



# Shared Lives Service Provision V1.0

<b>Document</b>	Shared Lives Service Provision
<b>Purpose</b>	How to input service provisions and providers onto Caredirector
<b>Version</b>	V1.0
<b>Owner</b>	ICT Business Transformation Team / Adults System Support Team
<b>Last Updated</b>	12/02/2024

## Contents

Shared Lives Service Provision.....	3
Shared Lives Provider Setup.....	10
Version Control .....	20

## Shared Lives Service Provision

1. This service provision is based around the bands for long term, short term, and sessional care.
2. When inputting, this will ensure payments are being made against the correct provider/ carer on Caredirector. If a provider/ carer required is not on Caredirector please refer to the [Shared Lives Provider Setup](#) section of this guide. To quickly check before going forward with the guide:  
**Workplace > Provider > Search for your chosen provider (if not there, please create it).**
3. From the selected person record, go to **Services > Create New Record**

The screenshot shows the Caredirector interface for a person record. At the top, there are navigation tabs: Home, Workplace, Settings, and a user profile for CD V6 Team. Below this, the person's name 'Person: Tom Test' is displayed. A 'Person Record' button is highlighted with a red arrow. The 'Services' tab is selected, and the 'Service Provisions' section is visible. A '+' icon is highlighted with a red arrow, indicating the option to create a new record. Below this, there is a search bar for records and a table of service provisions.

Id	Status	Planned St...	Planned End...	Actual Star...	Actual End D...	Service Element 1	Service El...
229954	Authorised		22/02/2023	20/02/2023		Adult Residential Care	Respite fi

4. **General** will already have the correct information. Leave the **Status** as **Draft**.

### General

Person\*

Responsible Team\*

Id

Responsible User\*

Status\*

## 5. Service Request:

**Service Request**

<p><small>Service Element 1*</small></p> <input style="width: 95%; border: 1px solid #ccc;" type="text" value="SDS - Managed Account"/> <span style="float: right; font-size: 0.8em;">X Q</span>	<p><small>Service Element 2*</small></p> <input style="width: 95%; border: 1px solid #ccc;" type="text" value="Shared Lives LT - Band 1"/> <span style="float: right; font-size: 0.8em;">X Q</span>
<p><small>Special Scheme</small></p> <input style="width: 95%; border: 1px solid #ccc;" type="text"/> <span style="float: right; font-size: 0.8em;">Q</span>	<p><small>Finance Client Category</small></p> <input style="width: 95%; border: 1px solid #ccc;" type="text"/> <span style="float: right; font-size: 0.8em;">Q</span>
<p><small>GL Code</small></p> <input style="width: 95%; border: 1px solid #ccc;" type="text"/>	<p><small>Rate Unit*</small></p> <input style="width: 95%; border: 1px solid #ccc;" type="text" value="Per Week Pro Rata"/> <span style="float: right; font-size: 0.8em;">X Q</span>

<u>Field</u>	<u>Information</u>
<b>Service Element 1</b>	<b>SDS – Managed Account</b>
<b>Service Element 2</b>	Choose the appropriate option: <ul style="list-style-type: none"> <li>- <b>Shared Lives LT – Band 1</b></li> <li>- <b>Shared Lives LT – Band 2</b></li> <li>- <b>Shared Lives LT – Band 3</b></li> <li>- <b>Shared Lives LT – Band 4</b></li> <li>- <b>Shared Lives LT – Band 5</b></li> <li>- <b>Shared Lives ST – Band 1</b></li> <li>- <b>Shared Lives ST – Band 2</b></li> <li>- <b>Shared Lives ST – Band 3</b></li> <li>- <b>Shared Lives ST – Band 4</b></li> <li>- <b>Shared Lives ST – Band 5</b></li> <li>- <b>Shared Lives Sessional – Band 1</b></li> <li>- <b>Shared Lives Sessional – Band 2</b></li> <li>- <b>Shared Lives Sessional – Band 3</b></li> </ul>
<b>Special Scheme</b>	Leave Blank
<b>Finance Client Category</b>	Leave Blank
<b>Rate Unit</b>	<b>Per Week Pro Rata</b>

## 6. Dates:

### Dates

Planned Start Date	Planned End Date
<input type="text" value="12/02/2024"/>	<input type="text"/>
Actual Start Date	Actual End Date
<input type="text"/>	<input type="text"/>
Start Reason*	
<input type="text" value="New Placement"/>	<input type="text"/>

<b><u>Field</u></b>	<b><u>Information</u></b>
<b>Planned Start Date</b>	This does not start payments. This when they plan to start this service provision.
<b>Planned End Date</b>	Leave Blank
<b>Actual Start Date</b>	This does start payments. Enter this information in when you know the date, they are going to start the service. If you do not know this, leave blank and fill in Planned Start Date.
<b>Actual End Date</b>	Leave Blank. This will be needed when ending the service provision to stop payments
<b>Start Reason</b>	<b>New Placement</b>

