Service Provision
V1.5

Document	Service Provision Booklet
Purpose	How to input Service Provisions and incorporate processes
Version	V1.5
Owner	ICT Business Transformation Team / Adults System Support
Last Updated	16/04/2024

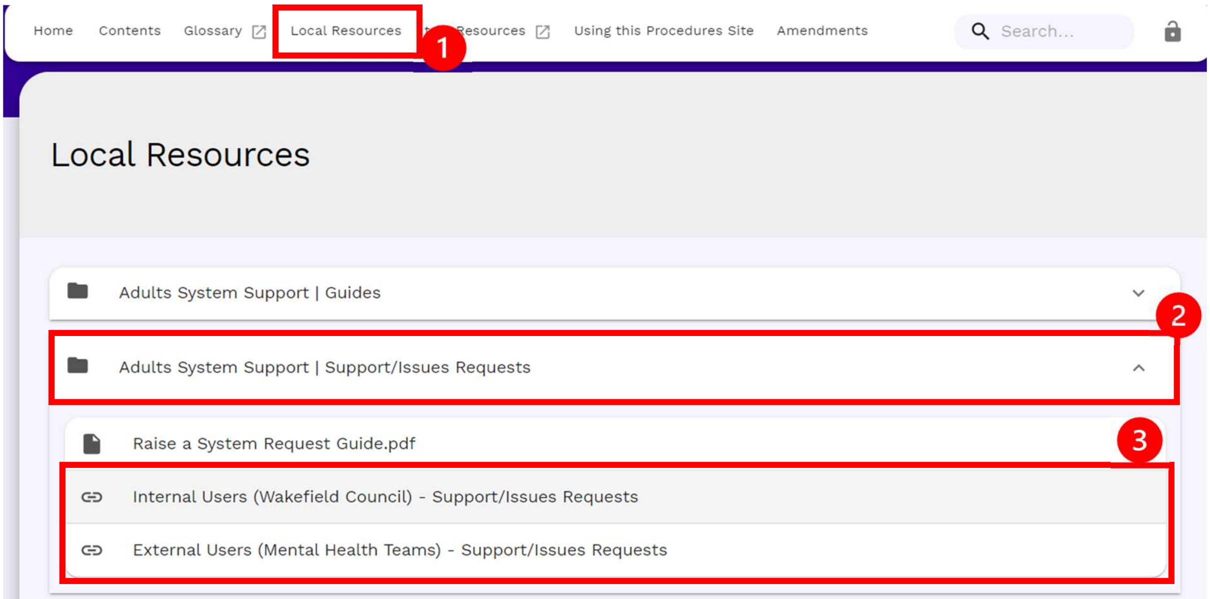
Contents

Adults System Support

We are here to support with Service Provisions. Support/ Issues Requests are completed via Tri-X:

https://wakefieldadults.proceduresonline.antser.com/resources/local-resources

Local Resources > Adults System Support | Support/ Issues Requests > Internal or **External link**



This booklet is bespoke, prior knowledge of fundamentals is essential. If at any point you require a refresher or need a **how to…** please refer to this link:

https://wakefieldadults.proceduresonline.antser.com/resources/local-resources

and search in the search bar the **how to** you are looking for or area of which you are needing to find.

What triggers a Service Provision

Service Provisions must be accurate and completed in a timely manner as collection of contributions and payments are made to and from Clients and Service Providers. The three items that trigger collections and payments are as follows:

- The **Actual Start Date** is recorded within the Service Provision
- The Service Provision is **Authorised**
- The Service Provision is linked to the Financial Assessment

Planned Start Date does not trigger a collection and payment. When you complete all three, that is when a collection is scheduled.

Services Provisions Information

It is important before entering new Service Provisions that you check that any unused out-of-date Service Provisions have/ are ended/ ending. You can check this by looking on the **Services tab** within the **Person Record**. This will show all Service Provisions linked to a Person. If a Service Provision has an **Actual End Date,** then the Service will terminate on that date.

Once a Service Provision is set to **Ready for Authorisation,** due to Financial Regulations, the system will not allow the same person who has input the Service Provision to authorise it. Also, to authorise a Service Provision, an account with extra security privileges is required (authorising Service Provisions is usually completed by a Team Manager or Support Services Co-ordinator).

Once a Service Provision has been authorised it cannot be deleted. If the service does not commence for any reason, then the Service Provision **must** be cancelled. A Team Manager or Support Services Co-ordinator can only cancel Service Provisions.

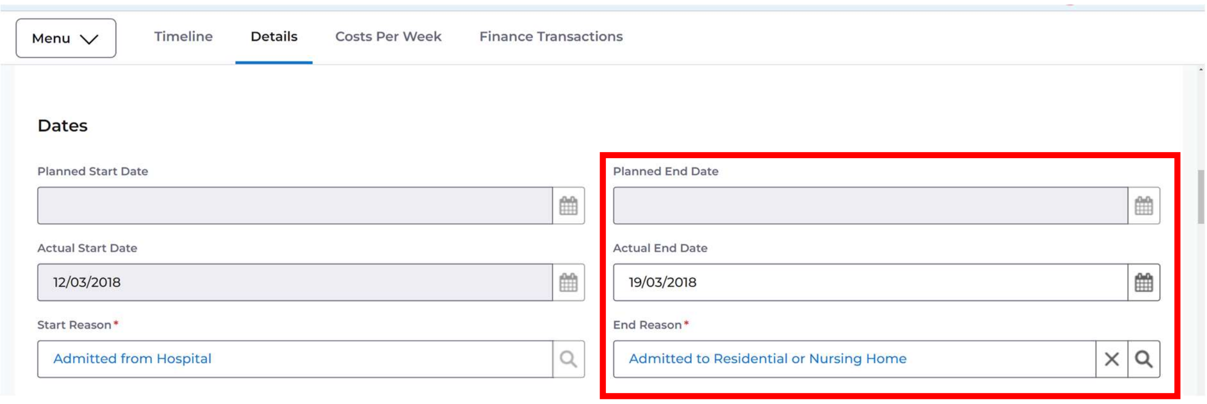
References toward the Co-Ordination Team within this booklet – this is the Team who source the Providers from a **Booking Request** and does not refer to Co-Ordination Support Officers or Care Co-ordinators.

When entering a Service Provision, you must always remember to change the **Purchasing Team** to the correct purchasing team to ensure the correct **GL Code** are inputted onto the Finance Module for payment.

It is paramount that the Service Provisions are updated following any change in care need and in line with an updated Care Plan, as this ensures that the person using the service is always charged correctly. Failure to update Service Provisions could result in complaints from a charging perspective.

Ending Service Provisions

To end Service Provisions, select the Service Provision and enter the **Actual End Date** and the appropriate **End Reason**. It is important to end Service Provisions in a timely manner to stop payments to the Service Provider and stop the collection of contributions from the Client. Home care service provisions should only be ended by the Co-ordination Team (contracted providers) or Peripatetic Team (in-house provision).



Not all service provisions require a **Planned End Date** however, a **planned end date** is there to issue an expected end date to the service, but this can be reviewed. Entering an **Actual End Date** will stop payments to Providers and the collection of contributions from Clients.

Entering a ‘Planned End Date’ will stop payments to Providers and the collection of contributions from Clients but it is important to also enter an ‘Actual End Date’ for accuracy of recording and data integrity.

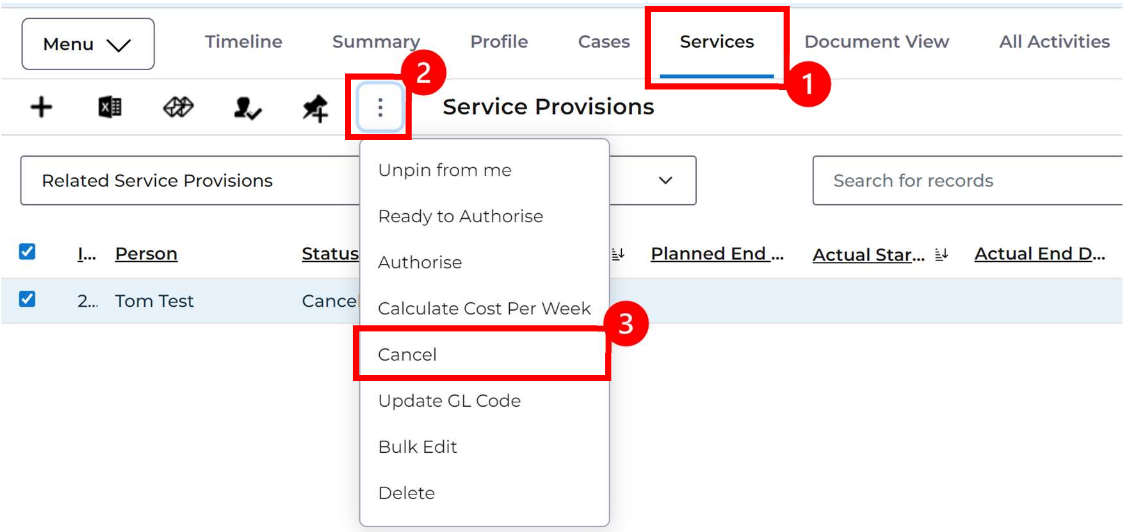
Cancelling & Deleting Service Provisions

If a Service Provision has been entered in error onto the **WRONG** person record, then please follow the **Adults System Support** section to raise this issue and request support.

Anything added in error to the correct person record or if a service does not proceed must be cancelled by your Team Manager/Support Services Co-ordinator. To cancel, managers must Authorise the service provision and then cancel it via the dropdown menu the same way you authorise it (See below).

Booking Request Cancellations

If a Service Provision has been entered on the system with a **Status** of **Booking Request** and for any reason the Service does not proceed (i.e. the client changes their mind), the Service Provision must **not** be deleted but must be ended with the same **Start Date** and **End Date** and **End Reason** of **Booking Request Cancelled.** This is so that we have a record that the care was requested. A task advising the Co-ordination Team is automatically generated.



Ending Service Provisions When Service User has Died

When ending a Service Provision after someone has passed away, the **Actual End Date** may not be the same as the Date of Death. (e.g. the Client may have been in hospital prior to their death meaning the service ended earlier than the Date of Death).

For **Residential/ Nursing and High-Cost Placements** the Practitioner/ CSO/ Admin will end these Service Provision with the Date of Death (unless the Client has been in hospital prior to their death, then it is required to check if the Care Home has a retainer).

For **Respite** you can end the Service Provision with the Date of Death. However, if you find that the Service Provision has no **Actual Start Date** recorded, the **Actual End Date** must not be entered (this will result in no payments being made to the Care Home or Client contribution collected). In these situations, a **Task** must be added to the Service Provision explaining that this has happened (found under **Menu > Activities > Task**) and set the **Responsible Team** as **Personalisation & Assessment Team**. The P&AT team will add the **Actual Start Date** and **Actual End Date** once they have checked that the **Financial Assessment** has been linked to the Service Provision. This will ensure that the **Provider** is paid, and any Client contributions are collected (unless the Client has been in hospital prior to their death, then it is required to check if the Care Home has a retainer).

For **Managed Accounts** Practitioner/ CSO/ Admin must complete an **Adults – Change to Service Request** form for the Co-Ordination Team to complete and they will end the Service Provision.

For **Cash Direct Payments** Practitioner/ CSO/ Admin must contact **Personalisation & Assessment Team** via a **Task Activity (Menu > Activities > Task)** and set the **Responsible Team** as **Personalisation and Assessment Team** and they will end the Service Provision.

For **Day Care/ Day Opps/ Extra Case** or any **ACP/Non-commissioned Services** the Practitioner/ CSO/ Admin can end these on the date the Service ended via the **Actual End Date**.

For services where there is no cost attached, **Self-funding Residential/ Reablement/ Advocacy/ Professional Support/ Orientation and Mobility/ Equipment,** these Service Provisions can be ended with the actual Date of Death as there are no financial implications.

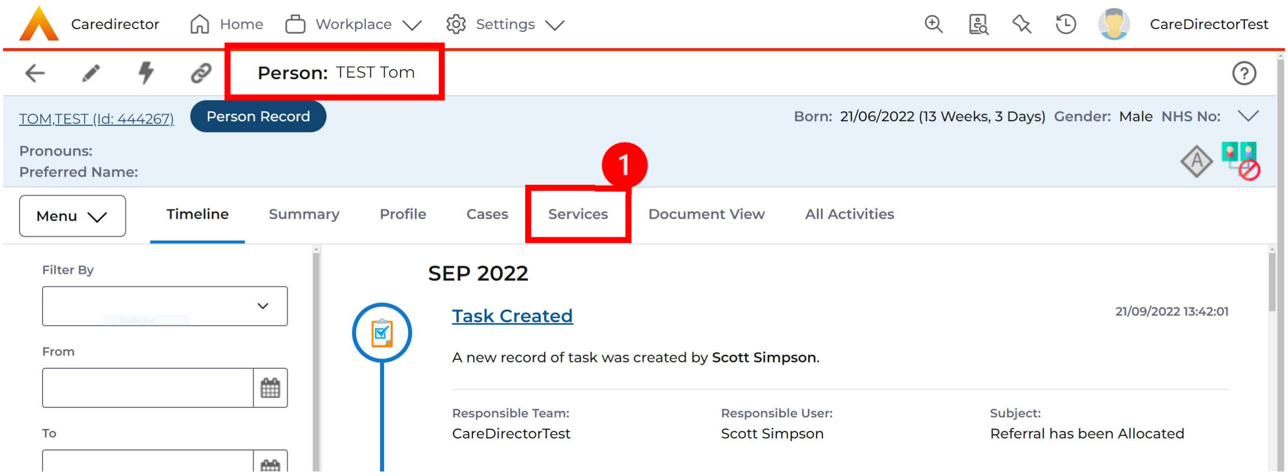
Service Provision Basics

If any of these steps require further explaining, please refer to our Adults System Support section to raise an issue or to find another guide to explain **how to…**

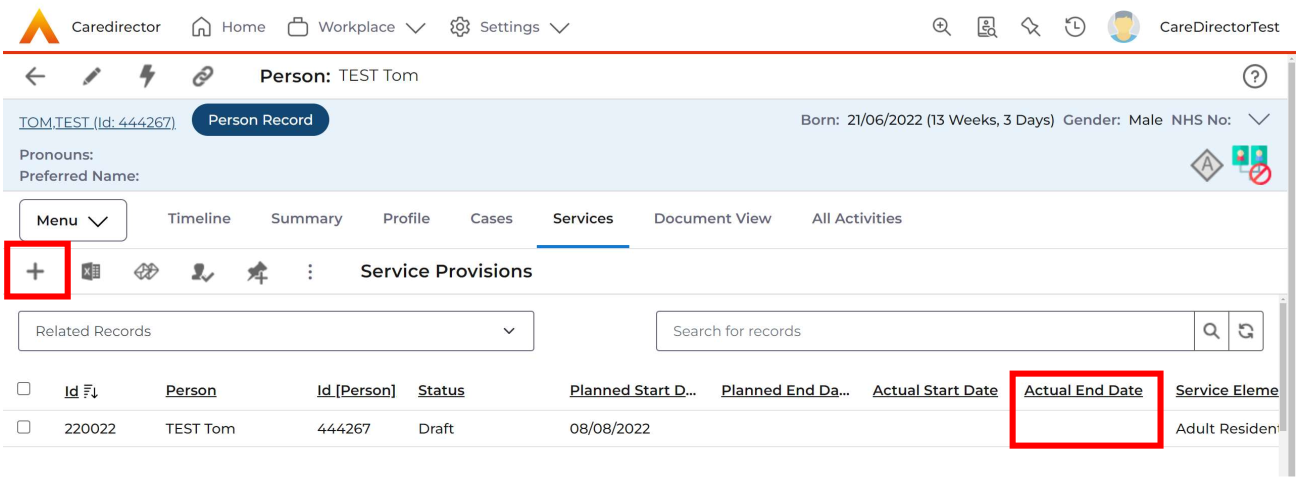
How to find Service Provisions and Create New

1. Every **Service Provision** in this booklet will require this step beforehand.

2. Locate and open the relevant **Person Record** and select **Services**.



3. After selecting **Services,** this will show all Service Provisions linked to this Person Record. Please ensure any Service Provisions which have ended, have an **Actual End Date** before creating a new one. Select anywhere along the row to open the SP in order to do this. However, if you want to create a new SP, please select the **Create New Record** from the toolbar. Then follow the relevant Service in the Service Provisions section.

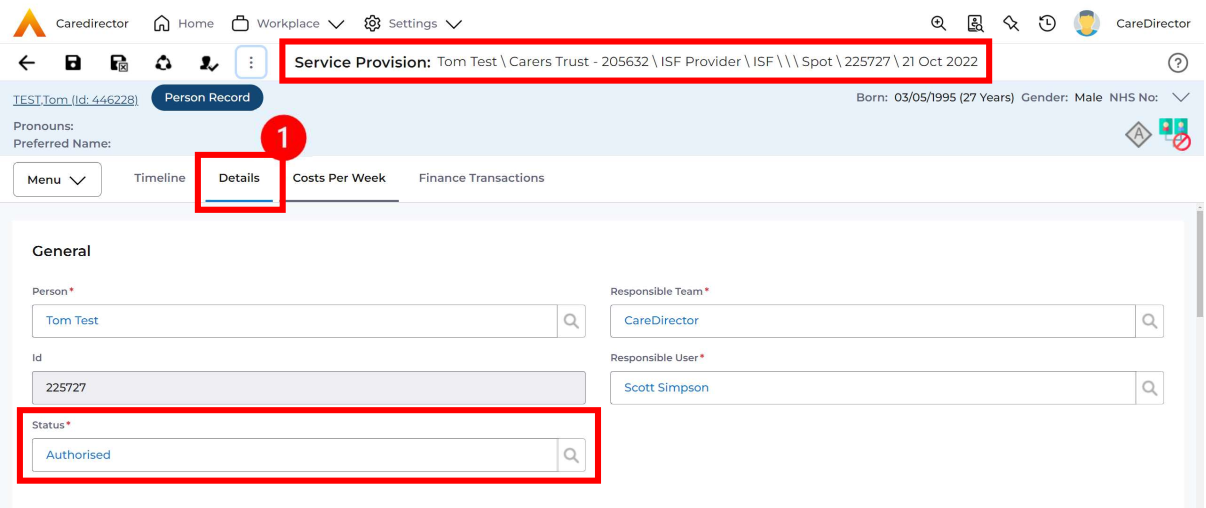


How to Clone a Service Provision

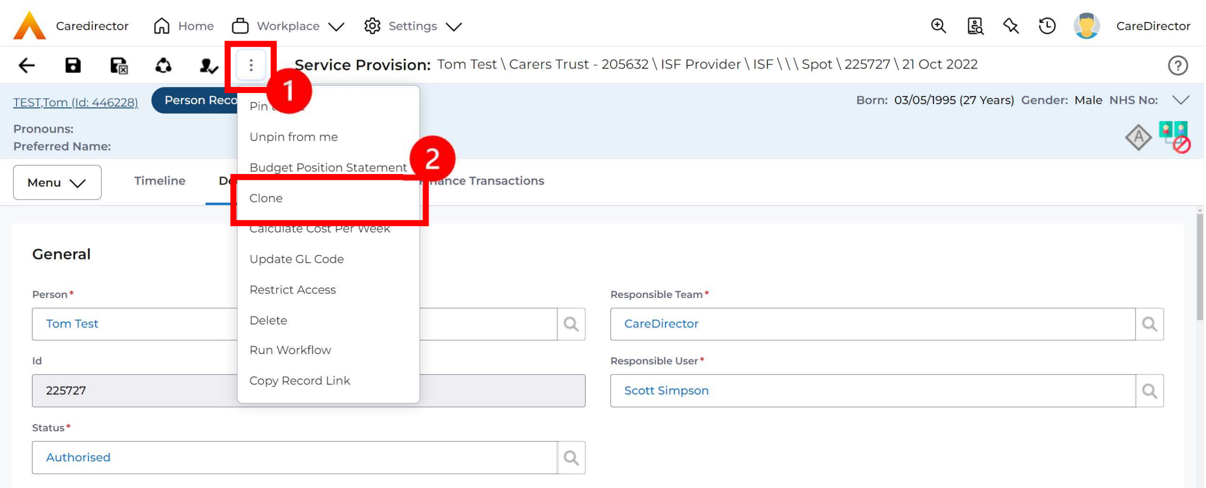
1. Occasionally, it is beneficial to clone a service provision so that information can be carried over whilst also being able to change details in many ways. **However**, cloning a Service Provision will automatically add an **actual** start date, therefore, this functionality should **not** be used for Service Provisions where a **planned** start date is required.

2. You can only clone a Service Provision if the **Status** is **Authorised.** If the status is not **Authorised** then the option of **Clone** will not be available.

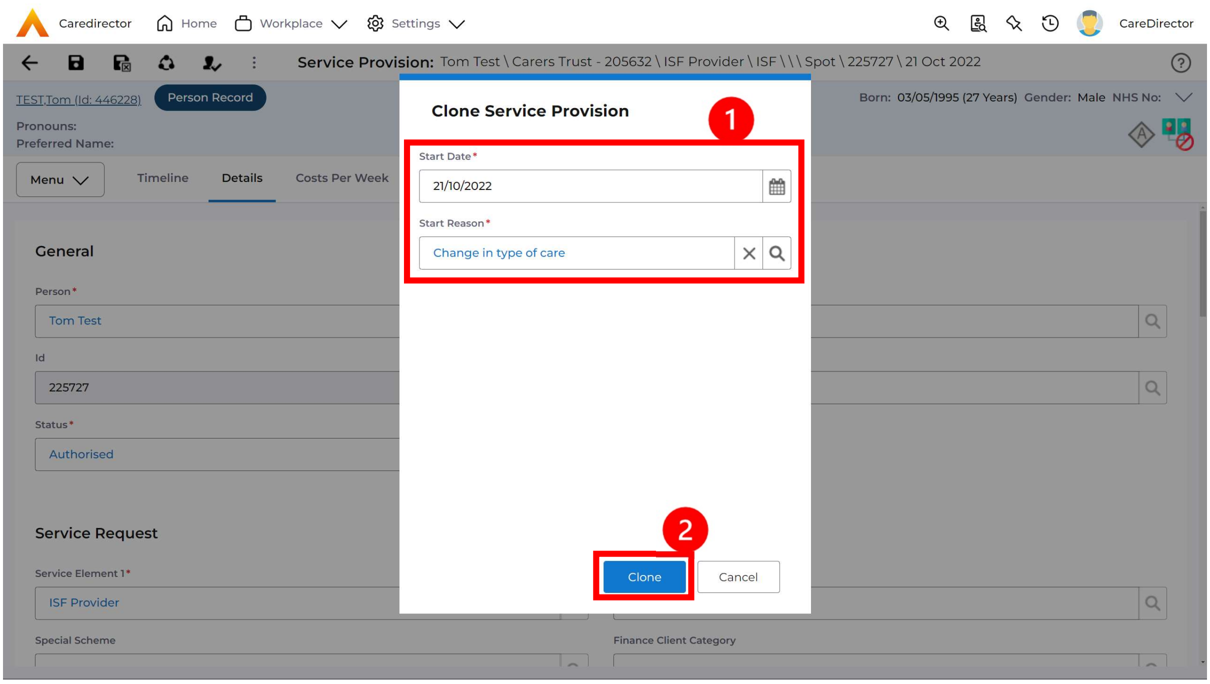
3. Locate the **Service Provision** and ensure that the **Status** is **Authorised.**



4. Select the **Three Dots** from the toolbar and select option **Clone** will be available**.** If the option is not there, then the Service Provision will require **Authorising**.



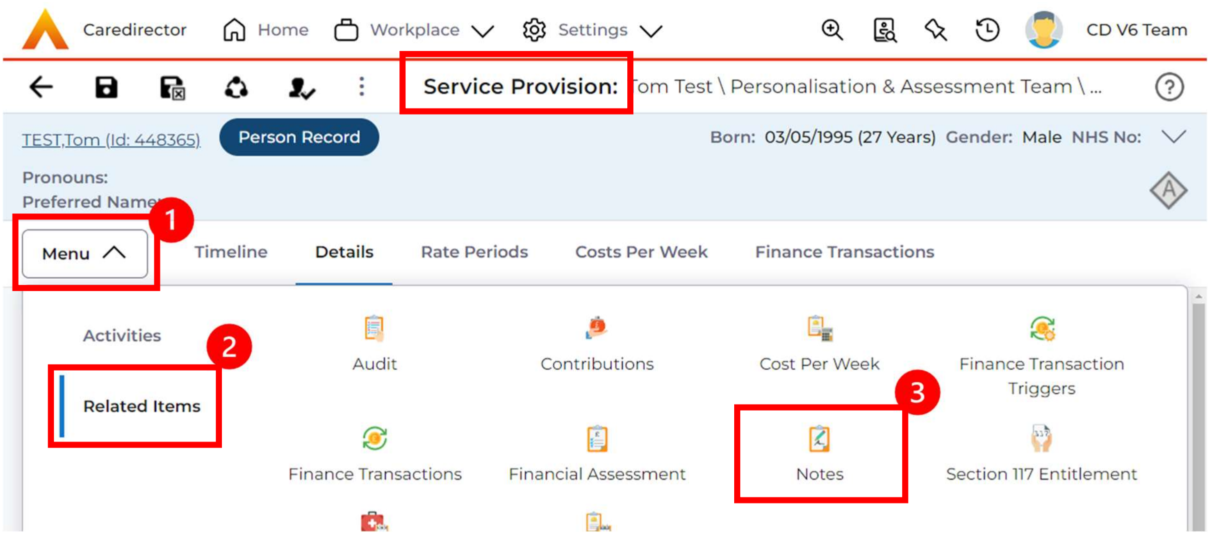
Select the new **Start Date** and **Start Reason** and select **OK**.



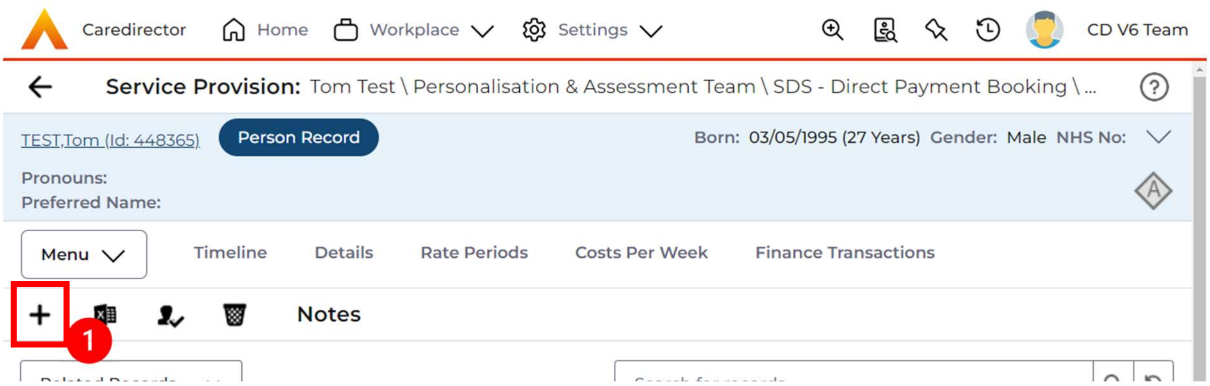
5. If the **Status** is anything else, then the option **Clone** will not appear. If a Service Provision is not authorised, please check why. A worker may still be working on the Service, or it is still awaiting a manager's authorisation.

How to add a Note

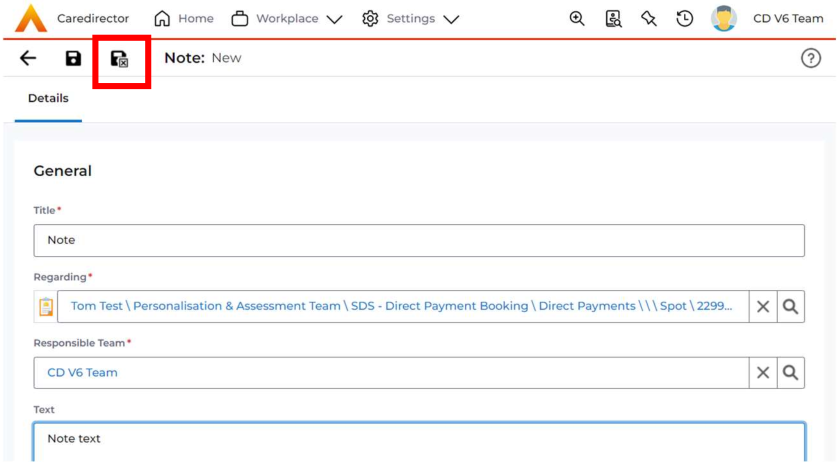
1. Locate the **Service Provision** that requires the **Note** to be inputted **(Service Provision > Menu > Related Items > Notes).**



2. When selected, **Create New Record** or choose one from the rows underneath.

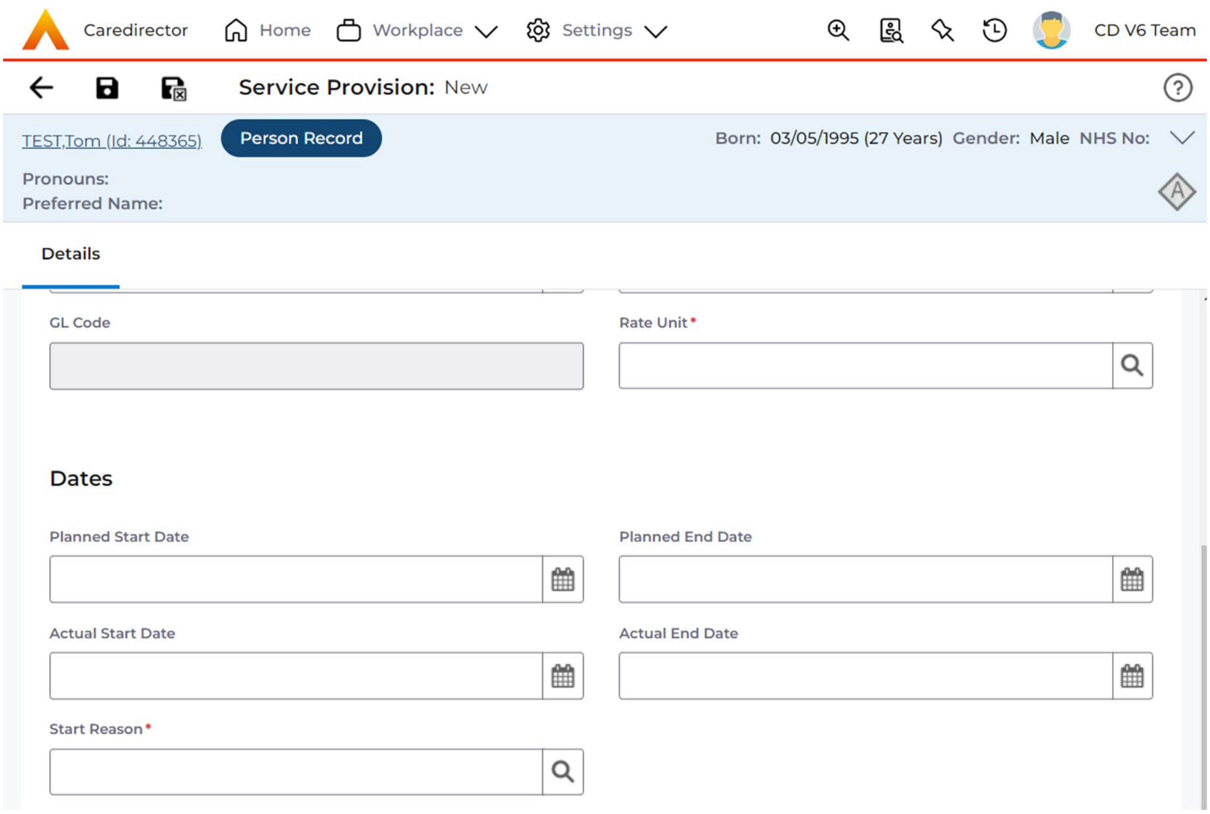


3. A **Title** and **Text** can be included, just ensure you select **Save and Return to Previous Page** when finished.



Planned and Actual Dates

1. It is important to understand what triggers what. The link with planned and actual dates within a Service Provision details tab is to do with payments and collections.



2. **Planned Start Date** is the day the service is expected to start. However, it does not trigger or commence payments from this date.

3. **Actual Start Date** is the day the service does start. This triggers financials to be paid or collected from this date entered.

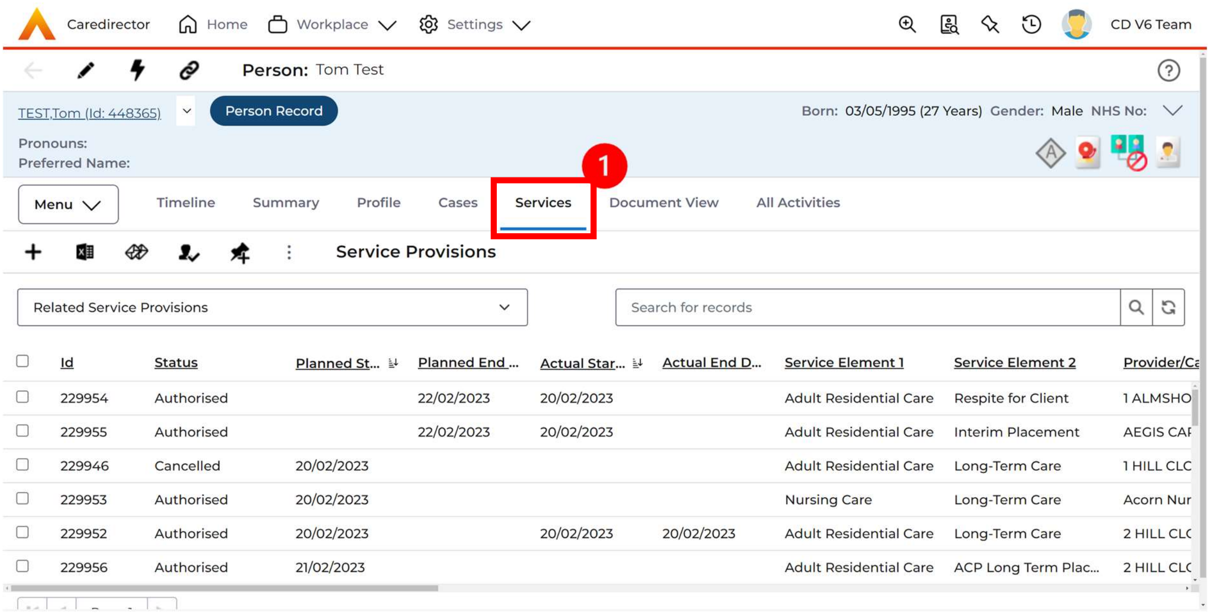
4. **Planned End Date** is when the service is expected to end. However, it does not stop collections or payments from being paid.

5. **Actual End Date** is the day when the service stops. It ceases all collections and payments from the date entered. However, this cannot be before the **Planned End Date** therefore you need to enter this on the day or after the planned end date.

