
In addition to the above documentation, when a new care package has been set up in our finance system or a care package has ended, OCC will send you a document to confirm we have set up the care package in the system via the provider portal. This is known as a Contract Document within the portal. These 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 or number of total hours 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.



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

Extra Care Housing Provision Ending Notification

The end notification terminates the care provision for the person detailed below.

1. Person's details:

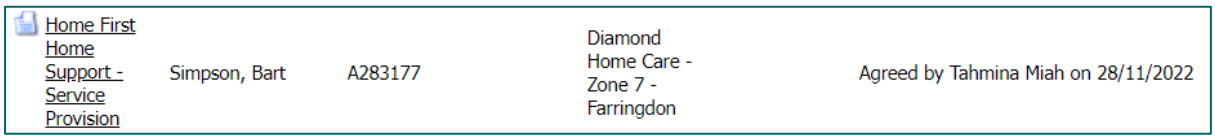
Name: Miss Peggy Wood **Date of Birth:** 15 July 1965
Social Care Reference No: A123456

2. Placement details:

Name of Service Provider: Order Of Saint John Care Trust - ECH - OSJ Mayott House
Address: Ock Street,
Abingdon,
Oxfordshire,
OX14 5HD
Care received: Extra Care Housing (OSJ) - Core Charge 1 Charge every week

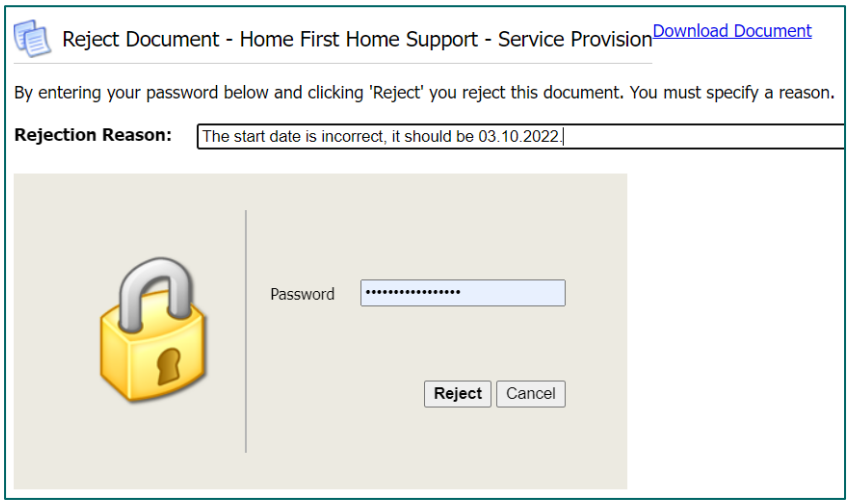
Agree: you will then need to enter your password and hit the Agree button at the bottom.

You can see the Notes column has updated:



Home First Home Support - Service Provision	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.



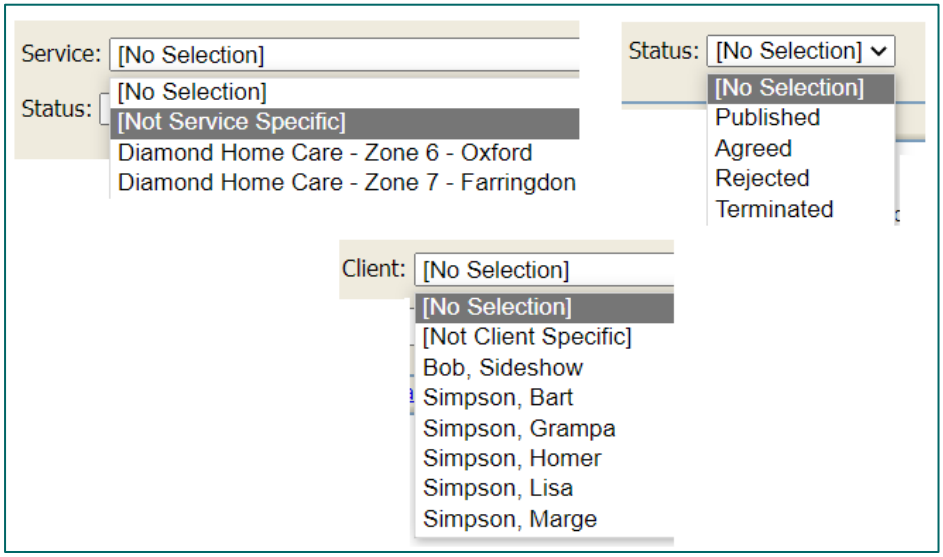
You can see the Notes column has updated:

Home First Home Support - Service Provision	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:

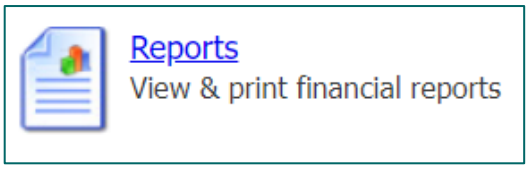
Home First Home Support - Service Provision	Van Houten, Milhouse	A43622	Pearl Carers - Zone 6 - Oxford	Agreed Manually by oxfordshire\fg607381 on 24/11/2022

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.

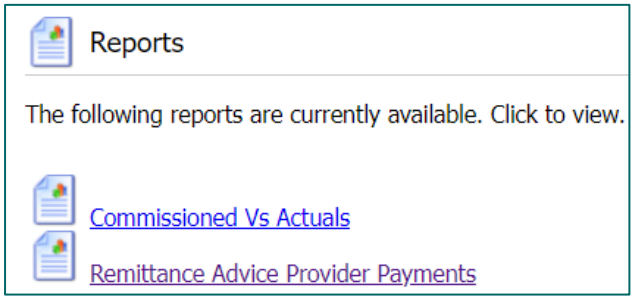


Reports

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.

Commissioned Vs Actuals:

This report compares the commissioned quantity/hours (what is recorded on the CPLI) to the Actual quantity (total hours actually delivered in a week). Differences are shown in terms of quantity and cost. The report can be limited by date range, Organisation and Client and be restricted to show only differences. There is an option to include or exclude weeks where no actuals have been recorded.