## 7. Commissioning:

### Commissioning

<p>Purchasing Team</p> <input type="text" value="Adults Connecting Care Team West"/>	<p>Frequency in Weeks *</p> <input type="text" value="1"/>
<p>Service Provided</p> <input type="text" value="Shared Lives Team Provider \ SDS - Managed Account \ Share..."/>	<p>Provider/Carer</p> <input type="text" value="Shared Lives Team Provider"/>

<u>Field</u>	<u>Information</u>
<b>Purchasing Team</b>	Enter in who made the request.
<b>Frequency in Weeks</b>	1
<b>Service Provided</b>	Select the lookup function and select Search. This will search within a big list of providers that will facilitate what you have chosen in Service Element 1 and Service Element 2. If your chosen provider that has agreed upon, is not in this list. You will need to go and either create the provider on the system or add in the service provided with the chosen service elements onto the existing provider.

8. **Authorisation Detail** is something you cannot fill out yet. Leave blank.

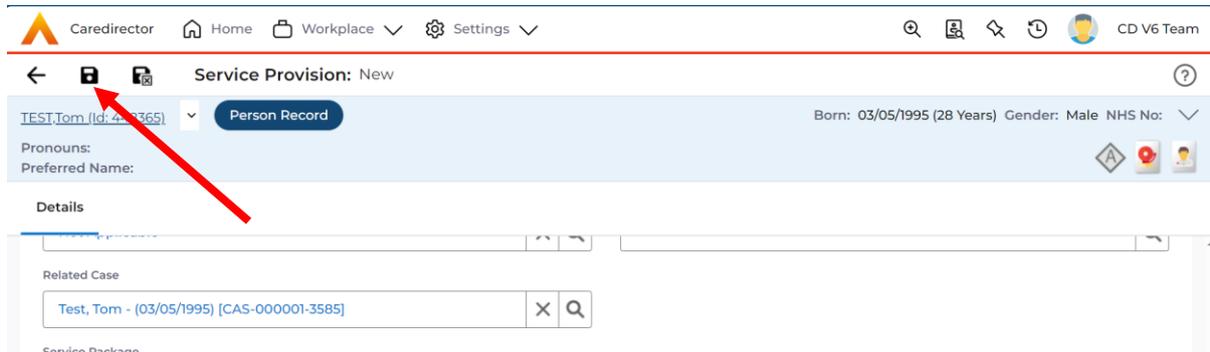
## 9. Related Information:

### Related Information

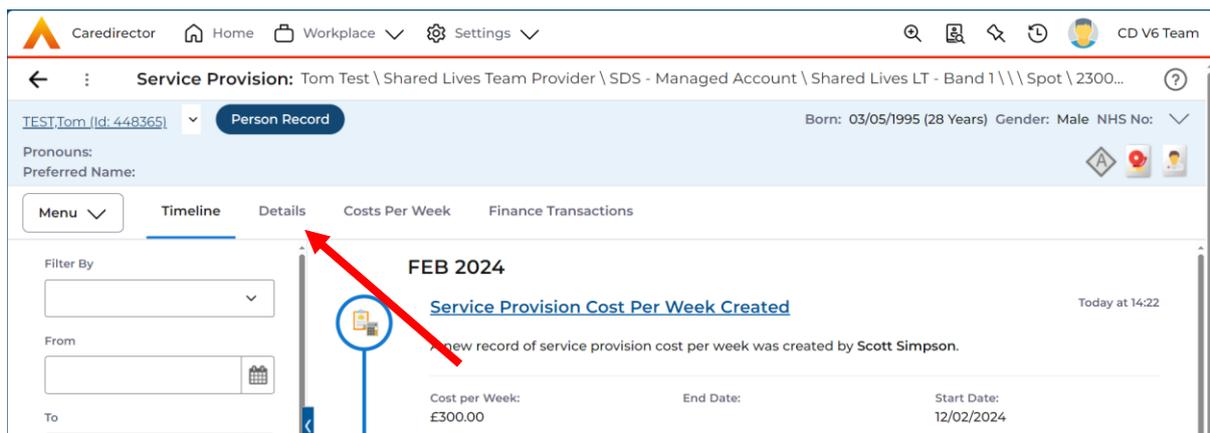
<p>Placement Room Type *</p> <input type="text" value="Not Applicable"/>	<p>Related Assessment</p> <input type="text"/>
<p>Related Case</p> <input type="text" value="Test, Tom - (03/05/1995) [CAS-000001-3585]"/>	
<p>Service Package</p> <input type="text"/>	

<u>Field</u>	<u>Information</u>
<b>Placement Room Type</b>	<b>Not Applicable</b>
<b>Related Case</b>	If there is a case within Caredirector linking with this Service Provision, you can link it here. Select lookup and search for the relevant case. This makes it easier to get onto the Case.
<b>Service Package</b>	If they have one available, please select it.
<b>Related Assessment</b>	This is going to choose from a list of forms that the person has been linked to. Attach it if it is available and relevant.

