Direct Payments Adults Nominee Agreement Adding a Care Package Line Item



ContrOCC - ContrOCC_Live on SPOCCSRV		
File View Tools Help		
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Elients	S M M , Client	· E
Client 🧕 M M Edmund (J6) 🛄	Details Contacts Attr	ribut
🖃 🚴 Mini Mining Edmund in (J6111)	Name M	I M
Provisions (0)	Client	
- Section Client Finance (0)	Title	M
Client Service History	Forename M	м
Charging Overview	Curramo (Edea
Client Accounts	Sumane	2 umi

8 M	M j Edmu ient	und (J6)	
Details	Contacts Attributes CP	LIs POs Documents Assessment Status Property Notifications Invoicing Details Income Budgets Web Access Exceptions	
Payme	nt Methods		
Payr	nent Method Starts	Ends Account Number Account Name Sort Code Direct Debit Add	
BACS	🔒 Client Payment	Method Og 27	٦.
			3
	Payment Method	BACS Delete	
	Starts	06 Dec 2010	
	Account Number	06 2300	
	Sort Code	09 27	
	Account Name	S Edmun	
Collect	ud	Save Cancel	

1. Click on *Clients Icon* and enter in the Carefirst ID and click on to the applicable name.

Please Note

If the Service Users name doesn't appear on CONTROCC - The Carefirst/CONTROCC Link needs to be activated via Carefirst.

2. Click on the Service Users name under the client field.

Client	<u>8</u> м	м	Edmund	(J6)	
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Click on the *Details Tab* to view the Service User Information.

3. Click on the *Invoicing Details Tab* to add/amend banking information

If banking information is already completed check to ensure that the information is current and there is a Payment Finance Reference number on the *Details Tab*

If information is current *Move on to step 5*

Click on *ADD* to enter banking information

- a. **Payment Method** = Always BACS
- b. Start Date
- c. Account Number (Should always be 8 digits (Excluding Building Society Accounts)
- d. **Sort Code** Should Always Be 6 Digits
- e. Account Name Should Match Account Name From Bank/Building Society.

Once information has been entered Click on *Save* and *Close*

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s POs Documents Assessment Status Proper	y Notifications Invoicing D	etails Income	Budgets Web Access	Exceptions	
dmund				ID	2561
	CC D-4	lie			
		10			
	Unarging Finance Her				
	Payments Finance Ref				
	File No				
	SPOCC ID				
	NINO				
O Unknown	NHS No				
✓ +	Hospital No				
	Client Group				
	Team				
mail	External Ref				
	le Child	Subite MH117			
		Subjectmini			
					Add
Hartlepool, Cleveland, TS26 9QU					
					Edit

4. If the Payment Reference Field is already completed this means that a payment reference already exists –

Move on to step 5.

If Payment Finance Field is blank -

Email the Finance Team SocSvcs.Finance@hartlepool.gov.uk

With the following information to request a Payment Finance Ref

- Service User
- *C/f No*

Finance will retrieve the banking information from the *Invoice Details Tab* on CONTROCC and request the Ref No and add the Ref no on the Service Users details on ContrOCC

Finance will confirm that Payment Ref has been added via the notes field in CONTROCC.

Details Contacts	Edr Attributes	mund (J6) Documents	Assessme	ent Status	Property	Notifications	Invoicing Details	Income	Budgets	Web Access	Exceptions	
Title Forename Surname Telephone Mobile Fax E-mail			meil	Address 1 Address 2 Address 3 Town County Post Code UPRN USRN	Contac Roles	t Contact x	1						map
All Contacts	oles E	-mail Tele	ph Mobile	Fax			(Save	Cancel				Add Edit Remove

5. Click on the *Contacts Tab* to add/amend Contact details for the Nominee

Click on to search for the nominees address details – If details are not present click on the to add a new contact

New Contact			
New Cont Contact	tact		
Details Web Acce	55		
Name			
Contact		Address	
Title		Address 1	4 Road
Forename	S	Address 2	
Surname	Edmun	Address 3	
Telephone	01429 27 12	Town	Hartlepool
Mobile		County	
Fax		Post Code	TS26 QU map
E-mail	mail	UPRN	
Job Title		USRN	Address
Financial Ref			

6. Complete the following fields

Forename Surname Telephone Number Address Details including post code Click on Save



7. Click on Description to select Role Type
Click on applicable Role Type
Click on *OK*Click on *Save*

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Details Contacts ,	Attributes CPLIs POs Docu	ments Assessment Sta	atus Property	Notifications	Invoicing Details	Income Bud	gets Web Access	Excep
Invoicee								
Title		Address 1						
Forename		Address 2						
Surname		Address 3						
Telephone		Town						
Mobile		County						
Fax		Post Code						
E-mail	mail	UPRN						
		USRN						
All Controls								
Name	Roles	E-mail Telephone		Mobile	Eau Address			
Edmun S	Nominee	01429 27 12		mobile	4 6	Road, Hartlep	ool, TS26 QU	

8. Contact has now been added.



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Next > Cancel

9. Click on the *CPLI's (Care Package Line Item) Tab* to add Direct Payment Care Package Line Item

Click on *ADD* button to start Care package Line Item Wizard

10. Add the following information

Client Group – Budget for S/User Team - SW's Own Team

Click Next

Care Package Line Item Wizard
Service Requirements Choose how to find suitable services
• Specific Service Create one or more care package line items for a specific service
Search for Services Search for all providers of a suitable service based on
service level requirements
< Back Next > Cancel

Care Package Line Item Wizard Client Details Who is the Care Package Line Item for?