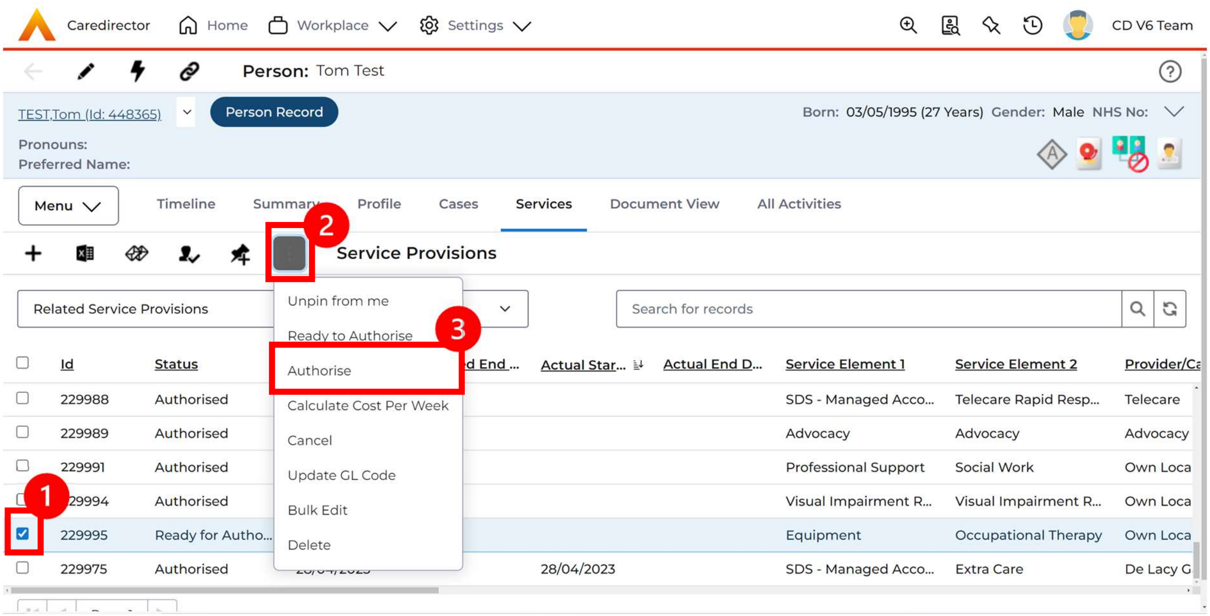
How to Authorise a Service Provision

Service provisions can only be authorised by a manager of a Support Services Team Leader.

1. Find the relevant **Person Record** that the **Service Provision** is linked to.
   Person Record > Services



2. Checkbox the relevant **Service Provision** after first checking through to ensure it is correct. If happy then go to:
   Checkbox Service Provision > Three Dots > Authorise

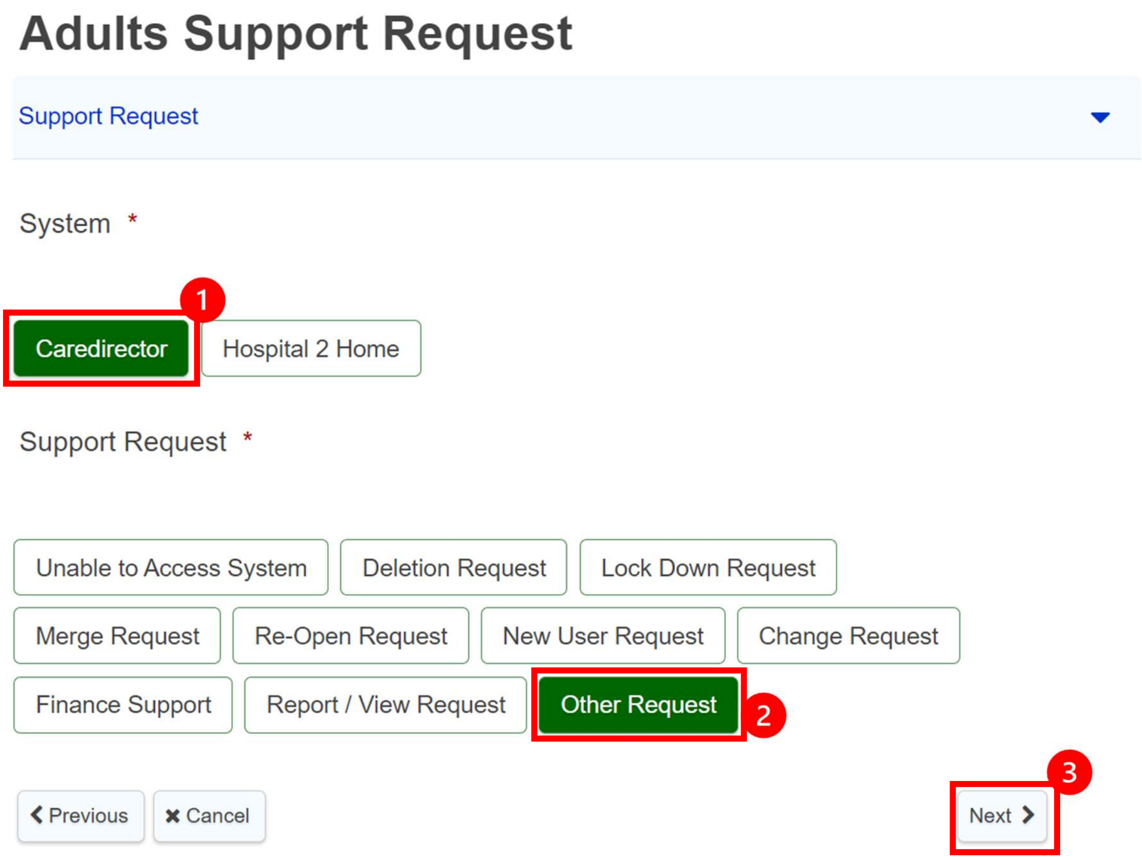


Providers

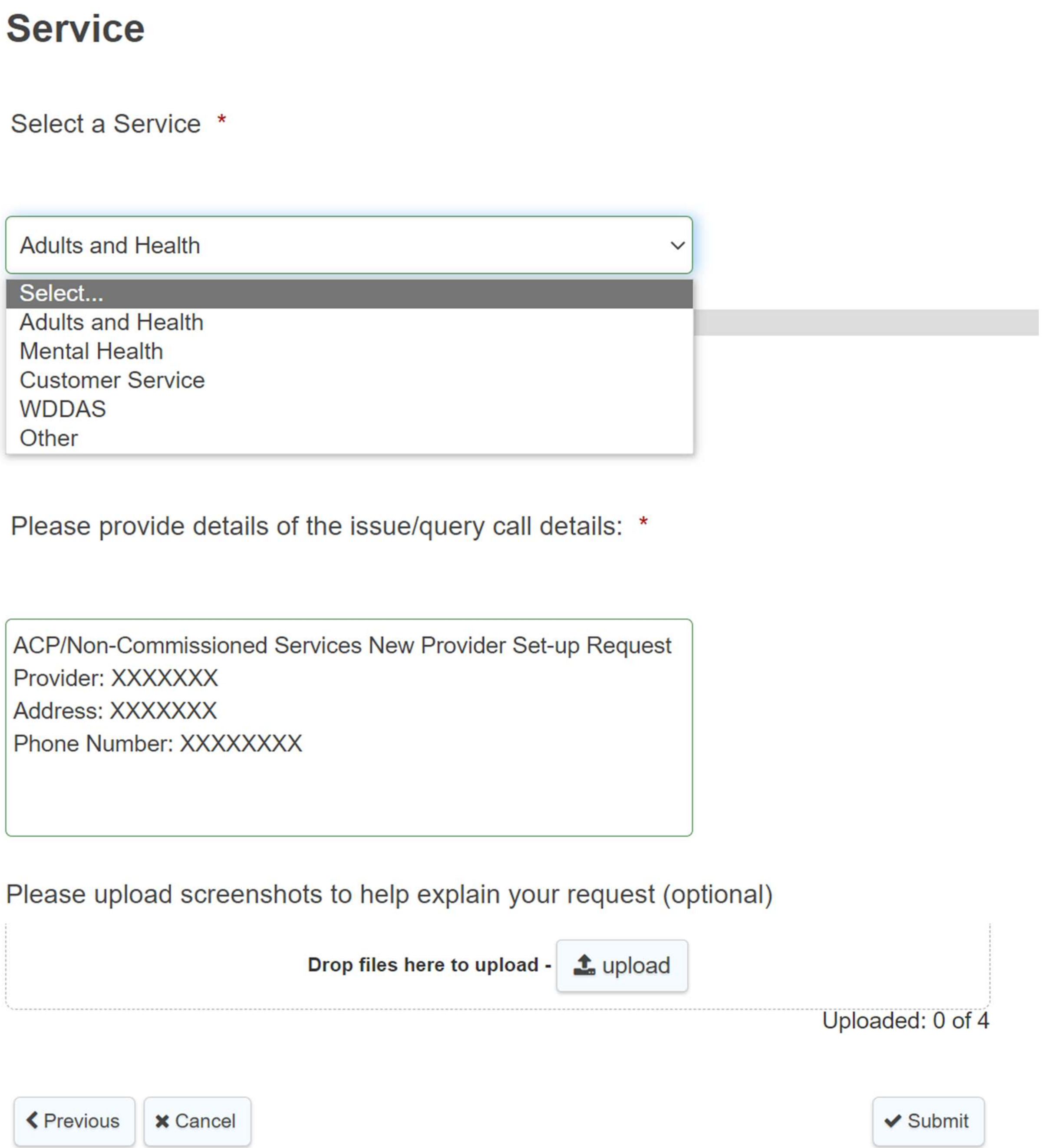
Non-Commissioned Providers - Set Up Process

1. If you find that the **Provider** is not recorded on Caredirector please follow the [Adults System Support section]() and raise a Support/ Issue Request.

2. Follow the onscreen instructions of filling out your name and contact information and select System **Caredirector** and the **Other Request** Option.



3. When **Next** is selected a new screen will appear with a **Service** box and a **Description** box. Select your relevant **Service**. Then in the **Please Provide Details of the issue/ query call details** type in. **“ACP/Non-Commissioned Services New Provider Set-up Request”** and add details of the **name**, **address**, **phone number**, etc. of the Provider. Then select **Submit**.


Service

Select a Service *

Adults and Health

Select...
Adults and Health
Mental Health
Customer Service
WDDAS
Other

Please provide details of the issue/query call details: *

ACP/Non-Commissioned Services New Provider Set-up Request
Provider: XXXXXXX
Address: XXXXXXX
Phone Number: XXXXXXXX

Please upload screenshots to help explain your request (optional)

Drop files here to upload - upload

Uploaded: 0 of 4

Previous Cancel Submit

Service Provisions

Long Term - Residential Care (For High-Cost Residential Placements please see High-Cost Residential Placements)

1. This Service Provision is recorded based on the service costs and not what the client is contributing.

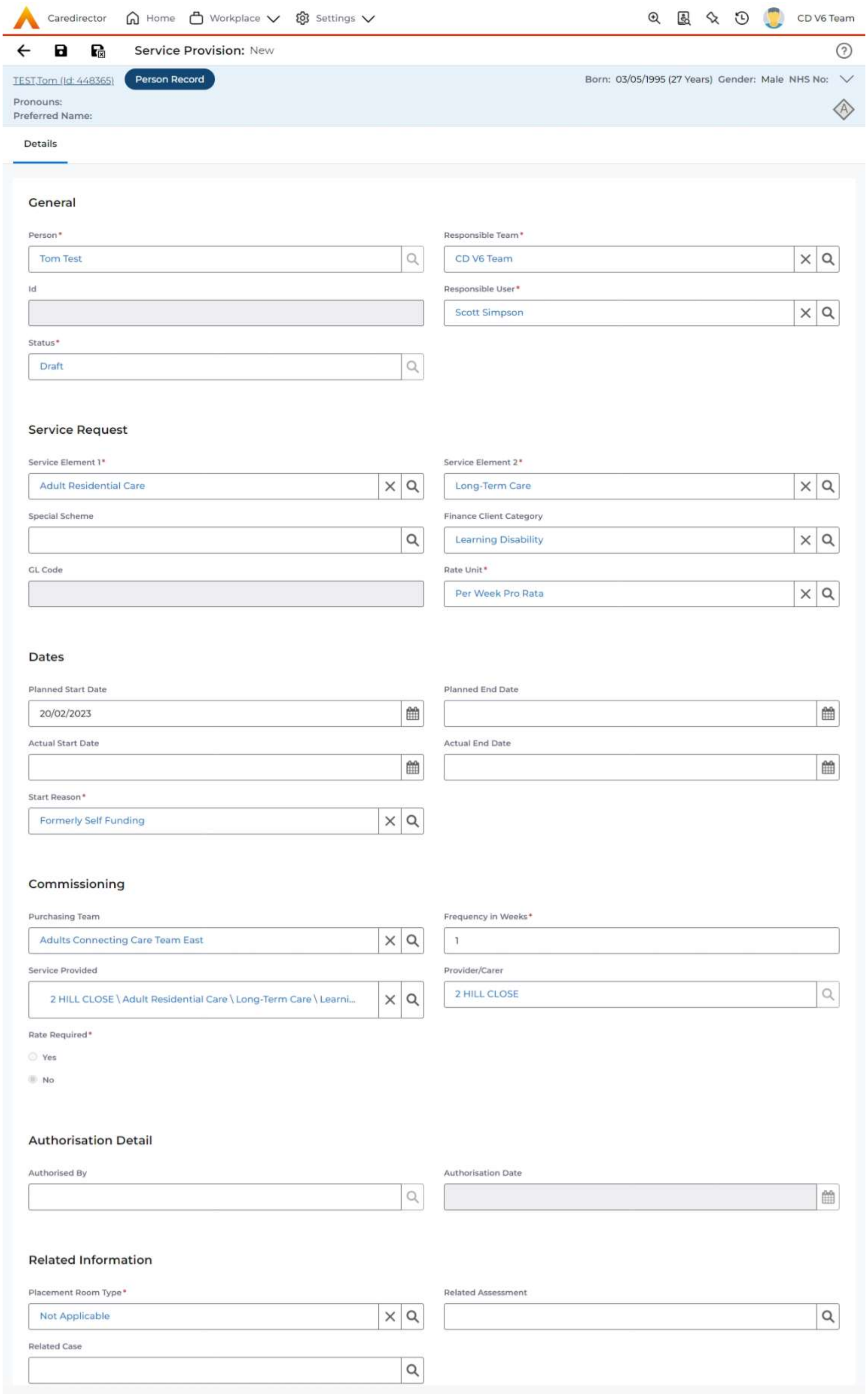
2. Previous self-funders are where the financial assessment case confirms that the service user is a previous self-funder then please follow the guidance below to **Record a Long-Term Residential Care Service Provision**.

3. The Personalisation and Assessment team will determine the **Actual Start Date** and record this in the Service Provision to generate payment to the care home. In the event that the **Actual Start Date** determined is prior to the **Planned Start Date** recorded, the P & A Team will notify you of this, as in this situation a new service provision will be required.

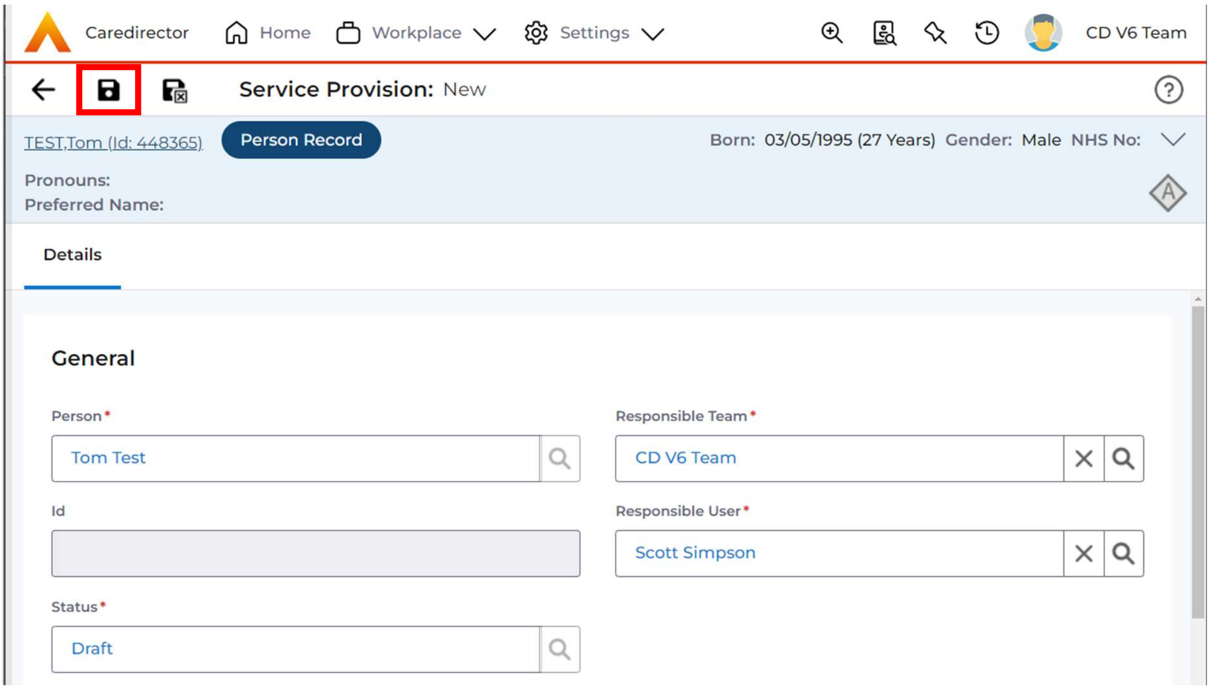
4. The fields below are available in the new Service Provision screen. Please locate the relevant **person record > services > create new record** then enter the information side into the according field.
   For more information follow: How to find Service Provisions and Create New.

Field	Information
Service Element 1:	**Adult Residential Care**
Service Element 2:	**Long-Term Care**
Finance Client Category:	**Choose appropriate option**
Rate Unit:	**Per Week Pro Rata**
Planned Start Date:	Enter date service expected to start.
Actual Start Date:	Leave blank
Planned End Date:	Leave blank
Actual End Date:	Leave blank (Can only be input on the day of the Planned End Date or after it).
Start Reason:	Choose either 'New Placement' or 'Formerly Self Funding'
Purchasing Team:	Choose appropriate Team.
Service Provided:	Type in **Providers Name. Search.** Select **Provider** from list.
Status:	**Draft.**
Placement Room Type:	Auto populates to 'Not Applicable'
Responsible Team:	Auto populated with the user's default team. If change is required use the **Lookup Function**.
Responsible User:	Auto populated with the user's name.
Related Case:	Select relevant case

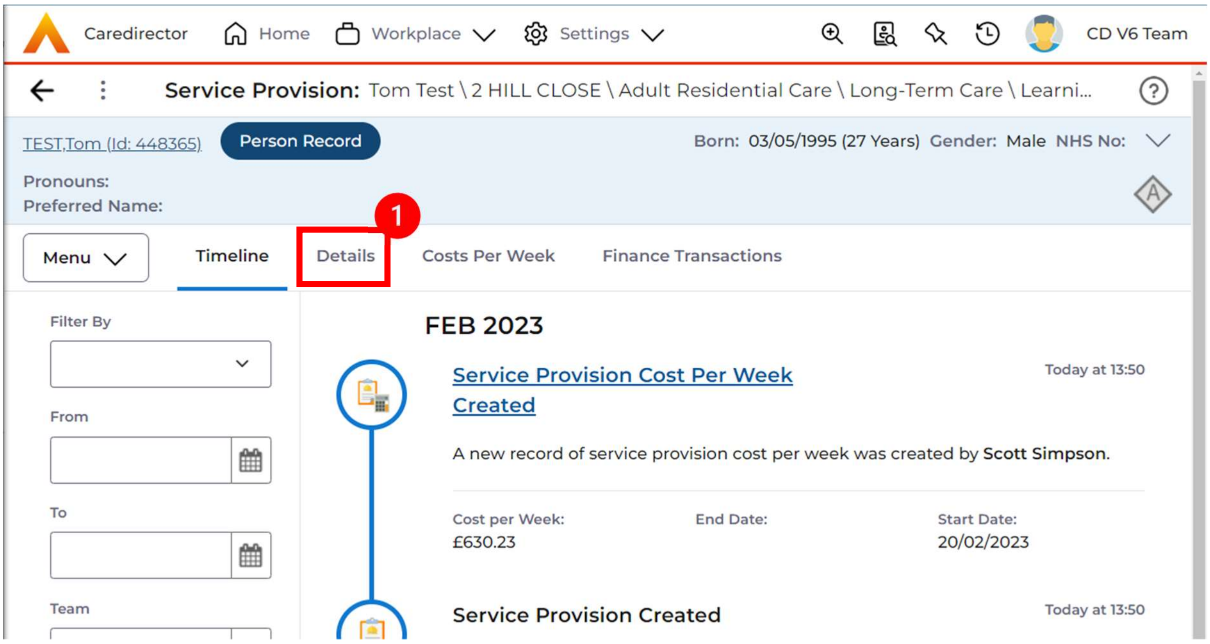
5. Where a top up fee has been agreed, the amount should be recorded in the Service Provision notes.



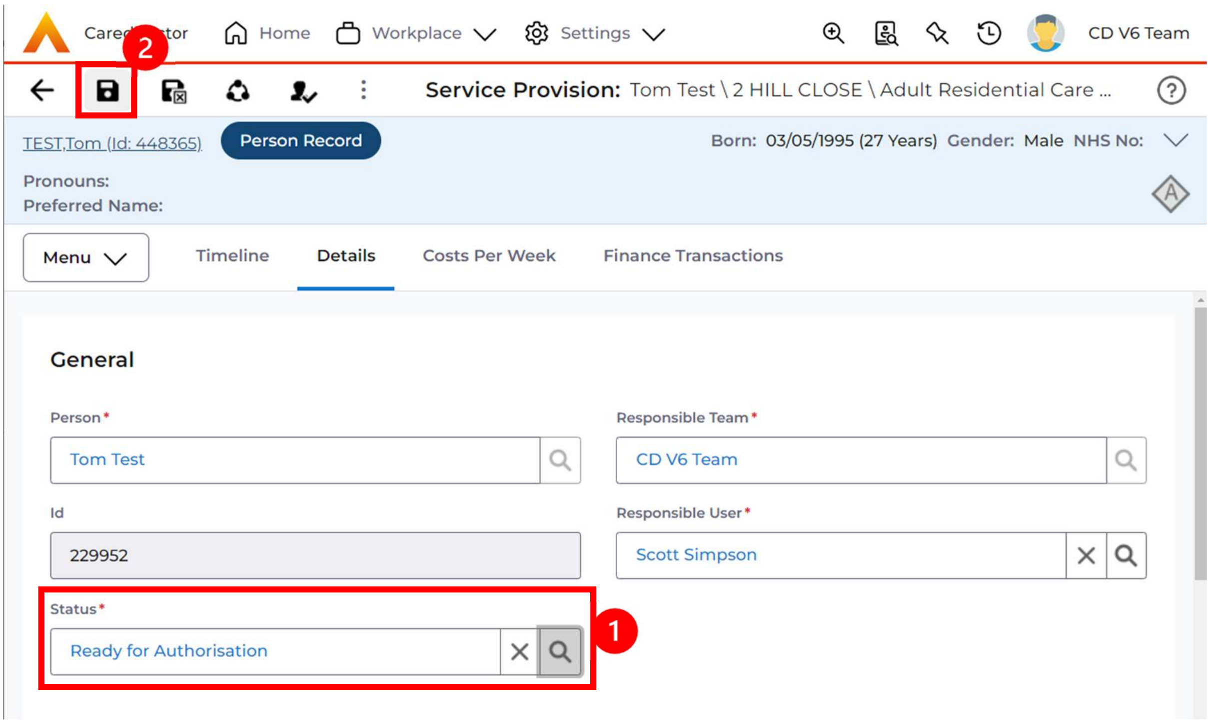
5. Select **Save** when completed.



6. This will take you back to the Service Provision **timeline**. To change the **Status** to **Ready for Authorisation** select **Details** tab. This Service Provision can then be authorised by your manager.



7. Change **Status** to **Ready for Authorisation** using the **Lookup function** and select **Save**.



8. Service Provisions that are set to **Ready for Authorisation** can be found via an **Advanced Find** and **Authorised** (How to Authorise a Service Provision) by a Team Manager/ Support Services Co-Ordinator.

9. If a client has a **S117** a Service Provision will still need entering on to the system for **Residential, Nursing Care or High-Cost Placements** in order to generate a payment to the Care Home. However, it is important to remember to indicate on the Financial Assessment Form that the Client has a S117 so that no contribution is collected from the Client.

Long Term - Nursing Care

1. This Service Provision is recorded based on the service costs and not what the client is contributing.

2. Previous self-funders are where the financial assessment case confirms that the service user is a previous self-funder then please follow the guidance below to **Record a Long-Term Residential Care Service Provision**.

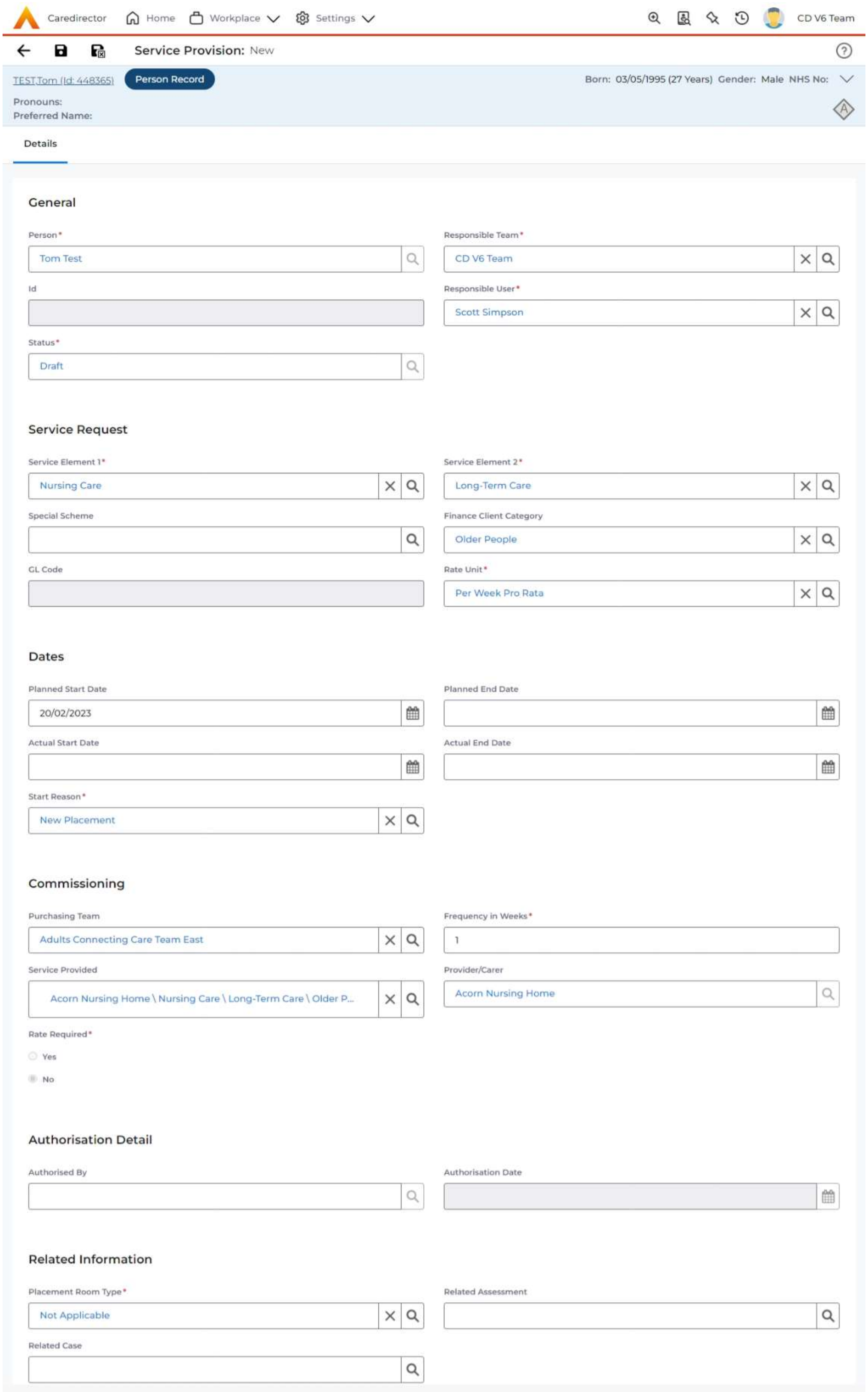
3. The Personalisation and Assessment team will determine the **Actual Start Date** and record this in the Service Provision to generate payment to the care home. In the event that the **Actual Start Date** determined is prior to the **Planned Start Date** recorded, the P & A team will notify you of this, as in this situation a new service provision will be required.

4. The fields below are available in the new Service Provision screen. Please locate the relevant **person record > services > create new record** then enter the information side into the according field.
   For more information follow: How to find Service Provisions and Create New.

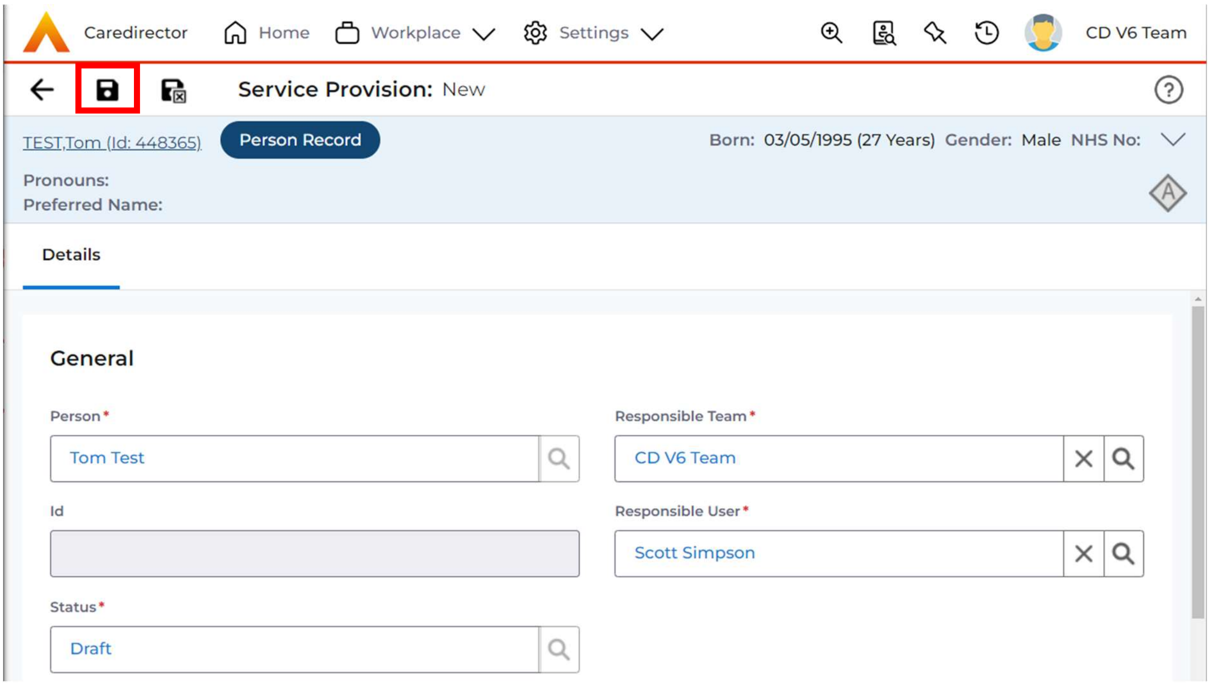
Field	Information
Service Element 1:	**Nursing Care**
Service Element 2:	**Long-Term Care**
Finance Client Category:	**Choose appropriate option from the lookup function.**
Rate Unit:	**Per Week Pro Rata.**
Planned Start Date:	**Enter date service expected to start.**
Actual Start Date:	Leave blank
Planned End Date:	Leave blank
Actual End Date:	Leave blank (Can only be input on the day of the **Planned End Date** or after it).
Start Reason:	Choose appropriate option from the lookup function.
Purchasing Team:	Choose appropriate Team.
Service Provided:	Type in **Providers Name. Search.** Select **Provider** from list.
Status:	**Draft.**
Placement Room Type:	Auto populates to 'Not Applicable'
Responsible Team:	Auto populated with the user's default team.
Responsible User:	Auto populated with the user's name
Related Case:	Select relevant case

5. If the **Service Provision** is linked to an existing **Case** please ensure you are putting the **Related Case** in the **Related Case** field.

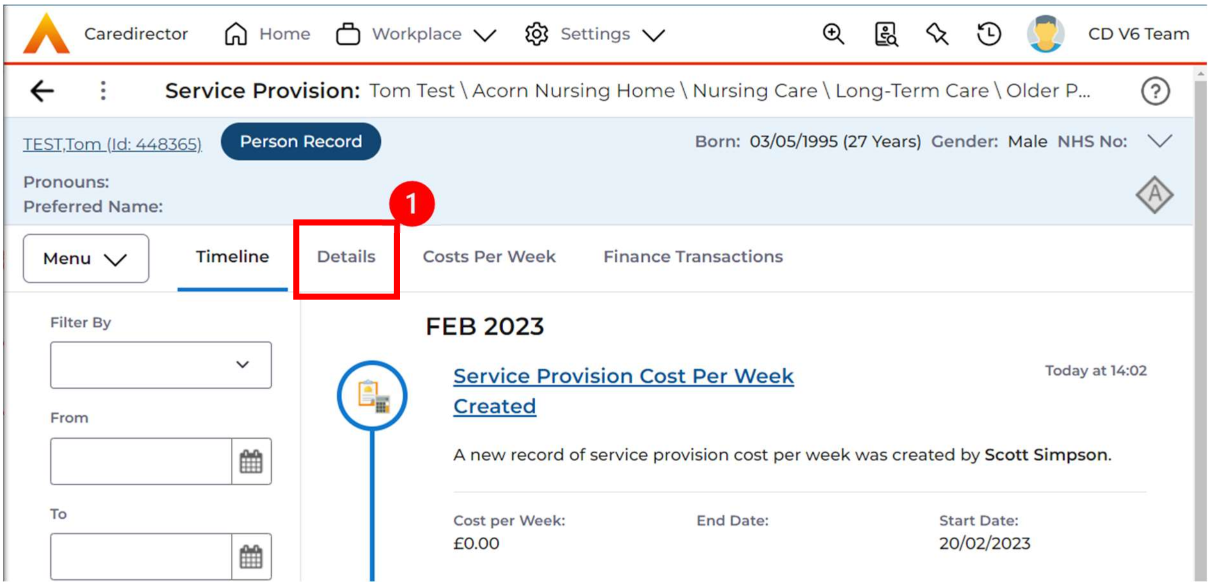
6. Where a top up fee has been agreed, the amount should be recorded in the Service Provision notes.