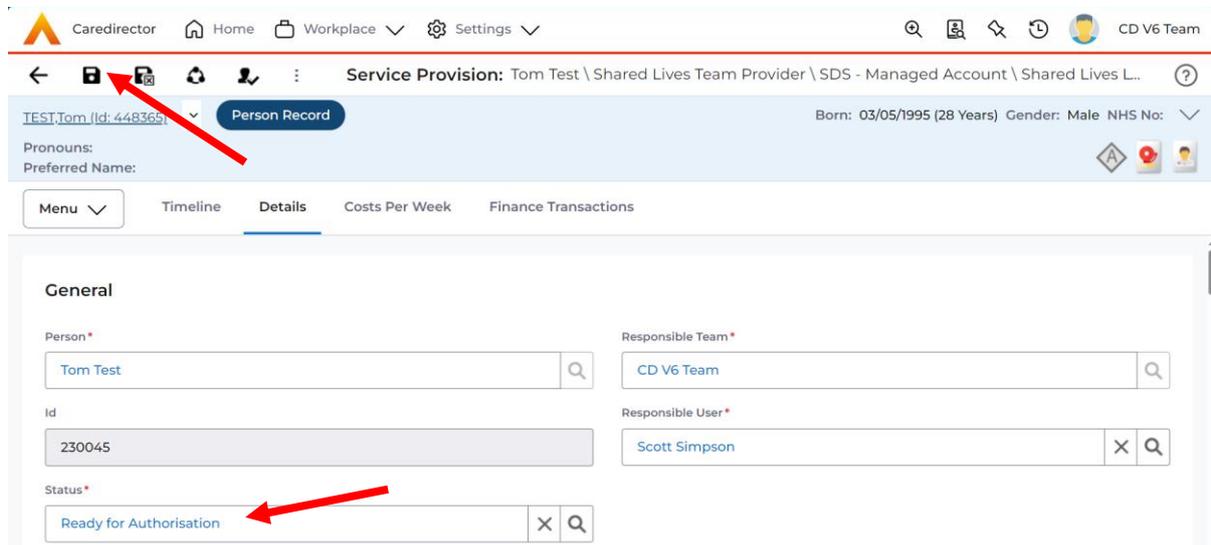
10. When finished, select **Save**.



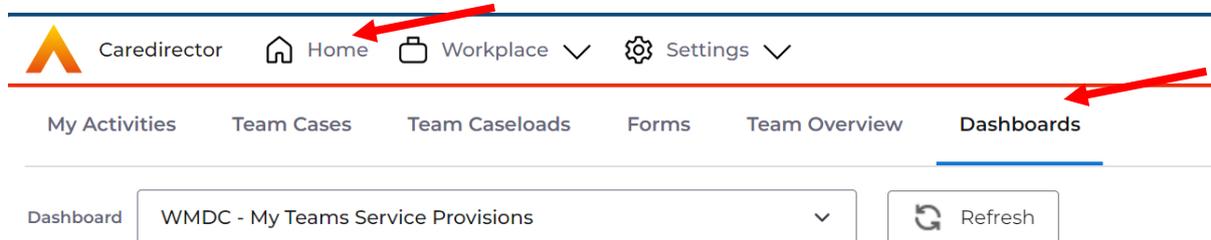
11. This will show you the **timeline** section of the **Service Provision**. For now, you can leave this until you have the **Actual Start Date**. Once you have the actual start date to enter or it is already inputted into the service provision. Click back onto **Details**.



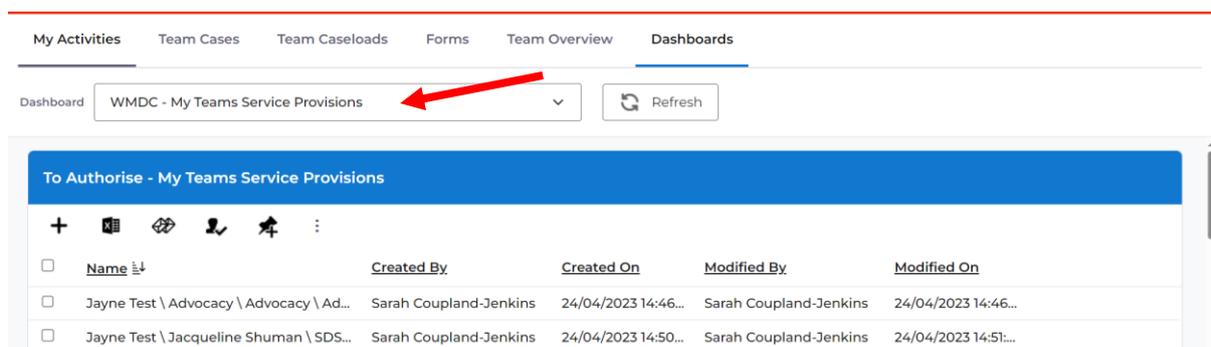
12. Go back to the **Status** and change it to **Ready for Authorisation** from **Draft**. Then select **Save**. (So long as you have now entered in the **Actual Start Date**).



