Shared Lives Service Provision V1.0

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

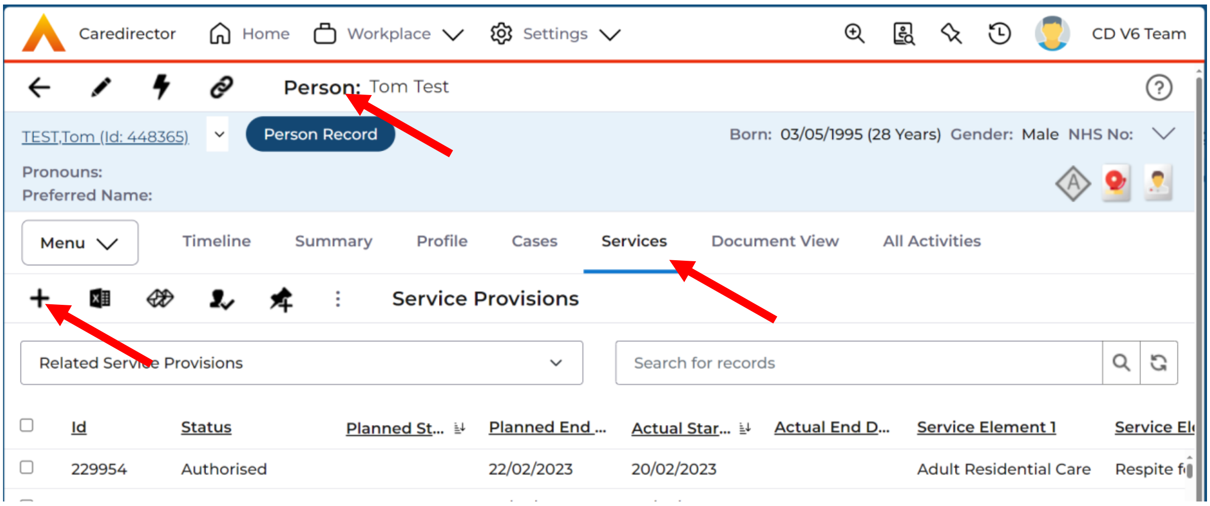
Contents

Shared Lives Service Provision

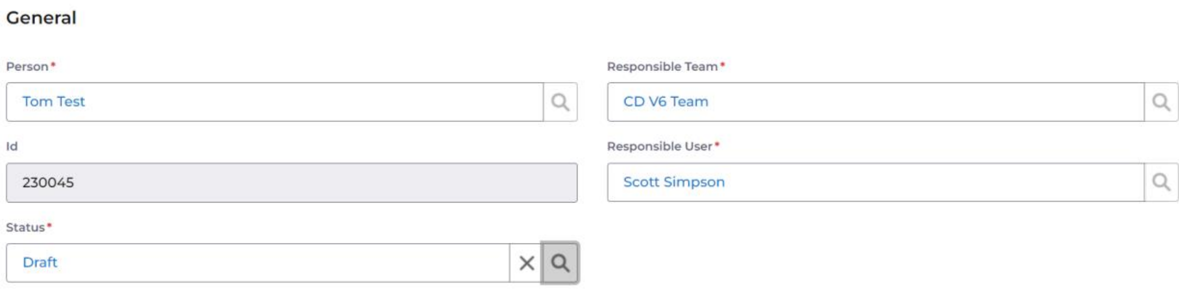
1. This service provision is based around the bands for long term, short term, and sessional care.

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).

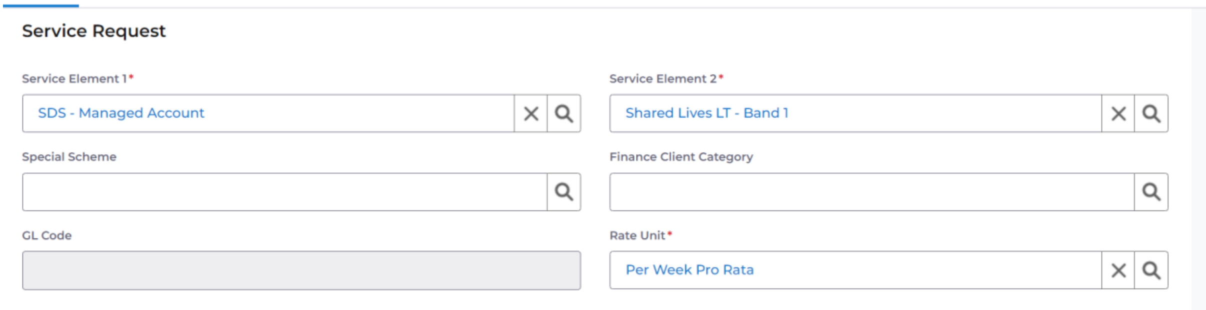
3. From the selected person record, go to **Services > Create New Record**



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

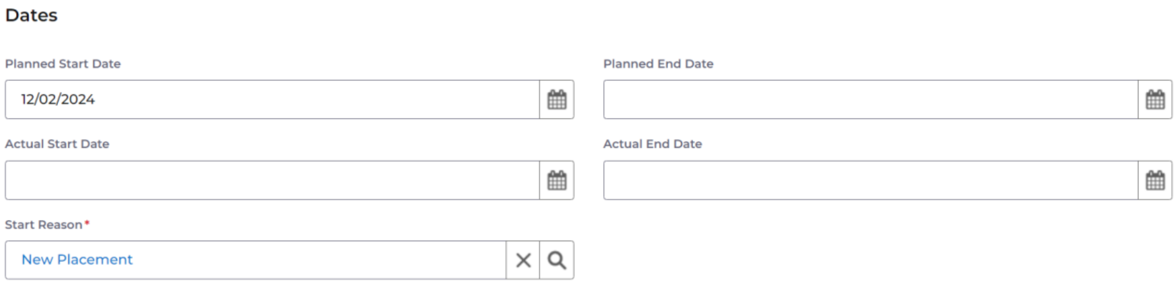


5. Service Request:



Field	Information
Service Element 1	**SDS – Managed Account**
Service Element 2	Choose the appropriate option: - **Shared Lives LT – Band 1** - **Shared Lives LT – Band 2** - **Shared Lives LT – Band 3** - **Shared Lives LT – Band 4** - **Shared Lives LT – Band 5** - **Shared Lives ST – Band 1** - **Shared Lives ST – Band 2** - **Shared Lives ST – Band 3** - **Shared Lives ST – Band 4** - **Shared Lives ST – Band 5** - **Shared Lives Sessional – Band 1** - **Shared Lives Sessional – Band 2** - **Shared Lives Sessional – Band 3**
Special Scheme	Leave Blank
Finance Client Category	Leave Blank
Rate Unit	**Per Week Pro Rata**

6. Dates:


Dates

Planned Start Date
12/02/2024

Planned End Date

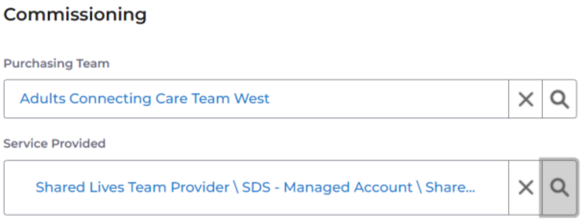
Actual Start Date

Actual End Date

Start Reason*
New Placement

Field	Information
Planned Start Date	This does not start payments. This when they plan to start this service provision.
Planned End Date	Leave Blank
Actual Start Date	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.
Actual End Date	Leave Blank. This will be needed when ending the service provision to stop payments
Start Reason	**New Placement**

