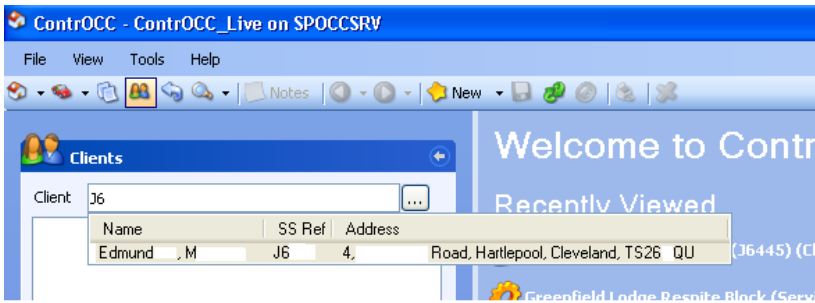



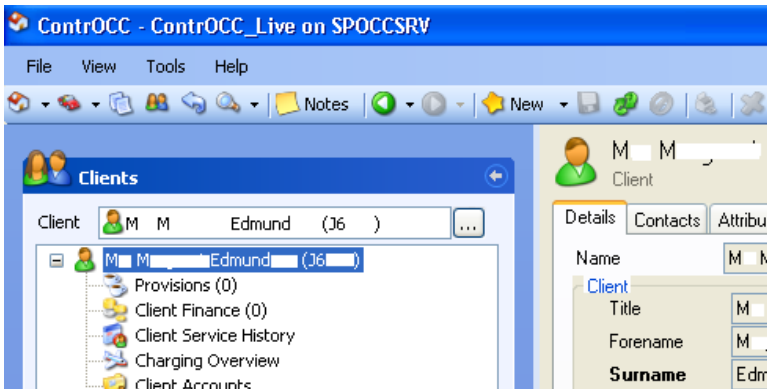
Direct Payments **Adults Nominee Agreement** Adding a Care Package Line Item



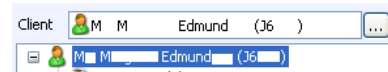
1. Click on **Clients Icon**  and enter in the Carefirst ID and click on to the applicable name.

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.



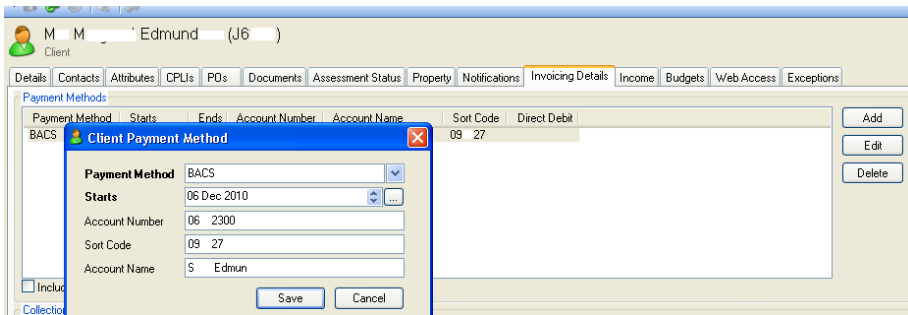
Click on the **Details Tab** to view the Service User Information.

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**

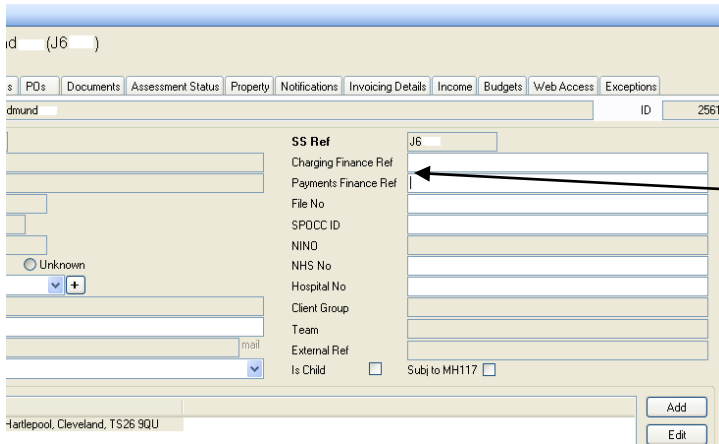
If information is current
Move on to step 5