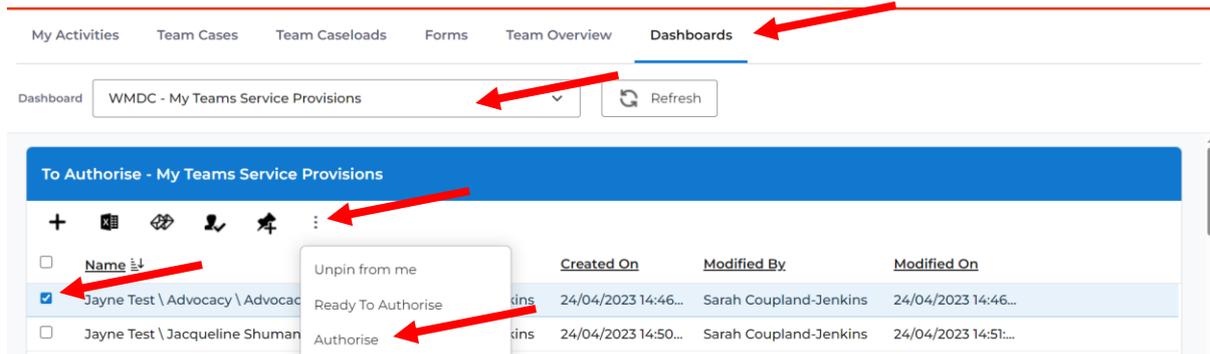
13. When this happens, this now requires managers authorisation. When saved, it will automatically send off to a dashboard that managers can access to check what requires sign off and authorisation. Managers will need to go onto their home screen by selecting **Home > Dashboards**



14. Select from the drop-down list – **WMDC – MY Teams Service Provisions**.

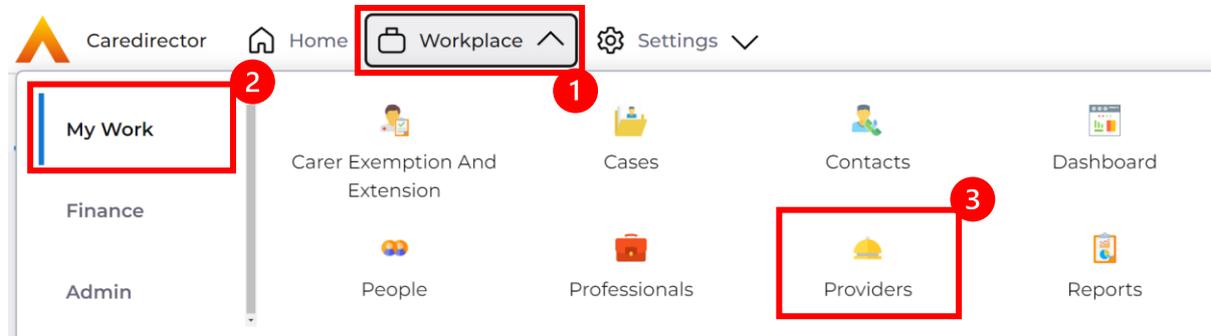


15. To authorise a **Service Provision** that has been changed to **Ready for Authorisation**. First check through by selecting the service provision under the widget heading saying **To Authorise – My Teams Service Provision**. Once you are happy this is correct making sure it has an **Actual Start Date**, go back to this screen and checkbox the right service provision that requires authorising. Once you have checked the checkbox go to the three dots on the right and select **Authorise**.

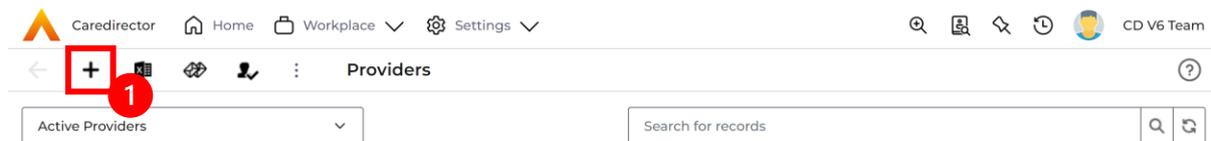


## Shared Lives Provider Setup

1. To add a new a Provider, ensure the same one does not exist on Caredirector first by searching for that provider. **Workplace > My Work > Providers.**



2. Search for the provider using the search box, if there are no duplicates then proceed to create a new provider. **Create New Record** from the toolbar.