Pearl Carers Ltd — Home Support - OCC

Personal Care
Skinner, Principal (A332295) — **Service Start** 03/10/2022

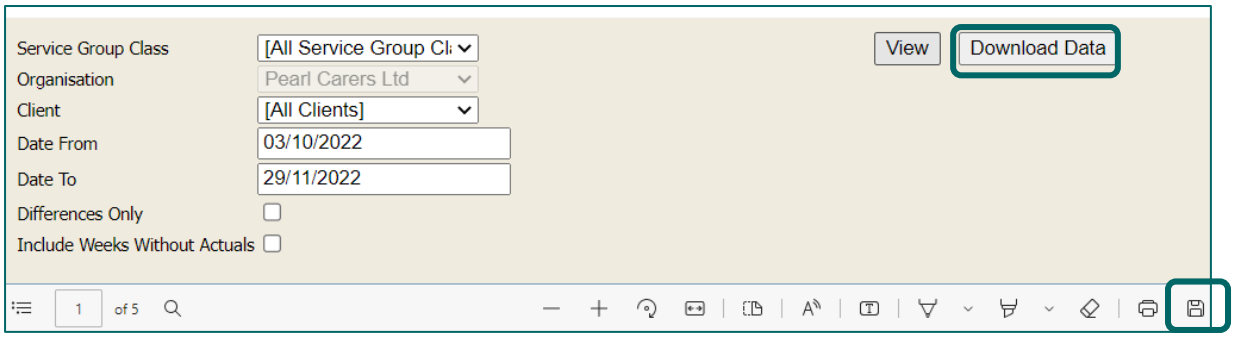
					Quantity				Cost			
Actual Week	**Gen.**	**Visits**	**Cost Centre**	**Subjective**	**Comm.**	**Actual**	**Frust.**	**Diff.**	**Comm.**	**Actual**	**Frust.**	**Diff.**
03/10/2022	N	3	Support at Home - Under 65 - Support with Memory and Cognition	Home Support	5	3.05	1	-0.95	£116.13	£70.84	£23.23	-£22.06

Details:

- Start date of the Care Package Line Item
- Quantity commissioned by the Care Package Line Item
- Quantity of Actual where different from the commissioned
- Frustrated quantity (where the visit was not delivered but the provider is still being paid)
- Any difference between commissioned quantity and payable quantity (actual + frustrated)
- Cost of commissioned hours
- Cost of Actual where different from the commissioned
- Cost of frustrated Actuals
- Any difference between commissioned cost and payable amount (based on actual + frustrated quantities)

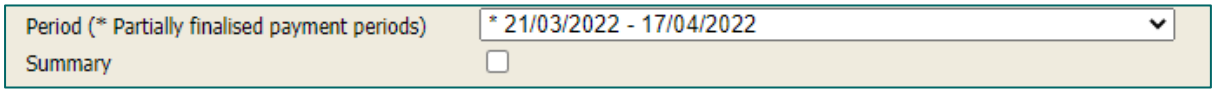
You can export the report in two ways:

1. Click on the Download Date button to export the report as a csv file
2. Click on the Save Icon to save the report as a PDF



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:

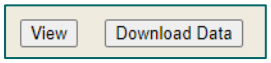


Payment items for the same client, are aggregated into one line in the report. For example, some backdated changes lead to pairs of positive and negative items. (If these pairs cancel each other out, they are not shown in the report at all.) Any manual adjustments made in OCC's financial system are always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

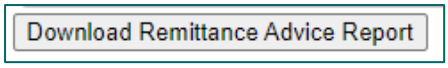
Each line shows:

- 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:

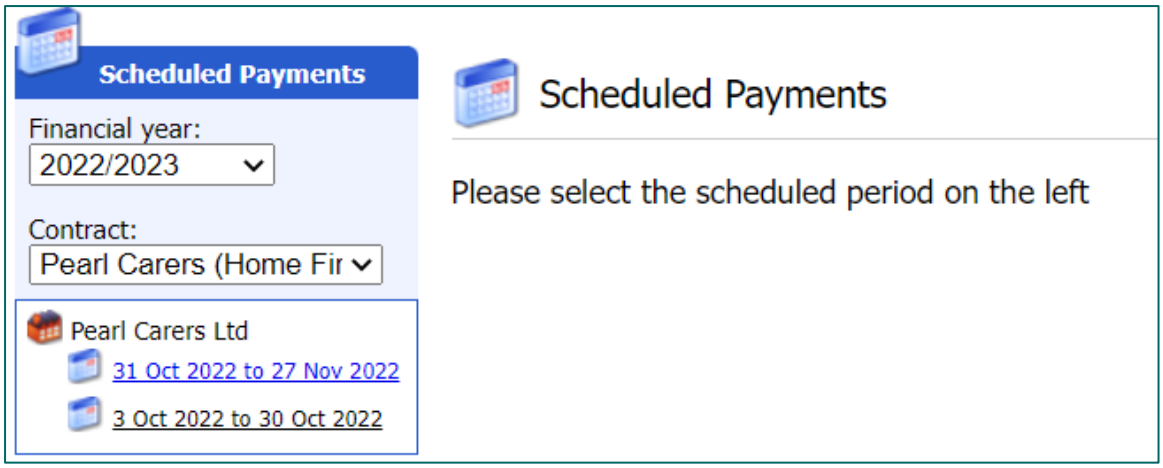


If you would like the report in a PDF format, you can click on the save icon or go to the Scheduled Payments screen, scroll to the bottom and click on the Download Remittance Advice Report:



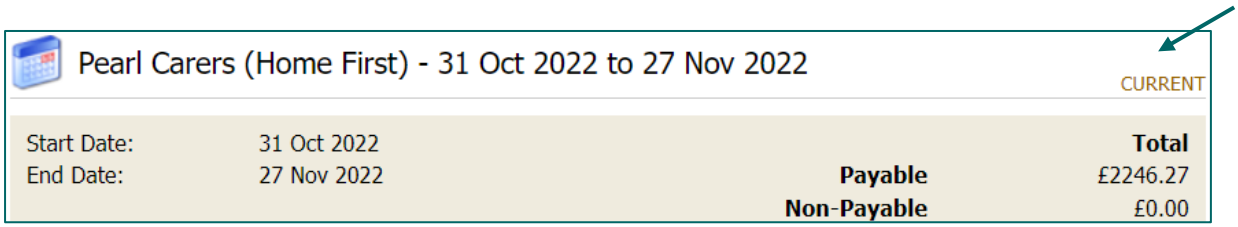
Scheduled Payments

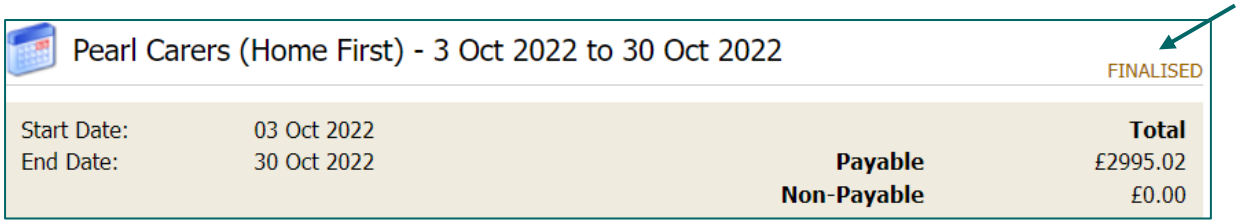
This will list the payments in OCC's finance system based on all the care package line items. You would need to select the payment period of interest from the left, it will select the current financial year by default:



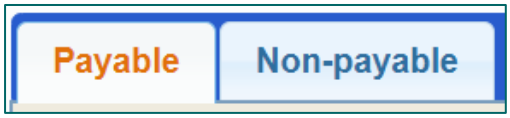
Note: OCC's four-weekly payment cycles are listed on our support page: [Orders of St John Care Trust | Oxfordshire County Council]

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.





There are two tabs Payable and Non-payable.



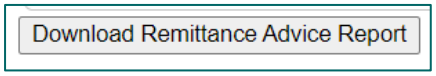
By default, the Payable tab is on display, and this will be a list of items being paid for in the current period (including any payments being made in instalments). Payments in OCC's finance system can be made non-payable if they have the following statuses:

⇒ 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:



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

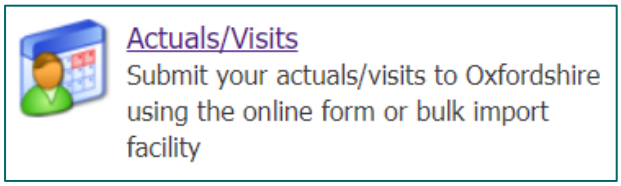
ECH Actuals

In order to pay you the correct amount but also charge our service users the correct amount we need to know what care was actually delivered on a weekly basis.

The planned hours are what we have agreed with you and is recorded on the CPLI that you can view in the portal. As an example, Mrs smith is planned to have 7 hours of care each week. She has a morning call for 30 minutes and an evening call for 30 minutes. The delivered hours are what was actually delivered from week to week, because it can fluctuate. Service users can cancel visits, go into hospital, need extra emergency support etc.

Therefore, we require providers to submit their actuals data into the portal. You do this by importing a file. Once you upload your file with the data, it is received into our finance system in real time. The data supplied will try to match to a CPLI, and then both payment and charges are generated from this. There is a schedule that we require providers to follow on our support page, that indicates when we need actuals data to be uploaded by.

We only require actuals for planned care hours. We do not need actuals for the core charge and notice periods.



The next few sections cover the following:

- The format of the actuals file
- The acceptable data formats within the file
- Column headings on the file
- Service names and service levels
- Comments on the file

ECH%20Actuals%20Import%20Guidance.xl

File Headings

- ☑ The actuals import file must be in a csv format.
- ☑ A header row is required, using the field names listed below.
- ☑ Even if the columns are not used, all the headings must be present in the file.

Column Heading	Required	Notes
Service	Yes	OCC Service Names, see options below
ServiceLevel	Yes	OCC Service Level, see below – this can be found on the portal
SSRef	Yes	OCC Client Ref – this can be found on the portal
Date	Yes	Example, 3rd April 2023 would be: 20230403
IsTimetabled	Yes	Extra Care Housing (OSJ) - Planned Care & Extra Care Housing (OSJ) - Non-chargeable* would be 1 (timetabled service) Extra Care Housing (OSJ) - Core Charge would be 0 (not a timetabled service)
TimetabledQuantity	No	
TimetabledEntryTime	Conditional	For Timetabled services only, otherwise must be empty. > Extra Care Housing (OSJ) - Planned Care & Extra Care Housing (OSJ) - Non-chargeable* = timetabled service > No longer needed on file: Extra Care Housing (OSJ) - Core Charge (not a timetabled service)
TimetabledExitTime	Conditional	For Timetabled services only, otherwise must be empty. > Extra Care Housing (OSJ) - Planned Care & Extra Care Housing (OSJ) - Non-chargeable* = timetabled service > No longer needed on file: Extra Care Housing (OSJ) - Core Charge (not a timetabled service)
TimetabledIsFrustrated	Conditional	For Timetabled services only, otherwise must be empty. > Extra Care Housing (OSJ) - Planned Care & Extra Care Housing (OSJ) - Non-chargeable* = 0 > No longer needed on file: Extra Care Housing (OSJ) - Core Charge (not a timetabled service)
WeeklyActualQuantity	Conditional	For Non-Timetabled services only, leave empty. > Extra Care Housing (OSJ) - Planned Care & Extra Care Housing (OSJ) - Non-chargeable* = blank > No longer needed on file: Extra Care Housing (OSJ) - Core Charge
WeeklyFrustratedQuantity	Conditional	Leave blank. No longer needed on file: Extra Care Housing (OSJ) - Core Charge

WeeklyMissedQuantity	Conditional	Leave blank. No longer needed on file: Extra Care Housing (OSJ) - Core Charge
WeeklyExtraQuantity	Conditional	Leave blank. No longer needed on file: Extra Care Housing (OSJ) - Core Charge
WeeklyNumberOfVisits	Conditional	Leave blank. No longer needed on file: Extra Care Housing (OSJ) - Core Charge
Comments	Conditional	Indicate why the increase or additional visit (see further below).
CarePackageLineItemID	No	
TimetabledWeekHasNoDelivery	No	

File Data Format

The data on the actuals files does need to be in a particular format for the portal to accept the file, otherwise you will get an error message when you import the file. The table below covers what formats each column data needs to be in, as well as other acceptable formats.