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**



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 -

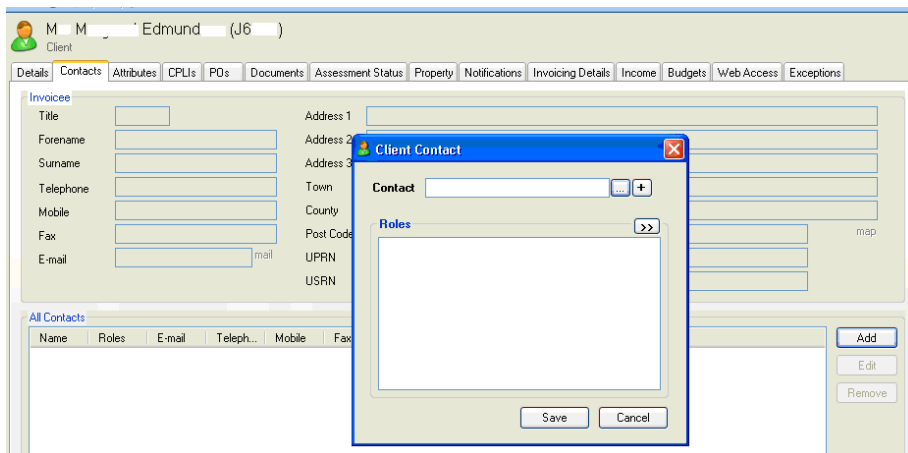
Email the Finance Team
SocSvcs.Finance@hartlepool.gov.uk

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.



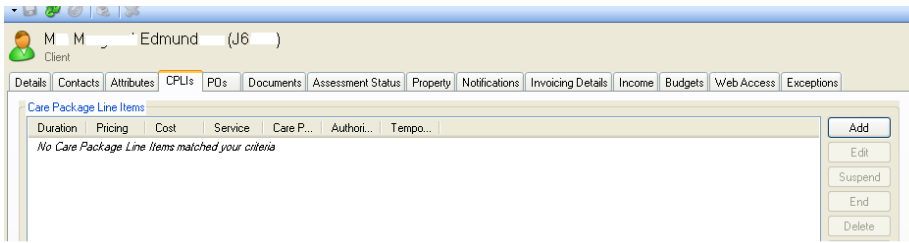
5. Click on the *Contacts Tab* to add/amend Contact details for the Nominee

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

- Complete the following fields
 - Forename
 - Surname
 - Telephone Number
 - Address Details including post code
- Click on **Save**

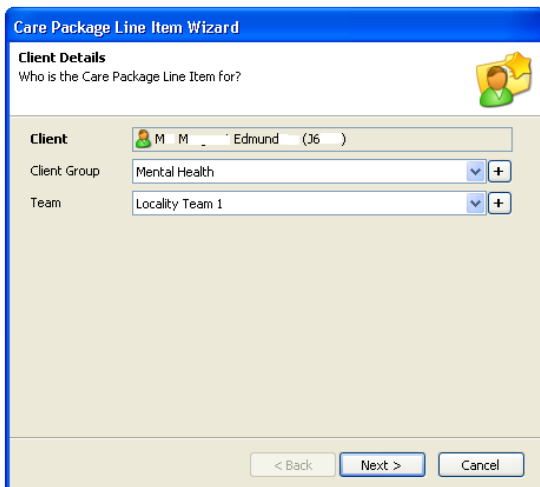
- Click on **>>>** to select Role Type
 - Click on applicable Role Type
 - Click on **OK**
 - Click on **Save**

- Contact has now been added.