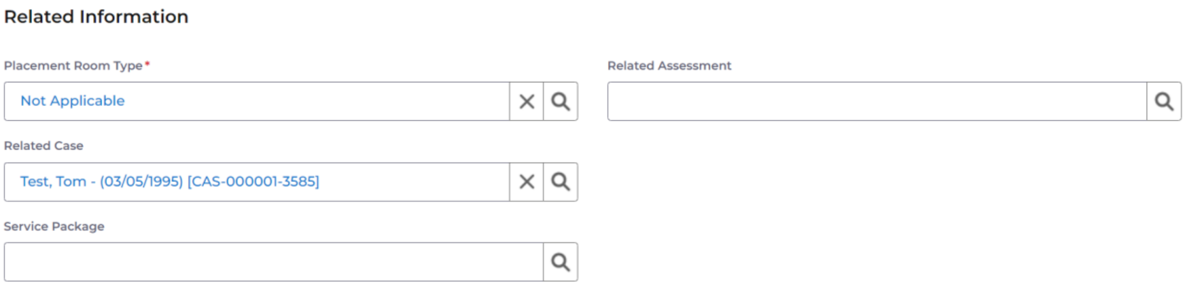
7. **Commissioning:**



Field	**Information**
Purchasing Team	Enter in who made the request.
Frequency in Weeks	**1**
Service Provided	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.

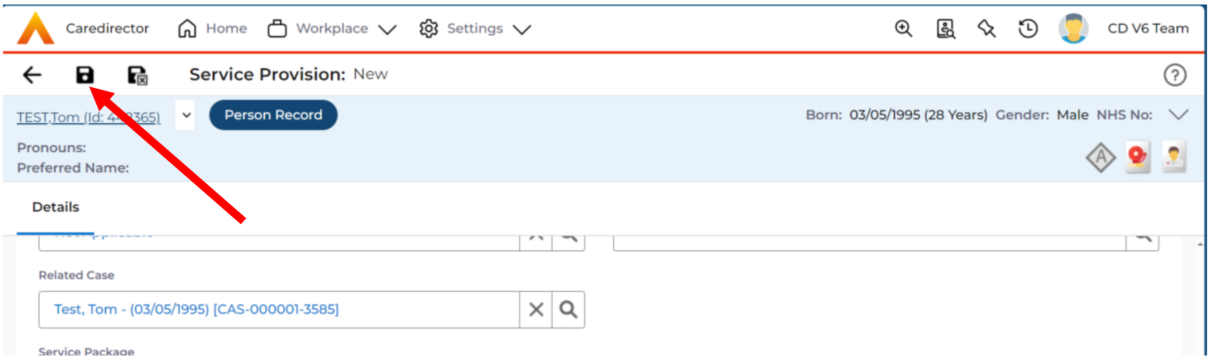
8. **Authorisation Detail** is something you cannot fill out yet. Leave blank.

9. **Related Information:**

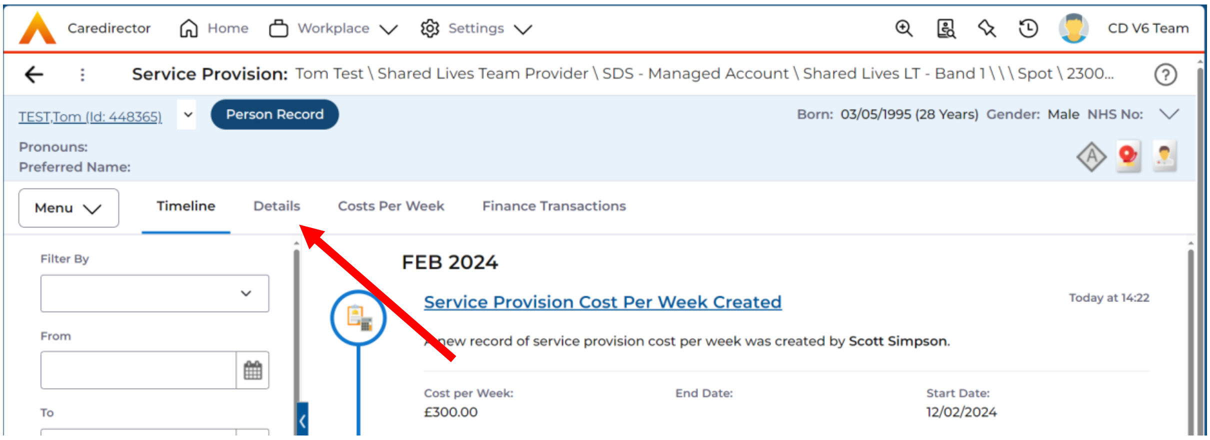


Field	**Information**
Placement Room Type	**Not Applicable**
Related Case	If there is a case within Caredirector linking with this Service Provision, you can link it here. Select lookup and search for the relevant case. This makes it easier to get onto the Case.
Service Package	If they have one available, please select it.
Related Assessment	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.