Column	DataType	Required?
Service	Text (100)	Yes
ServiceLevel	Text (500)	Yes
SSRef	Text (50)	Yes
Date	Date, YYYYMMDD	Yes
IsTimetabled	0=No or 1=Yes	Yes
TimetabledQuantity	Decimal	No
TimetabledEntryTime	Time, hh:mm	Conditional
TimetabledExitTime	Time, hh:mm	Conditional
TimetabledIsFrustrated	0=No or 1=Yes	Conditional
WeeklyActualQuantity	1 or 0	Conditional
WeeklyFrustratedQuantity	1 or 0	Conditional
WeeklyMissedQuantity	1 or 0	Conditional
WeeklyExtraQuantity	1 or 0	Conditional
WeeklyNumberOfVisits	Integer	Conditional
Comments	Text	Conditional
CarePackageLineItemID	Integer	No
TimetabledWeekHasNoDelivery	0=No or 1=Yes	No

Service Names and Service Levels

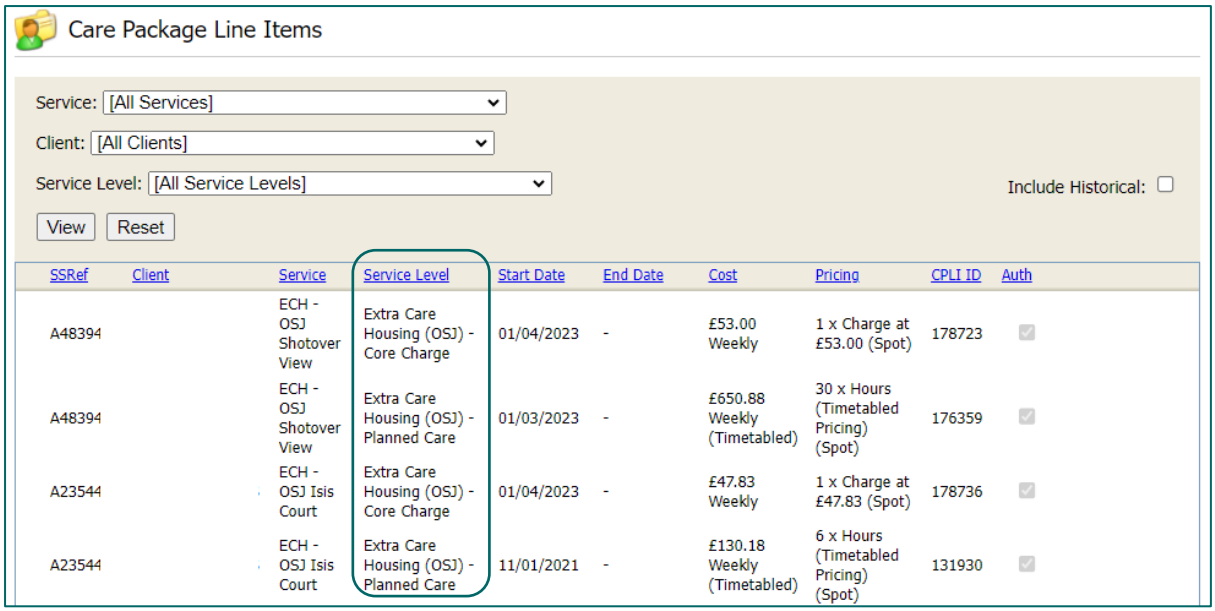
Service Names

Use the applicable service name below in the Service column on the csv actuals file.

Service Names Used
Centurion House
Isis Court
Mayott House
Moorside Place
Moorside Winter Crisis Flat 37
Moorside Winter Crisis Flat 41
Orchard Meadows
Orchard Meadows Pathway Flat 27
Shotover View
Shotover View Pathway Flat 22

Planned Hours of Care & CPLIs

When a package of care has been commissioned with OCC and we have added this to our finance system, you will be able to view this within the Provider Portal. These are referred to as Care Package Line Items (CPLI) in our system.



SSRef	Client	Service	Service Level	Start Date	End Date	Cost	Pricing	CPLI ID	Auth
A48394		ECH - OSJ Shotover View	Extra Care Housing (OSJ) - Core Charge	01/04/2023	-	£53.00 Weekly	1 x Charge at £53.00 (Spot)	178723	☑
A48394		ECH - OSJ Shotover View	Extra Care Housing (OSJ) - Planned Care	01/03/2023	-	£650.88 Weekly (Timetabled)	30 x Hours (Timetabled Pricing) (Spot)	176359	☑
A23544		ECH - OSJ Isis Court	Extra Care Housing (OSJ) - Core Charge	01/04/2023	-	£47.83 Weekly	1 x Charge at £47.83 (Spot)	178736	☑
A23544		ECH - OSJ Isis Court	Extra Care Housing (OSJ) - Planned Care	11/01/2021	-	£130.18 Weekly (Timetabled)	6 x Hours (Timetabled Pricing) (Spot)	131930	☑

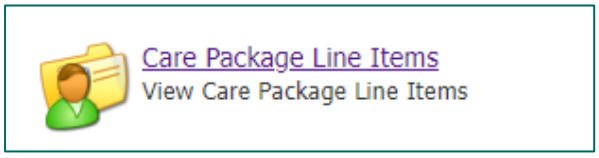
Clients would be receiving one of the following service types, and these are the service level options in the system that data is required for:

1. Extra Care Housing (OSJ) - Planned Care
2. Extra Care Housing (OSJ) - Core Charge
3. Extra Care Housing (OSJ) - Non-chargeable*

There is a service level column on the file and this column is mandatory. Note: we do not require actuals for the core charge element.

There are two places within the portal where you can retrieve the mandatory information you need for the visits file:

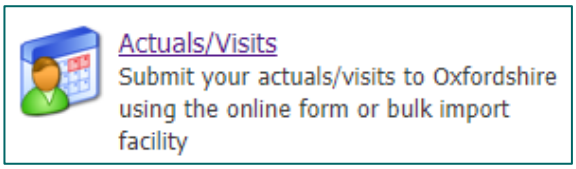
1. CPLI Screen:



The ssref, service name and service level can be viewed here:

2. Commissioned Care Export:

Click on the Actuals/Visits icon, then select the Commissioned Care Export link from the left:



Click on the Export button next to the globe icon and a csv file can be downloaded.

This export will list all packages of care in the system. The file will contain columns for the ssref, service name and service level.

You need to make sure you the same naming convention as that recorded on the CPLI for service level and service name on your visits file. Otherwise, the system will not recognise the data.

Comments

There is a comments column on the file. A comment explaining why there has been an increase to a visit or an additional visit, where it occurs, ensures OCC do not need to query and hold the payment for these actuals. Otherwise, we will need to hold payment for those actuals.