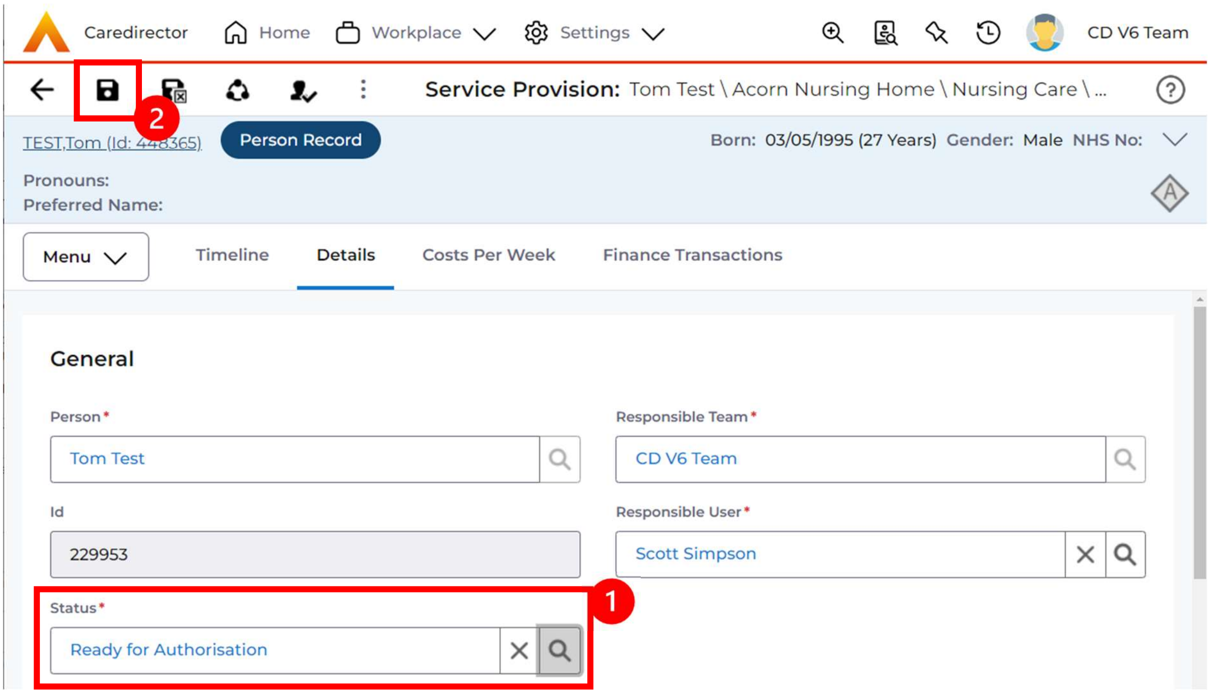
7. Select **Save** when completed.



8. This will take you back to the Service Provision **timeline**. To change the **Status** to **Ready for Authorisation** select **Details** tab. This Service Provision can then be authorised (How to Authorise a Service Provision) by your manager.



9. Change **Status** to **Ready for Authorisation** using the **Lookup function** and select **Save**.



10. Service Provisions that are set to **Ready for Authorisation** will be found via an **Advanced Find** and **Authorised** (How to Authorise a Service Provision) by a Team Manager/ Support Services Co-Ordinator.

11. If a client has a **S117** a Service Provision will still need entering on to the system for **Residential, Nursing Care or High-Cost Placements** in order to generate a payment to the Care Home. However, it is important to remember to indicate on the Financial Assessment Form that the Client has a S117 so that no contribution is collected from the Client.

Respite for Client / Respite for Carer and Respite Extensions.

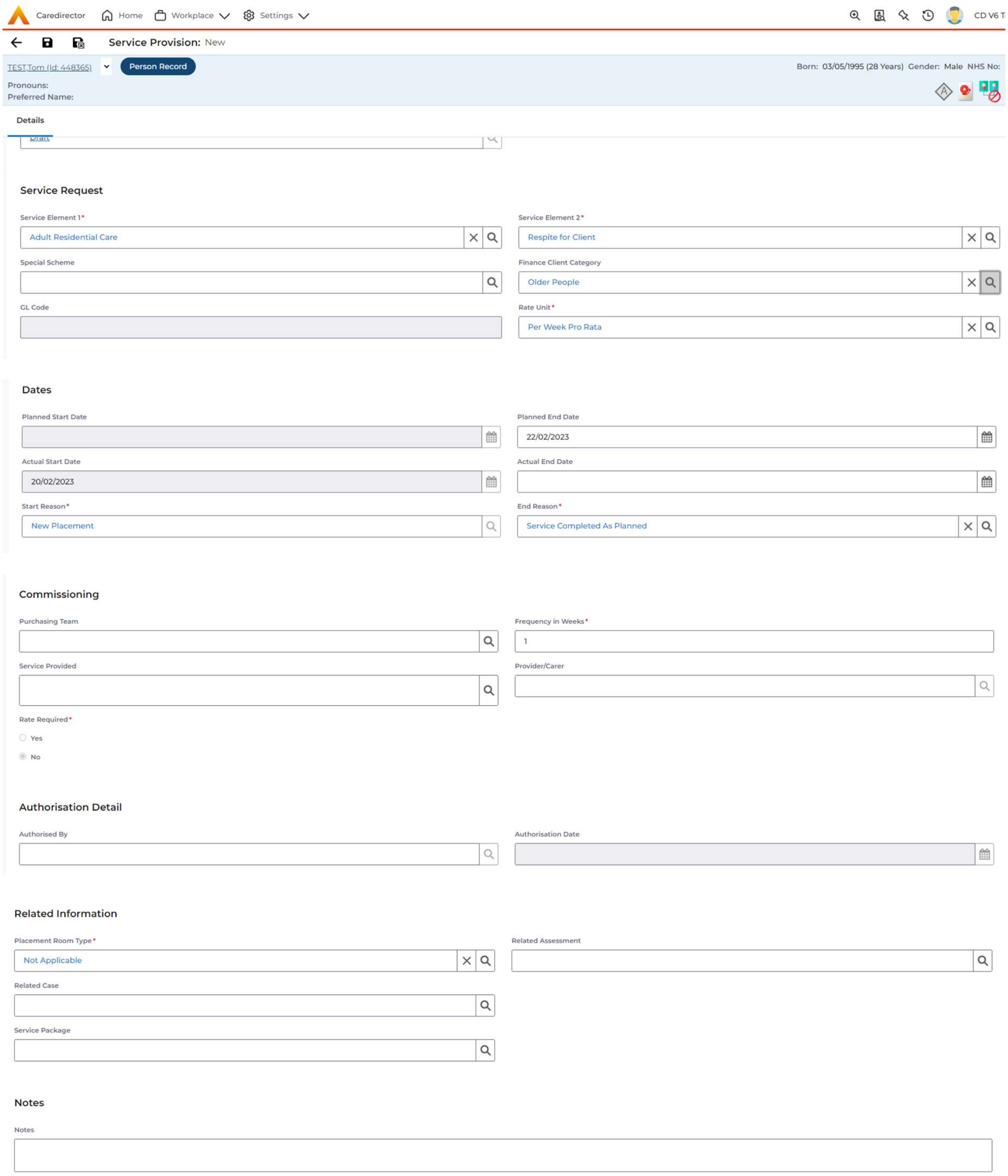
1. This Service Provision is recorded based on the service costs and not what the client is contributing.

2. The 'Planned End Date' will cease payments to the Provider and the collection of contributions from the Client. Therefore if the Practitioner becomes aware that the 'Planned End Date' has changed details of the change must be sent to the Personalisation and Assessment Team for them to update the Service Provision (see Section on Respite Extensions). The 'Actual End Date' should only be entered once the service ceases on or after the 'Planned End Date' for data integrity purposes.

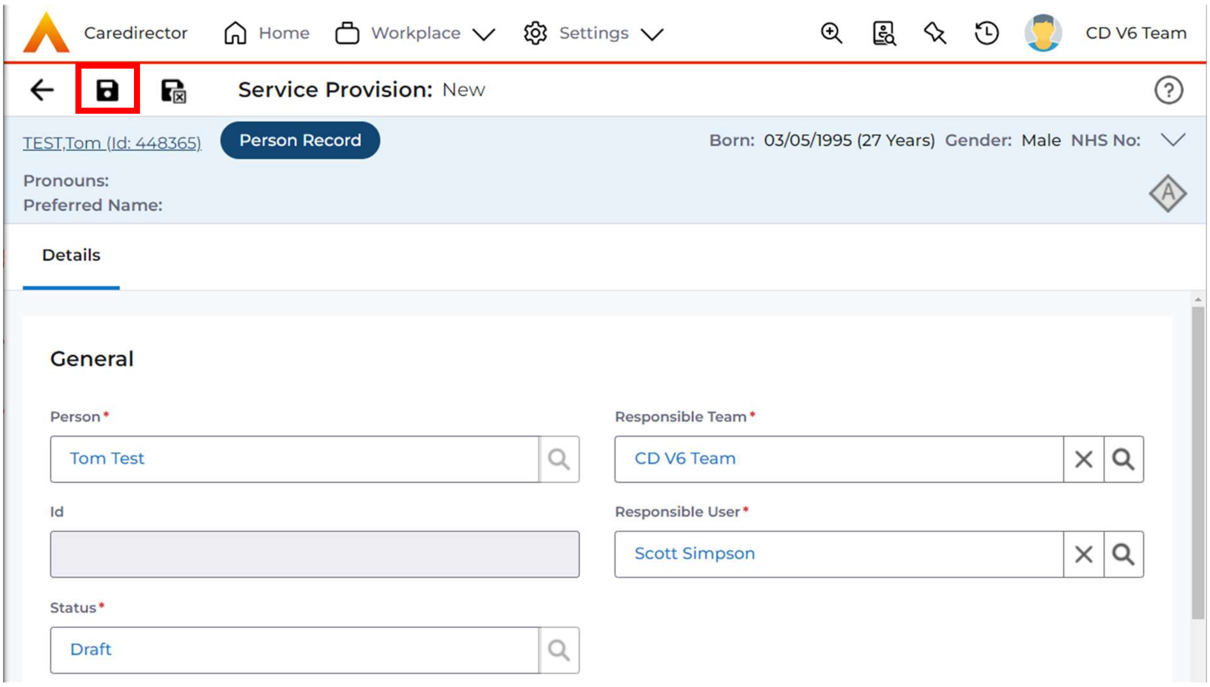
3. The fields below are available in the new Service Provision screen. Please locate the relevant **person record > services > create new record** then enter the information side into the according field.
   For more information follow: How to find Service Provisions and Create New.

Field	**Information**
Service Element 1:	**Adult Residential Care** or **Nursing Care**
Service Element 2:	**Respite for client/respite for carer (as appropriate)**
Finance Client Category:	**Choose appropriate option from the lookup function**
Rate Unit:	**Per Week Pro Rata**
Planned Start Date:	**Enter date Service is Planned to Start**
Actual Start Date:	Leave blank
Planned End Date:	**Date service expected to cease.**
Actual End Date:	Leave blank
Start Reason:	Choose appropriate option. (If **Respite for Carer** is **Service Element 2** choose **Carer Service).**
End Reason:	**Service Completed as Planned**.
Purchasing Team:	Choose appropriate Team.
Service Provided:	Type in **Providers Name. Search.** Select **Provider** from list.
Status:	**Draft.**
Placement Room Type:	Auto populates to 'Not Applicable'
Responsible Team:	Auto populated with the user's default team
Responsible User:	Auto populated with the user's name
Related Case:	Choose appropriate case

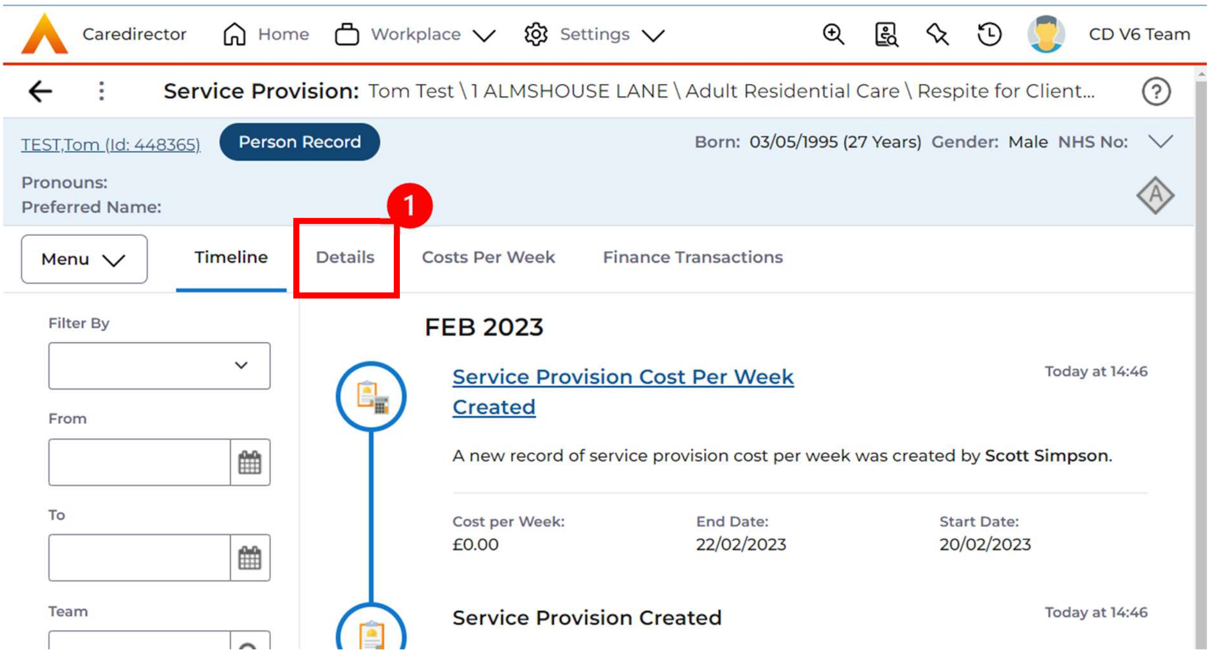
4. Where a top up fee has been agreed, the amount should be recorded in the Service Provision notes.


Caredirector
Home
Workplace
Settings
CD V6 T
Service Provision: New
TEST,Tom (Id: 448365)
Person Record
Born: 03/05/1995 (28 Years) Gender: Male NHS No:
Pronouns:
Preferred Name:
Details
Service Request
Service Element 1*
Adult Residential Care
Service Element 2*
Respite for Client
Special Scheme
Finance Client Category
Older People
GL Code
Rate Unit*
Per Week Pro Rata
Dates
Planned Start Date
Planned End Date
22/02/2023
Actual Start Date
20/02/2023
Actual End Date
Start Reason*
New Placement
End Reason*
Service Completed As Planned
Commissioning
Purchasing Team
Frequency in Weeks*
1
Service Provided
Provider/Carer
Rate Required*
Yes
No
Authorisation Detail
Authorised By
Authorisation Date
Related Information
Placement Room Type*
Not Applicable
Related Assessment
Related Case
Service Package
Notes
Notes

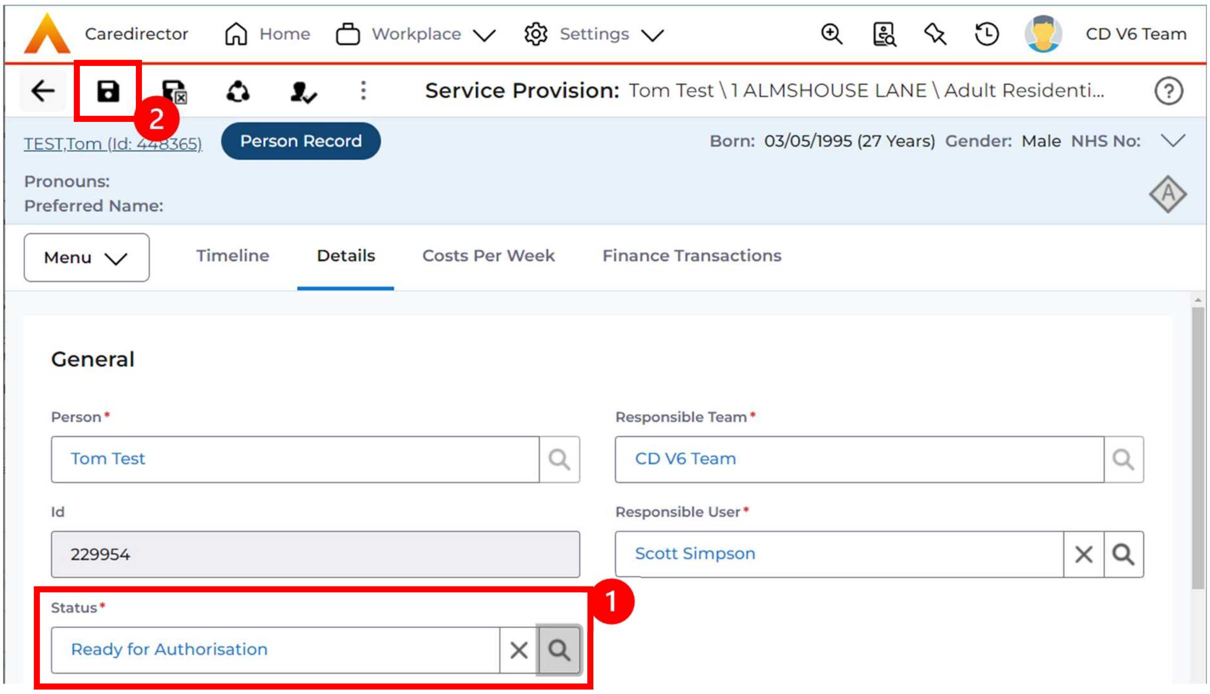
5. Select **Save** when completed.



6. This will take you back to the Service Provision **timeline**. To change the **Status** to **Ready for Authorisation** select **Details** tab. This Service Provision can then be authorised ([How to Authorise a Service Provision]) by your manager.



7. Change **Status** to **Ready for Authorisation** using the **Lookup function** and select **Save**.



8. Service Provisions that are set to **Ready for Authorisation** will be found via an **Advanced Find** and **Authorised** (How to Authorise a Service Provision) by a Team Manager/ Support Services Co-Ordinator.

9. Please note that Respite for a Carer is an exceptional circumstance and must have been approved first by a Service Manager. If you are choosing **Respite for Carer** the **Start Reason** will always be **Carer Service.**

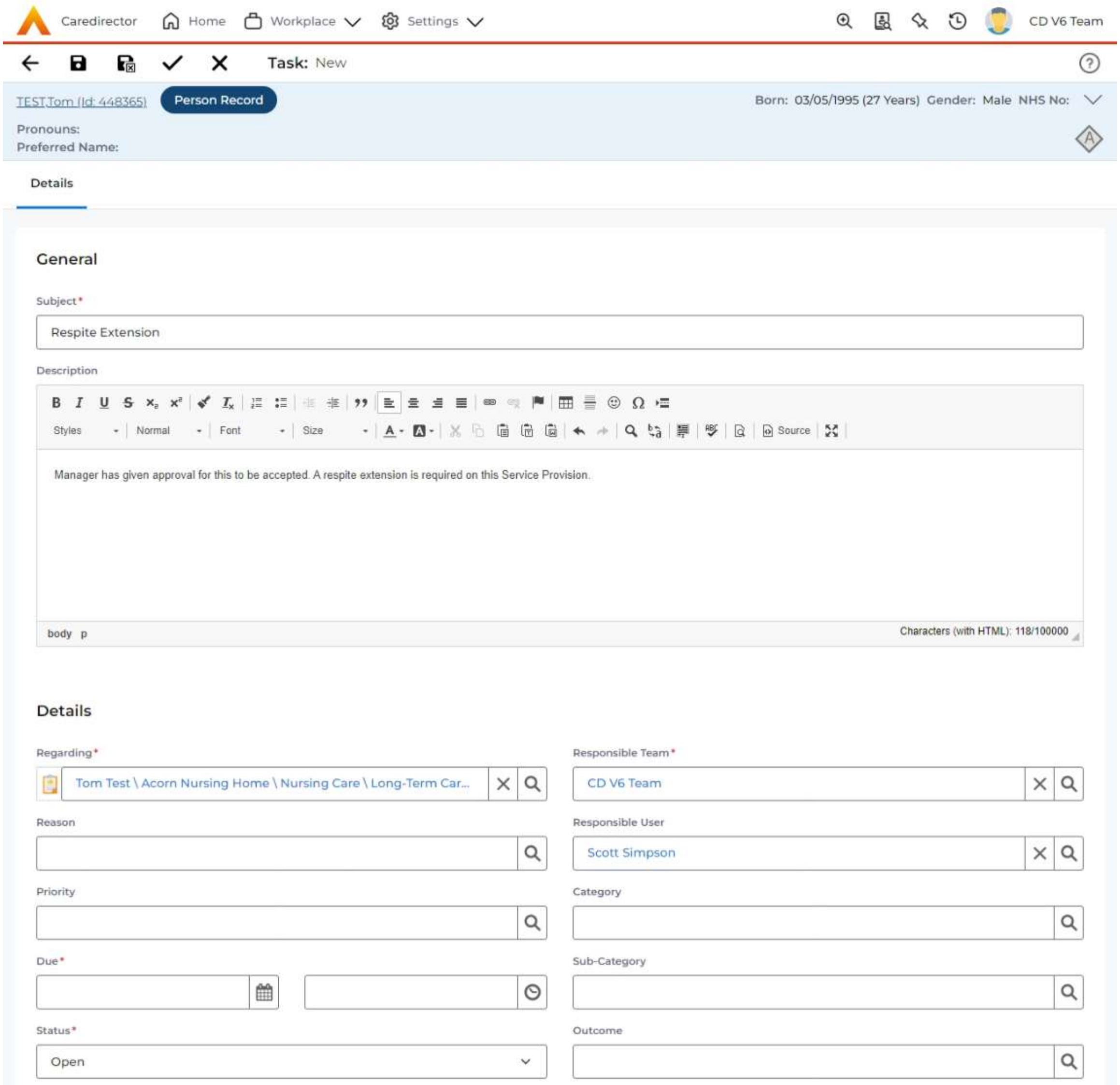
Respite Extensions

1. If there are instances where a Respite Service Provision has had an **Actual End Date** recorded but the respite has been extended, then the Service Provision must be re-entered and a new period of respite requires recording with a **Planned Start Date** of the same date as the previous Service Provision was ended (i.e. if the original Service Provision had an **Actual End Date** of 01/01/17 then the new Service Provision needs a **Planned Start Date** of 01/01/17) and a **Planned End Date** of when the new expected date will end. This will ensure continuation of payment to the Provider. The original Service Provision should not be cloned as this will automatically add an **Actual Start Date** which can not be removed.

2. If the original Service Provision does not contain an **Actual End Date**, no CSO/Admin involvement is required.

3. The Practitioner will add a **Task** activity to the Person record with:

Subject:	Respite Extension
Responsible Team:	Personalisation & Assessment Team
Description:	State that the manager has given approval and that a respite extension is required on this Service Provision.
Status	Open (P&AT will change it to Complete once they have completed the task)



4. Then select **Save and Return to Previous Page.**

5. The Personalisation & Assessment Team will also do a new Financial Assessment to cover the extension.

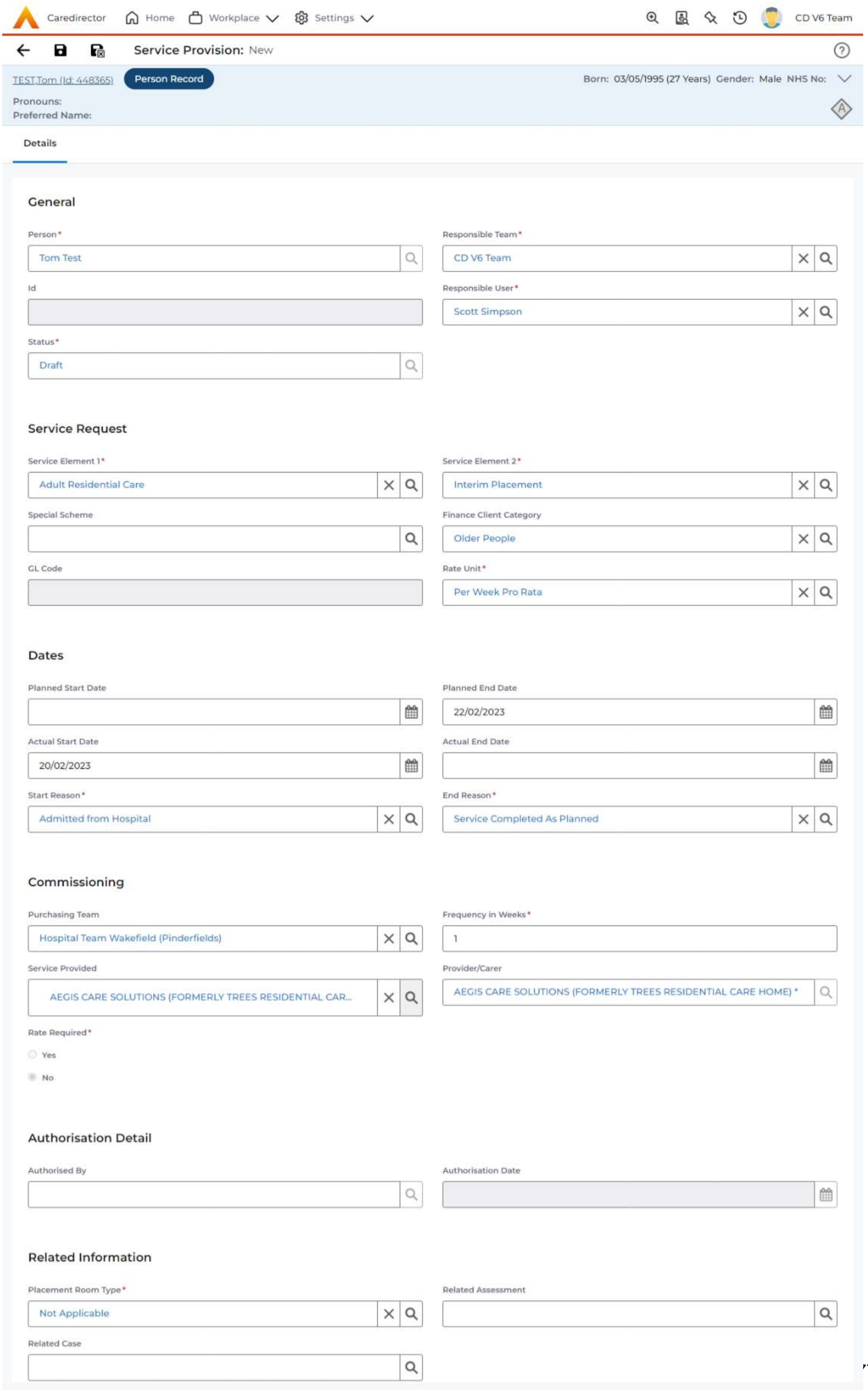
6. **Please note that if you are adding a Respite Service Provision retrospectively and the Care Home is currently suspended, you need to choose the 'Provider' before entering a 'Planned End Date'**

Interim Placements and Interim Extensions

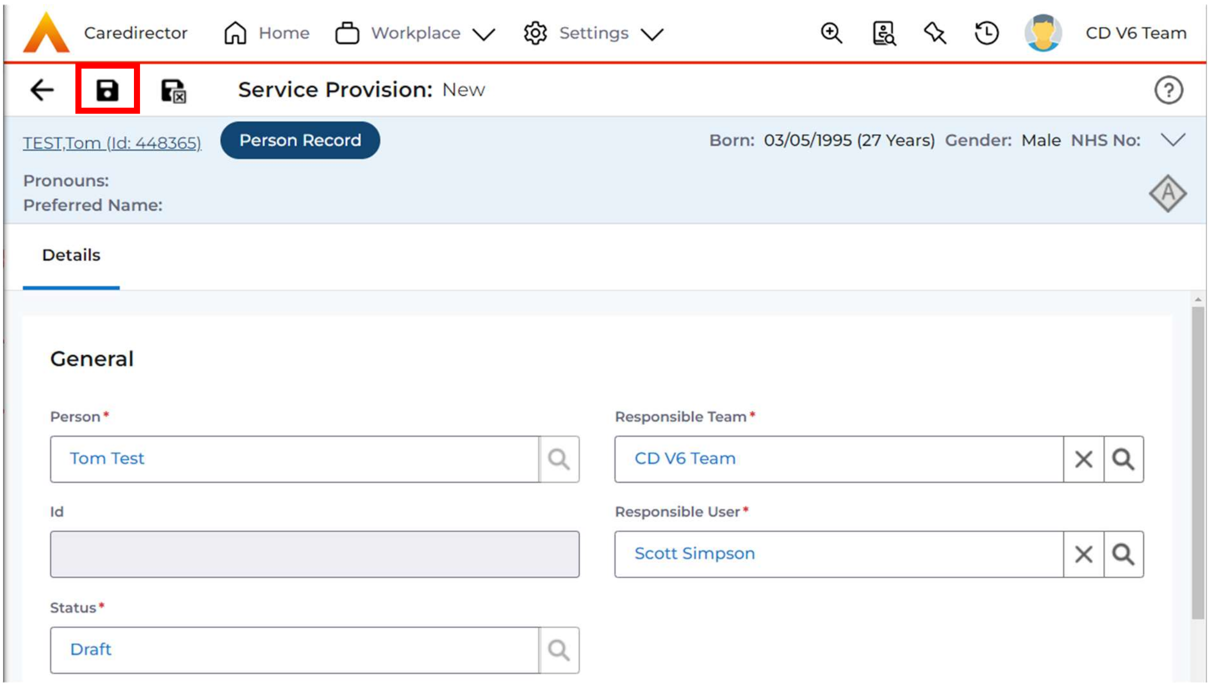
1. The '**Planned End Date'** will cease payments to the Provider, therefore if the Practitioner becomes aware that the '**Planned End Date'** has changed, please follow the guidance for "How to record Interim Extensions. The **Actual End Date** should only be entered once the service ceases on or after the **Planned End Date** for data integrity purposes.
   For more information please follow: How to record Interim Extensions.

2. The fields below are available in the new Service Provision screen. Please locate the relevant **person record > services > create new record** then enter the information side into the according field.
   For more information follow: How to find Service Provisions and Create New.

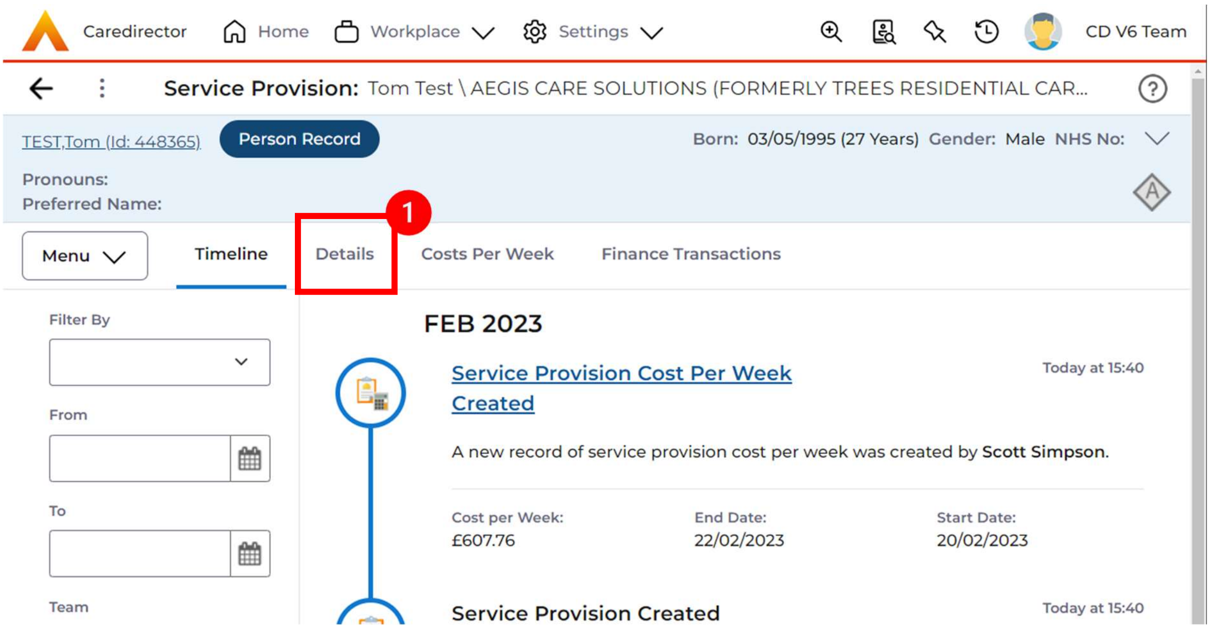
Field	**Information**
Service Element 1:	**Adult Residential Care** or **Nursing Care.**
Service Element 2:	Choose **Interim Placement.**
Finance Client Category:	**Choose appropriate option from the lookup function**
Rate Unit:	**Per Week Pro Rata.**
Planned Start Date:	**Date service expected to start**
Actual Start Date:	The date of admission to the Interim Placement.
Planned End Date:	Date service is expected to cease. *****The 'Planned End Date' will cease payments to the Provider and the collection of contributions from the Client. If this changes details of the change must be sent to the Personalisation & Assessment Team (see Section on Respite Extensions).**
Actual End Date:	Leave blank (This should only be input on the day of the **Planned End Date** or after it)
Start Reason:	Choose appropriate option. (Usually 'Admitted from Community', 'Admitted from Hospital' or 'Carer Service')
End Reason:	**Service Completed as Planned.**
Purchasing Team:	Choose appropriate Team.
Service Provided:	Type in **Providers Name. Search.** Select **Provider** from list.
Status:	**Draft.**
Placement Room Type:	Auto populates to 'Not Applicable'
Responsible Team:	Auto populated with the user's default team.
Responsible User:	Auto populated with the user's name
Related Case:	Select relevant case


Caredirector
Home
Workplace
Settings
CD V6 Team
Service Provision: New
TEST,Tom (Id: 448365)
Person Record
Born: 03/05/1995 (27 Years) Gender: Male NHS No:
Pronouns:
Preferred Name:
Details
General
Person *
Tom Test
Responsible Team *
CD V6 Team
Id
Responsible User *
Scott Simpson
Status *
Draft
Service Request
Service Element 1 *
Adult Residential Care
Service Element 2 *
Interim Placement
Special Scheme
Finance Client Category
Older People
GL Code
Rate Unit *
Per Week Pro Rata
Dates
Planned Start Date
Planned End Date
22/02/2023
Actual Start Date
20/02/2023
Actual End Date
Start Reason *
Admitted from Hospital
End Reason *
Service Completed As Planned
Commissioning
Purchasing Team
Hospital Team Wakefield (Pinderfields)
Frequency in Weeks *
1
Service Provided
AEGIS CARE SOLUTIONS (FORMERLY TREES RESIDENTIAL CAR...
Provider/Carer
AEGIS CARE SOLUTIONS (FORMERLY TREES RESIDENTIAL CARE HOME) *
Rate Required *
Yes
No
Authorisation Detail
Authorised By
Authorisation Date
Related Information
Placement Room Type *
Not Applicable
Related Assessment
Related Case

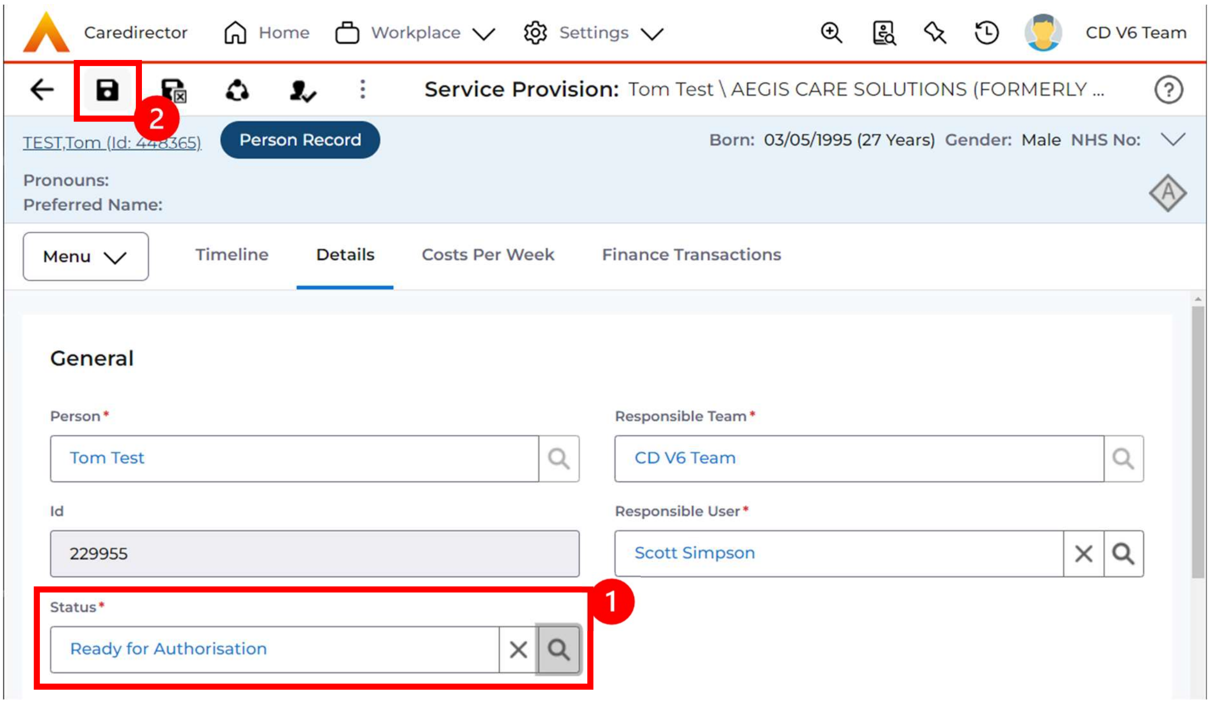
3. Select **Save** when completed.