3. This will open the create new provider details screen.  
Under this screen, complete the following:

<b>Field</b>	<b>Information</b>
<b>Name:</b>	Type in what their name is
<b>Provider Type:</b>	<b>Supplier</b>
<b>Start Date:</b>	When they plan to become a useable provider.
<b>Address:</b>	Use the <b>Address Search</b> Option
<b>Main Phone:</b>	Type in what their phone number is
<b>Email:</b>	Type in what their email is
<b>Other fields:</b>	Please use fill out the other information if known.

Details

**General**

<p><b>Id</b></p> <input type="text"/>	<p><b>Responsible Team*</b></p> <input type="text" value="CD V6 Team"/> <input type="button" value="X"/> <input type="button" value="Q"/>
<p><b>Name*</b></p> <input type="text" value="Shared Lives Team Provider"/>	<p><b>QA Lead</b></p> <input type="text"/> <input type="button" value="Q"/>
<p><b>Provider Type*</b></p> <input type="text" value="Supplier"/> <input type="button" value="v"/>	<p><b>Start Date</b></p> <input type="text" value="24/02/2023"/> <input type="button" value="Calendar"/>
<p><b>Top Up</b></p> <input type="text"/>	<p><b>End Date</b></p> <input type="text"/> <input type="button" value="Calendar"/>
<p><b>Parent Provider</b></p> <input type="text"/> <input type="button" value="Q"/>	<p><b>Available On Provider Portal?</b></p> <p><input type="radio"/> Yes</p> <p><input checked="" type="radio"/> No</p>
<p><b>CQC Location ID</b></p> <input type="text"/>	
<p><b>ODS Code</b></p> <input type="text"/>	
<p><b>Description</b></p> <input type="text"/>	

**Contact**

<p><b>Primary Contact</b></p> <input type="text"/> <input type="button" value="Q"/>	<p><b>Contract Lead</b></p> <input type="text"/> <input type="button" value="Q"/>
<p><b>Main Phone</b></p> <input type="text"/>	<p><b>Other Phone</b></p> <input type="text"/>
<p><b>Website</b></p> <input type="text"/>	<p><b>Email</b></p> <input type="text"/>

**Address**

<p><b>Start Date of Address</b></p> <input type="text"/> <input type="button" value="Calendar"/>	<p><b>Property Type</b></p> <input type="text"/> <input type="button" value="Q"/>
<p><b>Address Type</b></p> <input type="text" value="Primary"/> <input type="button" value="v"/>	<p><b>Country</b></p> <input type="text"/>
<p><b>Property Name</b></p> <input type="text" value="Provider"/>	<p><b>Address Phone</b></p> <input type="text"/>
<p><b>Property No</b></p> <input type="text" value="1"/>	<p><b>Contact Hours</b></p> <input type="text"/>
<p><b>Street</b></p> <input type="text" value="Provider Street"/>	<p><b>Preferred Contact Method</b></p> <input type="text"/> <input type="button" value="Q"/>
<p><b>Vlg/District</b></p> <input type="text"/>	<p><input type="button" value="Clear Address"/></p>
<p><b>Town/City</b></p> <input type="text" value="Shared"/>	
<p><b>County</b></p> <input type="text"/>	
<p><b>Postcode</b></p> <input type="text" value="SLT"/>	
<p><input type="button" value="Address Search"/></p>	

4. Scroll down until you see **Classification** heading.  
Under this heading, complete the following:

<u>Field</u>	<u>Information</u>
<b>Home Location:</b>	<b>External</b>
<b>Home Type:</b>	<b>Private</b>

### Classification

<p>Home Location</p> <input type="text" value="External"/>	<p>Placement URN</p> <input type="text"/>
<p>Home Type</p> <input type="text" value="Private"/>	<p>Overview</p> <input type="text"/>

5. When you have entered in the information for the **Provider** select **Save** on the toolbar.

Provider: New

Details

Name\*

QA Lead

Provider Type\*

Start Date

6. Any **Notes** please use **Menu > Related Items > Notes** as the notes section at the bottom of **Details** is going to be removed.