Standard notation to be used for comments are one of the following:

1. Planned [Additional Visit/Extra Time] – approved by SW **/**/** (date)
2. Unplanned [Additional Visit/Extra Time] – 'enter reason'

Planned [Additional Visit/Extra Time]: this is where it is known that the service user needs an extra call or more time added to an existing call, ahead of time (at least 24 hours ahead of time). In which case, approval is needed from a duty social worker – ASC. It will be

sufficient to just put the prefix (as noted above) and the name of the social worker who approved it and the date of approval. No reason is required.

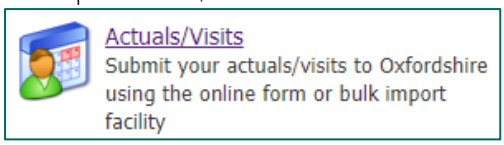
Unplanned [Additional Visit/Extra Time]: this is where the service user needs extra time or an extra visit that day and there is no time to get prior approval. Valid reasons are as follows:

Reasons for unplanned:

- ☑ Medical emergency
- ☑ Care duties took longer due to [illness, injury, environmental]
- ☑ Informal carer unable to provide support (ASC informed retrospectively)
- ☑ Other: enter reason if you believe payment is due for this extra time/visit (OCC will need to review these ones to ascertain whether they will be paid for or not, therefore it's possible they will not be paid for.)

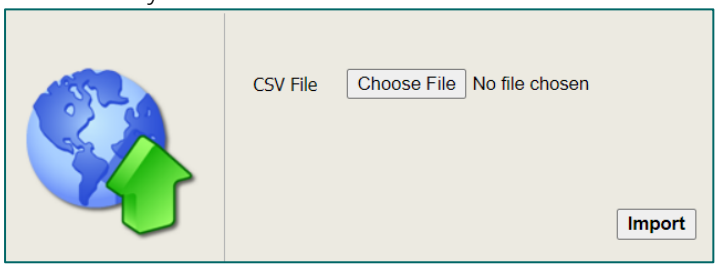
Importing a file

To import a file, click on the Actuals/Visits icon on the homepage:

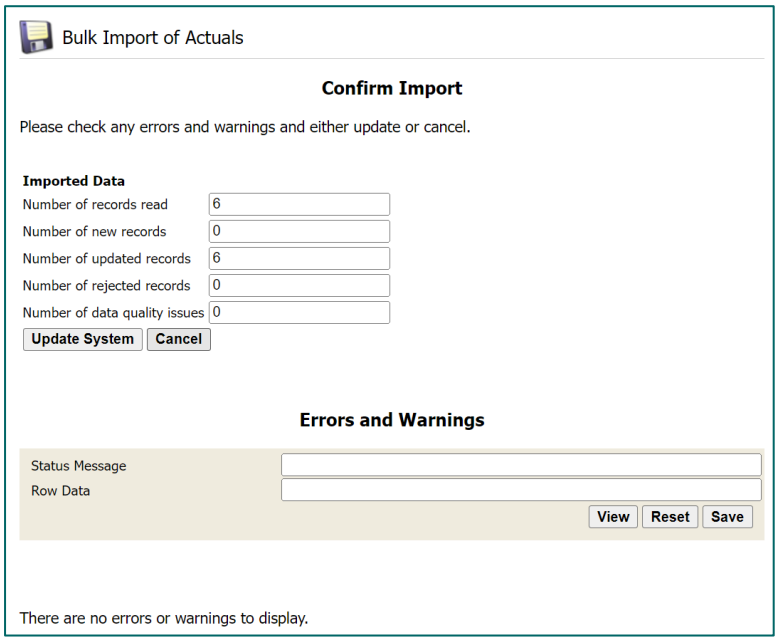


Then click on the Actuals Bulk Import link from the left:

Make sure your file is saved in a csv format. Choose file and then click Import:



You will then get the following screen, if there are any errors, these will appear at the bottom. If it has successfully read all rows, you can click on Update System:



If there are errors, you will need to correct these on the file and reimport the file. Click Cancel and proceed.

Out of Period Actuals

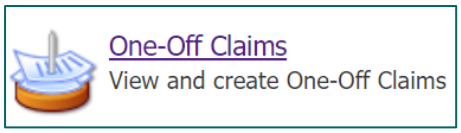
If an additional actual/visit is supplied in a subsequent period for a client, but the remaining visits have *already* been provided in another file (in the correct period), the system will wipe out the previously supplied visits (that week) and only count the latest (retrospectively) supplied visit/visits. This will create clawbacks in payments.

To work out around this, the additional visit alongside the previously supplied visits must be submitted on one file, again. This ensures the system does not claw back payments for the previously supplied visits.

If it is the case that the entire week for a client was missed in the relevant period, then that is not an issue. It is only an issue where; some actuals were supplied, and some were not for a given week.

It has however been agreed that OSJ will not submit out of period actuals. If you do need to, please contact us, so that we can advise you on what you need to do. However, the above guidance should give you an overview of what to do.

Notice Periods - One-Off Claims



OCC will pay notice periods in certain circumstances and will do this using something called a one-off claim within our finance system. The details around notice period payments are covered below in the table.

However, if there are situations where OSJ believe a notice period payment has not been made, you can use the One-off claims feature within the Provider Portal to request the payment. We will then check and either approve or reject the claim (providing a reason if applicable). The steps to do this are covered further below.

Please do not submit actuals to cover notice periods. Actuals not only create payments, but they also create charges to clients. For this reason, notice periods are handled in a different way.

Notice periods are due in the following circumstances:

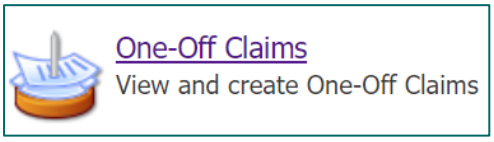
- ⇒ Hospital Admission: OCC will continue to pay the core charge and 1 week of planned care hours from the date of hospital admission.
- ⇒ Death: OCC will pay the core charge for 2 weeks. Payment for the planned care hours ceases.
- ⇒ Vacating flat: This is a planned change with 4 weeks' notice given. OCC will stop paying the core charge and the planned care hours on the date of leaving. If no was notice given, OCC will pay 2 weeks core charge and 2 weeks planned care hours.