4. This will take you back to the Service Provision **timeline**. To change the **Status** to **Ready for Authorisation** select **Details** tab. This Service Provision can then be authorised (How to Authorise a Service Provision) by your manager.



5. Change **Status** to **Ready for Authorisation** using the **Lookup function** and select **Save**.



6. Service Provisions that are set to **Ready for Authorisation** will be found via an **Advanced Find** and **Authorised** ([How to Authorise a Service Provision]) by a Team Manager/ Support Services Co-Ordinator.

Interim Extensions

1. When the Team Managers approval is given for the extension of the interim stay, then the **Planned End Date** needs to be changed by the **CSO** Team. Add a **Task** activity **for the Personalisation & Assessment Team** to the case to confirm that Team Manager approval was given to extend dates to and from.

2. If there are instances where an Interim Service Provision has had an **Actual End Date** recorded but the interim placement has been extended, then the Service Provision must be cloned (see How to Clone a Service Provision, if unsure on how to…)* and a new period of interim recorded with an **Actual Start Date** of the same date the previous Service Provision was ended (i.e. if the original Service Provision had an **Actual End Date** of 01/01/21 then the new Service Provision needs an **Actual Start Date** of 01/01/21) and a **Planned End Date** of when the new expected date will end. This will ensure continuation of payment to the Provider.

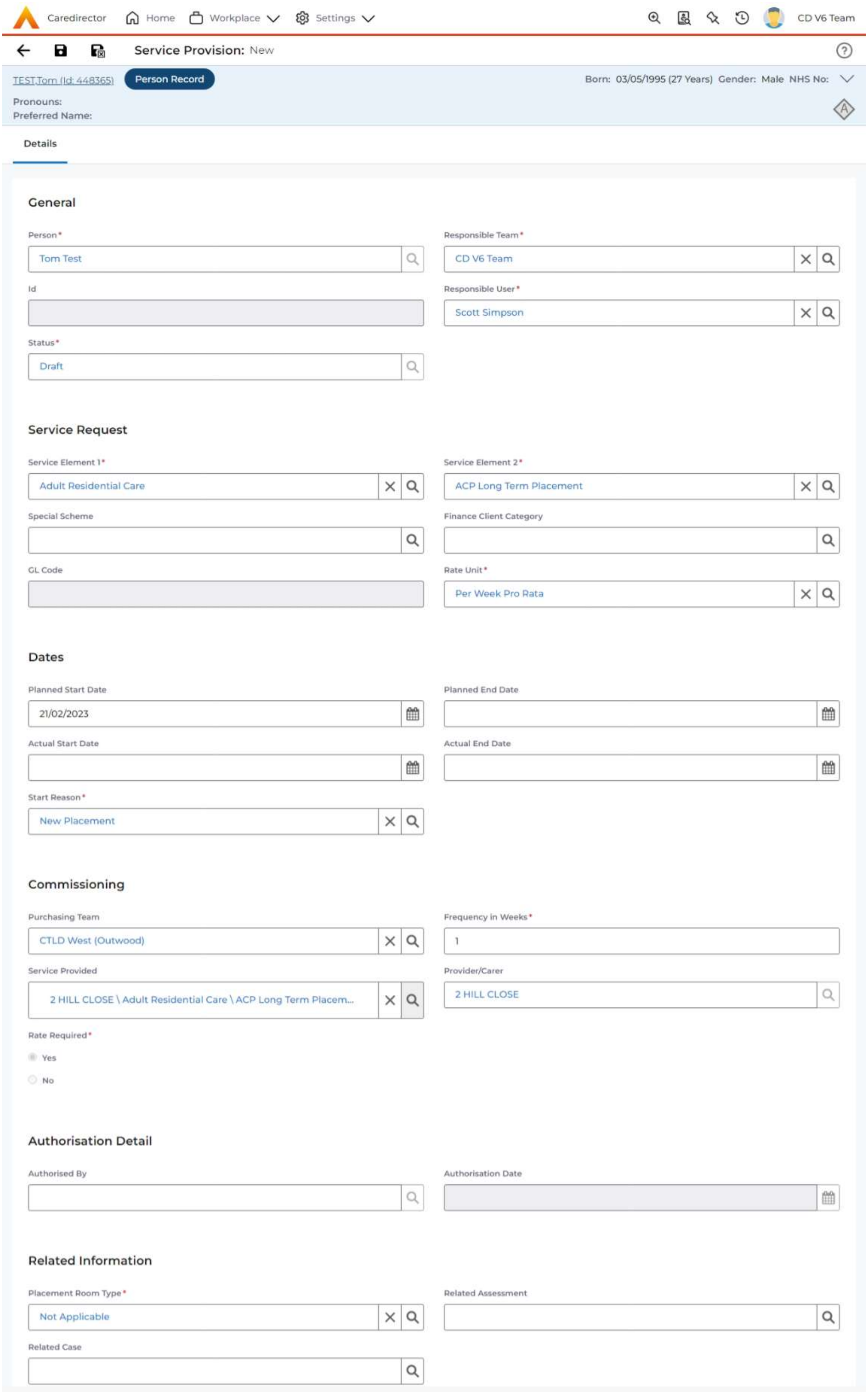
High-Cost Residential Placements

1. This Service Provision is recorded based on the service costs and not what the client or any other organisation (e.g. health) is contributing.

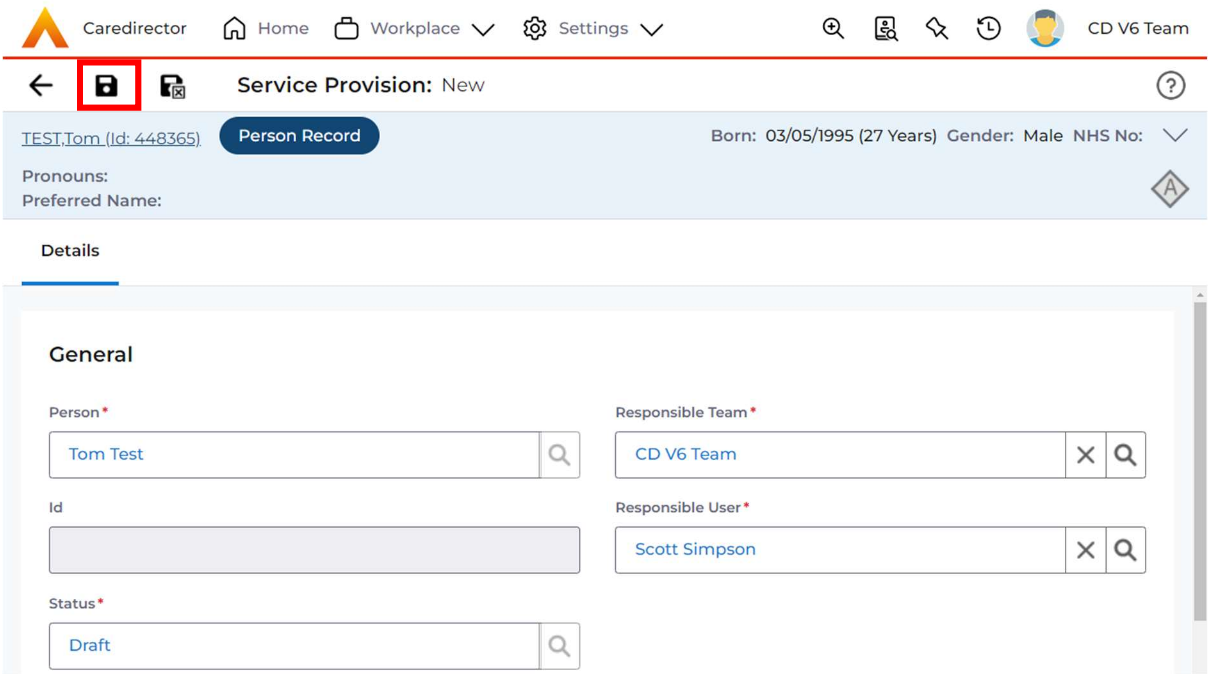
2. High-cost placements can be case agreed at an Adult Commissioning Panel or Joint Funding Panel and are set up the same as **Residential Care** or **Nursing Care** Service Provisions. Except the individual cost of the service is input as a **Rate Unit** against the Service Provision as follows:

3. The fields below are available in the new Service Provision screen. Please locate the relevant **person record > services > create new record** then enter the information side into the according field.
   For more information follow: How to find Service Provisions and Create New.

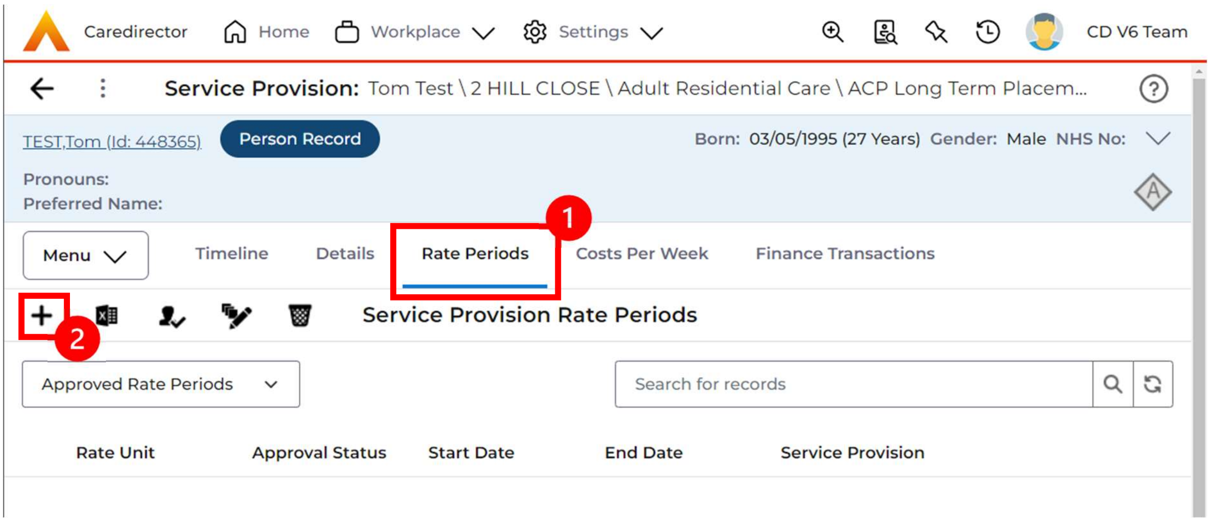
Field	Information
Service Element 1:	**Adult Residential Care** or **Nursing Care.**
Service Element 2:	Choose **ACP Long-Term Placement** or **ACP Short-Term Placement.**
Rate Unit:	**Per Week Pro Rata.**
Planned Start Date:	**The date service is expected to start.**
Actual Start Date:	Leave blank. (This field is completed by the Personalisation and Assessment Team when the Actual Start Date is known.)
Planned End Date:	Leave blank.
Actual End Date:	Leave blank (This should only be input on the day of the **Planned End Date** or after it).
Start Reason:	Choose appropriate option. (Usually 'Admitted from Community', 'Admitted from Hospital', 'Carer service')
Purchasing Team:	Choose appropriate Team.
Service Provided:	Type in **Providers Name. Search.** Select **Provider** from list.
Status:	**Draft.**
Placement Room Type:	Auto populates to 'Not Applicable'.
Responsible Team:	Auto populated with the user's default team.
Responsible User:	Auto populated to user's name.
Related Case:	Select relevant case


Caredirector
Home
Workplace
Settings
CD V6 Team
Service Provision: New
TEST,Tom (Id: 448365)
Person Record
Born: 03/05/1995 (27 Years) Gender: Male NHS No:
Pronouns:
Preferred Name:
Details
General
Person*
Tom Test
Responsible Team*
CD V6 Team
Id
Responsible User*
Scott Simpson
Status*
Draft
Service Request
Service Element 1*
Adult Residential Care
Service Element 2*
ACP Long Term Placement
Special Scheme
Finance Client Category
GL Code
Rate Unit*
Per Week Pro Rata
Dates
Planned Start Date
21/02/2023
Planned End Date
Actual Start Date
Actual End Date
Start Reason*
New Placement
Commissioning
Purchasing Team
CTLD West (Outwood)
Frequency in Weeks*
1
Service Provided
2 HILL CLOSE \ Adult Residential Care \ ACP Long Term Placem...
Provider/Carer
2 HILL CLOSE
Rate Required*
Yes
No
Authorisation Detail
Authorised By
Authorisation Date
Related Information
Placement Room Type*
Not Applicable
Related Assessment
Related Case

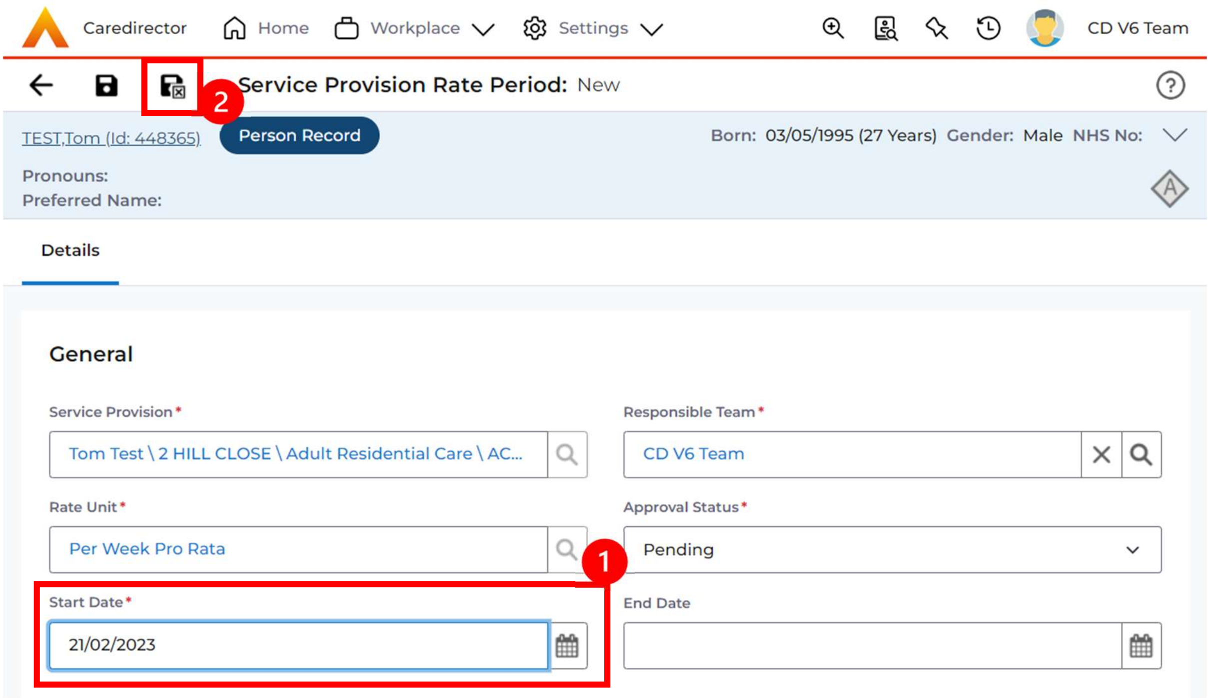
4. Select **Save** when completed.



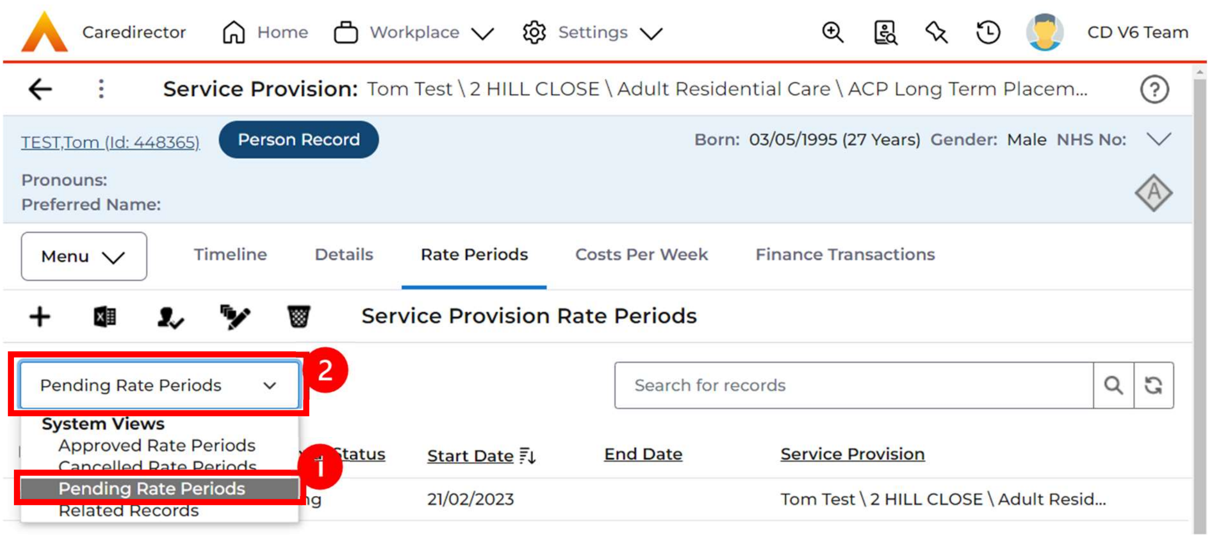
5. When saved it will bring you to the timeline tab, select the tab **Rate Periods,** and **Create New Record**.



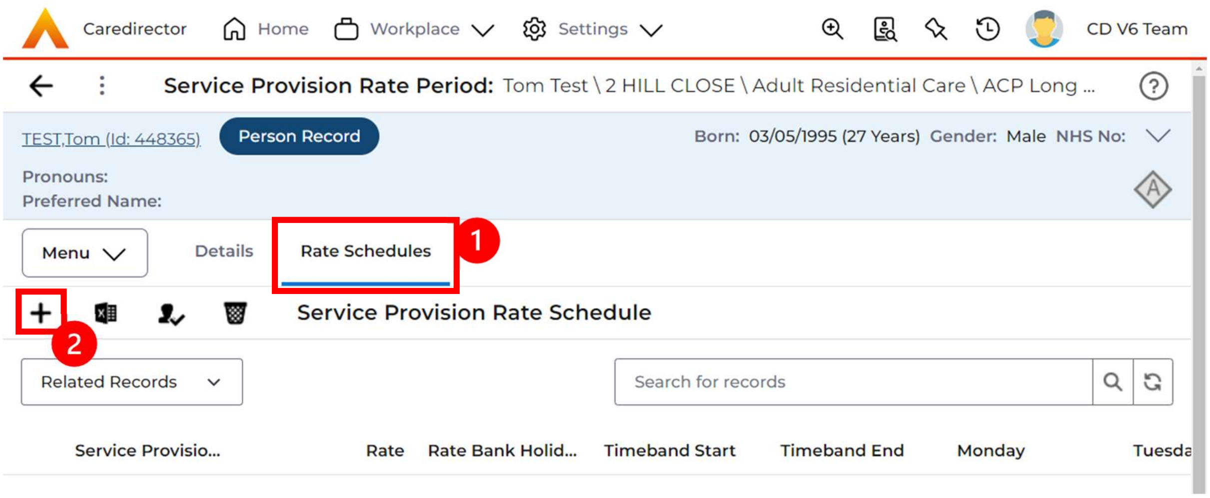
6. Insert **Start Date** that is in the **Actual Start Date** field (as the date the service started). Then **Save and Return to Previous Page.**



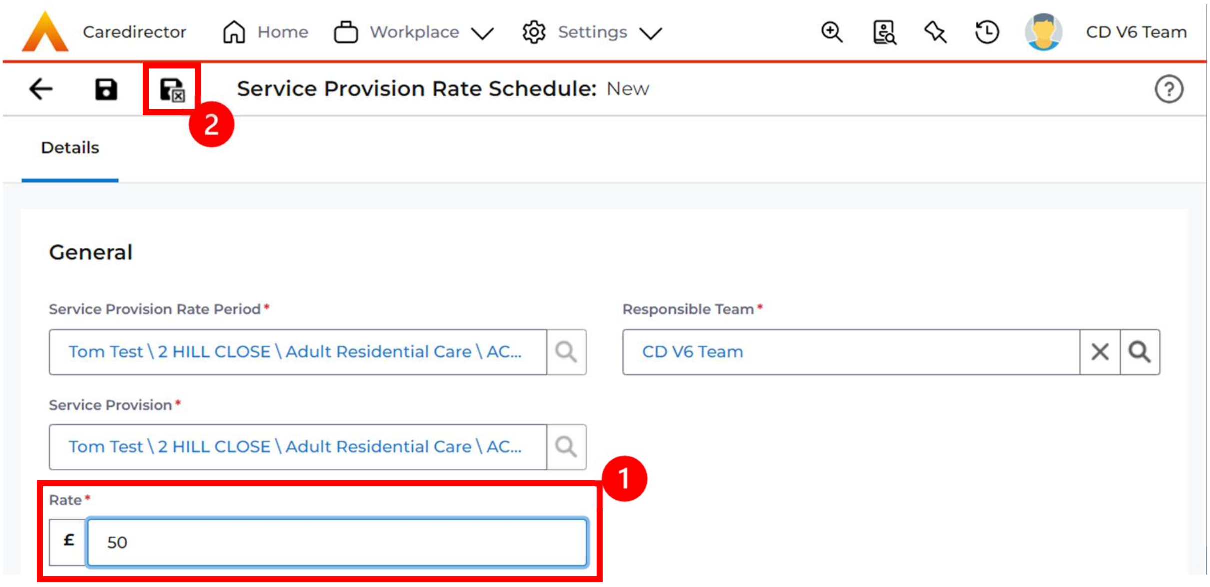
7. When saved, by default the **System View** will be on **Approved Rate Periods**. To see the **Rate Period** entered then you will need to change this to **Pending Rate Periods** system view.



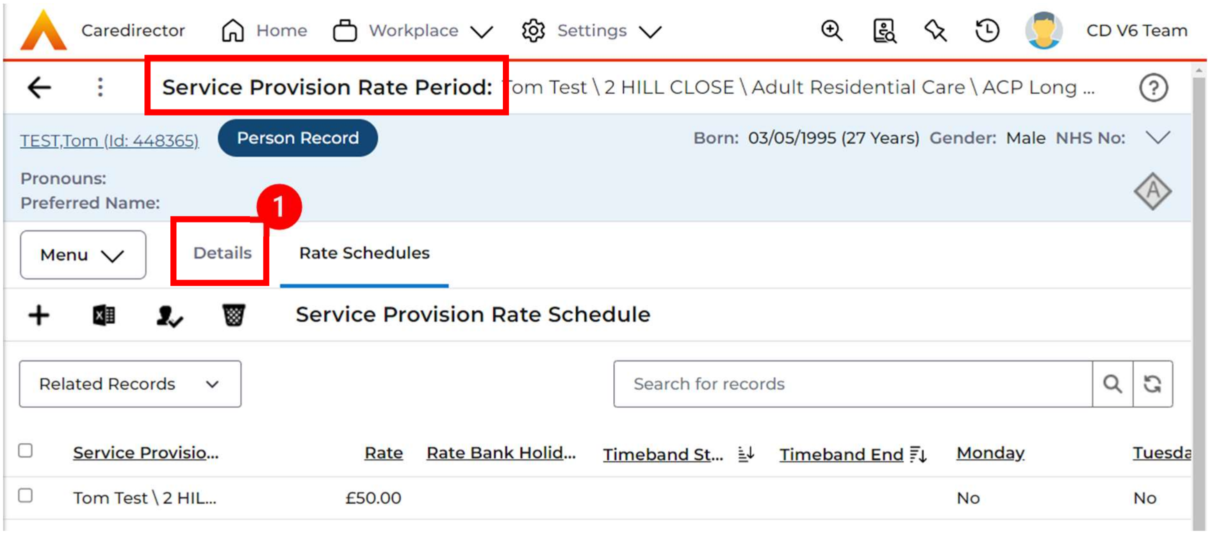
8. Select the pending **rate period** and open the **Service Provision Rate Period** screen. Then a new tab called **Rate Schedules** will show. Select this and **Create New Record.**



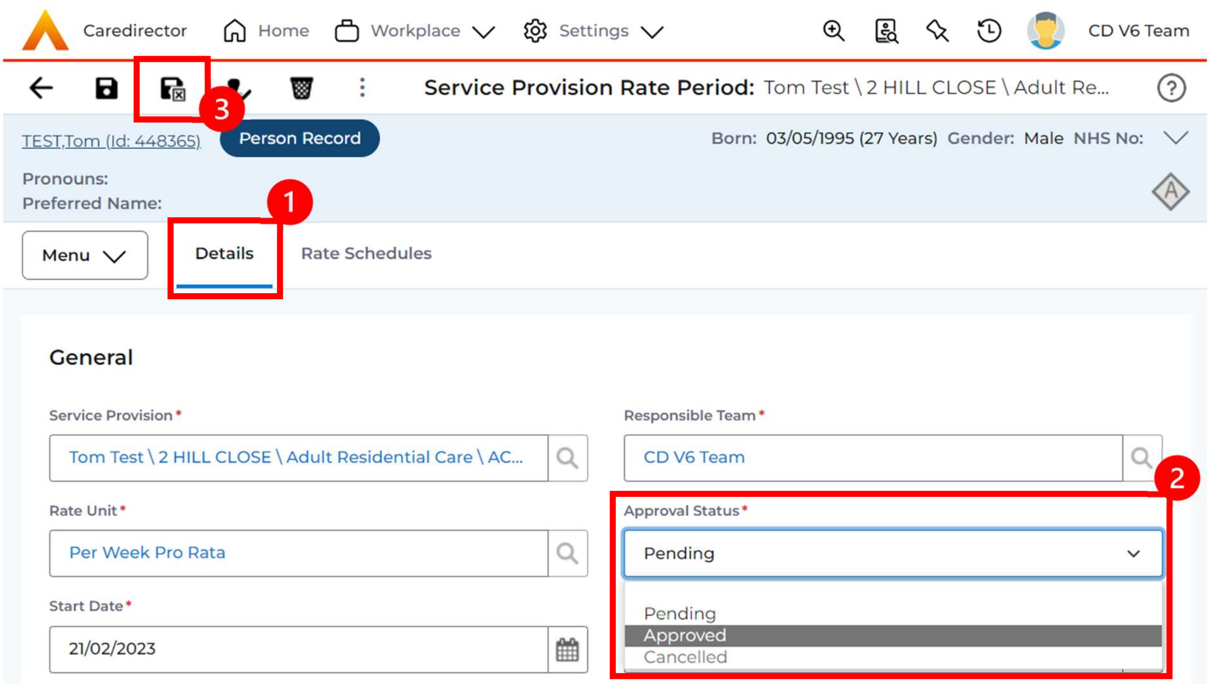
9. Enter the **Rate** in the **Rate** field, as per the agreed weekly amount (this amount will have been agreed at the Adult Commissioning Panel). Then **Save and Return to Previous Page**.



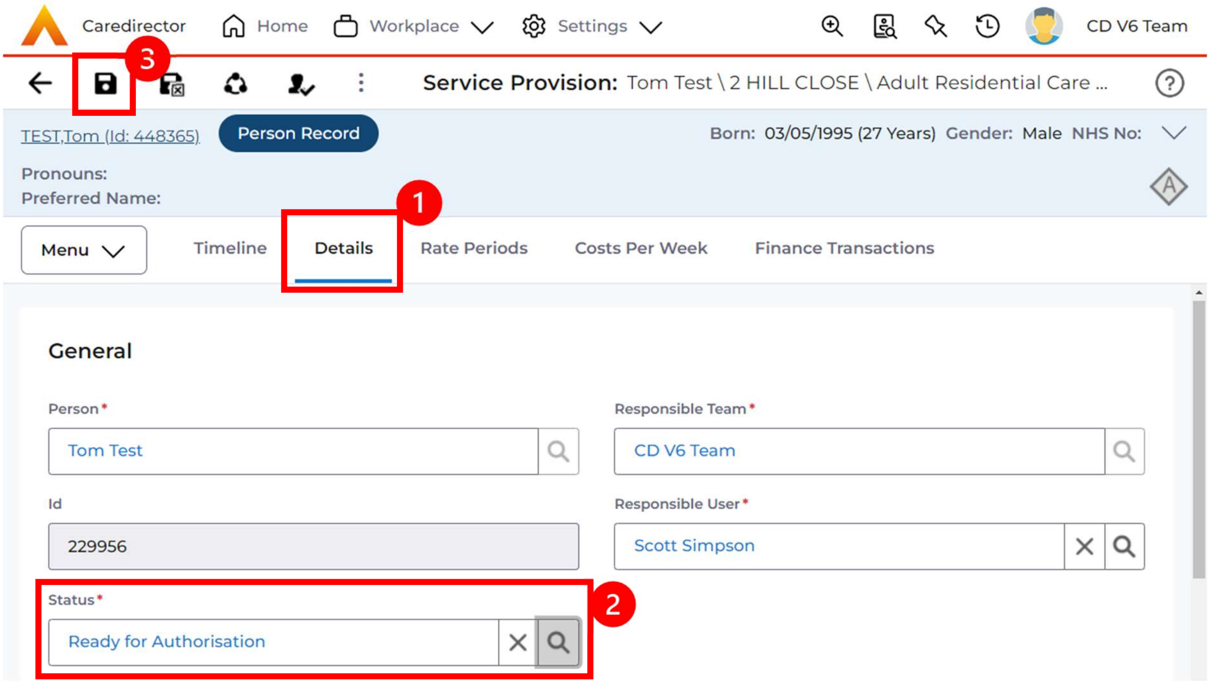
10. Then your location should be in the **Service Provision Rate Period** under the **Rate Schedules** tab. We need to go back to the **Details** tab under this screen.



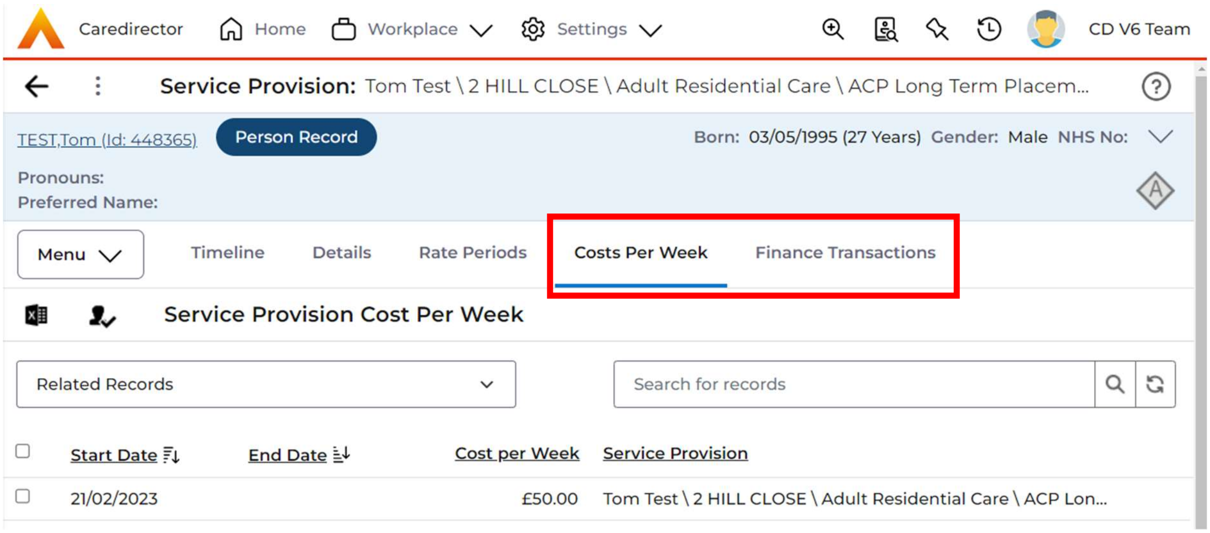
11. What is happening in the background, and it is not instant, is the system is calculating the costs and schedule of what we just entered. If this option does not show straight away, please leave it 2 minutes, perhaps **Save and Return to Previous Page** and come back into this screen as under the **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 Service Provision **Status** as **Ready for Authorisation** later.