Caredirector Home Workplace Settings CD V6 Team

Provider: Shared Lives Team Provider

Shared Lives Team Provider (Id:19325) Provider Record

Type: Supplier

Menu ^ Timeline Summary Details Service Provisions Services Provided Suspensions Service I

Activities

Related Items

Commissioning

Addresses

Audit

Allegations (Alleged Abuser)

Child Providers

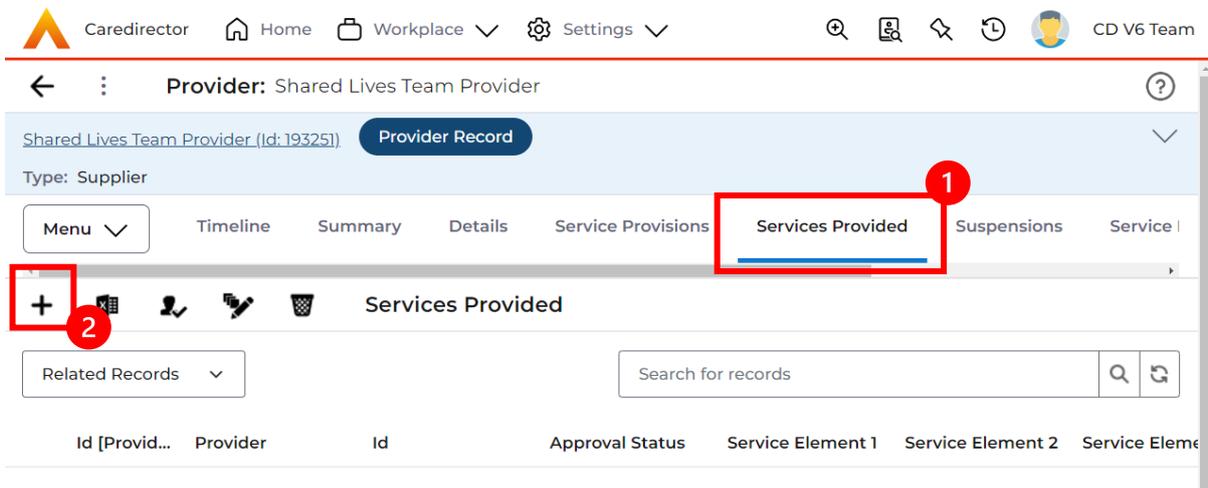
Allegations (Alleged Victim)

Forms (For Provider)

Attachments

Notes

7. This will create the provider and show new options.  
 Choose **Services Provided > Create New Record**.



8. Complete the following:

	<u>Field</u>	<u>Information</u>
	<b>Service Element 1:</b>	<b>SDS – Managed Account</b>
	<b>Service Element 2:</b>	<b>Shared Lives ST 1-5, Shared Lives LT 1-5, Sessional 1-3 (whichever is applicable)</b>
	<b>Contract Type:</b>	<b>Spot</b>
	<b>Negotiated Rates Apply:</b>	<b>No</b>

Then select **Save**.

Caredirector Home Workplace Settings CD V6 Team

Service Provided: New

Shared Lives Team Provider (Id: 193251) **Provider Record**

Type: Supplier

Details

**General**

Provider\* Shared Lives Team Provider

Responsible Team\* CD V6 Team

Service Element 1\* SDS - Managed Account

Responsible User\* Scott Simpson

Service Element 2\* Shared Lives LT - Band 1

Approval Status\* Pending

Service Element 3

Id

Contract Type\* Spot

Client Category

Negotiated Rates Apply\*  Yes  No

Current Ranking

Used In Finance\*  Yes  No

GL Code

8. When saved, new tabs will appear.  
Select **Service Finance Settings > Create New Record**.

Caredirector Home Workplace Settings CD V6 Team

Service Provided: Shared Lives Team Provider \ SDS - Managed Account \ Home Care \ \ \ Spot

Shared Lives Team Provider (Id: 193251) **Provider Record**

Type: Supplier

Menu Details **Service Finance Settings** Rate Periods Service Delivery Variations

**+** Service Finance Settings

Related Records Search for records

Service Provided	Start Date	End Date	Payment Type	Provider Batch ...	VAT Code	Adjust
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9. Complete the following:

Select **Save and Return to Previous Page** when finished.

<u>Field</u>	<u>Information</u>
<b>Start Date:</b>	Date the Service Starts
<b>Payment Type:</b>	<b>Invoice</b>
<b>Provider Batch Grouping:</b>	<b>Shared Lives Weekly</b>
<b>VAT Code:</b>	<b>Exempt</b>
<b>Adjusted Days:</b>	<b>(-1 for residential placements, 0 for everything else)</b>
<b>End Reason Rules Apply:</b>	<b>Yes</b>
<b>VAT apply to charging:</b>	<b>No</b>