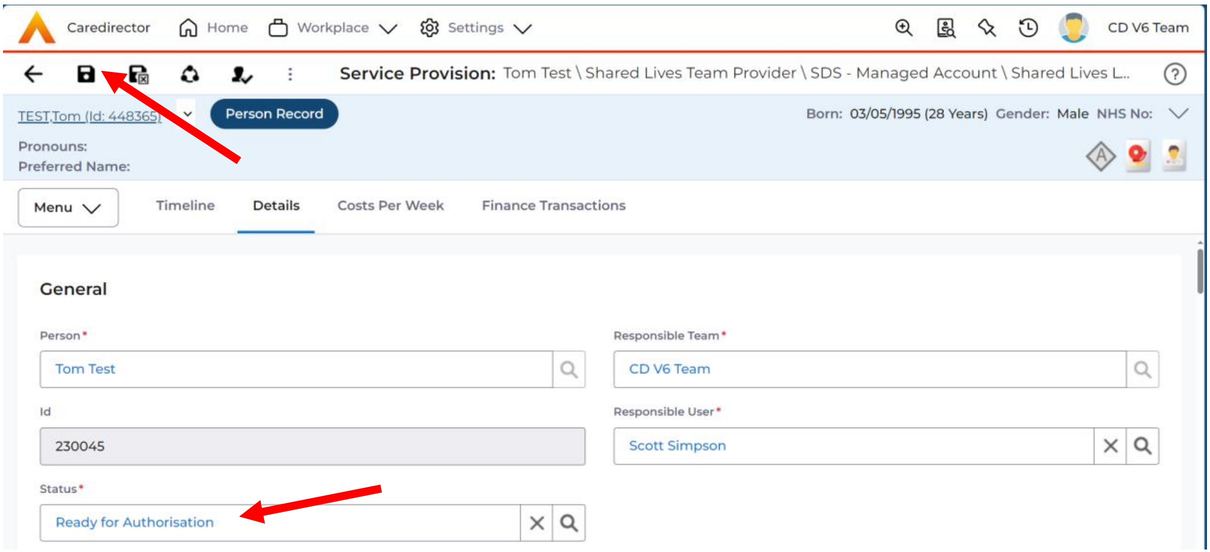
10. When finished, select **Save.**



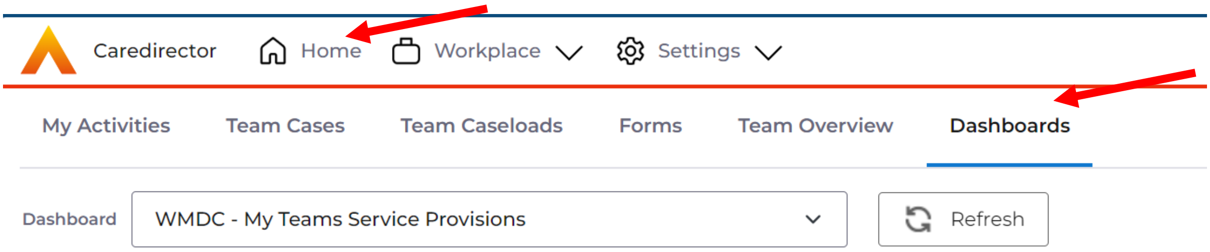
11. This will show you the **timeline** section of the **Service Provision**. For now, you can leave this until you have the **Actual Start Date**. Once you have the actual start date to enter or it is already inputted into the service provision. Click back onto **Details.**



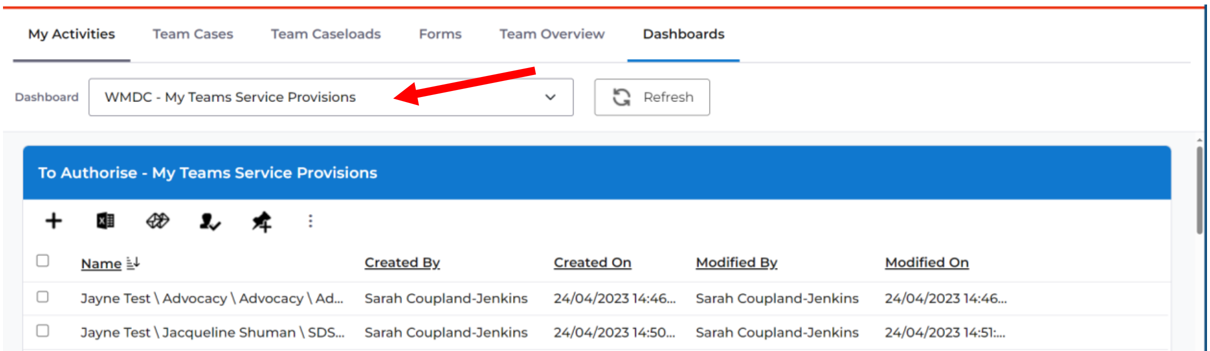
12. Go back to the **Status** and change it to **Ready for Authorisation** from **Draft**. Then select **Save. (So long as you have now entered in the Actual Start Date).**



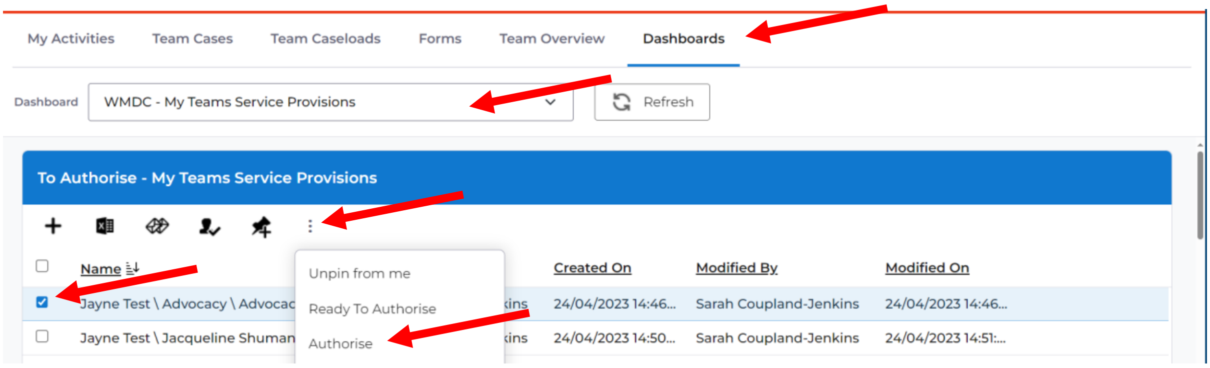
13. When this happens, this now requires managers authorisation. When saved, it will automatically send off to a dashboard that managers can access to check what requires sign off and authorisation. Managers will need to go onto their home screen by selecting **Home** > **Dashboards**



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

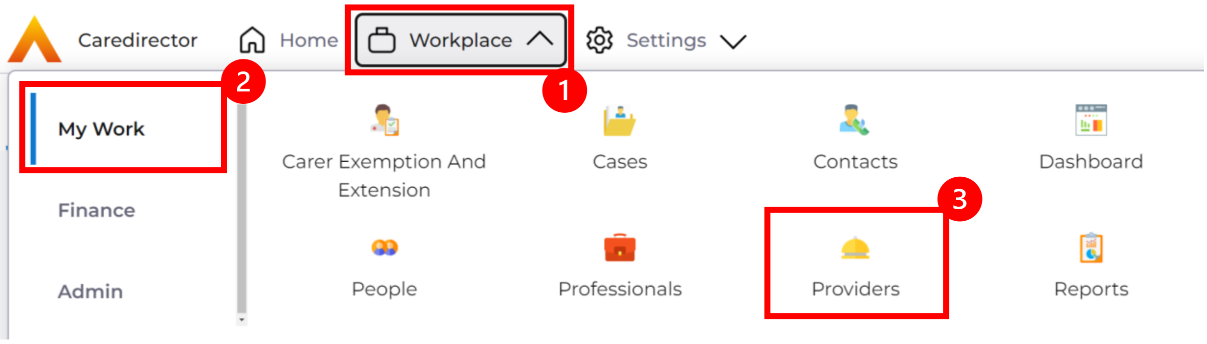


15. To authorise a **Service Provision** that has been changed to **Ready for Authorisation**. First check through by selecting the service provision under the widget heading saying **To Authorise – My Teams Service Provision.** Once you are happy this is correct making sure it has an **Actual Start 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.**

