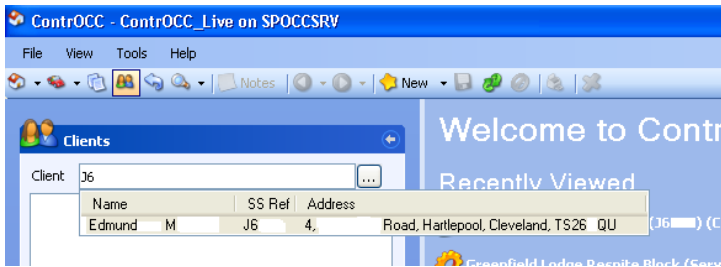


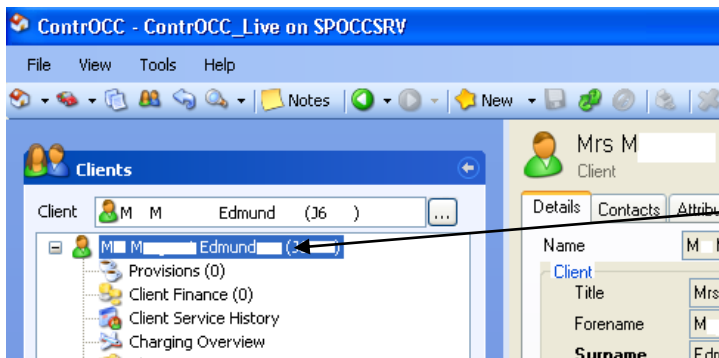
# Direct Payments 16/17 Year Old - Nominee Agreement Adding a Care Package Line Item



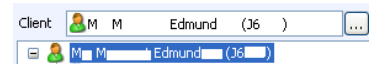
1. Click on *Clients Icon*  and enter in the Carefirst ID and click on to the applicable name

### **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.



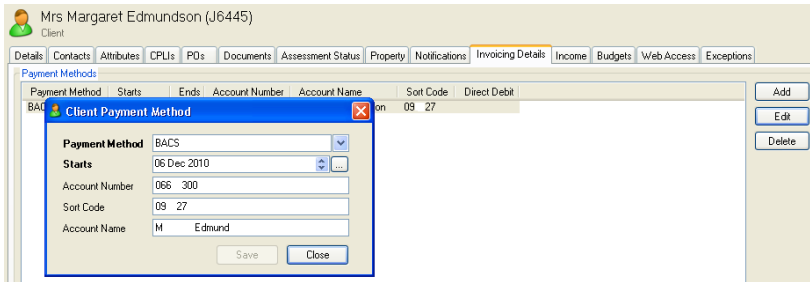
Click on the *Details Tab* to view Service User Information.

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

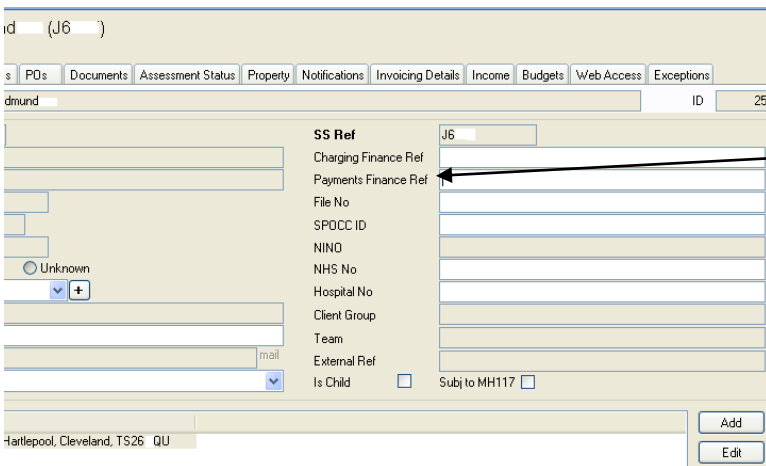


- Payment Method** = Always BACS
- Start Date**
- Account Number** (Should always be 8 digits (Excluding Building Society Accounts))
- Sort Code** - Should Always Be 6 Digits
- Account Name** – Should Match Account Name From Bank/Building Society.

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 -

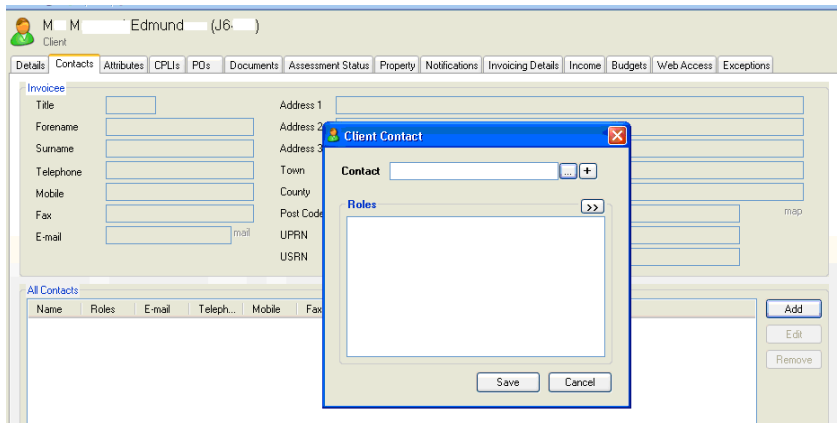
Email the Finance Team  
[SocSvcs.Finance@hartlepool.gov.uk](mailto:SocSvcs.Finance@hartlepool.gov.uk)