Trigger	Core Charge	Planned Care
Hospital Admission – SU returning	Continue to pay until return	Pay 1 week only from date of admission
Hospital Admission – SU not returning/Care Home	Four weeks paid from the date notice given	Pay 1 week only from date of admission
Death	Pay for 2 weeks	Stop paying immediately
Vacating Flat – with 4 weeks' notice	Stop paying upon date of leaving	Stop paying upon date of leaving
Vacating Flat – without notice	Pay for 2 weeks	Pay for 2 weeks
Vacating Flat – belongings not removed	Pay core until the date belongings are removed	As above

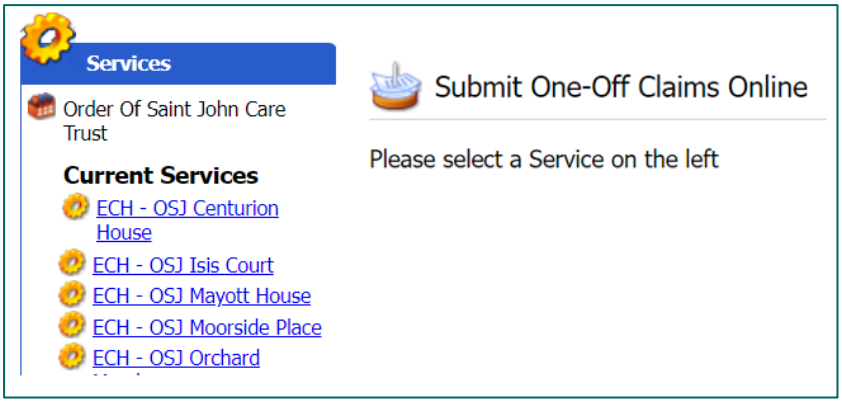
Steps:

1. You cannot claim for actuals and a notice period. You need to raise a one-off claim for a notice period payment.

2. To raise a One-off claim > click on the One-Off Claims icon on the homepage.

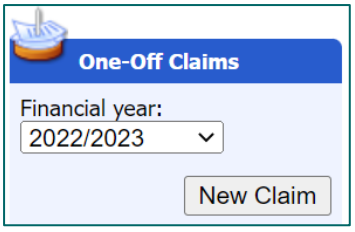


3. Select the relevant service name from the left.

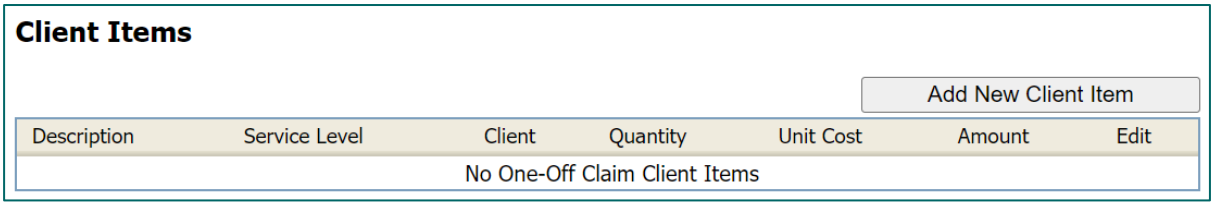


If you are unsure which service name it is, check the Care Package Line Item screen, find the service user in the list and the service column will indicate the service name.

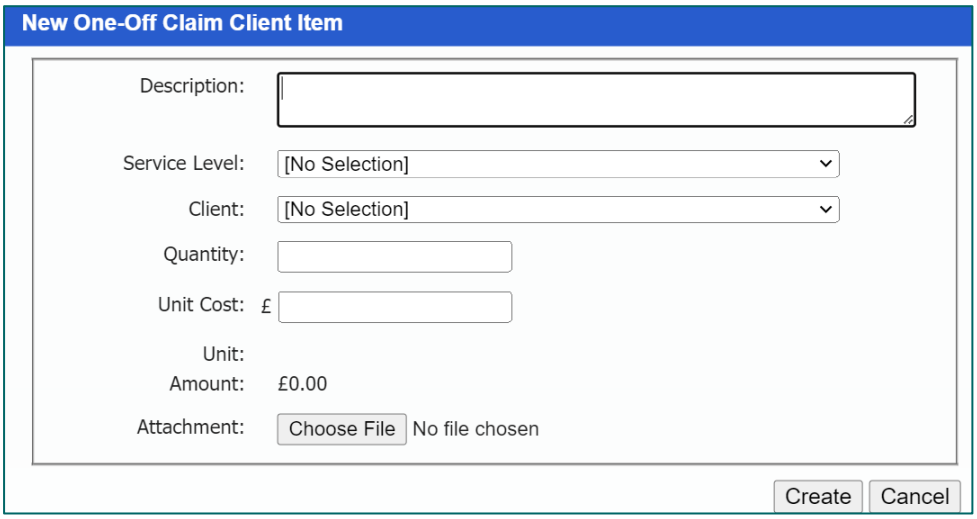
4. Click on New Claim on the left.



5. In the Client Items section, on the right – click on Add New Client Item.



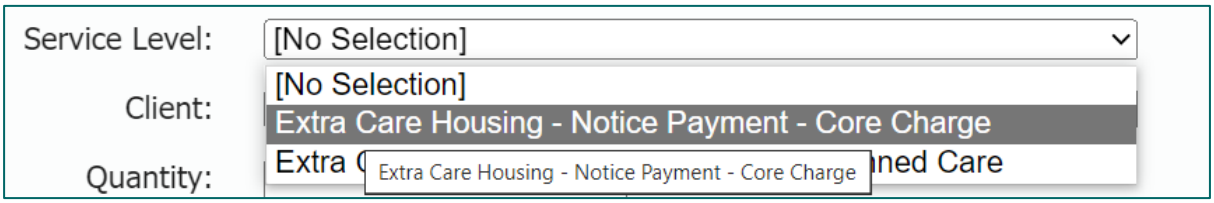
6. The following form will appear:



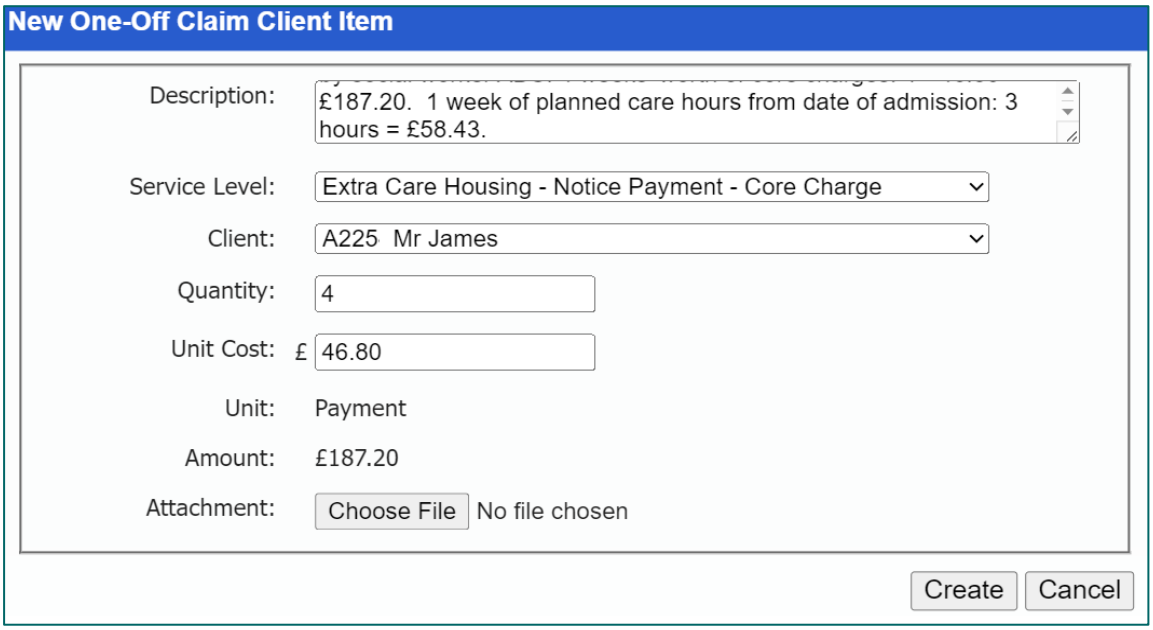
Description: As a minimum enter relevant dates and the scenario applicable to that service user. Show your calculations to clarify how you came to your final figure. Example:

*The service user was admitted into hospital on DD/MM/YY and is not returning to the flat. Four weeks' notice was given from DD/MM/YY by social worker ABC. 4 weeks' worth of core charges: 4 * 46.80 = £187.20. 1 week of planned care hours from date of admission: 3 hours = £58.43.*

Service Level: select the Core Charge option (you will be able to add a second claim for the planned hours after)
Client: select the service user applicable



Quantity: for the core charge – enter number of weeks owed
Unit Cost: this is the weekly core charge
Attachment: if you have evidence that would help us to process the claim faster or clearly evidences that service user's situation, please attach it here



7. Click Create

8. You have now created a draft claim. If you need to edit the claim or cancel it, you still have the option to do so as you have not yet submitted the claim.

9. Repeat the process if you want to claim for planned care hours too. You will need to select the relevant service name from the left, again (there will be a service name for the core charge and a separate service name for planned care hours). Then click on the Add New Client Item button again:

Client Items

Add New Client Item

Description	Service Level	Client	Quantity	Unit Cost	Amount	Edit
The service user was admitted into hospital on DD/MM/YY and is not returning to the flat. Four weeks' notice was given from DD/MM/YY by social worker ABC. 4 weeks' worth of core charges: 4 * 46.80 = £187.20. 1 week of planned care hours from date of admission: 3 hours = £58.43.	Extra Care Housing - Notice Payment - Core Charge	James	4	£46.80	£187.20	edit remove

This time select the planned care service level from the dropdown.
In this example, the client has 3 hours per week. We have entered the quantity 3 and the hourly rate in the unit cost field.

New One-Off Claim Client Item

Description: £187.20. 1 week of planned care hours from date of admission: 3 hours = £58.43.

Service Level: Extra Care Housing - Notice Payment - Planned Care

Client: A225453, Mr James Edmonds

Quantity: 3

Unit Cost: £ 19.48

Unit: Payment

Amount: £58.44

Attachment: Choose File No file chosen

Create Cancel

Click Create.

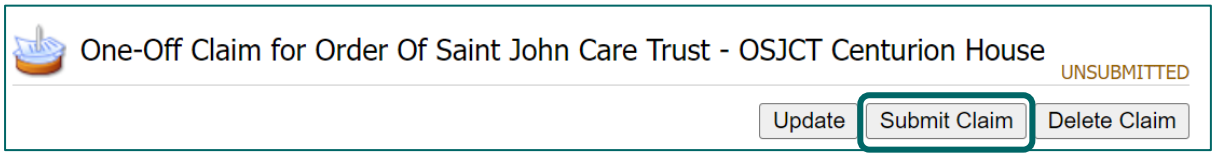
Client Items

Add New Client Item

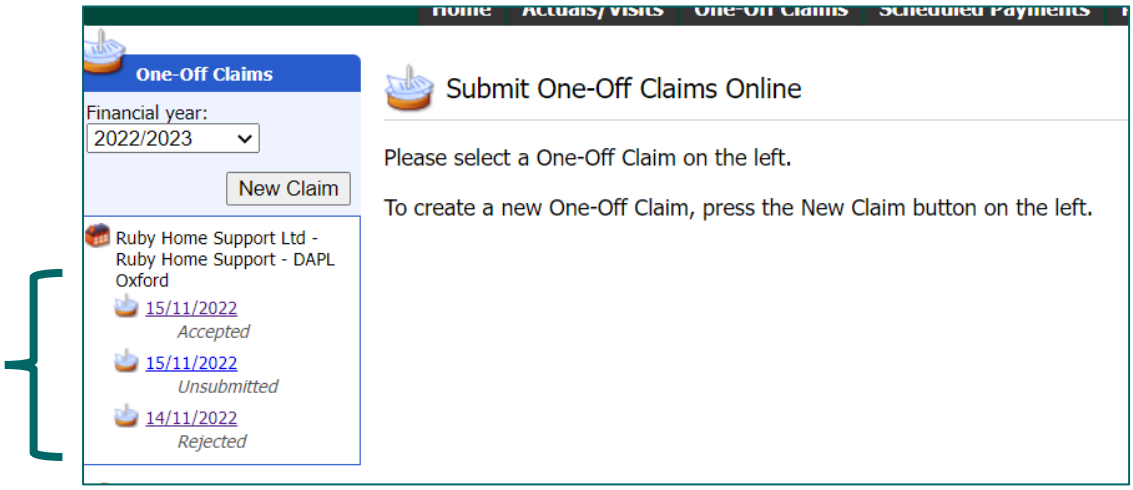
Description	Service Level	Client	Quantity	Unit Cost	Amount	Edit
The service user was admitted into hospital on DD/MM/YY and is not returning to the flat. Four weeks' notice was given from DD/MM/YY by social worker ABC. 4 weeks' worth of core charges: 4 * 46.80 = £187.20. 1 week of planned care hours from date of admission: 3 hours = £58.43.	Extra Care Housing - Notice Payment - Core Charge	James	4	£46.80	£187.20	edit remove
The service user was admitted into hospital on DD/MM/YY and is not returning to the flat. Four weeks' notice was given from DD/MM/YY by social worker ABC. 4 weeks' worth of core charges: 4 * 46.80 = £187.20. 1 week of planned care hours from date of admission: 3 hours = £58.43.	Extra Care Housing - Notice Payment - Planned Care	James	3	£19.48	£58.44	edit remove