**Service Finance Setting: New**

**Details**

**General**

Service Provided\*

Responsible Team\*

Start Date\*

End Date

Payment Type\*

Provider Batch Grouping\*

VAT Code\*

Adjusted Days\*

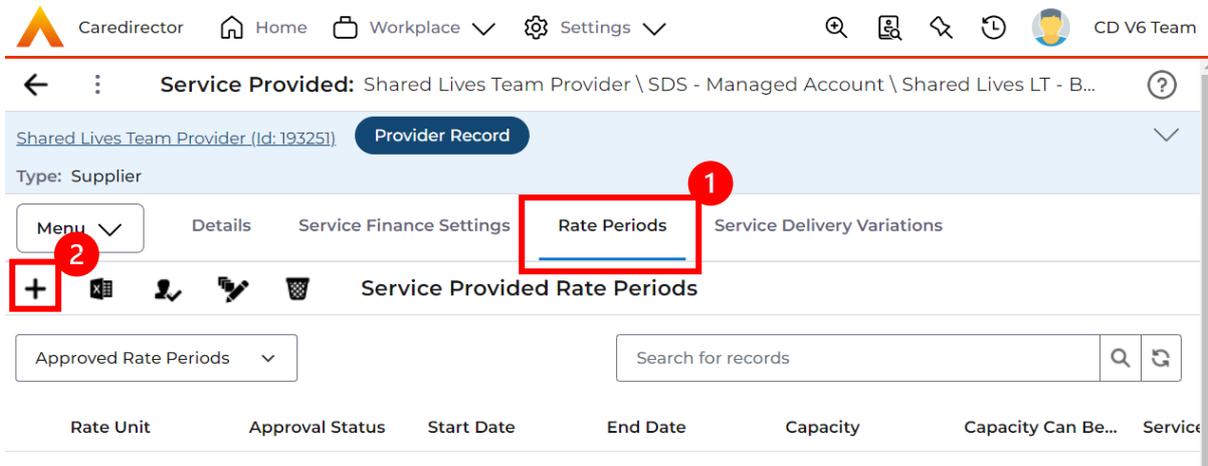
Charge Using Number of Carers?  
 Yes  
 No

End Reason Rules Apply\*  
 Yes  
 No

Used in Batch Setup\*  
 Yes  
 No

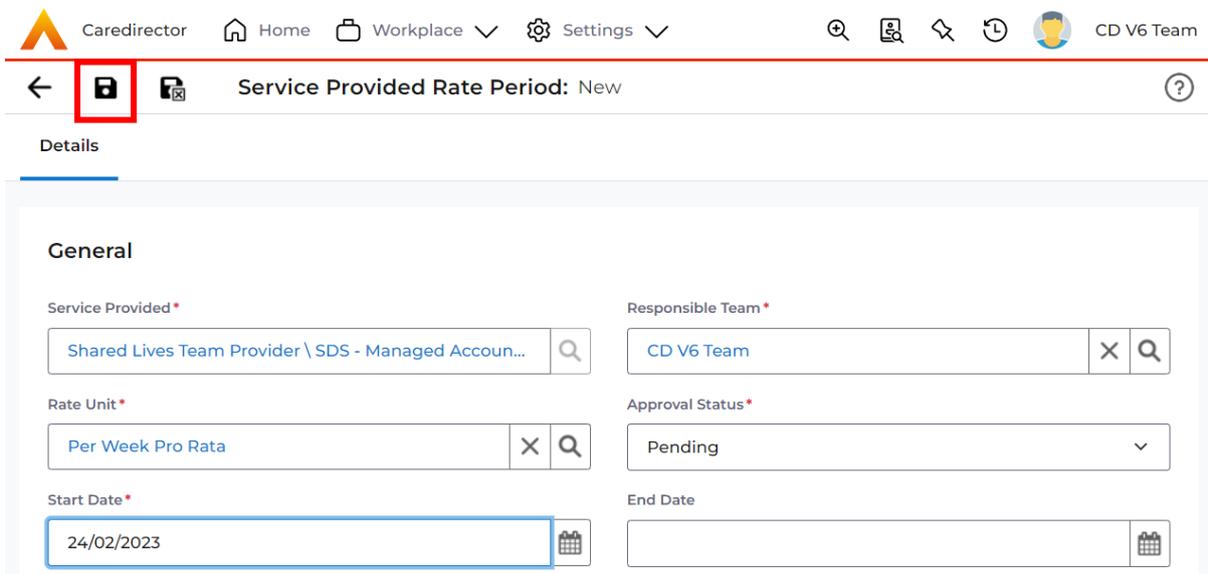
VAT apply to Charging?\*  
 Yes  
 No

10. Ensure you are back out of that **Service Finance Setting** page and back to where you can see **Rate Periods > Create New Record**.



11. This screen is asking what Rate Unit is linked to this **Provider**.  
Complete the following:  
Select **Save** when finished.

