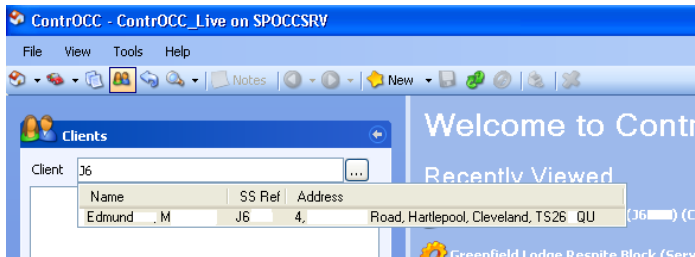


Direct Payments Carer's Individual Agreement Adding a Care Package Line Item

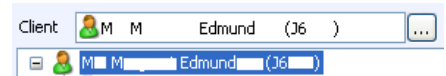
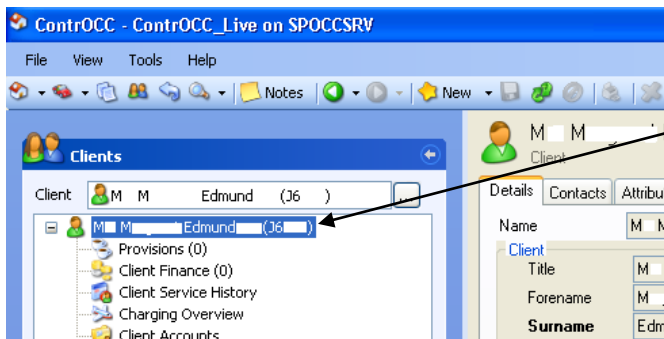


1. Click on **Clients Icon**  and enter in the Carefirst ID and click on to the applicable name

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.



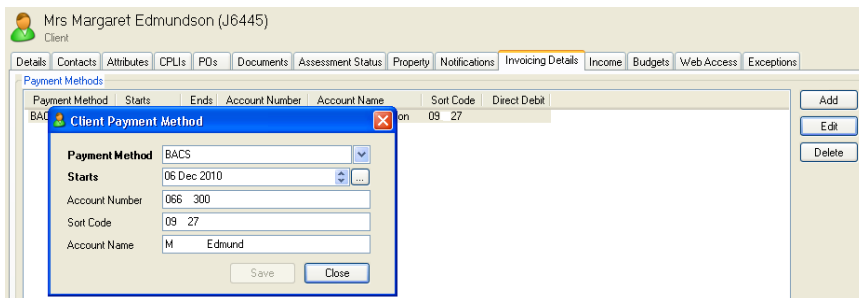
Click on the **Details Tab** to view the Service User Information.

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**

- 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.

- 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

6. Add the following information

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

Click *Next*

7. *Click on*

Search for Services

Click *Next*

8. *Click on*

Service Group Class = Direct Payments-Carer

Service Group = DP Carer or DP Carer Start Up

9. *Click on*

Service Level = Direct Payments-Carer Various


Select applicable

Click *Next*

10. *Click on*

Quantity = Always 1

Start Date

Click on  to view Calendar and highlight the start date of the DP

Click *Select*

Click *Next*

Type	Provider	Service	Unit Cost
Spot	Hartlepool Borough Council	Direct Payments	

11. 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

12. 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

13. 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

14. 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

15. Add Authoriser

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

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

Click **Finish**

M M Edmund (J6)

Client

Details Contacts Attributes CPUs 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
Edmund, M					
07/02/2011 onwards	1 x Payment at £37.60 (Spot)	£37.60 Weekly	Direct Payments-4 Weekly (Payment) from Direct Payments		

Add Edit Suspend End Delete Un-Import Authorise Auditing

16. 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.