10. To now submit these claims to OCC, click on the Submit Claim button at the top of the screen (for each service name).

Note: it is preferred if you submit one claim per client. This makes it easier for us to process. Create a new claim for each client if there are multiple clients within a period.



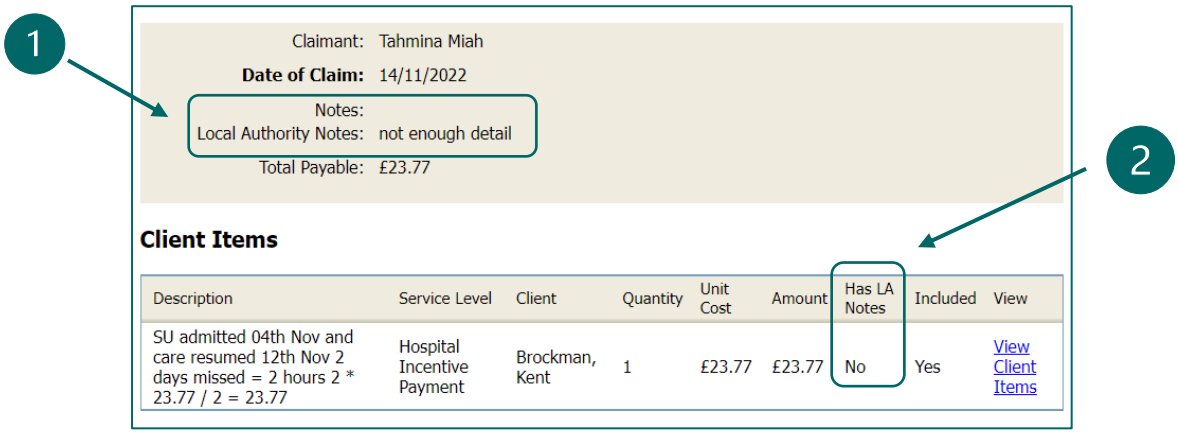
Once you have submitted your claim, you can view the status of your claim as well as any notes OCC supply.



On the left it will state either:

- ☐ Pending – OCC have yet to accept or reject the claim. We may still be verifying the details and if we have added any notes, you can click on the claim and view these notes.
- ☐ Accepted – your claim has been accepted.
- ☐ Rejected – your claim has been rejected. You can click on the claim and view the reason why.

Our notes can appear in two places on a claim.



1)

Claimant:	Tahmina Miah
Date of Claim:	17/11/2022
Notes:	Checking dates with social care team TM 18.11.22

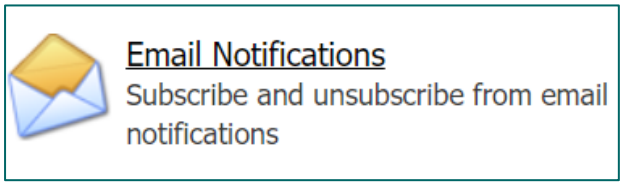
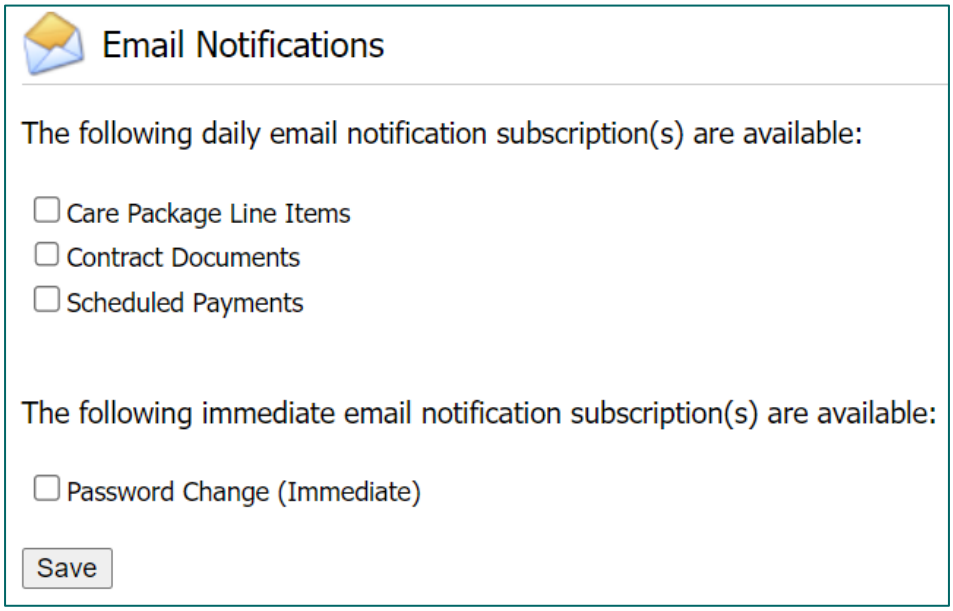
2)

Client Items

Description	Service Level	Client	Quantity	Unit Cost	Amount	Has LA Notes	Included	View
SU admitted 04th Nov and care resumed 12th Nov 2 days missed = 2 hours' worth of visits (2*23.77)/2= 23.77	Hospital Incentive Payment	Brockman, Kent	1	£15.00	£15.00	Yes	Yes	View Client

OCC have amended the claim amount to £15 because there was an error in your calculation.

Email Notifications



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