With the following information to request a Payment Finance Ref



- **Service User**
- **C/f No**

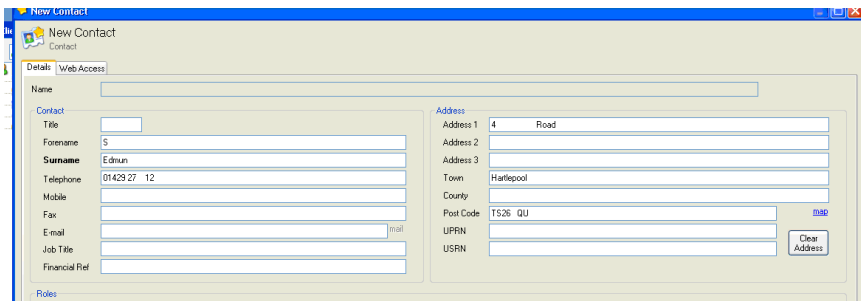
Finance will retrieve the banking information from the *Invoice Details Tab* on CONTROCC and request the Ref No and add the Ref no on the Service Users details on ContrOCC

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



4. 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



5. Complete the following fields

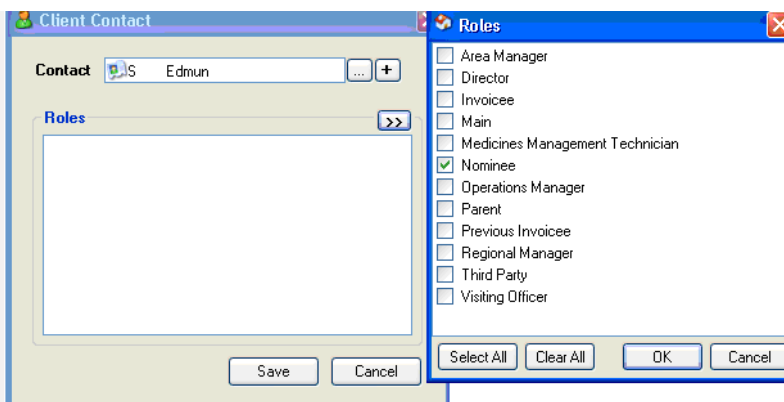
*Forename*


*Surname*

*Telephone Number*

*Address Details* including post code

Click on **Save**



6. Click on  to select Role Type

Click on applicable Role Type

Click on **OK**

Click on **Save**

7. Contact has now been added.

8. 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

9. 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

10. *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-Child-16-17-Nominee +

**Service Group** +

**Service Level** Direct Payments-Child-16-17-Nominee +  
 Direct Payments-Child-16-17-Nominee-Start Up +

< Back    Next >    Cancel

11. *Click on*

**Service Group Class** = Direct Payments –Child-16-17 Nominee

**Service Group** = Direct Payments—Child-16-17-Nominee  
 Direct Payments–Child-16-17-Nominee  
 Start Up

**Care Package Line Item Wizard**  
**Service Requirements**  
 What kind of service does the Client need?

**Service Group Class** Direct Payments-Child-16-17-Nominee +

**Service Group** Direct Payments-Child-16-17-Nominee +

**Service Level** +  
 Direct Payments-Child-16-17-Nominee-4 Weekly (Payment)  
 Direct Payments-Child-16-17-Nominee-Annual (Payment)  
 Direct Payments-Child-16-17-Nominee-One Off (Payment)

< Back    Next >    Cancel

12. *Click on*

**Service Level** = Direct Payments – Child 16-17 Nominee  
 Various Options

Select applicable option

Click *Next*

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

Quantity:

Delivered:  Any Frequency  Weekly  Every

Dates: Starts:  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

13. **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

14. Click **Next**

**Care Package Line Item Wizard**  
**Pricing and Expenditure Budget**  
 Review and Edit automatically generated prices and budgetary information

Unit Cost: £  A client-specific Pricing Agreement will be created.

Cost Centre:  +

Subjective:

Sub Detail:  +

Restore Defaults

< Back Next > Cancel

15. **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

**16. 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  
Willis, Jeanette  
Windram, Anne

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

< Back   Finish   Cancel

**17. 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, Elaine  
 Armstrong, Sue  
 Ashcroft, Wendy  
 Ayre, Brian  
 Ayre, Brian  
 Bailey, Gill  
 Bailey, Nicola

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

< Back Finish Cancel

**18. Add Authoriser**

If **over** £100 always Select Jill Harrison

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

M M Edmund (J6)

Client

Details | Contacts | Attributes | CPLIs | POs | Documents | Assessment Status | Property | Notifications | Invoicing Details | Income | Budgets | Web Access | Exceptions

Care Package Line Items

Duration	Pricing	Cost	Service	Care Pkg. Ref	Aut	Add
Edmund M						
07/02/2011 onwards	1 x Payment at £37.60 (Spot)	£37.60 Weekly	Direct Payments-4 Weekly (Payment) from Direct Payments			Edit Suspend End Delete Unimport Authorise Auditing

**19. 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.***