12. Once returned to the **Service Provision** main screen we can change the **Status** from **Draft** to **Ready for Authorisation** then select **Save**.



13. You will be able to see the **Costs Per Week** and any **Finance Transactions** via these tabs. Just ensure the **Actual Start Date** is entered.



14. **Service Provisions** that are set to **Ready for Authorisation** will be picked up via an **Advanced Search** and **Authorised** (<u>How to Authorise a Service Provision</u>) by Team Manager/ Support Services Co-ordinator.

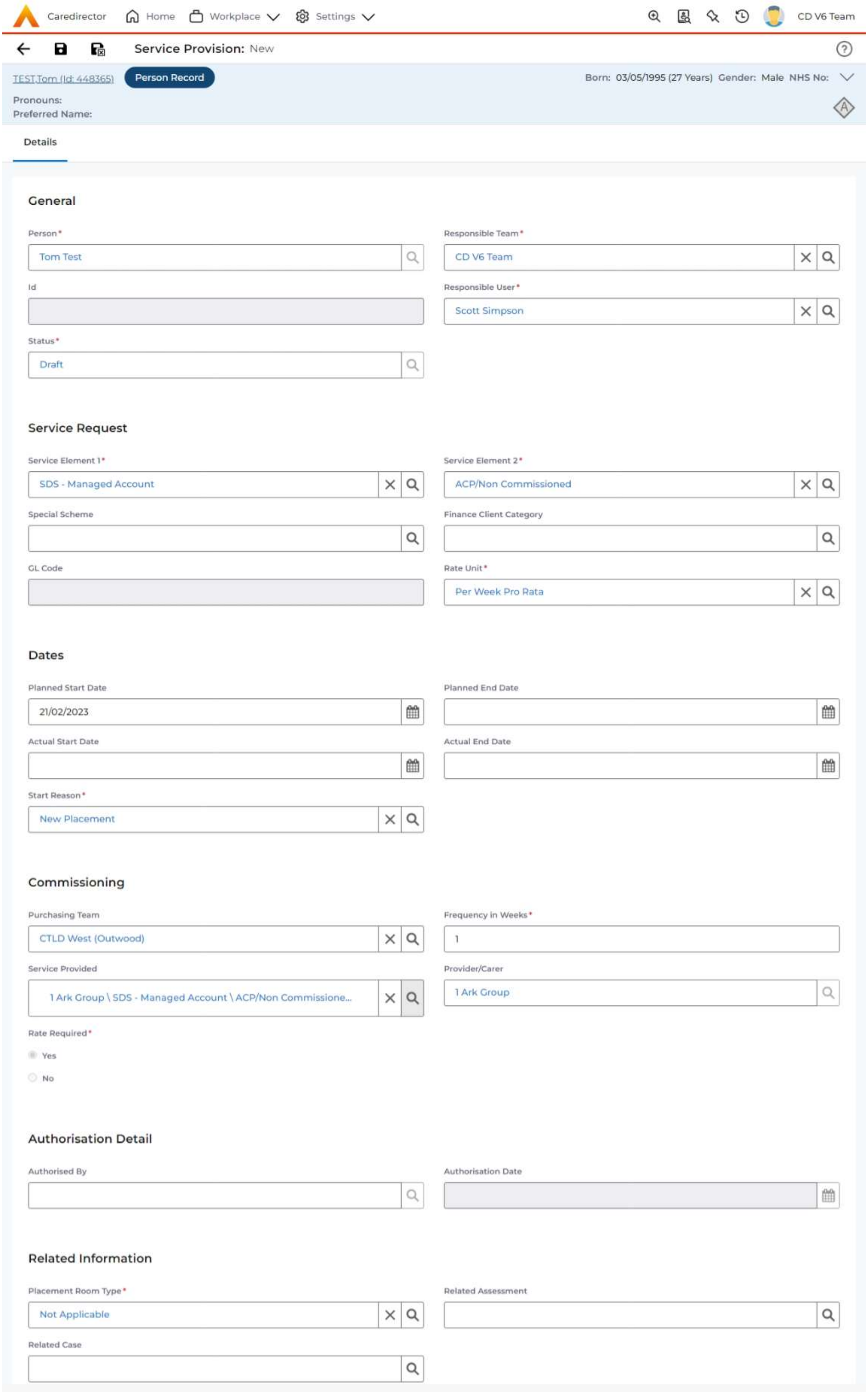
ACP or Non-Commissioned Services

1. These are non-commissioned Providers. If you come across a non-commissioned provider that has not be set up yet, please follow Non-Commission Providers – Set Up Process.

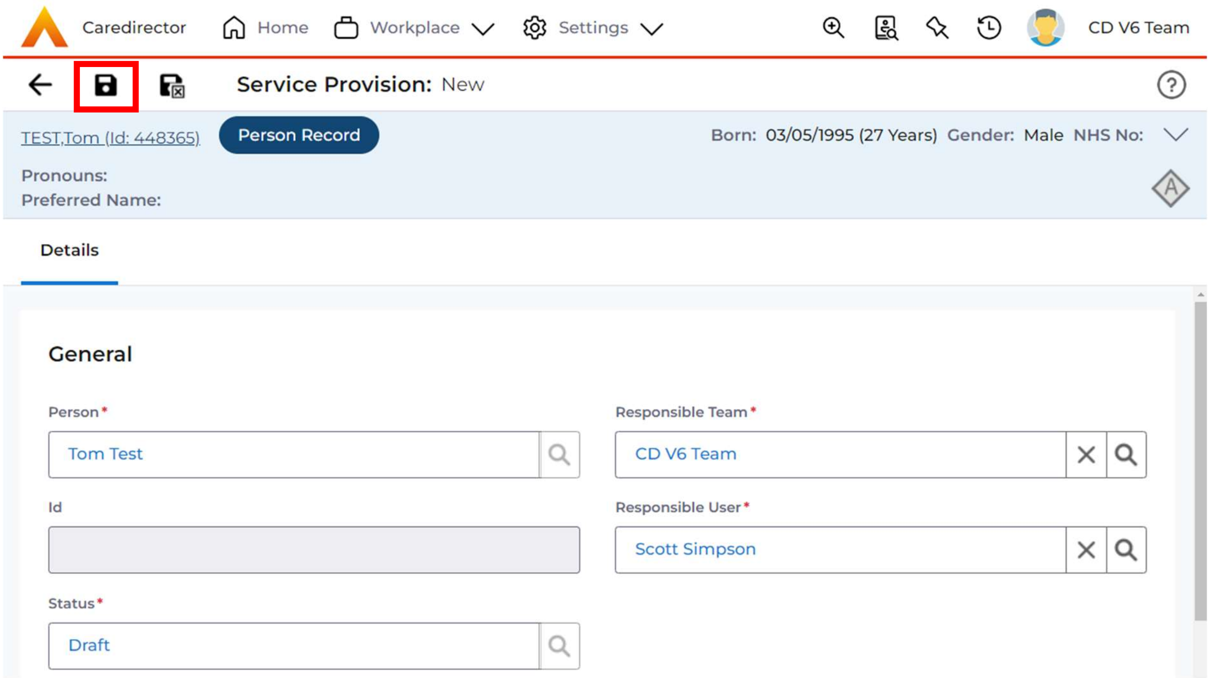
2. This Service Provision is recorded based on the service costs and not what the client/other organisations (e.g. health) are contributing.

3. The fields below are available in the new Service Provision screen. Please locate the relevant **person record > services > create new record** then enter the information side into the according field.
   For more information follow: How to find Service Provisions and Create New.

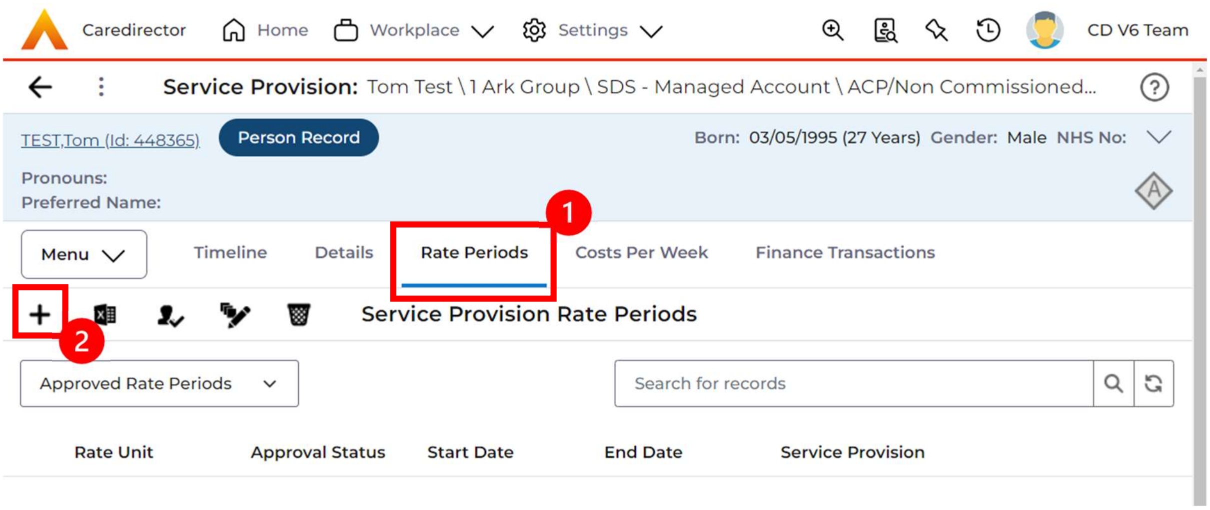
Field	Information
Service Element 1:	**SDS – Managed Account.**
Service Element 2:	Choose **ACP/ Non-Commissioned.**
Rate Unit:	**Per Week Pro Rata.**
Planned Start Date:	Leave blank.
Actual Start Date:	**Enter date service is to start**
Planned End Date:	Leave blank.
Actual End Date:	Leave blank (Can only be input on the day of the Planned End Date or after it).
Start Reason:	Choose appropriate option. Usually 'New Placement', 'Admitted from Hospital'
Purchasing Team:	Choose appropriate Team.
Service Provided:	Type in **Providers Name. Search.** Select **Provider** from list.
Status:	**Draft.**
Placement Room Type:	Auto populates to 'Not Applicable'
Responsible Team:	Auto populated with the user's default team
Responsible User:	Auto populated with the user's name
Related Case:	Select related case


Caredirector
Home
Workplace
Settings
CD V6 Team
Service Provision: New
TEST,Tom (Id: 448365)
Person Record
Born: 03/05/1995 (27 Years) Gender: Male NHS No:
Pronouns:
Preferred Name:
Details
General
Person*
Tom Test
Responsible Team*
CD V6 Team
Id
Responsible User*
Scott Simpson
Status*
Draft
Service Request
Service Element 1*
SDS - Managed Account
Service Element 2*
ACP/Non Commissioned
Special Scheme
Finance Client Category
GL Code
Rate Unit*
Per Week Pro Rata
Dates
Planned Start Date
21/02/2023
Planned End Date
Actual Start Date
Actual End Date
Start Reason*
New Placement
Commissioning
Purchasing Team
CTLD West (Outwood)
Frequency in Weeks*
1
Service Provided
1 Ark Group \ SDS - Managed Account \ ACP/Non Commissione...
Provider/Carer
1 Ark Group
Rate Required*
Yes
No
Authorisation Detail
Authorised By
Authorisation Date
Related Information
Placement Room Type*
Not Applicable
Related Assessment
Related Case

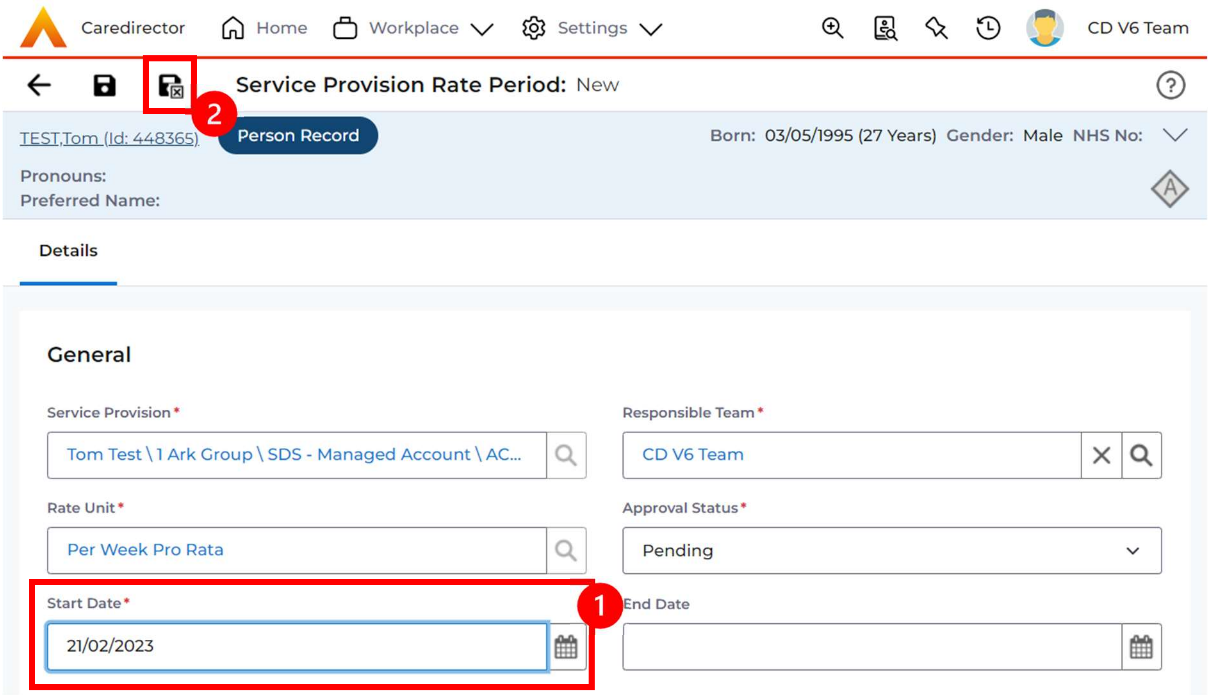
5. Select **Save** when completed.



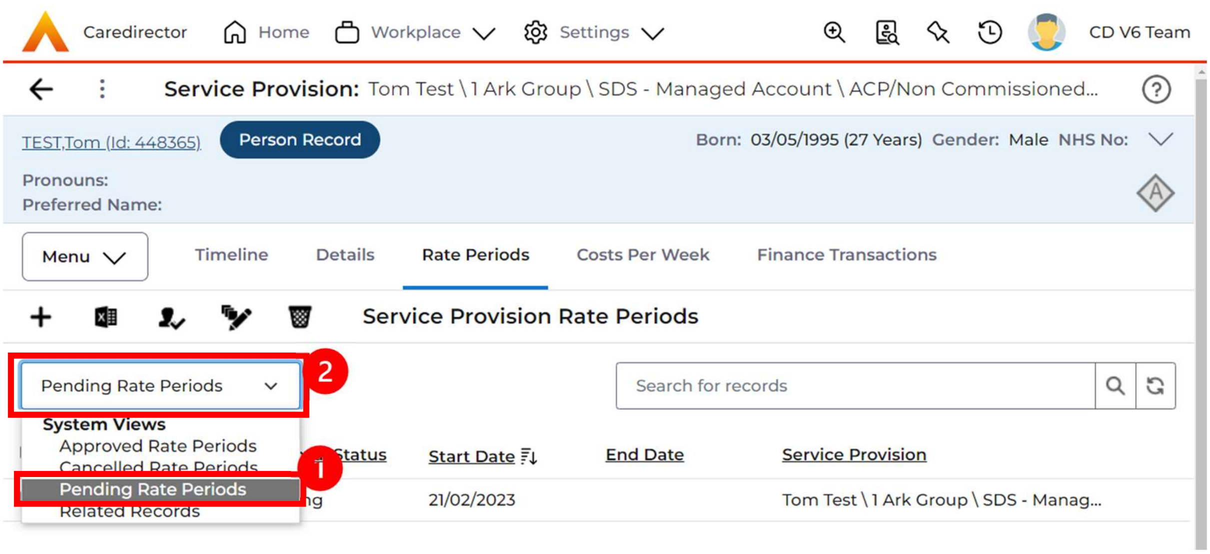
6. When saved it will bring you to the timeline tab, select the tab **Rate Periods,** and **Create New Record**.



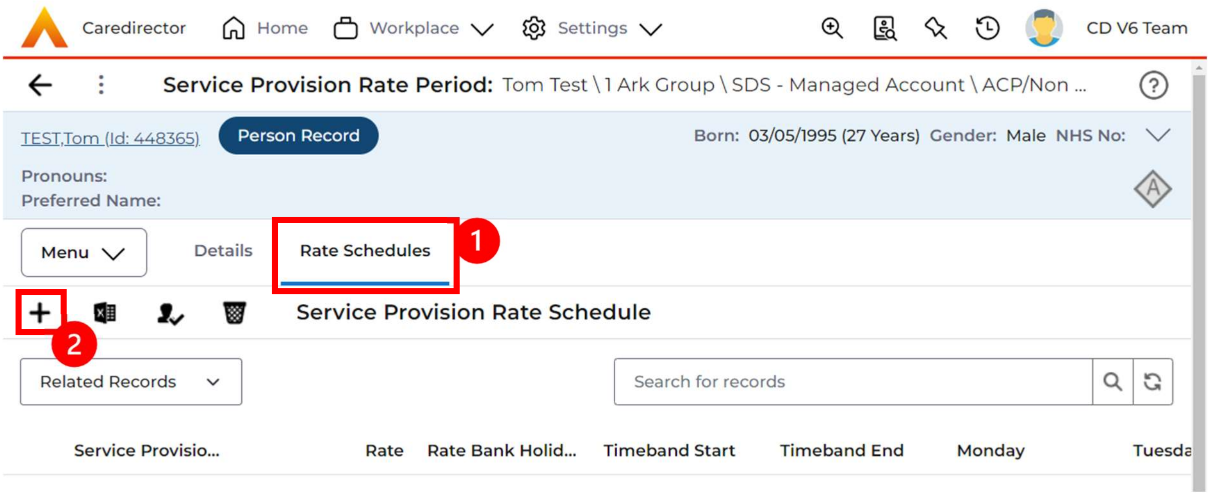
7. Insert **Start Date** that is in the **Actual Start Date** field (as the date the service started). Then **Save and Return to Previous Page.**



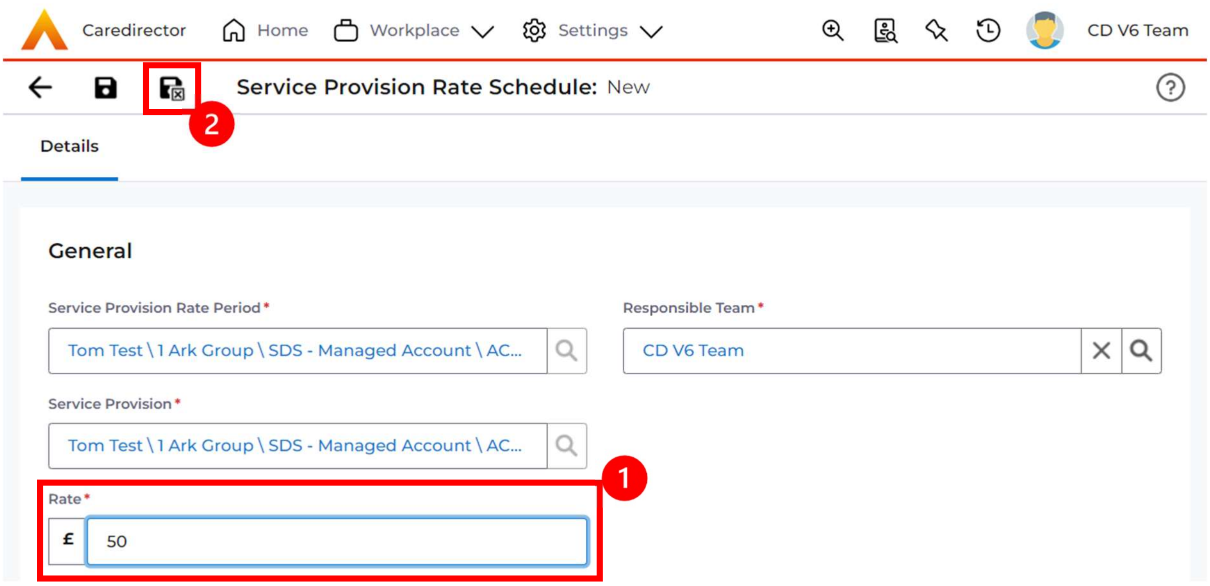
8. When saved, by default the **System View** will be on **Approved Rate Periods**. To see the **Rate Period** entered then you will need to change this to **Pending Rate Periods** system view.



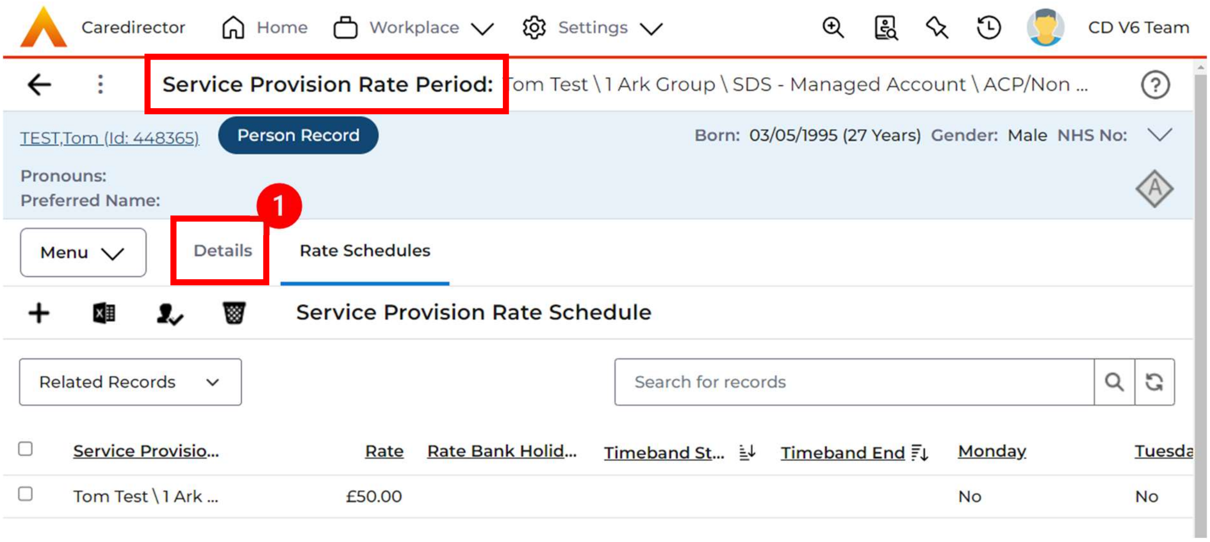
9. Select the pending **rate period** and open the **Service Provision Rate Period** screen. Then a new tab called **Rate Schedules** will show. Select this and **Create New Record.**



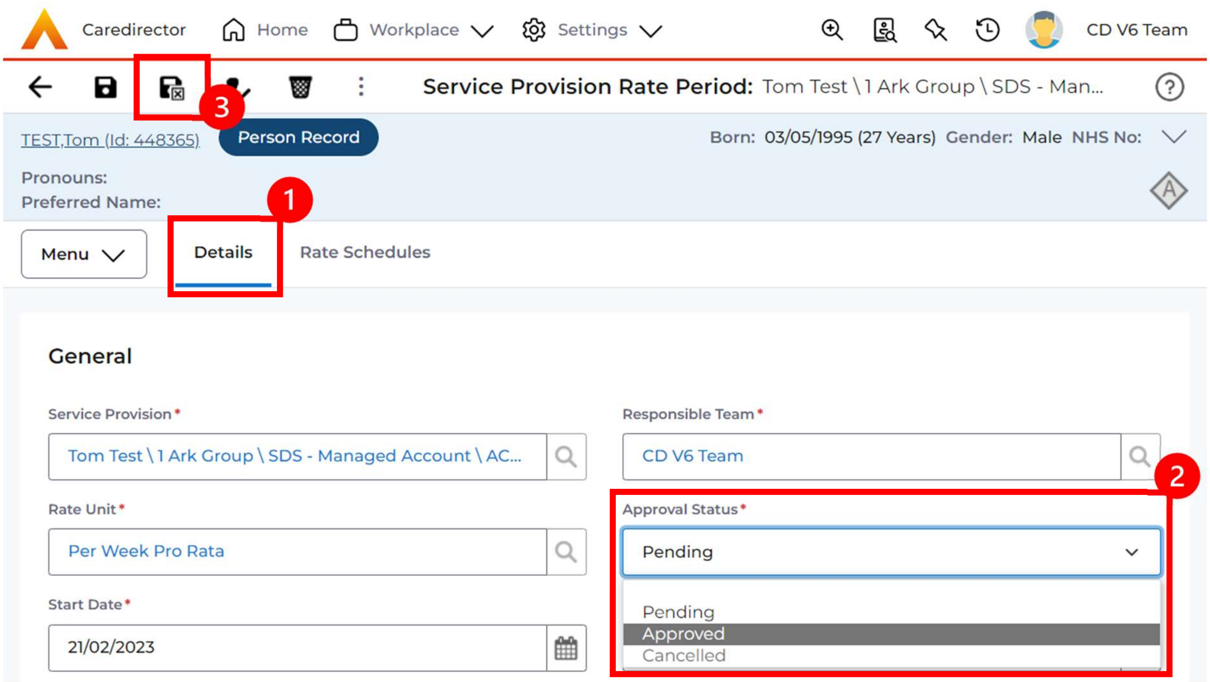
10. Enter the **Rate** in the **Rate** field, as per the agreed weekly amount. Then **Save and Return to Previous Page**.



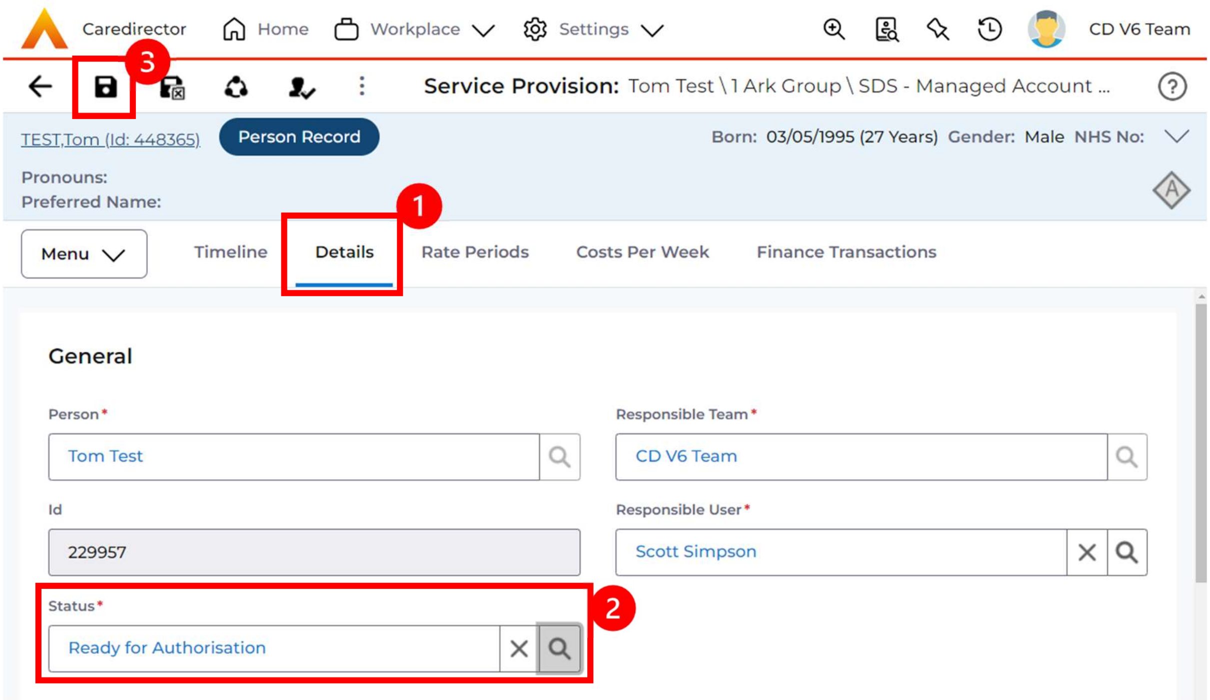
11. Then your location should be in the **Service Provision Rate Period** under the **Rate Schedules** tab. We need to go back to the **Details** tab under this screen.



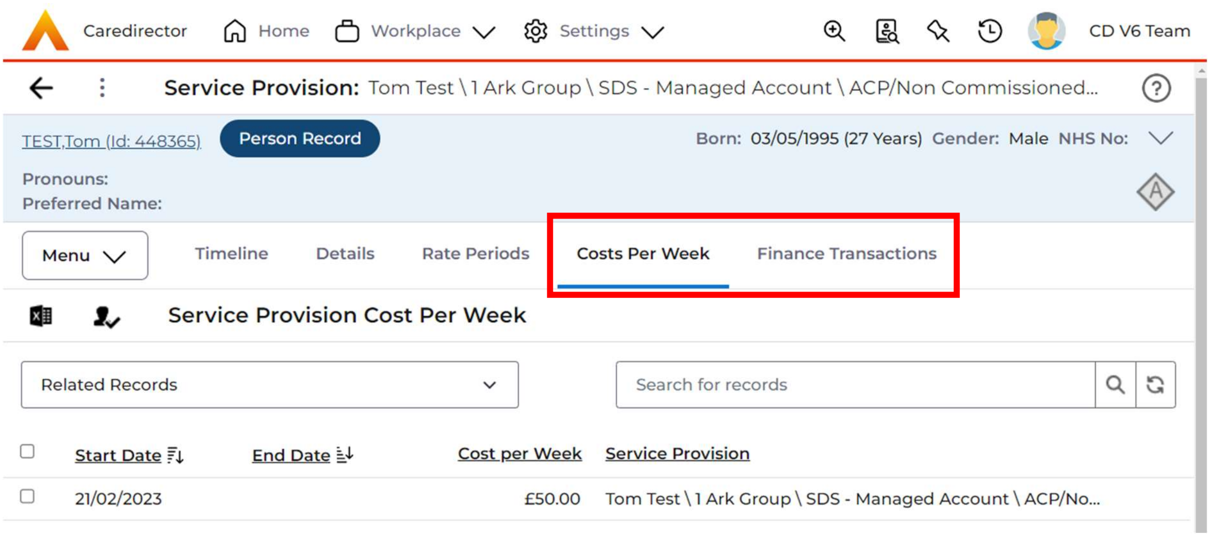
12. What is happening in the background, and it is not instant, is the system is calculating the costs and schedule of what we just entered. If this option does not show straight away, please leave it 2 minutes, perhaps **Save and Return to Previous Page** and come back into this screen as under the **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 Service Provision **Status** as **Ready for Authorisation** later.



13. Once returned to the **Service Provision** main screen we can change the **Status** from **Draft** to **Ready for Authorisation** then select **Save**.



14. You will be able to see the **Costs Per Week** and any **Finance Transactions** via these tabs. Just ensure the **Actual Start Date** is entered.



15. **Service Provisions** that are set to **Ready for Authorisation** will be picked up via an **Advanced Search** and **Authorised** (How to Authorise a Service Provision) by Team Manager/ Support Services Co-ordinator.

SDS – Cash Direct Payments

CSOs/Admin do not set up the Booking request/Service Provision for a Cash Direct Payment as this is done by the Personalisation & Assessment Team as follows:

1. The Practitioner will send a task on the person record via CareDirector with the following information:

a. Subject: PB - Cash Direct Payment – Agreement

b. Responsible Team: Personalisation & Assessment Team (please do not assign to an owner)

c. Description: Must contain details of weekly budget approved, including hours, visits, rates (where applicable) and start date, Third Party Representative (Full name and address)/Third Party Supported Account (TPSA – managed by Penderels) (see below for full information required in activity)

Confirm Agreement is saved in Attachments.

2. Select Save.

3. The Personalisation & Assessment Team will then pick up the task and then set up a booking request (Service Provision) with the Rate and Start Date of the new Cash Direct Payment and change the Status to Ready for Authorisation.

4. Service Provisions that are set Ready for Authorisation will be picked up via an Advanced Search and Authorised by Team Manager/ Support Services Co-ordinator

Example Description (please copy and paste into the task as required)

Title - PB - Cash Direct Payment - Agreement

Cash Direct Payment start date – DD/MM/YYYY

Total cost of care per week – £XXX

Is there a top up? YES / NO

Top Up contribution – £XXX

Personal Assistant

Number of hours X @ £12.07 or £13.59 per hour (22/23 rates) = £

PA - Self Employed No / Yes / TBC

Date referred to Penderels – DD/MM/YYYY

Agency Provider – (INSERT NAME)

Number of hours X @ £18.50 per hour (22/23 rates) = £

Number of visits X @ £1.50 per visit (22/23 rates) = £

Day Centre – (INSERT CENTRE)

Number of sessions – X

Cost per day / session – £XXX

Commissioned services – Managed Account

Please enter service provision

SDS – Cash Direct Payments Change in Care or change to Third Party Representative/ Third Party Support Account

CSOs/Admin do not change the Service Provision for Cash Direct Payments as this is done by the P&A Team.

1. The Practitioner will send a task on the person record via CareDirector with the following information:

a. Subject: PB - Cash Direct Payment – Change in Care

b. Responsible Team: P&A Team (please do not assign to an owner)

c. Description: Must contain details of revised weekly budget approved including hours, visits, rates when appropriate and start date, and / or any change to delivery i.e. new Third-Party Representative / Third Party Supported Account (TPSA)

2. Select Save.

3. The Personalisation & Assessment Team will now pick up the task and will then update with the Rate and Start Date of the new Cash Direct Payment.

Cash direct payments **cannot be put on hold**, the Personalisation & Assessment Team should be advised of the end date and will end the Service Provisions and Financial Assessments as appropriate.

If the Cash Direct Payment is set back up within 12 months, the same agreement can be used, in this case, a task should be added to the person record and sent to the Personalisation & Assessment Team entitled ‘PB – Cash Direct Payment – Reinstate’ and should include all the information as per the ‘PB - Cash Direct Payment – Agreement’ procedure (above). If longer than 12 months has elapsed, the budget will need setting up as new see ‘PB - Cash Direct Payment – Agreement’ procedure (above).