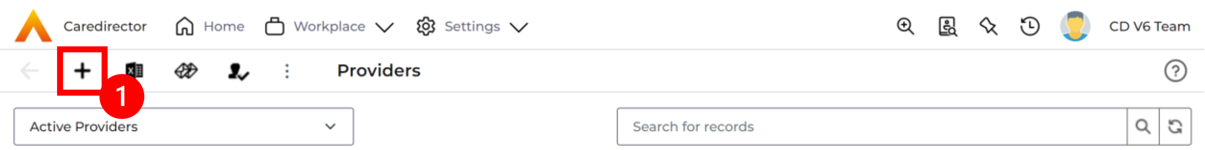


Shared Lives Provider Setup

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.**

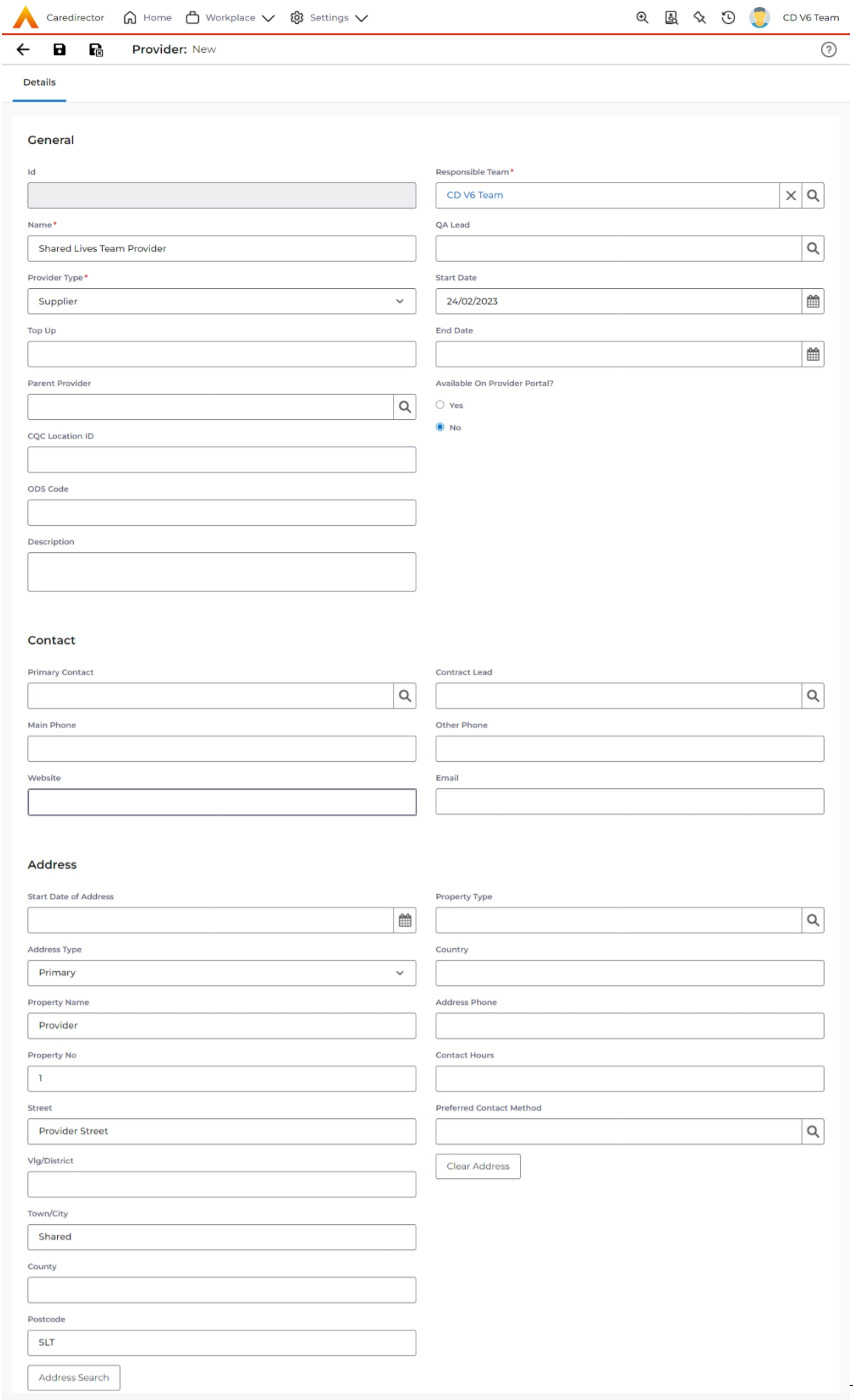


2. Search for the provider using the search box, if there are no duplicates then proceed to create a new provider. **Create New Record** from the toolbar.



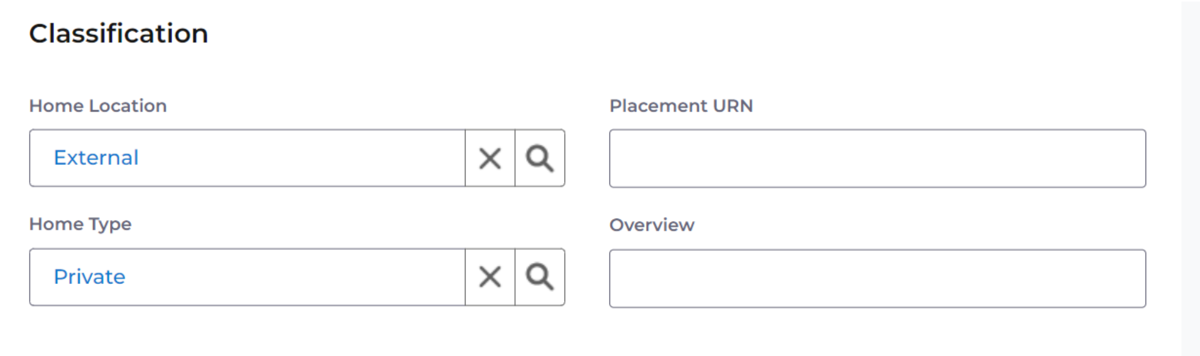
3. This will open the create new provider details screen. Under this screen, complete the following:

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

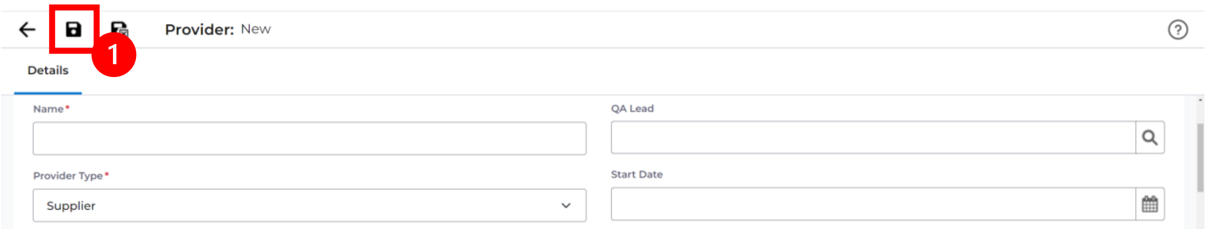

Caredirector
Home
Workplace
Settings
CD V6 Team
Provider: New
Details
General
Id
Responsible Team*
CD V6 Team
Name*
Shared Lives Team Provider
QA Lead
Provider Type*
Supplier
Start Date
24/02/2023
Top Up
End Date
Parent Provider
Available On Provider Portal?
Yes
No
CQC Location ID
ODS Code
Description
Contact
Primary Contact
Contract Lead
Main Phone
Other Phone
Website
Email
Address
Start Date of Address
Property Type
Address Type
Primary
Country
Property Name
Provider
Address Phone
Property No
1
Contact Hours
Street
Provider Street
Preferred Contact Method
Clear Address
Vlg/District
Town/City
Shared
County
Postcode
SLT
Address Search