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

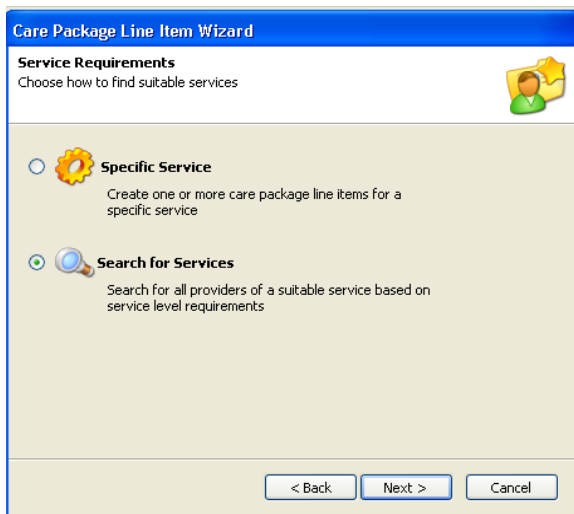
Click on **ADD** button to start Care package Line Item Wizard



10. Add the following information

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

Click **Next**



11. **Click on**

Search for Services

Click **Next**

Care Package Line Item 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 +

< Back Next > Cancel

12. **Click on**

Service Group Class = Direct Payments – Nominee

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

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-4 Weekly (Payment) +
 Direct Payments-Nominee-Annual (Payment) +
 Direct Payments-Nominee-One Off (Payment) +

< Back Next > Cancel

13. **Click on**

**Service Level = Direct Payments -Nominee
 Various Options**

Select applicable option

Click **Next**

Care Package Line Item Wizard
Service Requirements
 Specify the details of the requirement

Quantity: 1

Delivered: Any Frequency Weekly Every

Dates: Starts: 07 Feb 2011

Finance Starts: Temporary:

Please select a date: February 2011

Mon	Tue	Wed	Thu	Fri	Sat	Sun
31	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	1	2	3	4	5	6
7	8	9	10	11	12	13


Select Today No date

< Back Next > Cancel

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 Package Line Item Wizard

Select Service Level
Select a Service Level from the list of requirements matches

Sort by: Block/Spot Client Group Auth. Status Price Reset

Type	Provider	Service	Unit Cost
Spot	Hartlepool Borough Council	Direct Payments	

Notes: Service: Basic Authorisation, Staffed
No Pricing Agreement

< 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

17. Cost Centre = This is self populated

Subjective = This is self populated

Click *Next*

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: Weegram, Isabel +

Comments (will appear on PO):
 White, Kirsten
 White, Nicola
 Widdowfield, Gillian
 Williams, Brian
 Willingham, Albert
 Wills, Jeanette
 Windram, Anne

Care Pkg. Ref: (For matching with future imports)

< Back Finish Cancel

18. Add Care Manager

Care Manager = Select SW's Name

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, Elsine
 Armstrong, Sue
 Ashcroft, Wendy
 Ayre, Brian
 Ayre, Brian
 Bailey, Gill
 Bailey, Nicola

Care Pkg. Ref: (For matching with future imports)

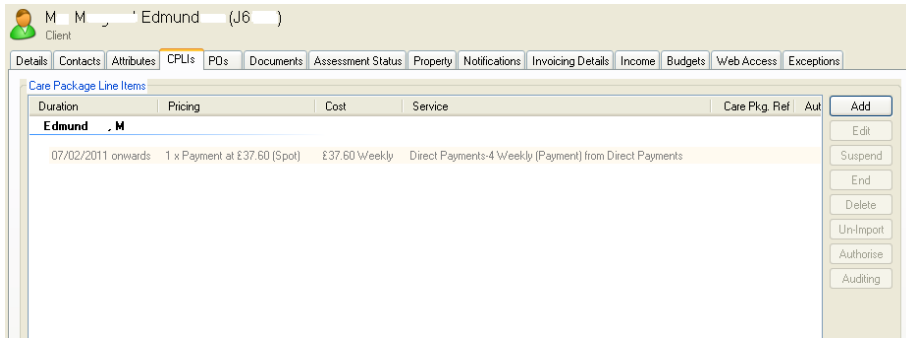
< Back Finish Cancel

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.