Cash Direct Payment for a Carer

CSOs/Admin do not set up the Booking request/Service Provision for a Cash Direct Payment as this is done by the Personalisation & Assessment Team as follows:

1. The Practitioner will send a task on the **carer's person record** via CareDirector with the following information:

a. Subject: PB - Cash Direct Payment – Agreement

b. Responsible Team: Personalisation & Assessment Team (please do not assign to an owner)

c. Description: Must contain details of weekly budget approved, including hours, visits, rates (where applicable) and start date, Third Party Representative (Full name and address)/Third Party Supported Account (TPSA – managed by Penderels) (see below for full information required in activity)

Confirm Agreement is saved in Attachments.

2. Select Save.

3. The Personalisation & Assessment Team will then pick up the task and then set up a booking request (Service Provision) with the Rate and Start Date of the new Cash Direct Payment and change the Status to Ready for Authorisation.

4. Service Provisions that are set Ready for Authorisation will be picked up via an Advanced Search and Authorised by Team Manager/ Support Services Co-ordinator

Example Description (please copy and paste into the task as required)

Title - PB - Cash Direct Payment - Agreement

Cash Direct Payment start date – DD/MM/YYYY

Total cost of care per week – £XXX

Is there a top up? YES / NO

Top Up contribution – £XXX

Personal Assistant

Number of hours X @ £12.07 or £13.59 per hour (22/23 rates) = £

PA - Self Employed No / Yes / TBC

Date referred to Penderels – DD/MM/YYYY

Agency Provider – (INSERT NAME)

Number of hours X @ £18.50 per hour (22/23 rates) = £

Number of visits X @ £1.50 per visit (22/23 rates) = £

Day Centre – (INSERT CENTRE)

Number of sessions – X

Cost per day / session – £XXX

Commissioned services – Managed Account

Please enter service provision

SDS – Carers Cash Direct Payment Change in Care

CSO/Admin do not change the Service Provision for Cash Direct Payments as this is done by the Personalisation and Assessment Team.

1. The Practitioner will send a task on the person record via CareDirector with the following information:

a. Subject: PB - Cash Direct Payment – Change in Care

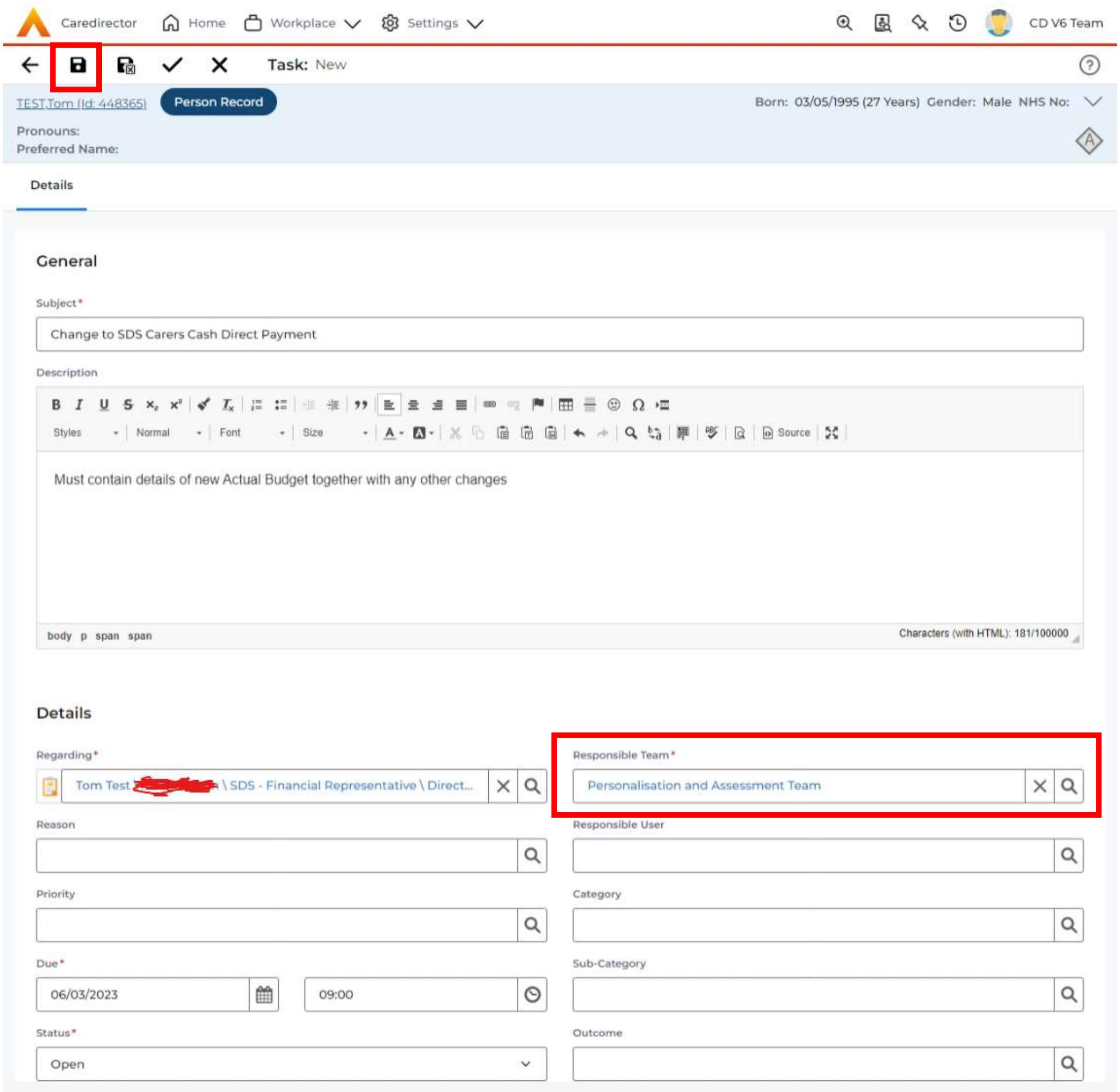
b. Responsible Team: P&A Team (please do not assign to an owner)

c. Description: Must contain details of revised weekly budget approved including hours, visits, rates when appropriate and start date, and / or any change to delivery i.e. new Third-Party Representative / Third Party Supported Account (TPSA)

2. Select Save.
3. The Personalisation & Assessment Team will now pick up the task and will then update with the Rate and Start Date of the new Cash Direct Payment.

Cash direct payments **cannot be put on hold**, the Personalisation & Assessment Team should be advised of the end date and will end the Service Provisions and Financial Assessments as appropriate.

If the Cash Direct Payment is set back up within 12 months, the same agreement can be used, in this case, a task should be added to the person record and sent to the Personalisation & Assessment Team entitled ‘PB – Cash Direct Payment – Reinstate’ and should include all the information as per the ‘PB - Cash Direct Payment – Agreement’ procedure (above). If longer than 12 months has elapsed, the budget will need setting up as new see ‘PB - Cash Direct Payment – Agreement’ procedure (above).



2. Select **Save**.

3. The **Personalisation & Assessment Team** will now pick up the **Activity Task**. They will then clone the existing **Service Provision** and update with the **Personalisation & Assessment Team** will also end the previous **Service Provision**.

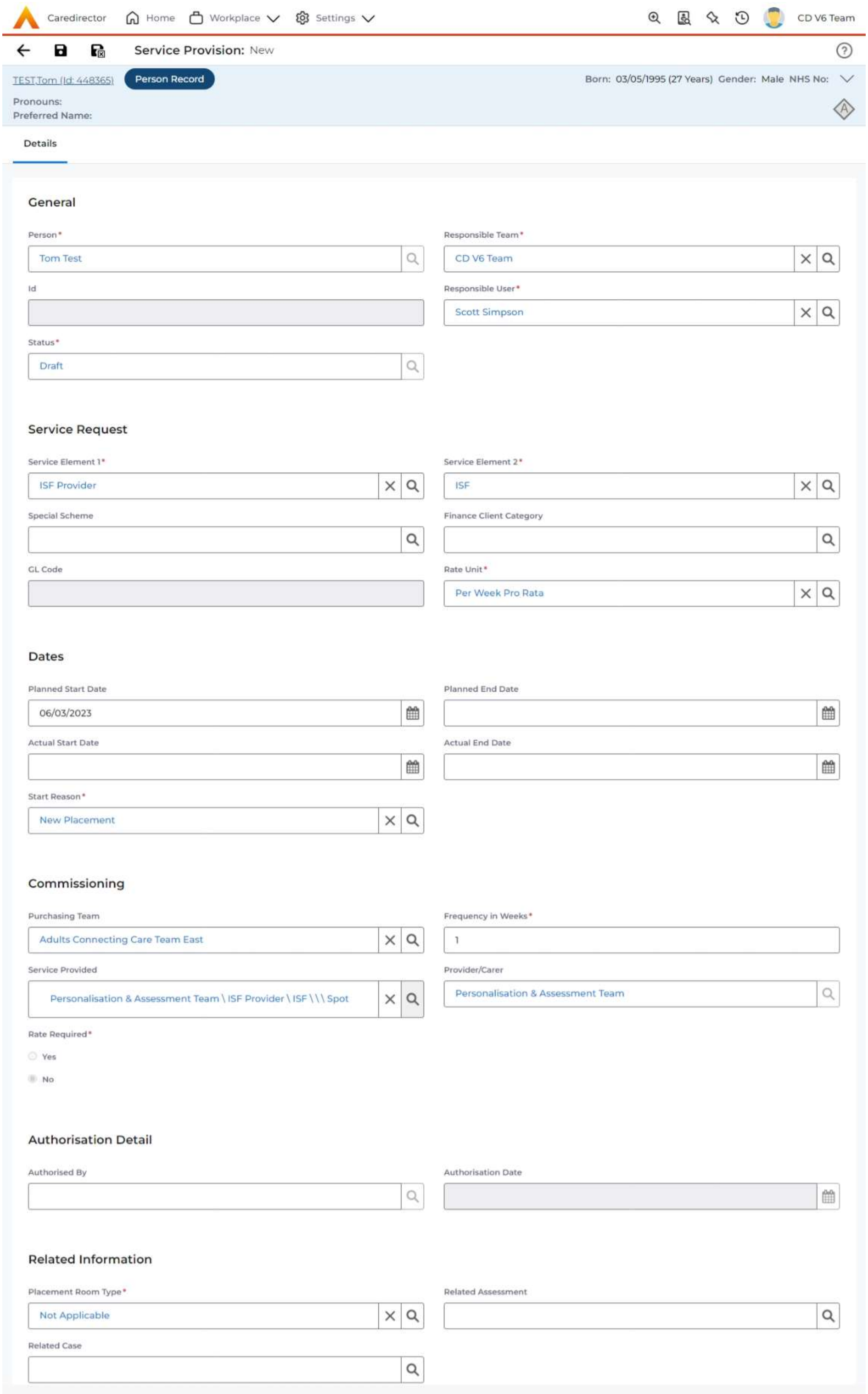
4. **Service Provisions** that are set **Ready for Authorisation** will be picked up via an **Advanced Search** and **Authorised** (How to Authorise a Service Provision) by **Team Manager/ Support Services Co-ordinator.**

Individual Service Fund (ISF) (Booking Request)

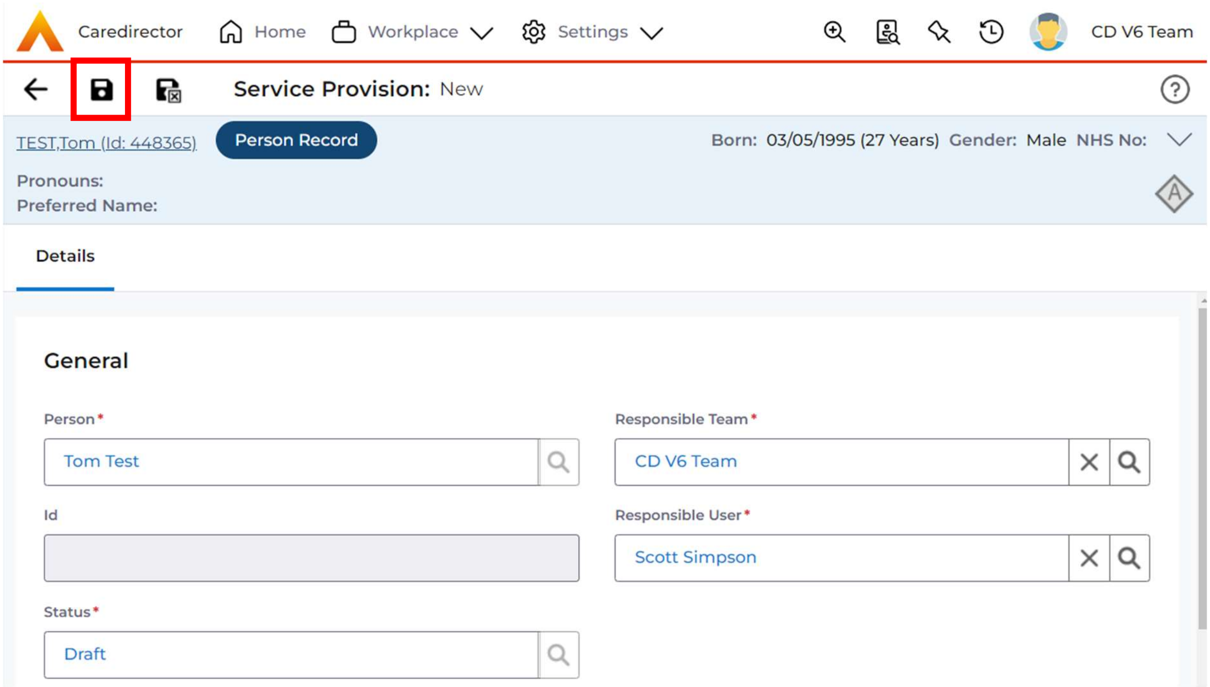
1. This Service Provision is recorded based on the service costs and not what the client is contributing.

2. The fields below are available in the new Service Provision screen. Please locate the relevant **person record > services > create new record** then enter the information side into the according field.
   For more information follow: How to find Service Provisions and Create New.

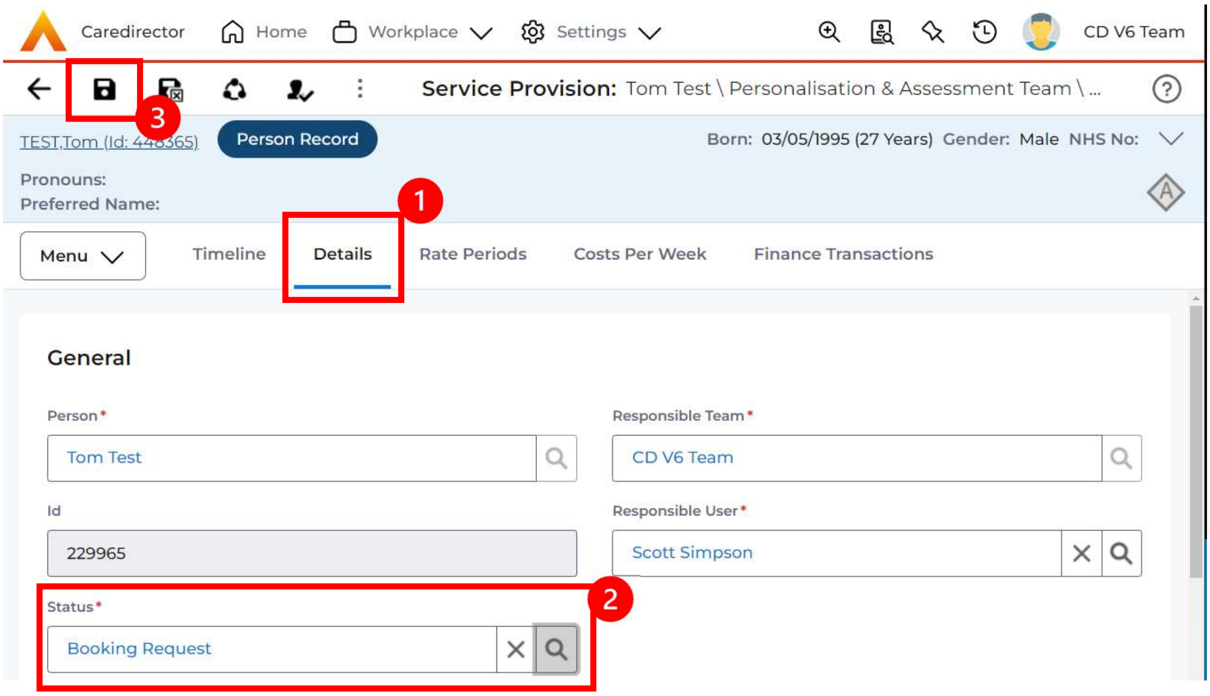
Field	Information
Service Element 1:	**ISF Provider**
Service Element 2:	Choose **ISF**
Finance Client Category:	Choose appropriate option.
Rate Unit:	**Per Week Pro Rata**
Planned Start Date:	**Enter date today's date**
Actual Start Date:	Leave blank
Planned End Date:	Leave blank
Actual End Date:	Leave blank
Start Reason:	Choose appropriate option, usually 'New Placement', 'Change in Care Type'.
Purchasing Team:	Choose appropriate Team.
Service Provided:	Find **Personalisation & Assessment Team**
Status:	**Draft,** at this point but once fully complete, change to '**Booking request'** and **save**
Placement Room Type:	Auto populates to 'Not Applicable'
Responsible Team:	Auto populated with the user's default team. If change is required use the **Lookup Function**.
Responsible User:	Auto populated with the user's name
Related Case:	Select relevant case


Caredirector
Home
Workplace
Settings
CD V6 Team
Service Provision: New
TEST,Tom (Id: 448365)
Person Record
Born: 03/05/1995 (27 Years) Gender: Male NHS No:
Pronouns:
Preferred Name:
Details
General
Person*
Tom Test
Responsible Team*
CD V6 Team
Id
Responsible User*
Scott Simpson
Status*
Draft
Service Request
Service Element 1*
ISF Provider
Service Element 2*
ISF
Special Scheme
Finance Client Category
GL Code
Rate Unit*
Per Week Pro Rata
Dates
Planned Start Date
06/03/2023
Planned End Date
Actual Start Date
Actual End Date
Start Reason*
New Placement
Commissioning
Purchasing Team
Adults Connecting Care Team East
Frequency in Weeks*
1
Service Provided
Personalisation & Assessment Team \ ISF Provider \ ISF \ \ Spot
Provider/Carer
Personalisation & Assessment Team
Rate Required*
Yes
No
Authorisation Detail
Authorised By
Authorisation Date
Related Information
Placement Room Type*
Not Applicable
Related Assessment
Related Case

5. Select **Save** when completed.

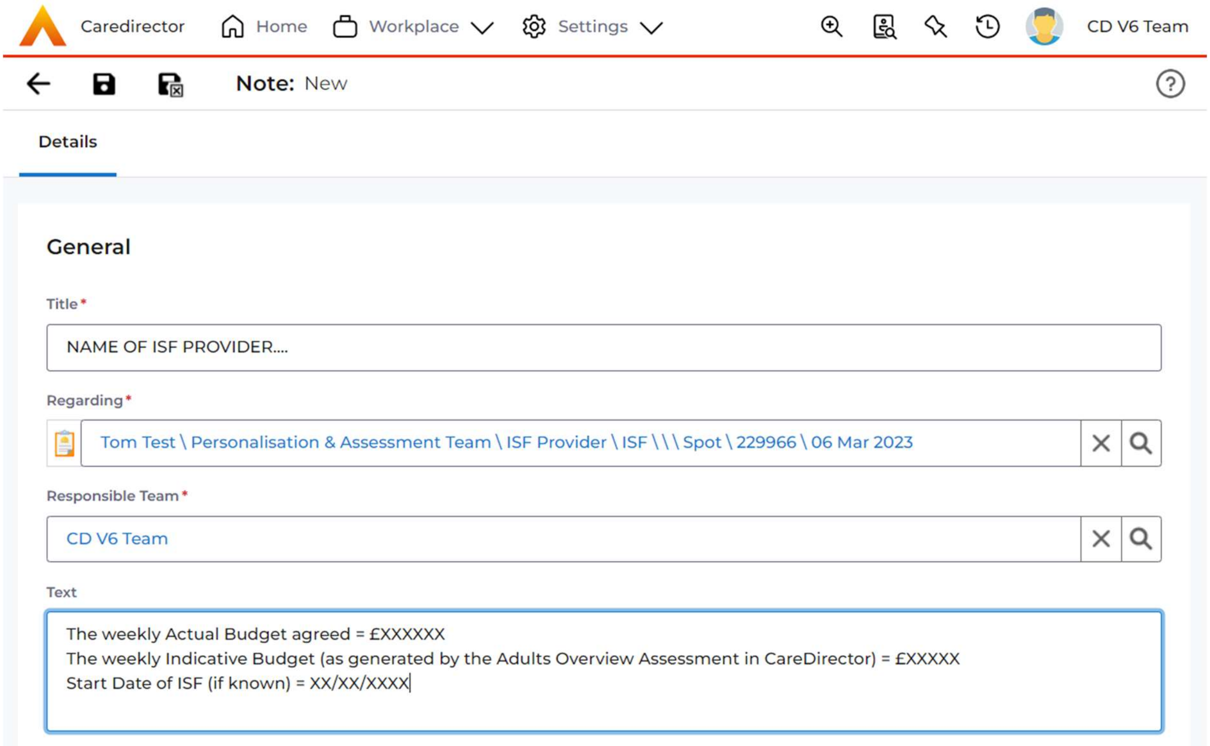


6. When saved, go back into details as it will default you to the **Timeline** tab and select **Booking Request** then **Save.**



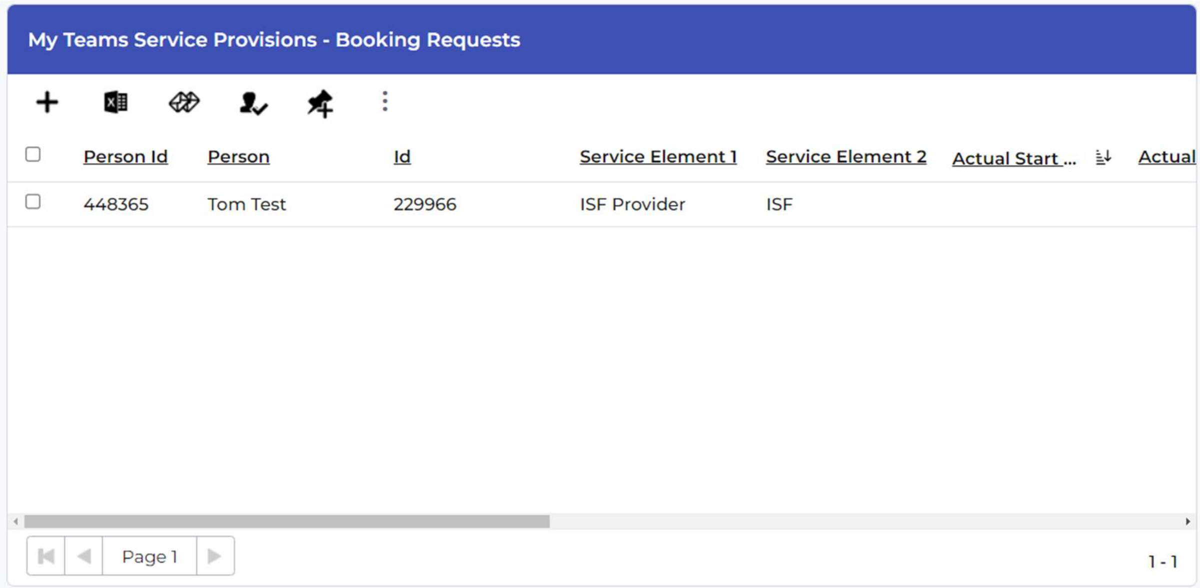
7. Next, a **Note** requires adding for further information.
   For more information on how to… follow: How to add a Note

Field	**Information**
Title:	Name of ISF Provider
Text:	The weekly Actual Budget agreed The weekly Indicative Budget (as generated by the Adults Overview Assessment in CareDirector) Start Date of ISF (if known)

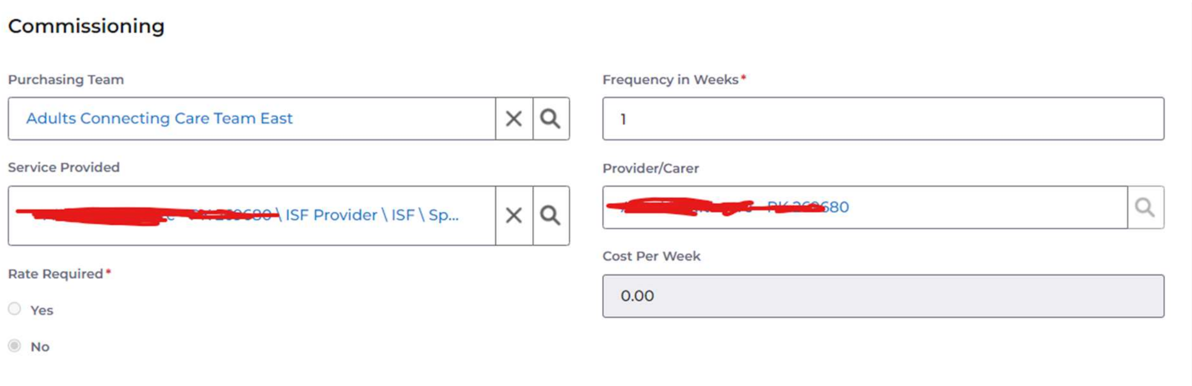


6. When finished, select **Save and Return to Previous Page.**

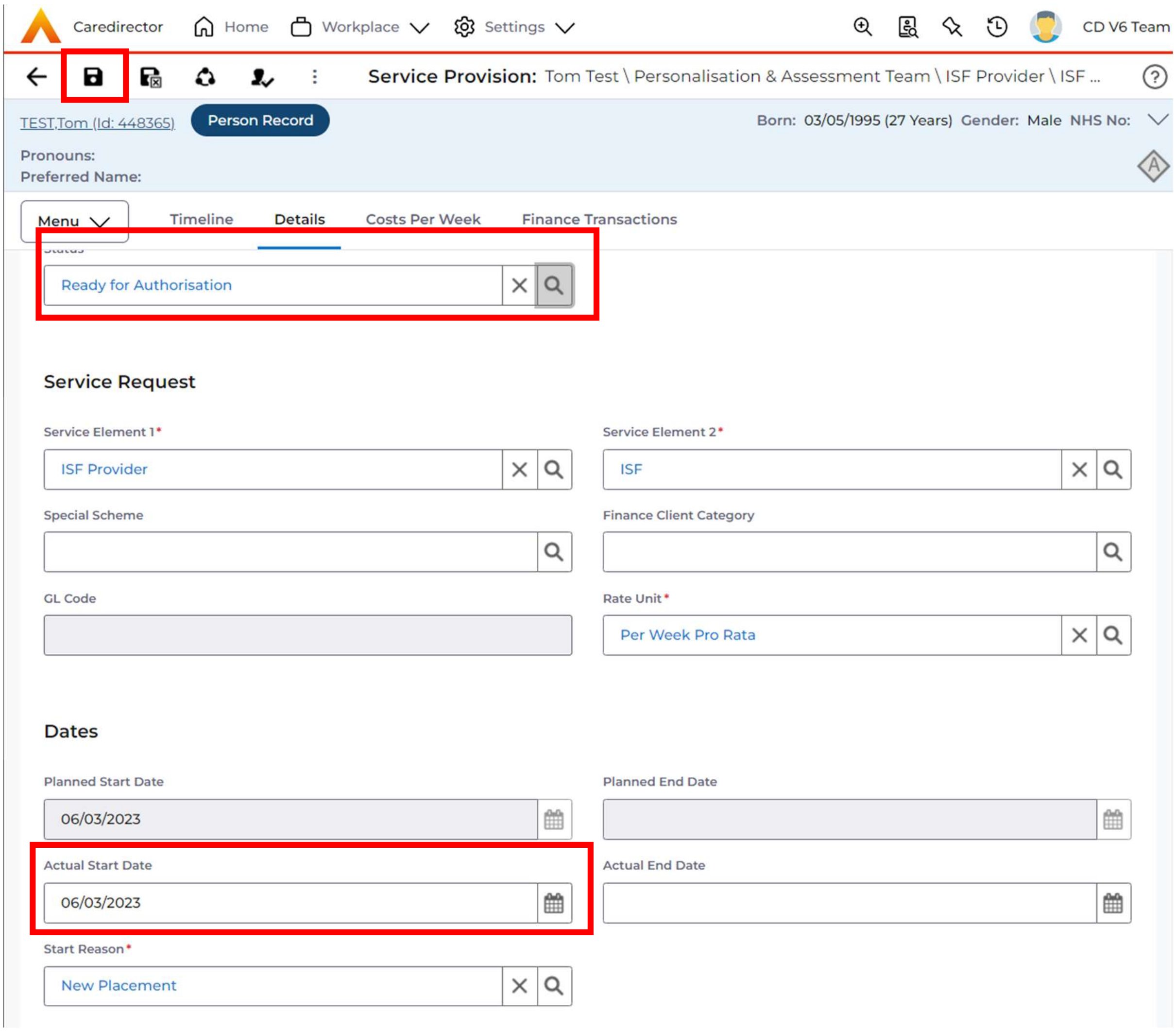
7. The **Personalisation & Assessment Team** will now pick up the **Booking Request** via an **Advanced Search** or **dashboard** widget.



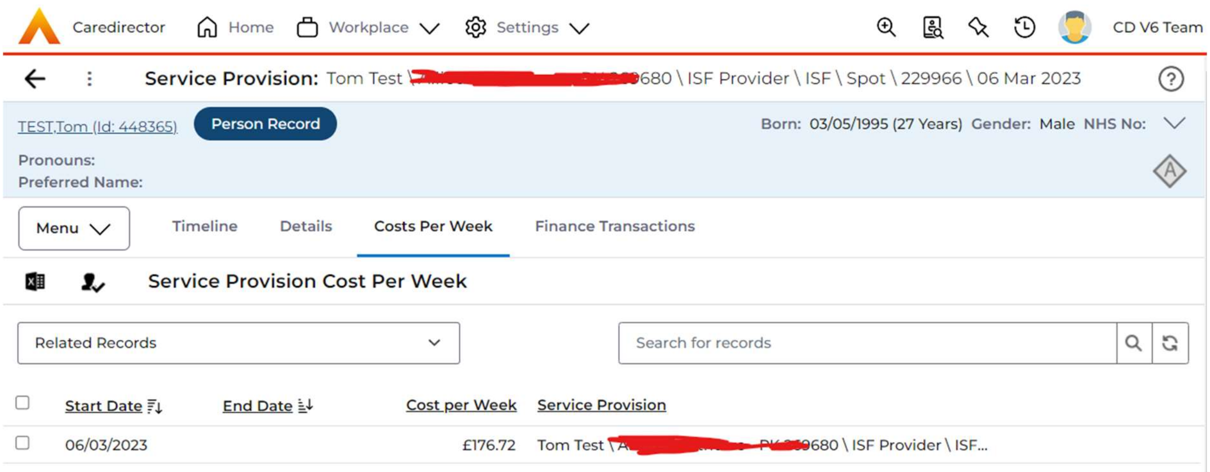
8. When opened, the current **Provider** allocated is **Personalisation and Assessment Team**. What they need to do, is look on **Notes** to find the name of the new provider and select that one from the provided list or create a new provider with the new details. Select this in the **Service Provided** field under **Commissioning** heading.
(How to set up a new provider: Can be found within the **Personalisation and Assessment Team** guide).



9. The **Cost Per Week** will not change and no charges will start. Enter in the **Actual Start Date** as this commence payments from then and change the **Status** to **Ready for Authorisation** and select **Save.**



10. Once **Saved**, select **Costs Per Week** tab, and check to ensure the default amount set up is calculated correctly. If this is different, then what is shown in **Notes** then the **Provider** will need adjusting.



11. **Service Provisions** that are set to **Ready for Authorisation** will be picked up via an **Advanced Search** and **Authorised** (How to Authorise a Service Provision) by Team Manager/ Support Services Co-ordinator.

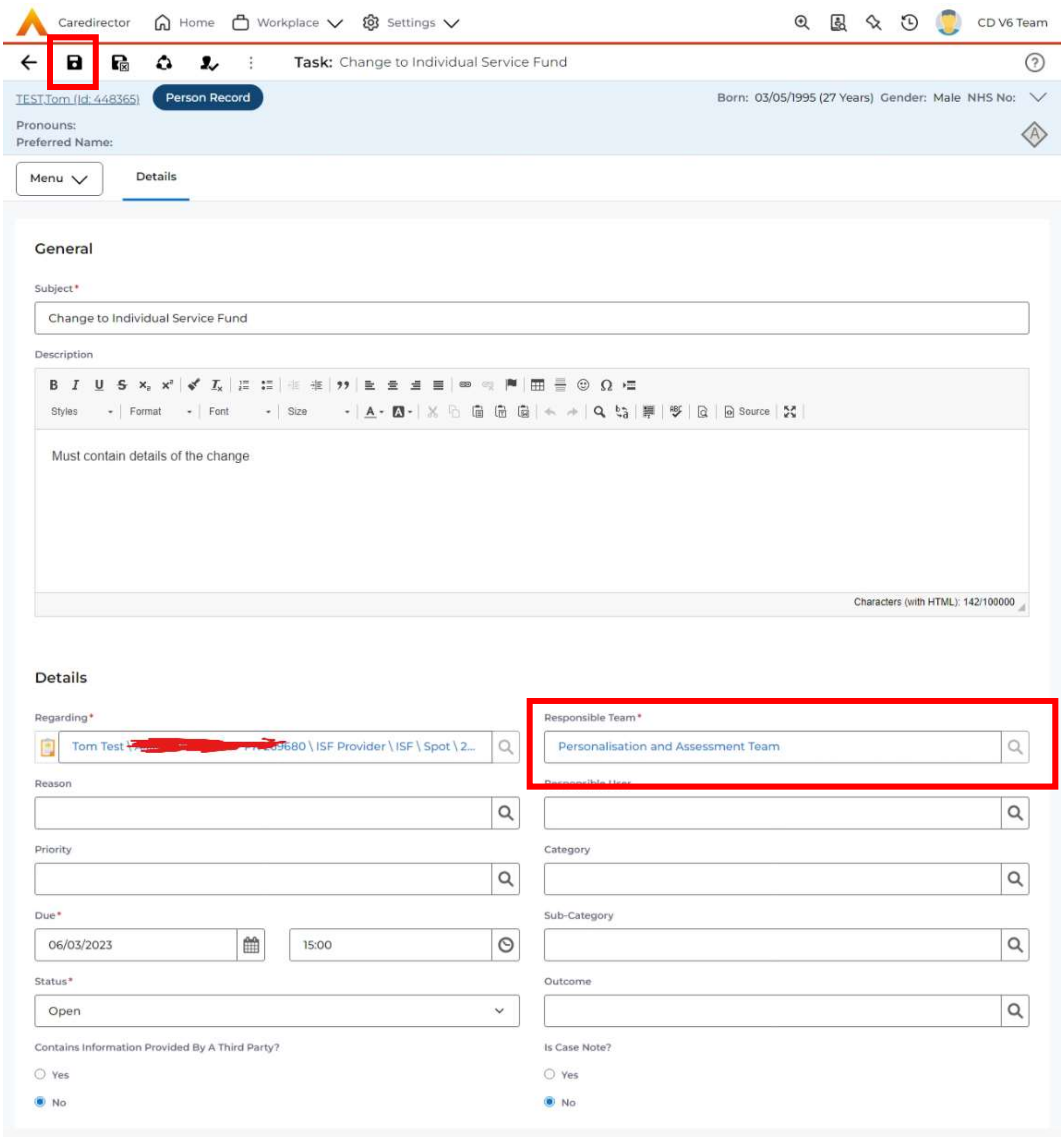
*****Once you know the date that the ISF is to cease please send details in an Activity to The Personalisation & Assessment Team, the team will record the Actual End Date in the Service Provision*****

Change to an Individual Service Fund (ISF)

1. **CSO/Admin** do not change the **Service Provision** for an **ISF** as this is done by the **Personalisation and Assessment Team.**

2. The Practitioner will send a **Task** on the person record of Caredirector with the following information:

Field	**Information**
Subject	Change to Individual Service Fund
Responsible Team	Personalisation and Assessment Team
Description	Must contain details of the change
Due	Today's date
Status	**Open**



3. Select **Save.**

4. The **Personalisation & Assessment Team** will now pick up the **Activity Task**. They will then **clone** the existing **Service Provision** and update with the **Rate** and **Start Date** of the new **ISF** and change the **Status** to **Ready for Authorisation**. The **Personalisation & Assessment Team** will also end the previous **Service Provision**.