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

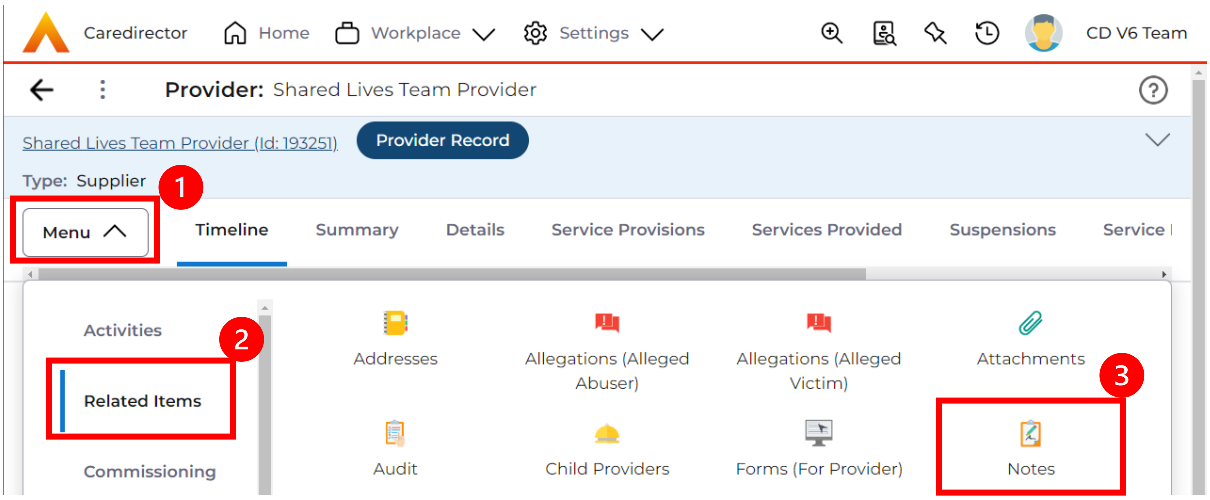
Field	**Information**
Home Location:	**External**
Home Type:	**Private**



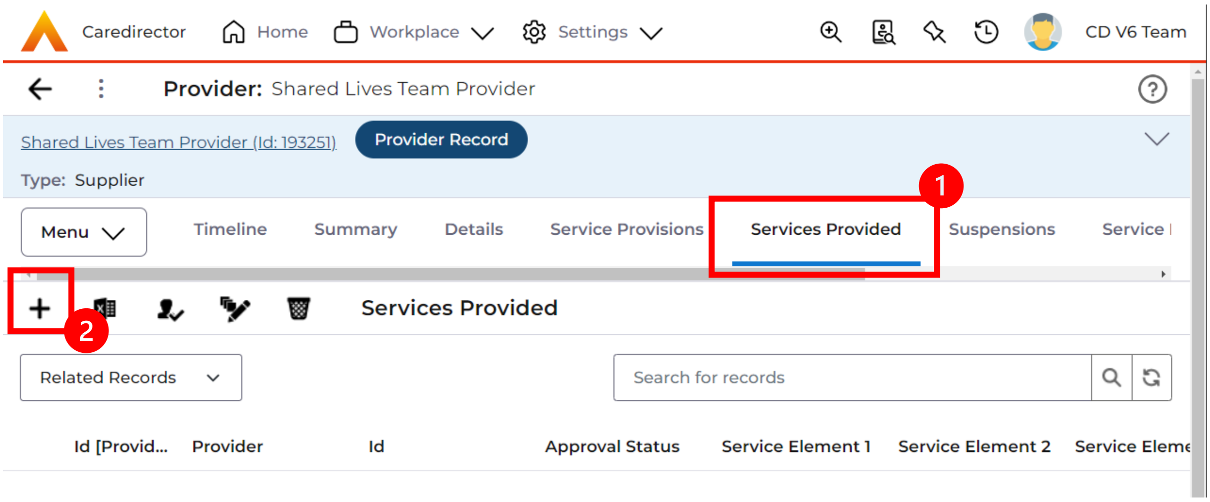
5. When you have entered in the information for the **Provider** select **Save** on the toolbar.



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



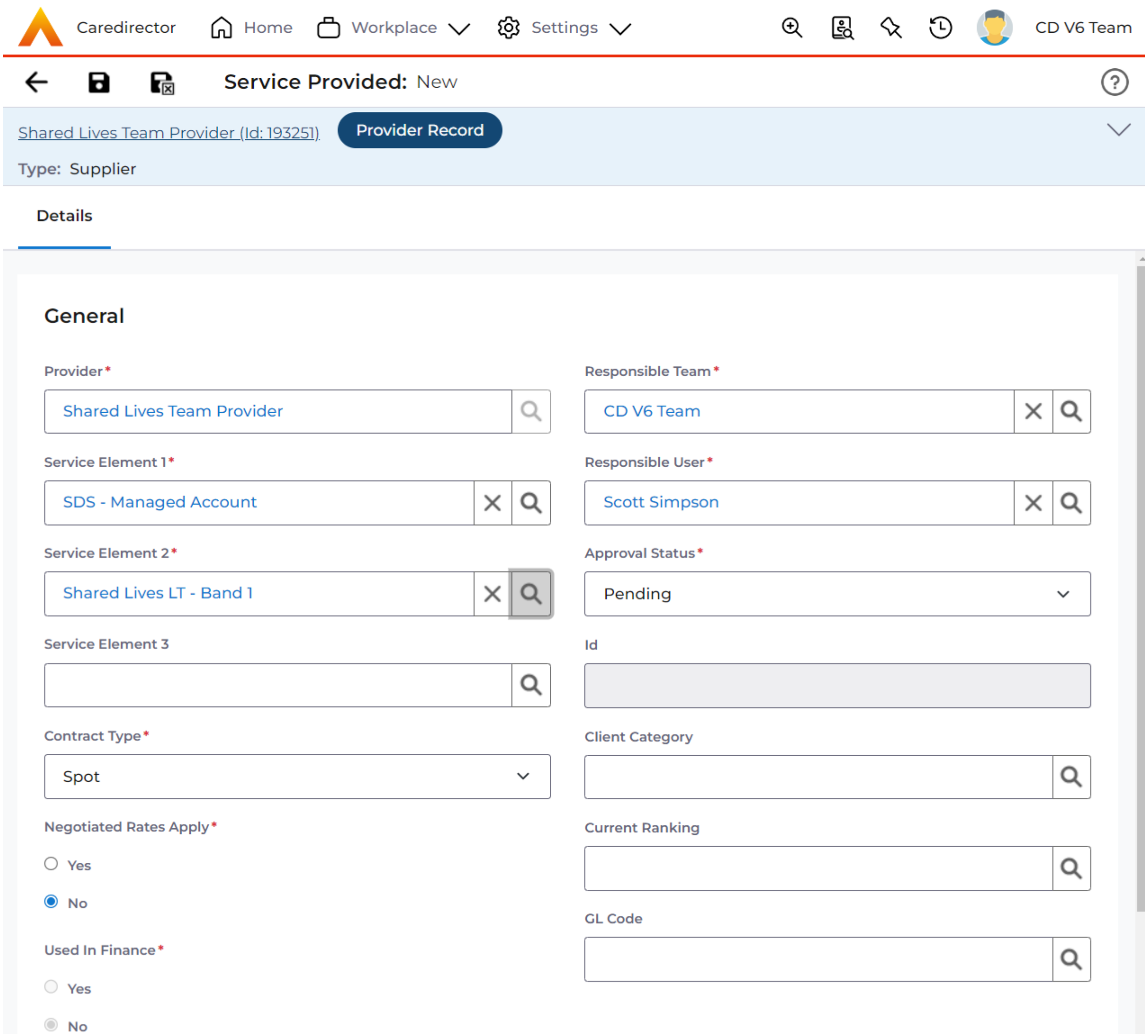
7. This will create the provider and show new options. Choose **Services Provided > Create New Record**.