Client

Team

Client Group

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Mental Health

Locality Team 1

Edmund (J6)

< Back

11. Click on

Search for Services

Click Next

Care Package Line Ite	m Wizard
Service Requirements What kind of service does	the Client need?
Service Group Class	Direct Payments-Nominee
Service Group	✓ +
Service Level	Direct Payments-Nominee Direct Payments-Nominee-Start Up +
	<pre>< Back Next > Cancel</pre>

Care Package Line Item Wizard				
Service Requirements What kind of service does	the Client need?			
Service Group Class	Direct Payments-Nominee 🗨 🛨			
Service Group	Direct Payments-Nominee			
Service Level	✓ +			
	Direct Payments-Nominee-Annual (Payment) Direct Payments-Nominee-Annual (Payment) Direct Payments-Nominee-One Off (Payment)			
	< Back Next > Cancel			

12. Click on

Service Group Class = Direct Payments – Nominee

Service Group = Direct Payments-Nominee Direct Payments-Nominee Start Up

13. Click on

Service Level = Direct Payments -Nominee Various Options

Select applicable option

Click Next

Quantity	1	
Delivered	O Any Frequency	🕈 Please select a date 🛛 🔀
	Weekly	K February 2011 💽
	O Every	Mon Tue Wed Thu Fri Sat Sun
		7 8 9 10 11 12 13
Dates	07 Eeb 2011	14 15 16 17 18 19 20 21 22 23 24 25 26 27
Finance Starts	071602011	
-		7 8 3 10 11 12 13

14. Click on

Quantity = Always 1

Start Date

Click on to view Calendar and highlight the start date of the Direct Payment.

Click Select

Click Next

Care P	Care Package Line Item Wizard					
Select Select a	Service Level Service Level from the list of requ	irements matches				
Sort by	Block/Spot Client Group	Auth. Status Price Reset				
Туре	Provider	Service Unit Cost				
Sp Sp	ot Hartlepool Borough Council	Direct Payments				
Notes	Service: Basic Authorisation, Staf No Pricing Agreement	fed				
	(< Back Next > Cancel				

15. Click Next

Care Package Line Item Wizard			
Pricing and Expenditure Budget Review and Edit automatically generated prices and budgetary information			
Unit Cost £	37.60 A client-specific Pricing Agreement will be created.		
Cost Centre	17154 (Mental Health)		
Subjective	4303 (Expenditure - Direct Payments)		
Sub Detail	[None] +		
	Restore Defaults		
	< Back Next > Cancel		

16. **Unit Cost** = Cost of Applicable Package.

The package is a 4 weekly Direct payment so the example is showing the unit cost as a weekly amount .

Cost Centre = This is self populated

Subjective = This is self populated

Click Next

Care Package Line Item Wizard		
Income Budget Review and Edit the automatically generated budgetary information		
🥑 Direct Payments-4 Weekly (Payment)		
Cost Centre	17154 (Mental Health) 🗸 🔸	
Subjective	7178 (Income - From User)	
Sub Detail	[None]	
	< Back Next > Cancel	

Care Package Line Item Wizard		
Miscellaneous Details Enter all remaining fields, and click Finish to create the Care Package Line Item		
Care Manager Authoriser Comments (will appear on PO)	Weegram, Isabel Weegram, Isabel White, Kirsten White, Kirsten White, Kirsten Wildowrield, Gillan Williams, Brian Williams, Brian Williams, Derte Wilndram, Ahre	
Care Pkg. Ref	(For matching with future imports)	
	< Back Finish Cancel	

Care Package Line Item Wizard			
Miscellaneous Details Enter all remaining fields, and click Finish to create the Care Package Line Item			
Care Manager	Weegram, Isabel		
Authoriser	Bailey, Nicola 🗸 🗸		
Comments (will appear on PO)	Appleton, Louise Armatage, Elaine Armstrong, Sue Ashcroft, Wendy Ayre, Brian Bailey, Gill Bailey, Nicola		
Care Pkg. Ref	(For matching with future imports)		
< Back Finish Cancel			

17. **Cost Centre** = This is self populated

Subjective = This is self populated

Click *Next*

18. Add Care Manager

Care Manager = Select SW's Name

19. Add Authoriser

If over £100 always Select Jill Harrison

If **under** £100 select applicable Team Manager

Click Finish



20. The unauthorised CPLI has now been created on CONTROCC

Please Ensure That the Payment Reference Number Has Been Added To CONTROCC Before It Is Sent For Authorisation to the DP Authorisation In Box.