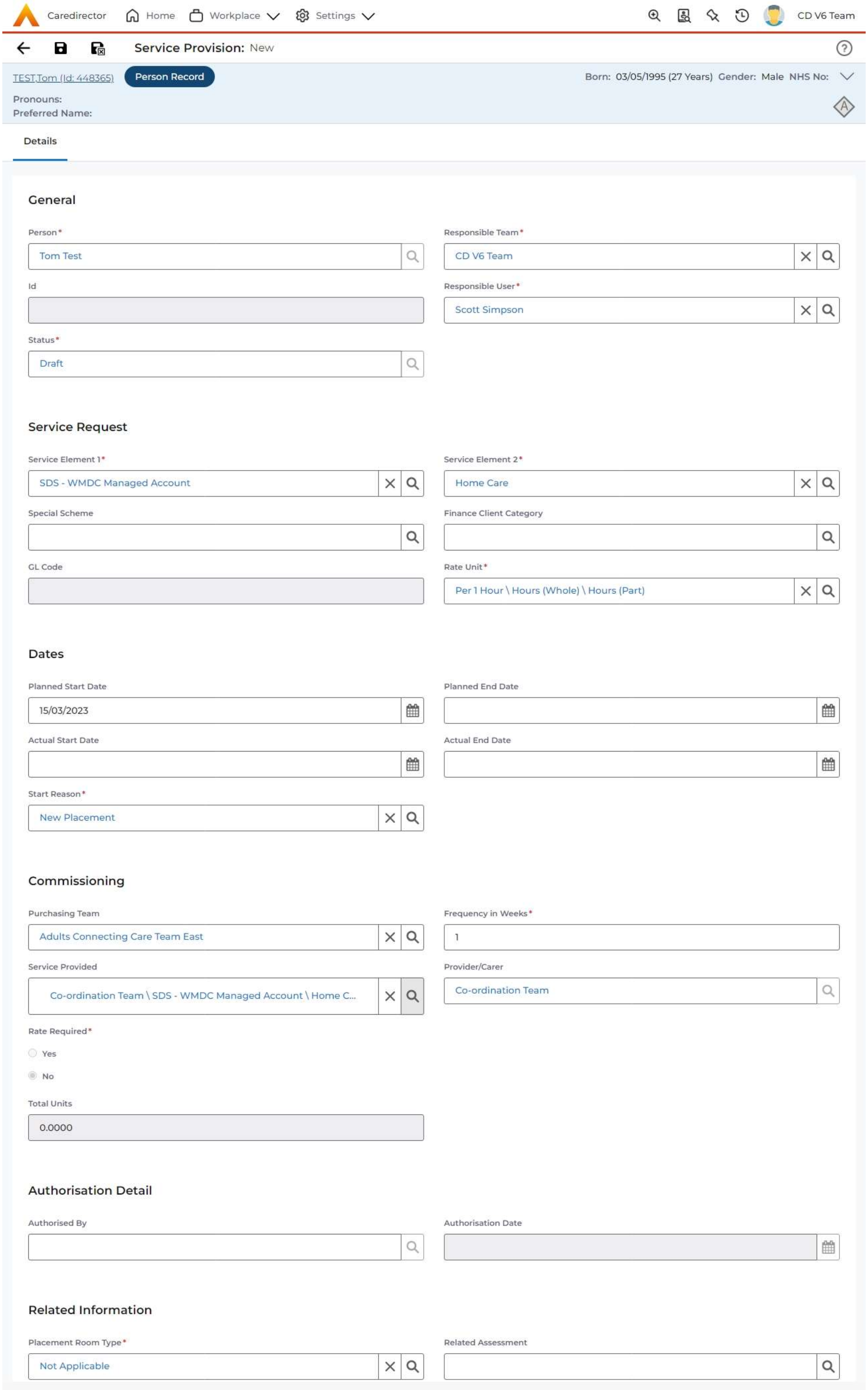
5. **Service Provisions** that are set to **Ready for Authorisation** will be picked up via an **Advanced Search** and **Authorised** (How to Authorise a Service Provision) by **Team Manager/ Support Services Co-ordinator.**

Home Care (Domiciliary Care) (Booking Request)

1. In the Care & Support Plan Timetable this service will be recorded as just **Managed Account**.
   (Please note that **Choice Support Services** (or any other **Provider** commissioned directly by Practitioner) are inputted the same as below however the **Co-ordination Team** must be informed by the **Practitioner/CSO/Admin** who the **Provider** is and the **Actual Start Date** (these details will be contained in the **Care & Support Plan)).**

2. The fields below are available in the new Service Provision screen. Please locate the relevant **person record > services > create new record** then enter the information side into the according field.
   For more information follow: How to find Service Provisions and Create New.

Field	Information
Service Element 1:	**SDS – WMDC Managed Account.**
Service Element 2:	Choose **Home Care.**
Rate Unit:	**Per 1 Hour \ Hours (Whole) \ Hours (Part)**
Planned Start Date:	**Today's date (the Actual Start Date will be entered by the Co-ordination Team).**
Actual Start Date:	Leave blank
Planned End Date:	Leave blank
Actual End Date:	Leave blank. (Can only be input on the day of the Planned End Date or after it).
Start Reason:	Choose appropriate option, usually 'New Placement' or 'Change in Type of Care.
Purchasing Team:	Choose appropriate Team.
Status:	**Draft.**
Placement Room Type:	Auto populates to 'Not Applicable'
Responsible Team:	Auto populated with the user's default team.
Responsible User:	Auto populated with the user's name
Related Case:	Select relevant case



Caredirector Home Workplace Settings CD V6 Team

Service Provision: New

TEST,Tom (Id: 448365) Person Record Born: 03/05/1995 (27 Years) Gender: Male NHS No:

Pronouns:
Preferred Name:

Details

General

Person* Tom Test

Responsible Team* CD V6 Team

Id

Responsible User* Scott Simpson

Status* Draft

Service Request

Service Element 1* SDS - WMDC Managed Account

Service Element 2* Home Care

Special Scheme

Finance Client Category

GL Code

Rate Unit* Per 1 Hour \ Hours (Whole) \ Hours (Part)

Dates

Planned Start Date 15/03/2023

Planned End Date

Actual Start Date

Actual End Date

Start Reason* New Placement

Commissioning

Purchasing Team Adults Connecting Care Team East

Frequency in Weeks* 1

Service Provided Co-ordination Team \ SDS - WMDC Managed Account \ Home C...

Provider/Carer Co-ordination Team

Rate Required*
Yes
No

Total Units 0.0000

Authorisation Detail

Authorised By

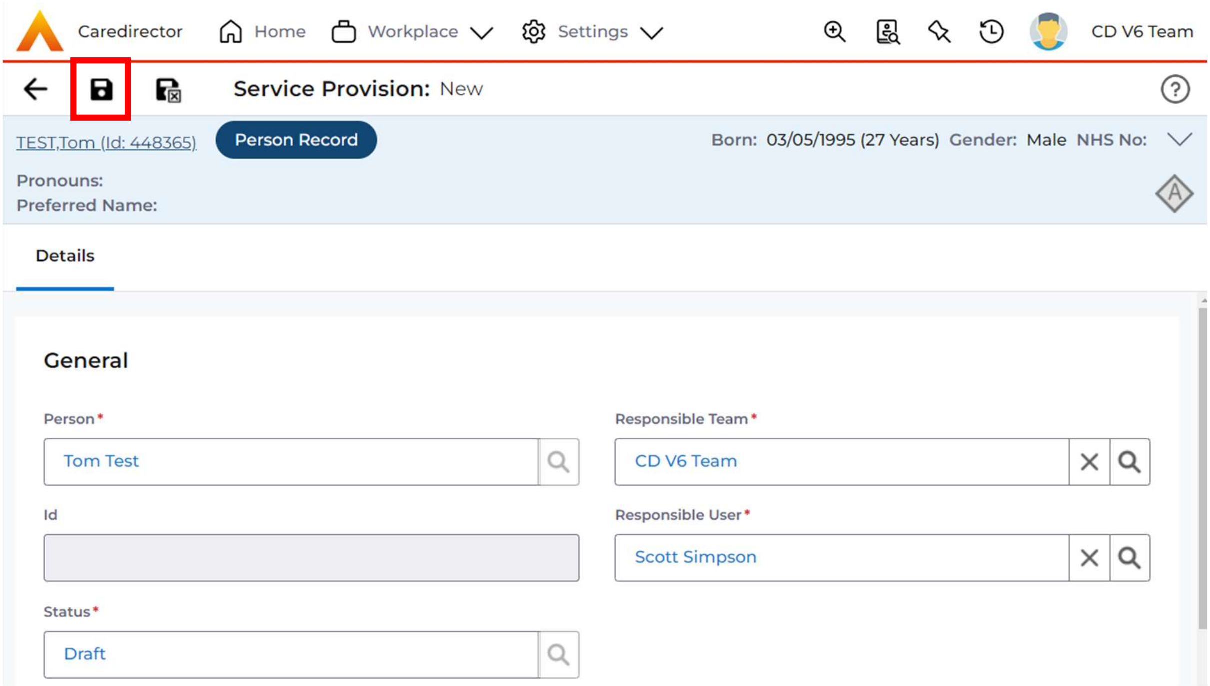
Authorisation Date

Related Information

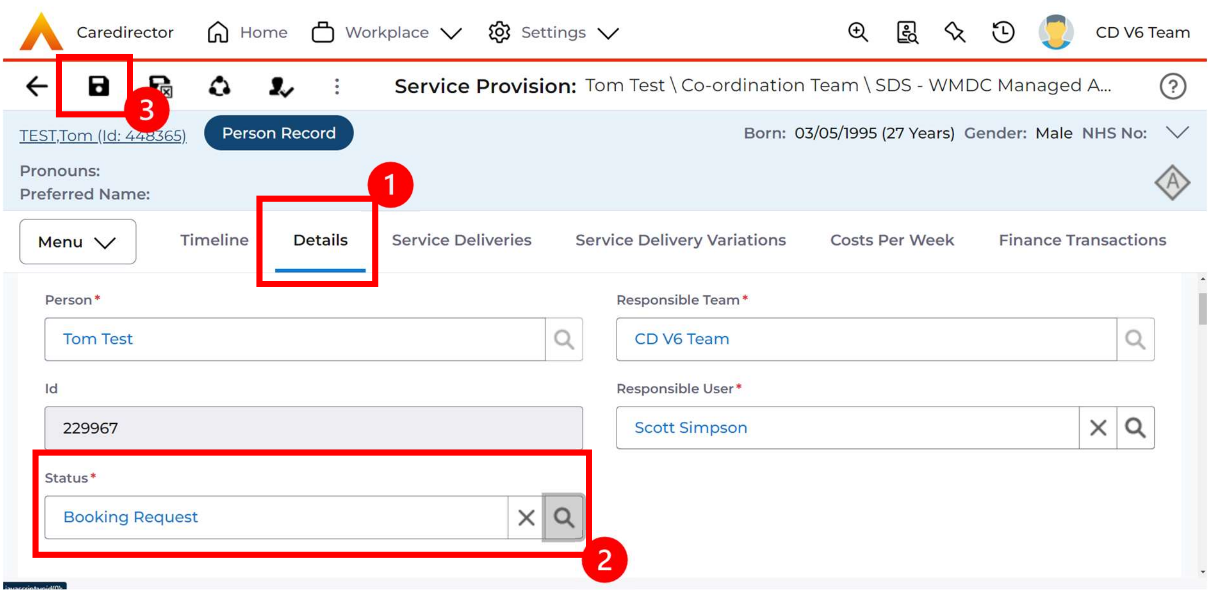
Placement Room Type* Not Applicable

Related Assessment

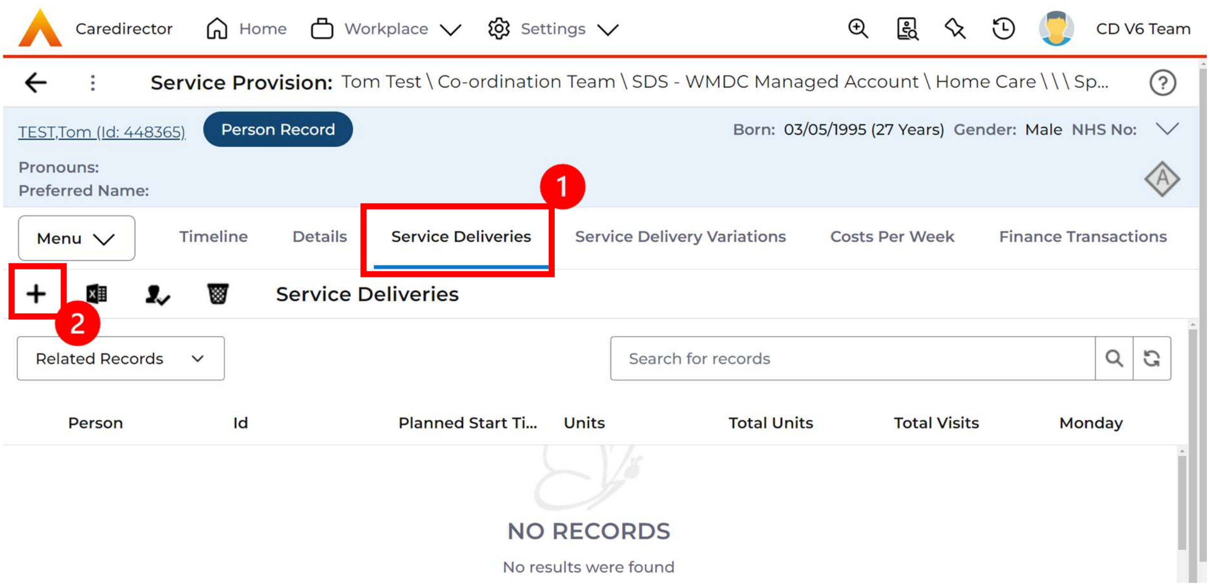
3. Select **Save** when completed.



4. When saved, go back into details as it will default you to the **Timeline** tab and select **Booking Request** then **Save.**



5. You will now need to record **Service Deliveries**. Select **Save** from the toolbar. Then select the **Service Deliveries** tab. Then **Create New Record.**

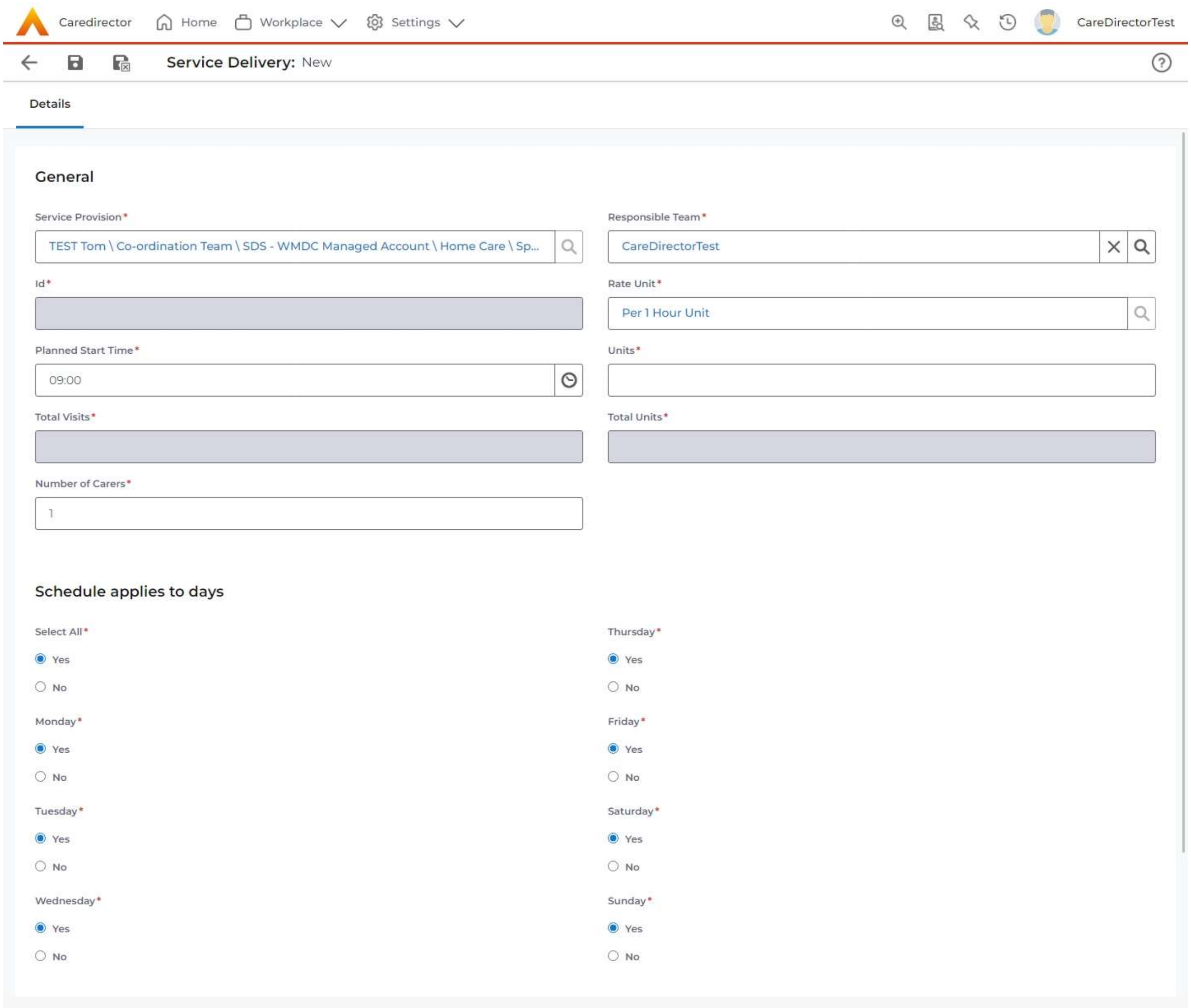


6. Now select your times and days of the week by completing the following information:
   a. If the Client needs more than one visit per day your will need to record each time band separately

   b. If the Client needs two carers you will need to change the **Number of Carers** field to the amount needed.

   c. Add the **Planned Start Time.**

   d. Add the **Units** (Duration of visit), in hours, using decimals e.g 1 hour = 1 or ½ hour = 30. Please see annexed table of Rate Unit Amounts, below.



7. **Save and Return to Previous Page**

8. The **Booking Request** will be picked up via an **Advanced Search** by the **Co-ordination Team**. They will then
    a. Source a **Provider**
    b. Change the **Service Provision Service Element 1** from **SDS – WMDC Managed Account to SDS – Managed Account**
    c. Re-enter the **Rate Unit – Per 1 Hour \ Hours (Whole) \ Hours (Part)**
    d. Re-enter the appropriate **Start Reason**
    e. Enter in the **Actual Start Date** from when the charging is set to start.
    f. Ensure the **Service Deliveries** are correct.
    g. Set to the correct **Provider**
    h. Change the **Status** to **Ready for Authorisation.**

9. **Service Provisions** that are set to **Ready for Authorisation** will be picked up via an **Advanced Search** and **Authorised** (How to Authorise a Service Provision) by Team Managers/ Support Services Co-ordinator.

Home Care Travel Time (Booking Request)

1. This will be recorded by the **Co-ordination team** only **– CSO/Admin** do not have to enter **Travel Time** when making a **Home Care Booking Request.**

2. The **Co-Ordination Team** will arrange travel along with the **Home Care request**, create the **Service Provision** with the correct **Provider**, **Actual Start Date** and **Service Deliveries** before setting the **Status** to **Ready for Authorisation.**

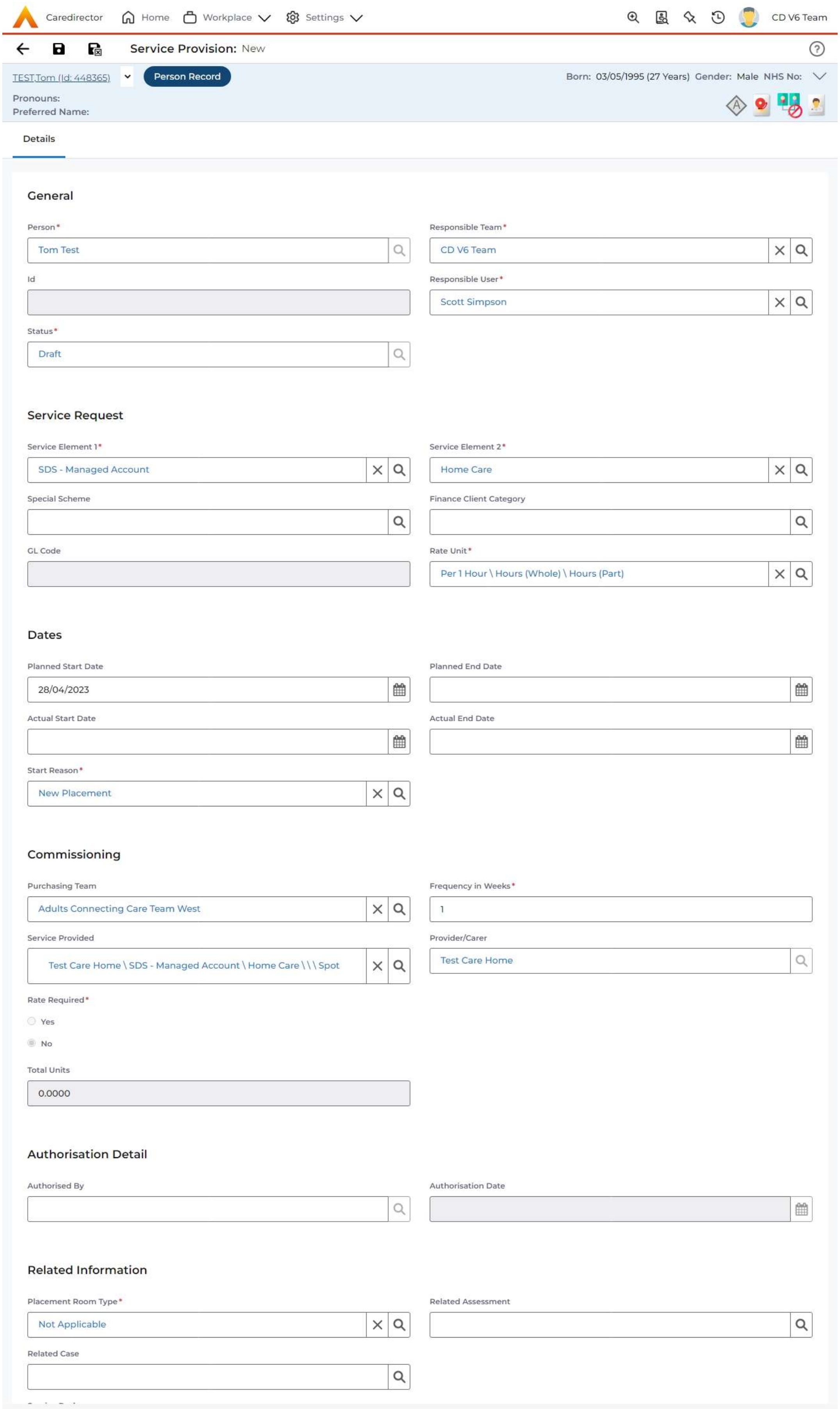
3. **Service Provisions** that are set to **Ready for Authorisation** will be picked up via an **Advanced Search** and **Authorised** (How to Authorise a Service Provision) by Team Managers/ Support Services Co-ordinator.

Home Care (Domiciliary Care) in Prisons

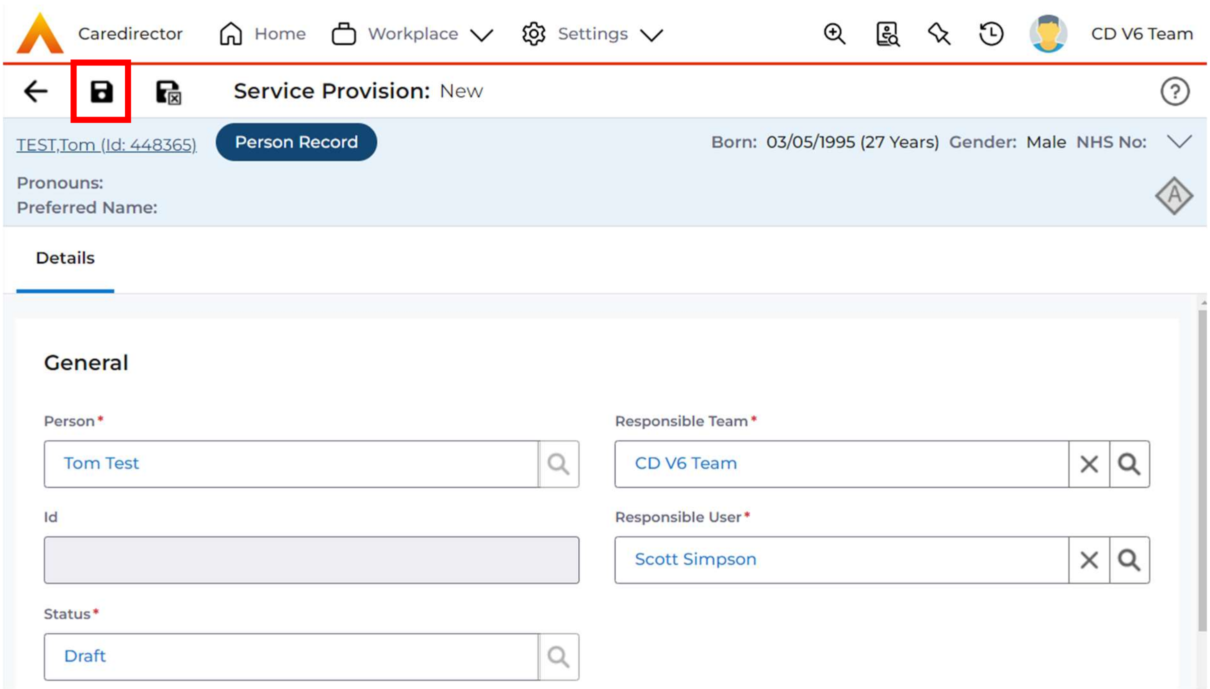
1. These **Service Provisions** will primarily be input by the **Adults Connecting Care Team West**. In the **Care & Support Plan Timetable** this service will be recorded as just **'Managed Account'.**

2. The fields below are available in the new Service Provision screen. Please locate the relevant **person record > services > create new record** then enter the information side into the according field.
   For more information follow: How to find Service Provisions and Create New.

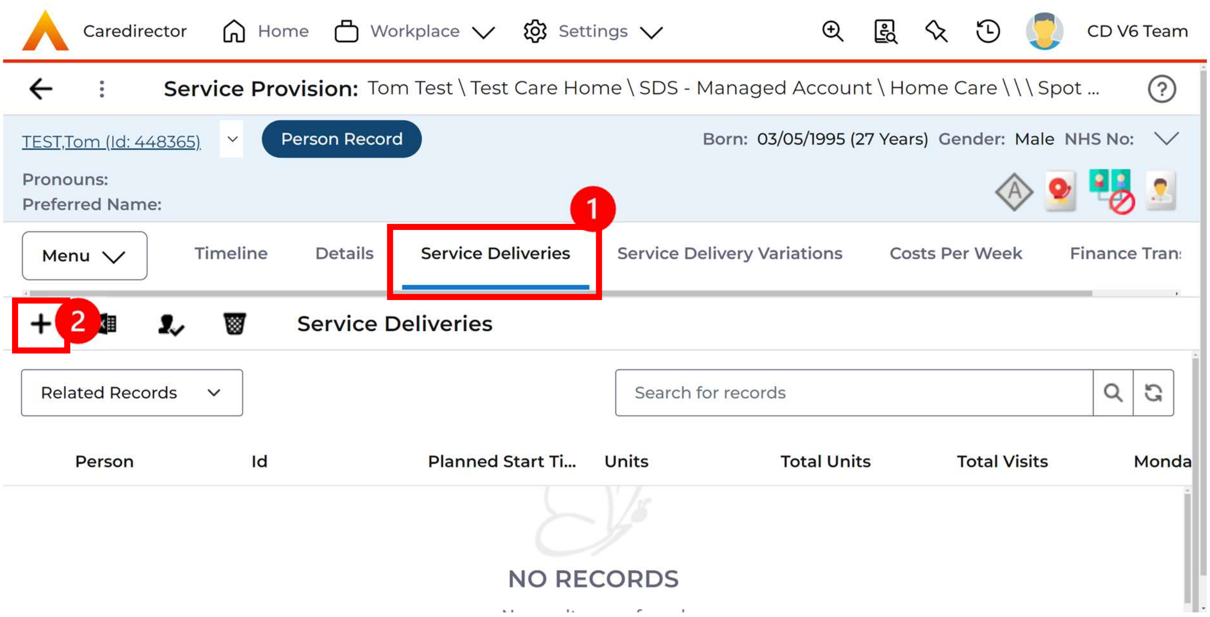
Field	Information
Service Element 1:	**SDS – Managed Account**
Service Element 2:	Choose **Home Care.**
Finance Client Category:	Choose appropriate option.
Rate Unit:	**Per 1 Hour \ Hours (Whole) \ Hours (Part)**
Planned Start Date:	Leave blank
Actual Start Date:	This will be given to you by the Practitioner the will commence charges from this date.
Planned End Date:	Leave blank
Actual End Date:	Leave blank
Start Reason:	Choose **New Placement**
Purchasing Team:	Choose appropriate Team.
Service Provided:	Type in **Providers Name. Search.** Select **Provider** from list.
Status:	**Draft.**
Placement Room Type:	Auto populates to 'Not Applicable'
Responsible Team:	Auto populated with the user's default team.
Responsible User:	Auto populated with the user's name
Related Case:	Select relevant case


Caredirector
Home
Workplace
Settings
CD V6 Team
Service Provision: New
TEST,Tom (Id: 448365)
Person Record
Born: 03/05/1995 (27 Years) Gender: Male NHS No:
Pronouns:
Preferred Name:
Details
General
Person*
Tom Test
Responsible Team*
CD V6 Team
Id
Responsible User*
Scott Simpson
Status*
Draft
Service Request
Service Element 1*
SDS - Managed Account
Service Element 2*
Home Care
Special Scheme
Finance Client Category
GL Code
Rate Unit*
Per 1 Hour \ Hours (Whole) \ Hours (Part)
Dates
Planned Start Date
28/04/2023
Planned End Date
Actual Start Date
Actual End Date
Start Reason*
New Placement
Commissioning
Purchasing Team
Adults Connecting Care Team West
Frequency in Weeks*
1
Service Provided
Test Care Home \ SDS - Managed Account \ Home Care \ \ \ Spot
Provider/Carer
Test Care Home
Rate Required*
Yes
No
Total Units
0.0000
Authorisation Detail
Authorised By
Authorisation Date
Related Information
Placement Room Type*
Not Applicable
Related Assessment
Related Case

4. Select **Save** when completed.



5. You will now need to record **Service Deliveries**. Select **Save** from the toolbar. Then select the **Service Deliveries** tab. Then **Create New Record.**



6. Now select your times and days of the week by completing the following information:

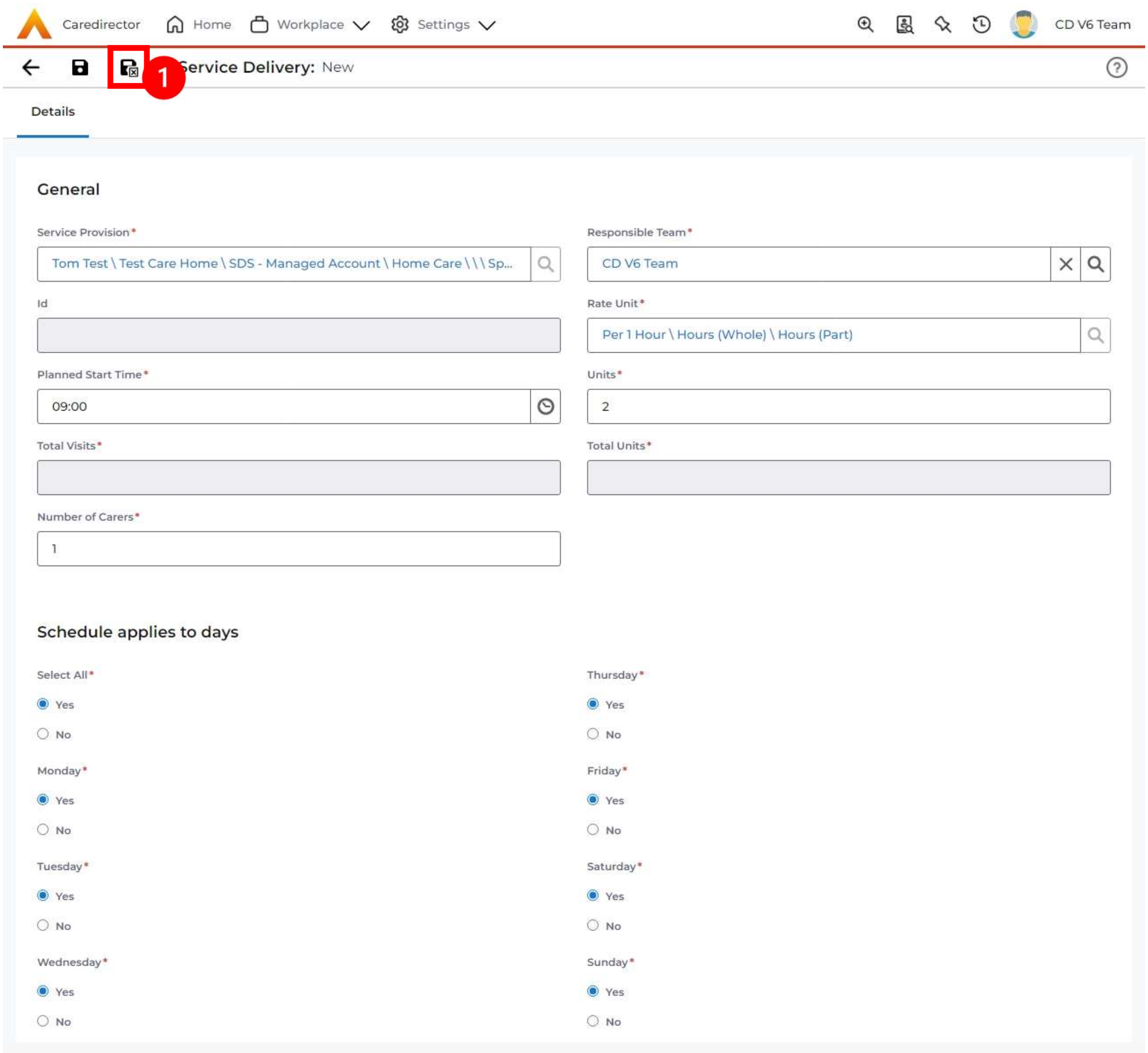
e. If the Client needs more than one visit per day your will need to record each time band separately

f. If the Client needs two carers you will need to change the **Number of Carers** field to the amount needed.

g. Change the **Planned Start Time.**

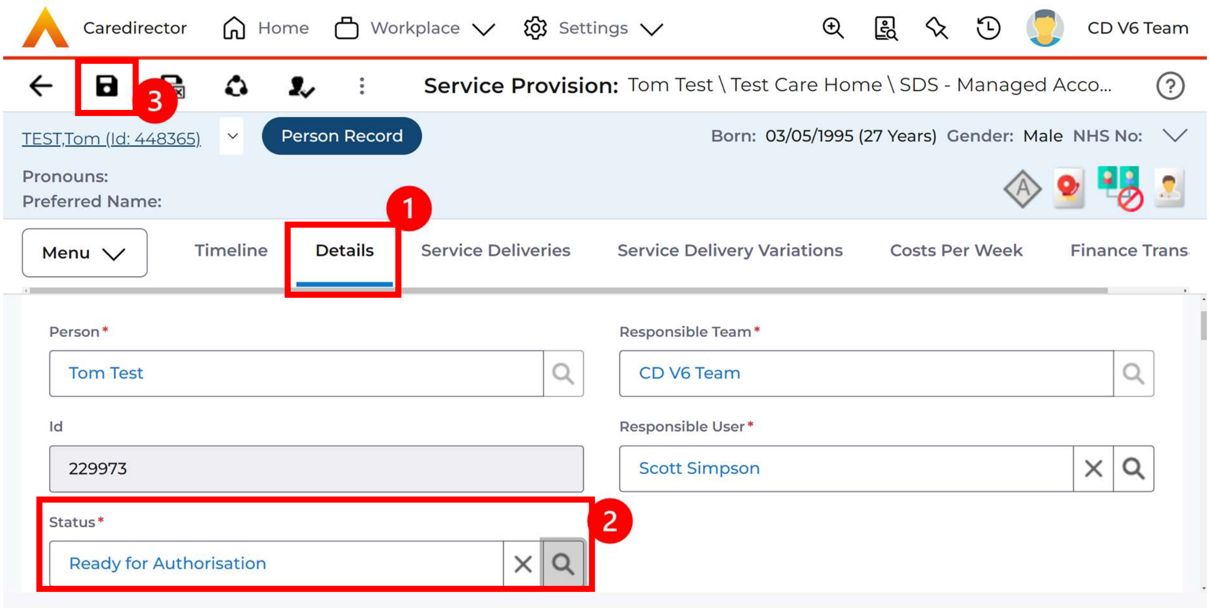
h. Add the **Units** (Duration of visit), in hours, using decimals e.g 1 hour = 1 or ½ hour = 30. Please see annexed table of Rate Unit Amounts, below.