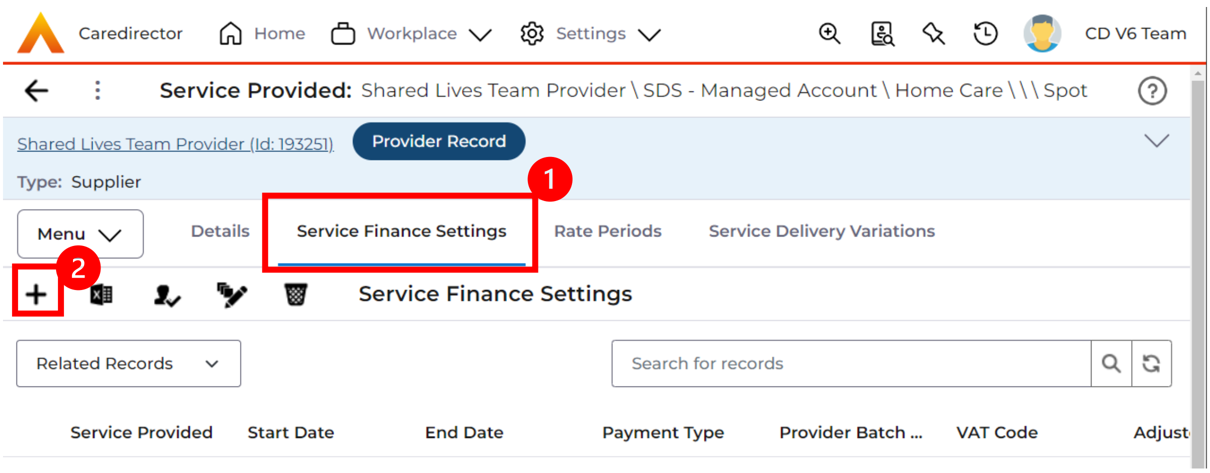
8. Complete the following:

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

Then select **Save.**

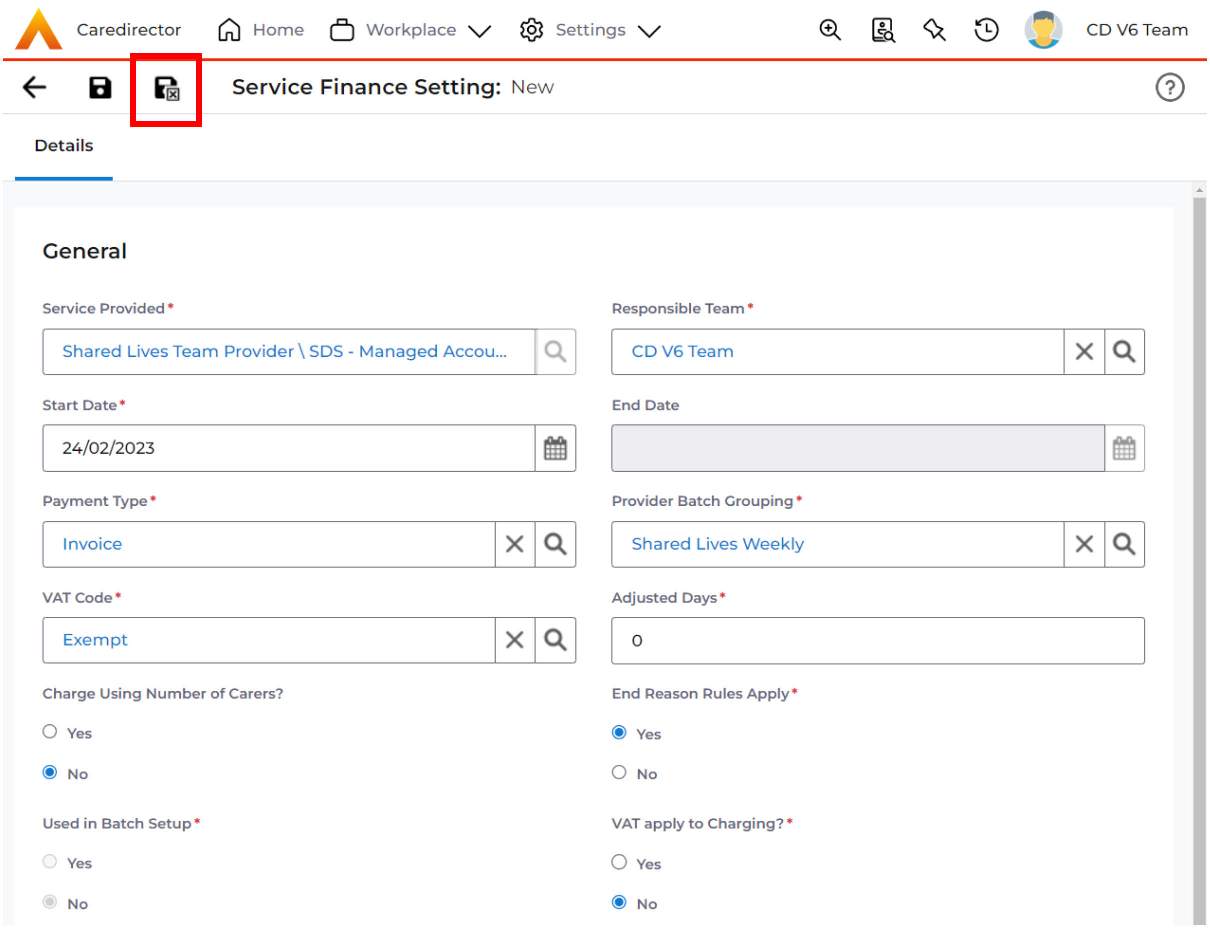


8. When saved, new tabs will appear.
   Select **Service Finance Settings > Create New Record.**

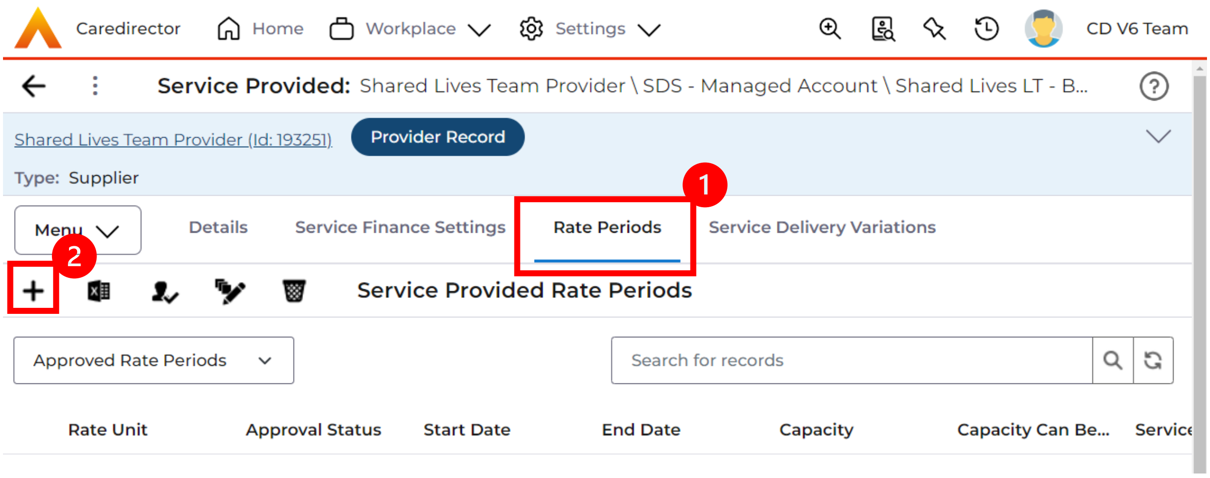


9. Complete the following:
   Select **Save and Return to Previous Page** when finished.

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

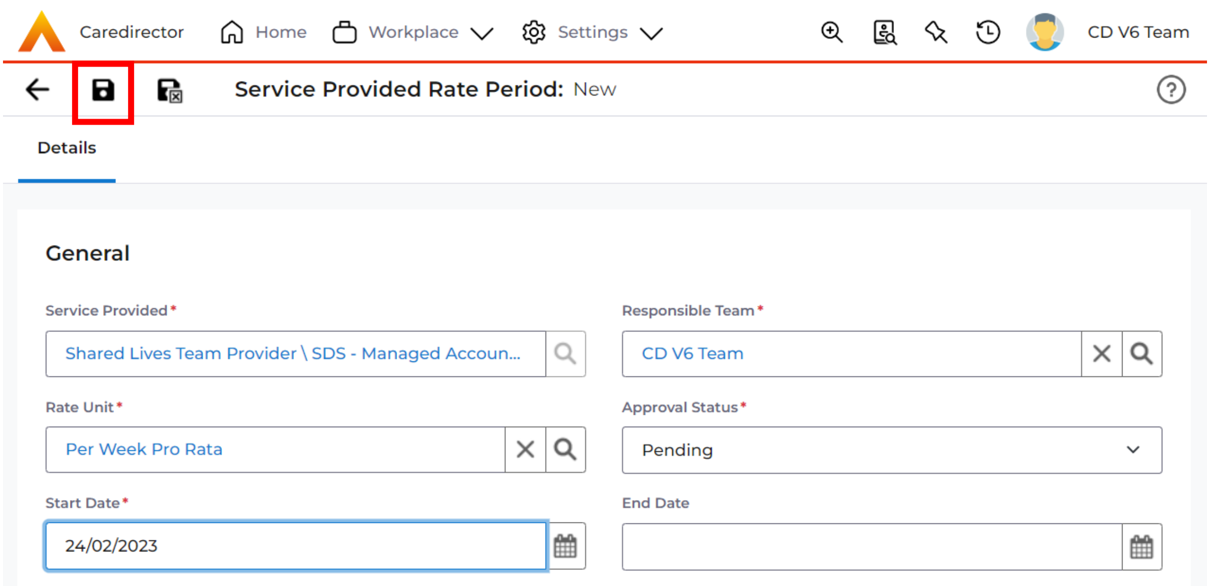


10. Ensure you are back out of that **Service Finance Setting** page and back to where you can see **Rate Periods > Create New Record.**

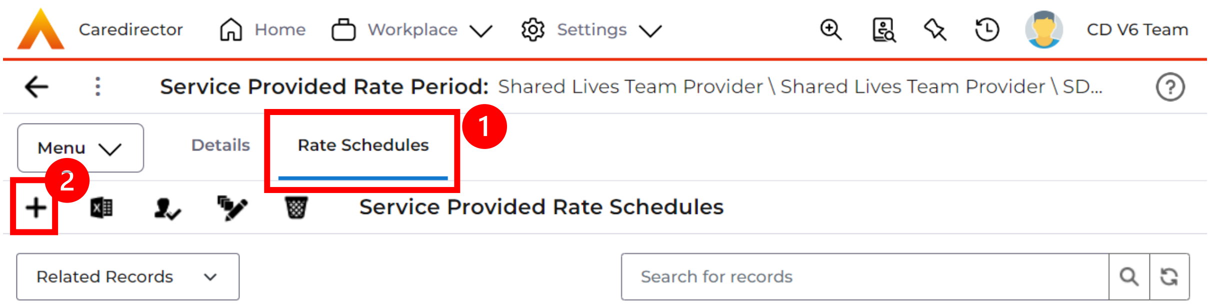


11. This screen is asking what Rate Unit is linked to this **Provider**.
Complete the following:
Select **Save** when finished.

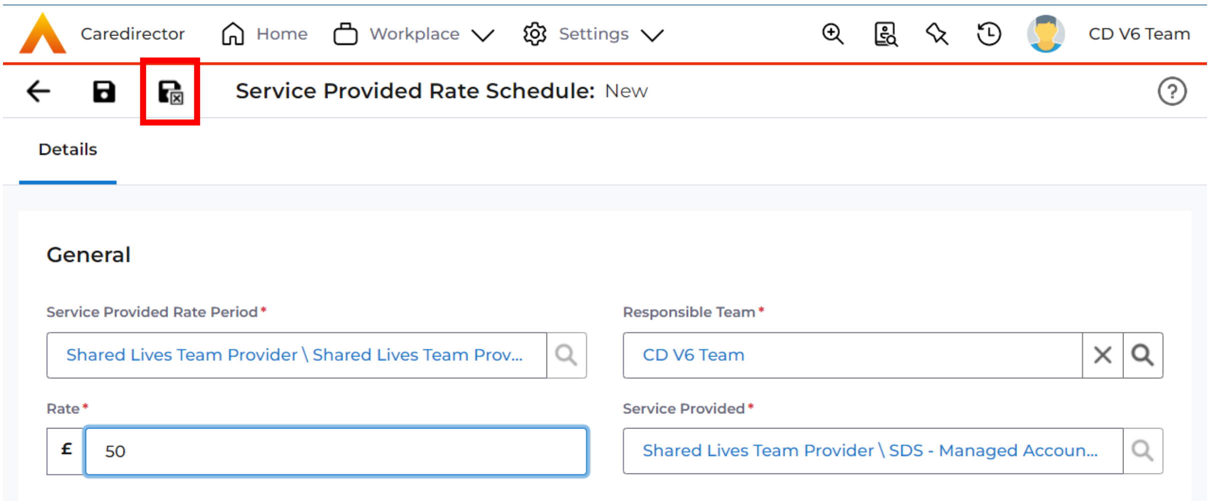
Field	Information
Start Date:	The date the new rate starts from
Rate Unit:	**Per Week Pro Rata**



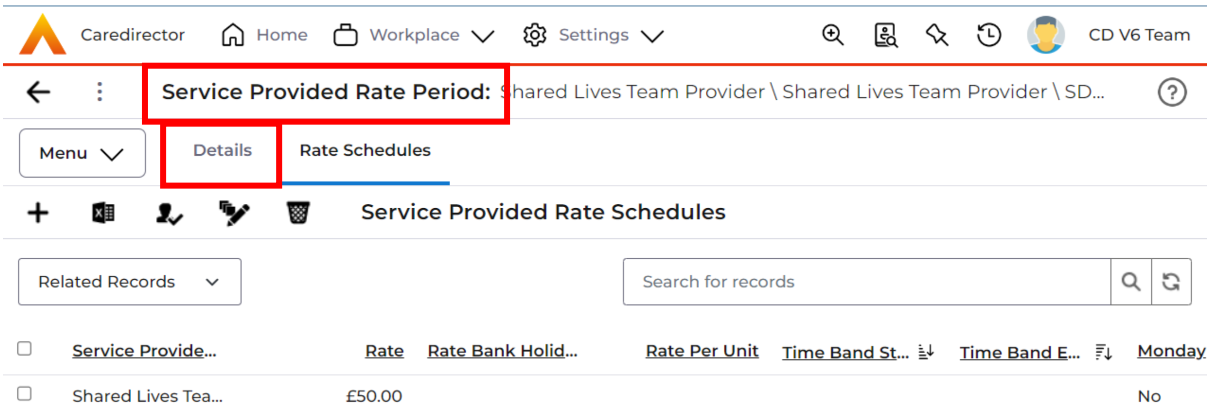
12. When saved, a new tab will appear.
    Select **Rate Schedules > Create New Record**.