**Field Information**  
**Start Date:** The date the new rate starts from  
**Rate Unit:** Per Week Pro Rata



12. When saved, a new tab will appear.  
Select **Rate Schedules > Create New Record**.

The screenshot shows the Caredirector interface. At the top, there is a navigation bar with 'Caredirector', 'Home', 'Workplace', and 'Settings'. Below this is a breadcrumb trail: 'Service Provided Rate Period: Shared Lives Team Provider \ Shared Lives Team Provider \ SD...'. A menu is open, showing 'Details' and 'Rate Schedules' (highlighted with a red box and a '1' in a red circle). Below the menu, there is a toolbar with a '+' icon (highlighted with a red box and a '2' in a red circle), a calendar icon, a person icon, a pencil icon, and a trash icon. The main content area has a 'Related Records' dropdown and a search bar.

13. Enter the appropriate amount and select **Save and Return to Previous Page**.

The screenshot shows the 'Service Provided Rate Schedule: New' form. At the top, there is a navigation bar with 'Caredirector', 'Home', 'Workplace', and 'Settings'. Below this is a breadcrumb trail: 'Service Provided Rate Schedule: New'. A toolbar contains a back arrow, a lock icon, and a 'Save and Return to Previous Page' icon (highlighted with a red box). The form has a 'Details' tab selected. Under the 'General' section, there are several fields: 'Service Provided Rate Period' (with a dropdown menu), 'Responsible Team' (with a dropdown menu), 'Rate' (with a text input field containing '50'), and 'Service Provided' (with a dropdown menu).

14. Then your location should be in the **Service Provided Rate Period** under the **Rate Schedules** tab. We need to go back to the **Details** tab under this screen.

The screenshot shows the 'Service Provided Rate Schedules' table. At the top, there is a navigation bar with 'Caredirector', 'Home', 'Workplace', and 'Settings'. Below this is a breadcrumb trail: 'Service Provided Rate Period: Shared Lives Team Provider \ Shared Lives Team Provider \ SD...'. A menu is open, showing 'Details' (highlighted with a red box) and 'Rate Schedules'. Below the menu, there is a toolbar with a '+' icon, a calendar icon, a person icon, a pencil icon, and a trash icon. The main content area has a 'Related Records' dropdown and a search bar. Below the search bar is a table with the following columns: 'Service Provide...', 'Rate', 'Rate Bank Holid...', 'Rate Per Unit', 'Time Band St...', 'Time Band E...', and 'Monday'. The table contains one row with the following data: 'Shared Lives Tea...', '£50.00', and 'No'.

Service Provide...	Rate	Rate Bank Holid...	Rate Per Unit	Time Band St...	Time Band E...	Monday
Shared Lives Tea...	£50.00					No

15. What is happening in the background, and it is not instant, is the system is calculating the costs and schedule of what we just entered. If this option does not show straight away, please leave it 2 minutes, perhaps **Save and Return to Previous Page** and come back into this screen as under the **Approval Status** we now need to change the **Rate Period** from **Pending** to **Approved**. Then select **Save and Return to Previous Page**. This is so we can set the Provider **Status** as **Approved** later.

The screenshot shows the Caredirector interface for configuring a 'Service Provided Rate Period'. The page is titled 'Service Provided Rate Period: Shared Lives Team Provider \ Share...'. The 'General' section contains the following fields:

- Service Provided \***: Shared Lives Team Provider \ SDS - Managed Accoun...
- Responsible Team \***: CD V6 Team
- Rate Unit \***: Per Week Pro Rata
- Start Date \***: 24/02/2023

The 'Approval Status' dropdown menu is open, showing the following options:

- Pending
- Approved
- Cancelled
- Pending

16. Go back to **Details** for the **Service Provided** and change the **Approval Status** from 'Pending' to 'Approved'. Then select **Save**.

The screenshot shows the CareDirector interface for a 'Service Provided' record. The breadcrumb trail is 'Service Provided: Shared Lives Team Provider \ SDS - Managed Acc...'. The page title is 'Shared Lives Team Provider (Id:19325) Provider Record'. The 'Type' is 'Supplier'. The 'Details' tab is selected. The 'General' section contains the following fields:

- Provider\*: Shared Lives Team Provider
- Responsible Team\*: CD V6 Team
- Service Element 1\*: SDS - Managed Account
- Responsible User\*: Scott Simpson
- Service Element 2\*: Shared Lives LT - Band 1
- Approval Status\*: Pending (dropdown menu is open, showing Pending, Approved, and Unapproved options)
- Service Element 3: (empty)
- Contract Type\*: Spot
- Client Category: (empty)
- Negotiated Rates Apply\*: No (selected)
- Current Ranking: (empty)
- Used In Finance\*: No
- GL Code: (empty)

17. You have successfully created a **Provider** on the system. Please see the [Shared Lives Service Provision](#) section of this booklet to add service provisions to this provider.

### Version Control

Version	Change	Author	Date
V1	INITIAL START	SS	12/02/2024