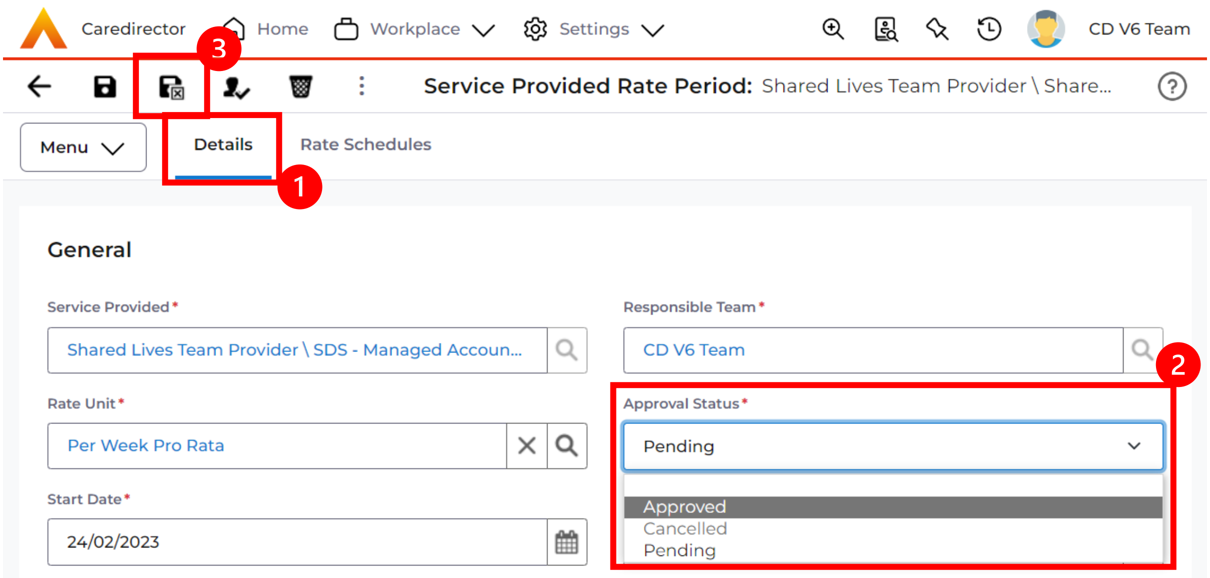
13. Enter the appropriate amount and select **Save and Return to Previous Page.**



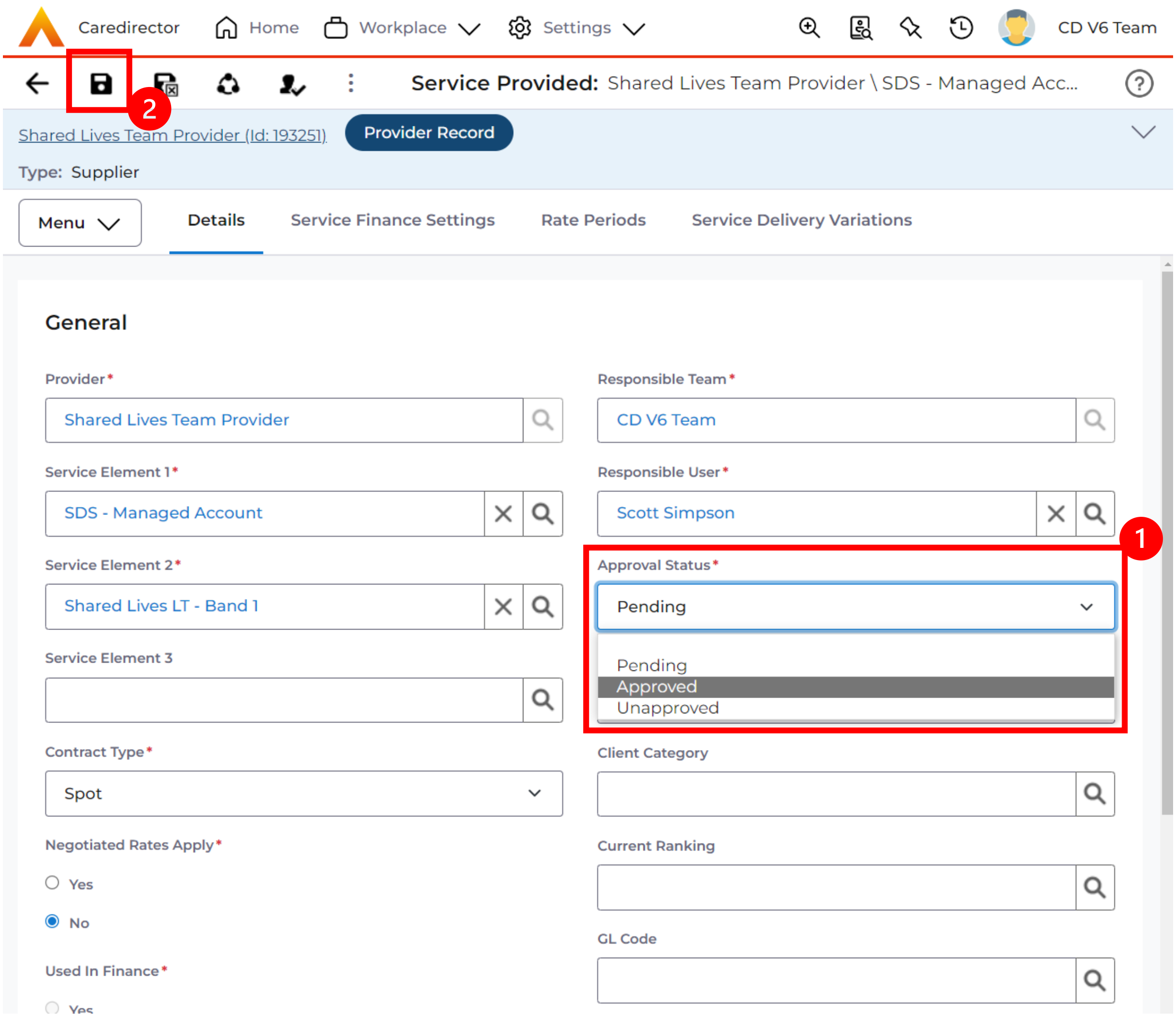
14. Then your location should be in the **Service Provided Rate Period** under the **Rate Schedules** tab. We need to go back to the **Details** tab under this screen.



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.



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



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