7. Select **Save and Return to Previous Page**.



8. When finished select **Save and Return to Previous Page** on the toolbar.

9. Locate the **Service Provision Details** tab and change the **Status** to **Ready for Authorisation** and **Save.**



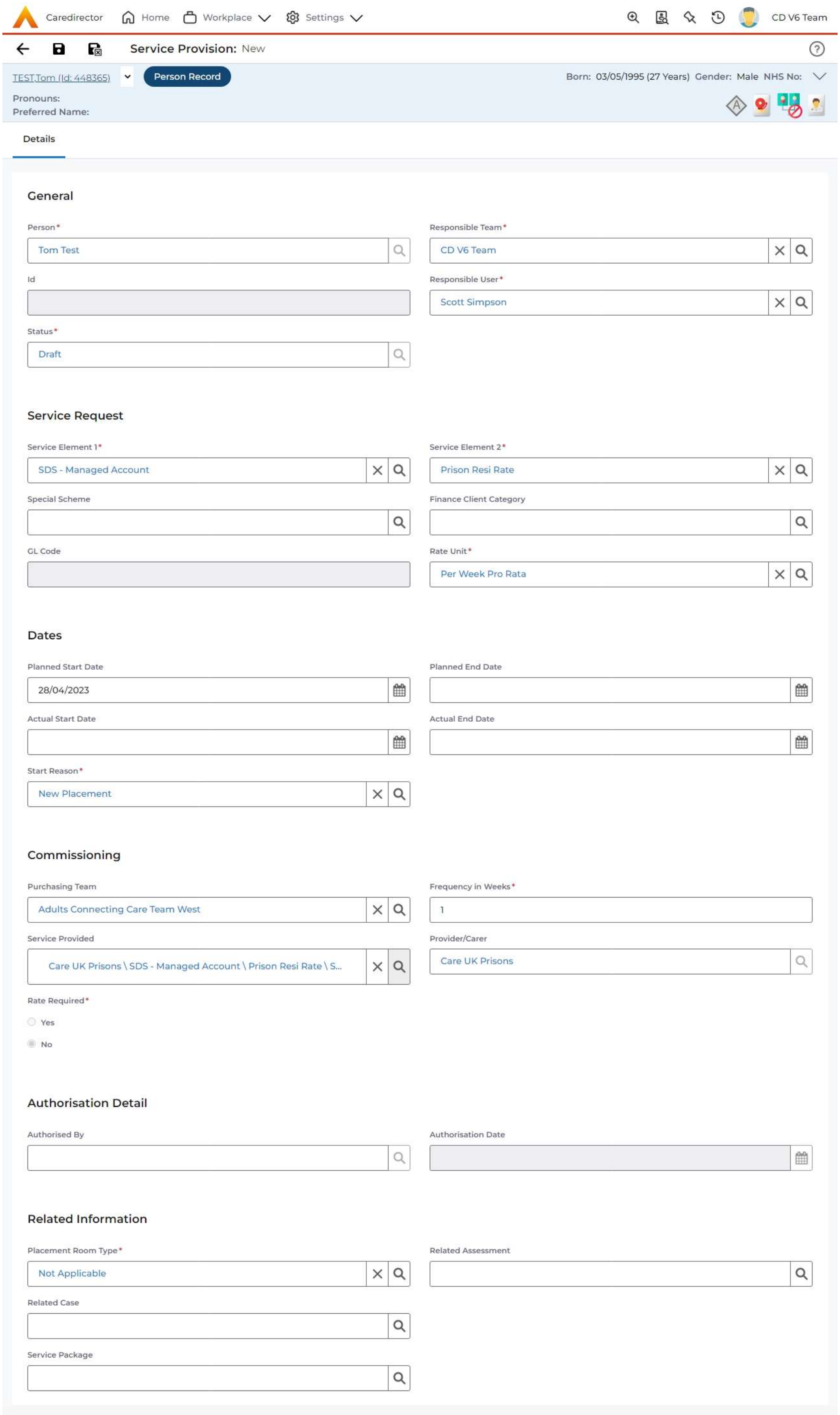
10. **Service Provisions** that are set to **Ready for Authorisation** will be picked up via an **Advanced Search** and **Authorised** ([How to Authorise a Service Provision]) by Team Managers/ Support Services Co-ordinator.

Residential Rates in Prisons (Domiciliary Care)

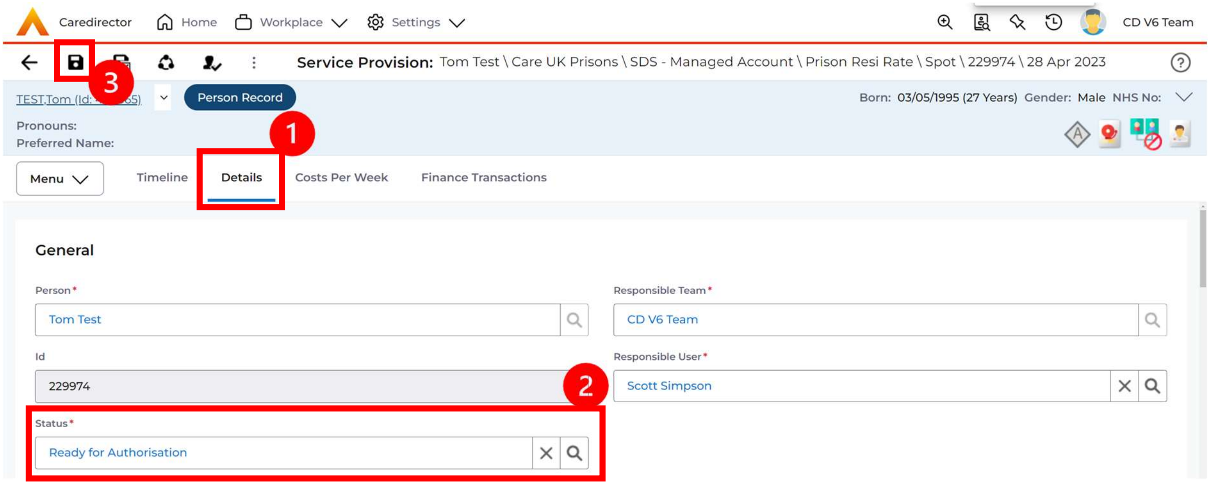
1. This option is used when the prisoner needs more than just a few hours of care per day and will be recorded at a **'Per Week Pro Rata'** rate. These **Service Provisions** will primarily be input by the **Adults Connecting Care Team West.**

2. The fields below are available in the new Service Provision screen. Please locate the relevant **person record > services > create new record** then enter the information side into the according field.
   For more information follow: How to find Service Provisions and Create New.

Field	Information
Service Element 1:	**SDS – Managed Account**
Service Element 2:	Choose **Person Resi Rate**
Rate Unit:	**Per Week Pro Rata**
Planned Start Date:	Leave blank
Actual Start Date:	**Enter date service is to start.** This will be given to you by the **Practitioner.**
Planned End Date:	Leave blank
Actual End Date:	Leave blank
Start Reason:	Choose **New Placement**
Purchasing Team:	Choose appropriate Team.
Service Provided:	Choose **Care UK Prision**.
Status:	**Draft.**
Placement Room Type:	Auto populates to 'Not Applicable'
Responsible Team:	Auto populated with the user's default team.
Responsible User:	Auto populated with the user's name
Related Case:	Select relevant case


Caredirector
Home
Workplace
Settings
CD V6 Team
Service Provision: New
TEST,Tom (Id: 448365)
Person Record
Born: 03/05/1995 (27 Years) Gender: Male NHS No:
Pronouns:
Preferred Name:
Details
General
Person*
Tom Test
Id
Status*
Draft
Responsible Team*
CD V6 Team
Responsible User*
Scott Simpson
Service Request
Service Element 1*
SDS - Managed Account
Special Scheme
GL Code
Service Element 2*
Prison Resi Rate
Finance Client Category
Rate Unit*
Per Week Pro Rata
Dates
Planned Start Date
28/04/2023
Actual Start Date
Start Reason*
New Placement
Planned End Date
Actual End Date
Commissioning
Purchasing Team
Adults Connecting Care Team West
Service Provided
Care UK Prisons \ SDS - Managed Account \ Prison Resi Rate \ S...
Rate Required*
Yes
No
Frequency in Weeks*
1
Provider/Carer
Care UK Prisons
Authorisation Detail
Authorised By
Authorisation Date
Related Information
Placement Room Type*
Not Applicable
Related Case
Service Package
Related Assessment

3. Select **Save**. When **Saved** go to the **Details** tab and change the **Status** to **Ready for Authorisation**. Select **Save** again.



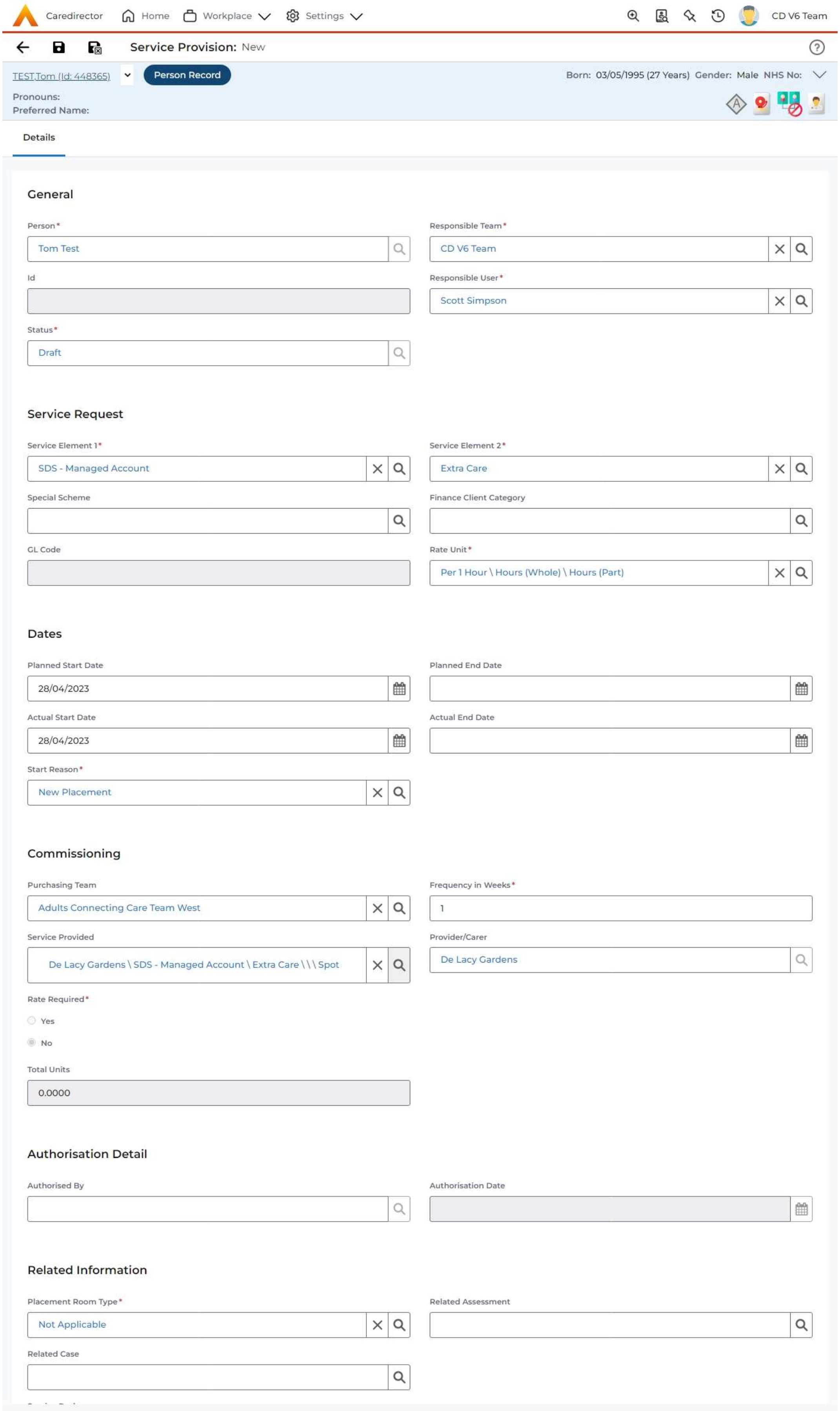
4. **Service Provisions** that are set to **Ready for Authorisation** will be picked up via an **Advanced Search** and **Authorised** (How to Authorise a Service Provision) by Team Managers/ Support Services Co-ordinator.

Extra Care for DeLacy Gardens & Sherwood Court (Booking Request)

1. This is for **new packages only** not changes to existing packages.

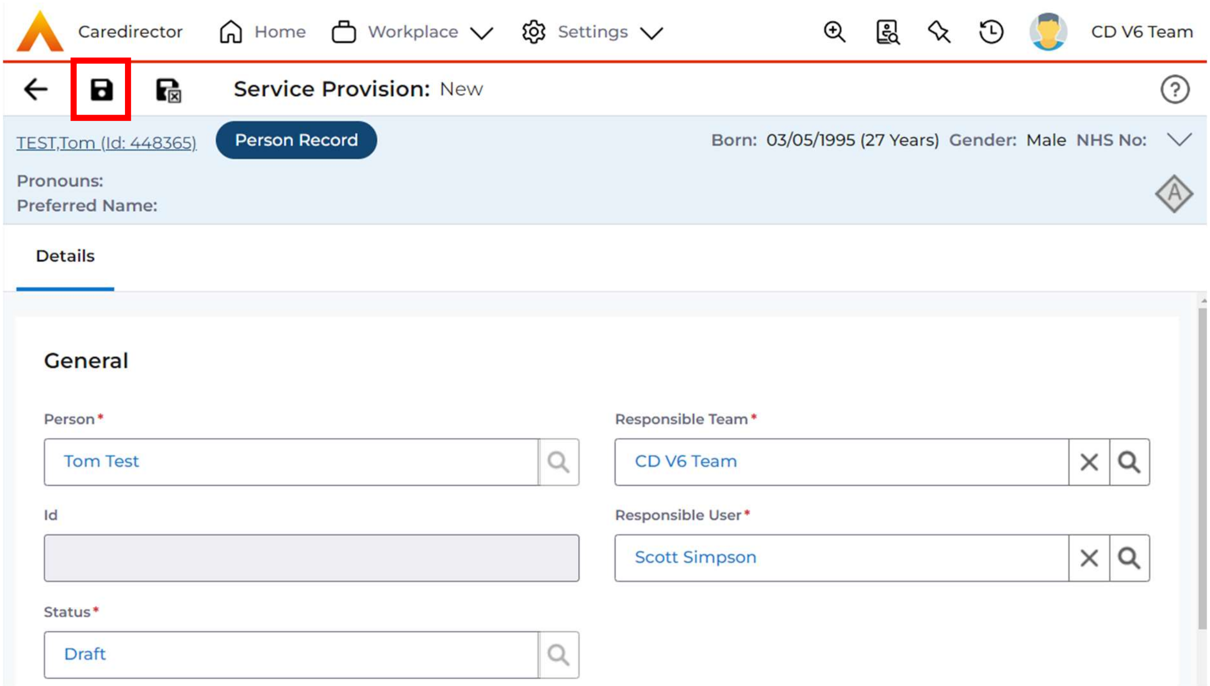
2. The fields below are available in the new Service Provision screen. Please locate the relevant **person record > services > create new record** then enter the information side into the according field.
   For more information follow: How to find Service Provisions and Create New.

Field	**Information**
Service Element 1:	**SDS – Managed Account**
Service Element 2:	**Extra Care.**
Rate Unit:	**Per 1 Hour \ Hours (Whole) \ Hours (Part)**
Planned Start Date:	**Enter today's date.**
Actual Start Date:	Leave blank. The **Peripatetic Team** will organise the actual start date with care.
Planned End Date:	Leave blank
Actual End Date:	Leave blank
Start Reason:	Choose appropriate option, generally '**New Placement**'.
Purchasing Team:	Choose appropriate Team.
Service Provided:	Choose **DeLacy Gardens** or **Sherwood Court.**
Status:	**Draft.**
Placement Room Type:	Auto populates to 'Not Applicable'
Responsible Team:	Auto populated with the user's default team.
Responsible User:	Auto populated with the user's name
Related Case:	Select relevant case

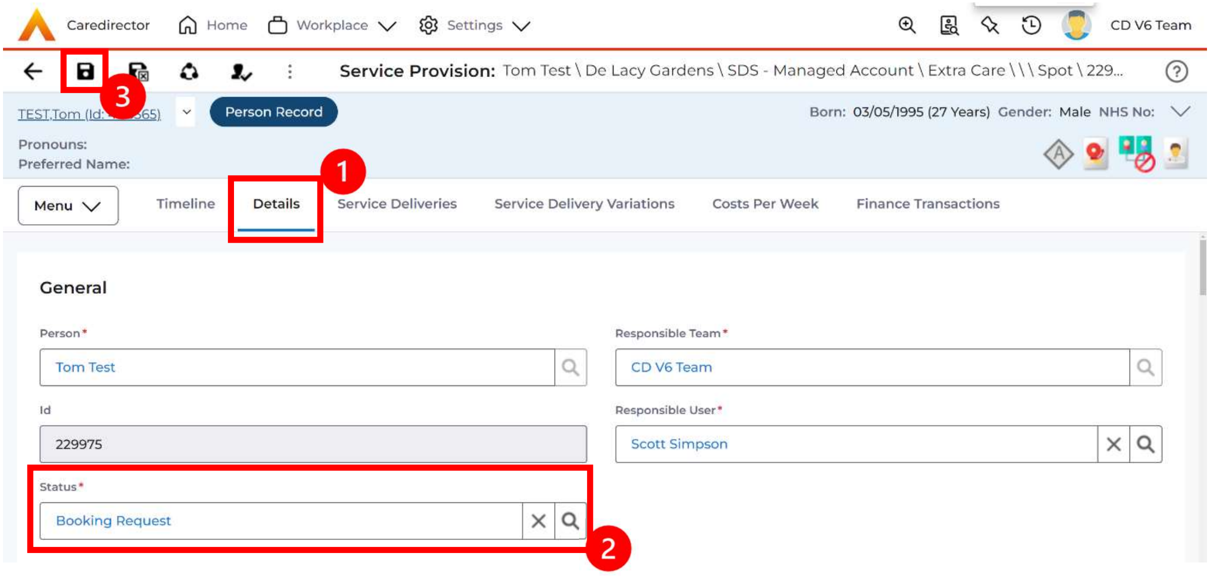


Caredirector
Home
Workplace
Settings
CD V6 Team
Service Provision: New
TEST,Tom (Id: 448365)
Person Record
Born: 03/05/1995 (27 Years) Gender: Male NHS No:
Pronouns:
Preferred Name:
Details
General
Person*
Tom Test
Responsible Team*
CD V6 Team
Id
Responsible User*
Scott Simpson
Status*
Draft
Service Request
Service Element 1*
SDS - Managed Account
Service Element 2*
Extra Care
Special Scheme
Finance Client Category
GL Code
Rate Unit*
Per 1 Hour \ Hours (Whole) \ Hours (Part)
Dates
Planned Start Date
28/04/2023
Planned End Date
Actual Start Date
28/04/2023
Actual End Date
Start Reason*
New Placement
Commissioning
Purchasing Team
Adults Connecting Care Team West
Frequency in Weeks*
1
Service Provided
De Lacy Gardens \ SDS - Managed Account \ Extra Care \ \ \ Spot
Provider/Carer
De Lacy Gardens
Rate Required*
Yes
No
Total Units
0.0000
Authorisation Detail
Authorised By
Authorisation Date
Related Information
Placement Room Type*
Not Applicable
Related Assessment
Related Case

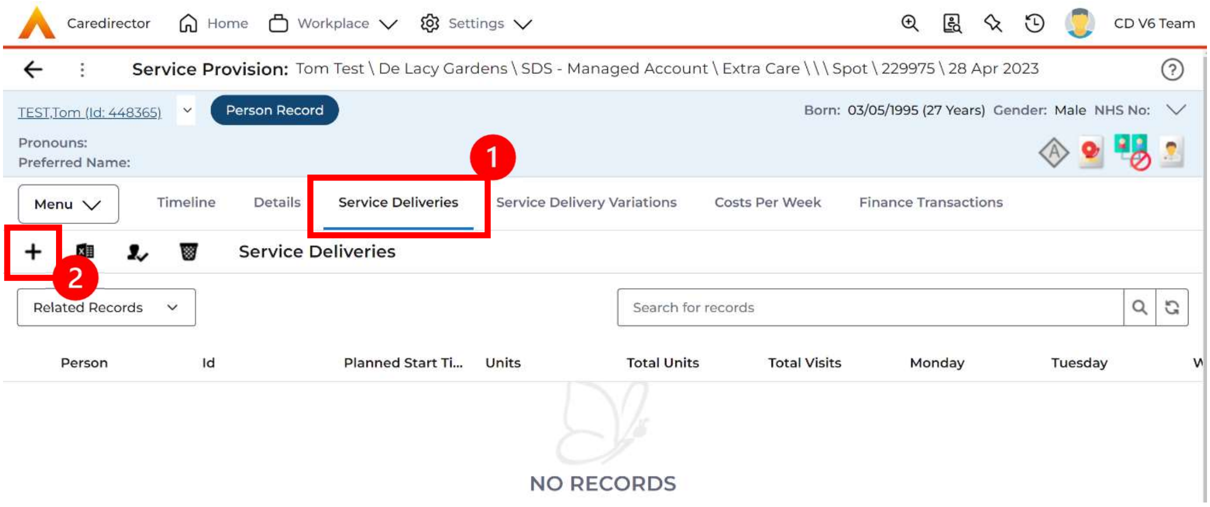
4. Select **Save** when completed.



5. When saved, go back into details as it will default you to the **Timeline** tab and select **Booking Request** then **Save.**



6. You will now need to record **Service Deliveries**. Select **Save** from the toolbar. Then select the **Service Deliveries** tab. Then **Create New Record.**

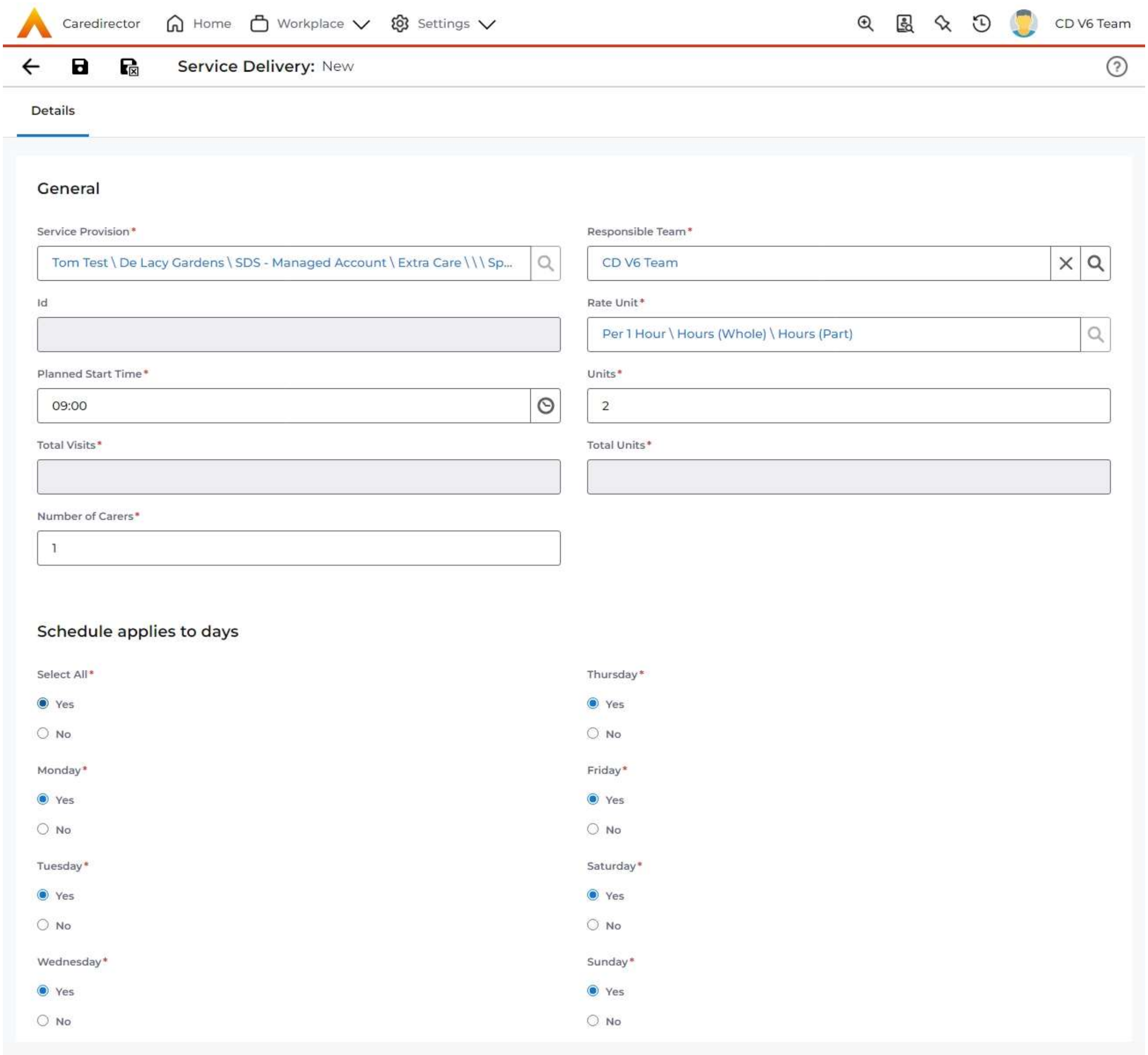


7. Now select your times and days of the week by completing the following information:
   a. If the Client needs more than one visit per day your will need to record each time band separately

   b. If the Client needs two carers you will need to change the **Number of Carers** field to the amount needed.

   c. Add the **Planned Start Time.**

   d. Add the **Units** (Duration of visit), in hours, using decimals e.g 1 hour = 1 or ½ hour = 30. Please see annexed table of Rate Unit Amounts, below.



8. **Save and Return to Previous Page.** Once **Saved,** this will automatically generate **Total Visits/ Total Units.**

9. The **Booking Request** will be picked up via an **Advanced Find** by the **Support Planner** in the **Peripatetic Team**. They will then arrange the **Home Care** with **DeLacy Gardens** or **Sherwood Court**, enter the **Actual Start Date,** and ensure that the **Service Deliveries** are correct before setting the **Status** to **Ready for Authorisation.**

10. **Service Provisions** that are set to **Ready for Authorisation** will be picked up via an **Advanced Search** and **Authorised** (How to Authorise a Service Provision) by Team Managers/ Support Services Co-ordinator.

Changes to Extra Care for DeLacy Gardens & Sherwood Court

1. The Practitioner will complete an **Adult Change** in **Service Request Form** in the usual way and the **Co-ordination Team** will pick these up and send them through to the **In-House Peripatetic Team** who will arrange for the increase/decrease to take effect.

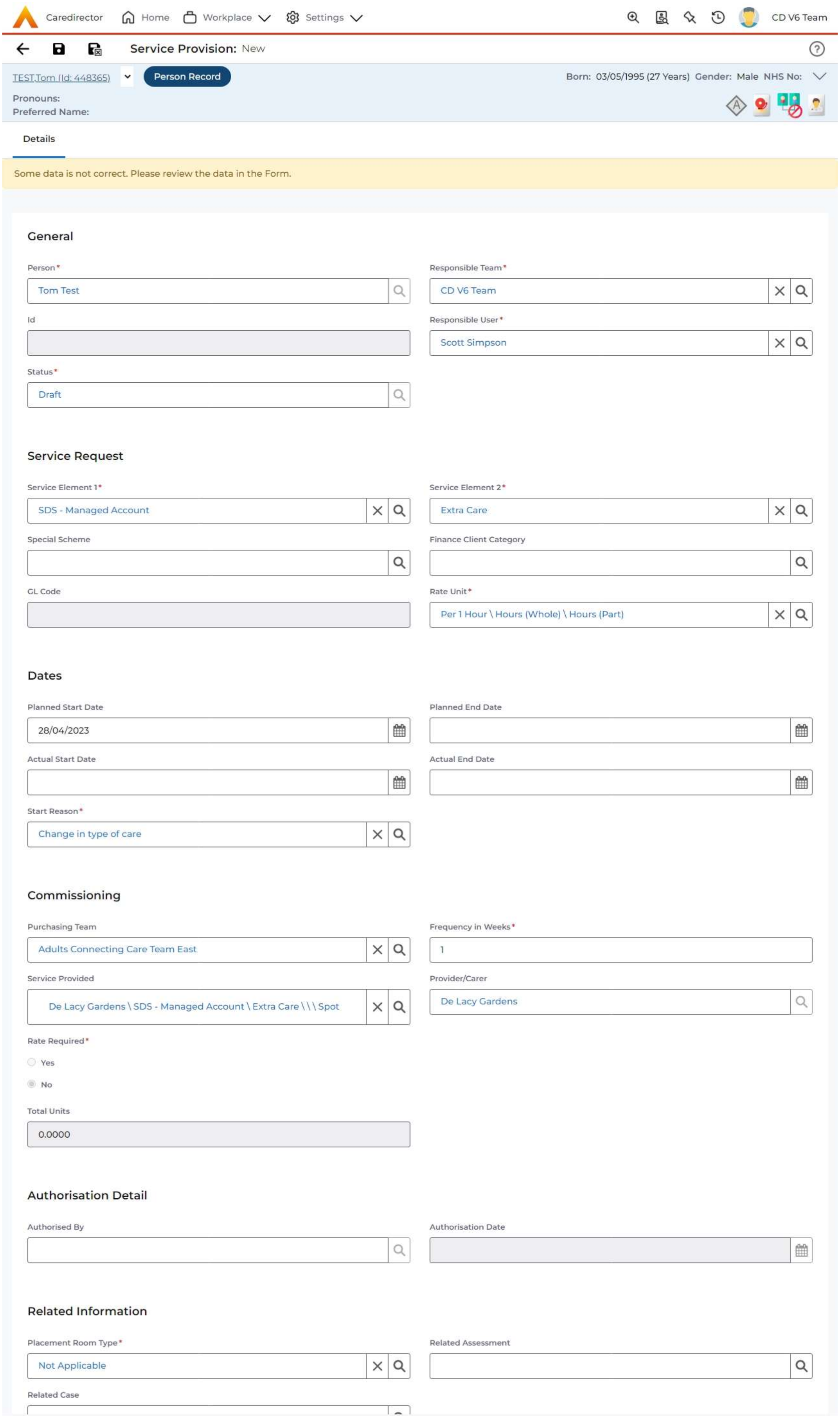
2. The Practitioner to liaise with the **Peripatetic Team** regarding agreed changes and then change the **Care Plan** accordingly. **Closing** the **Care Plan** will then trigger an **Activity** to the **Business Support Dashboard** and the **CSO/Admin** will pick this up and record the new **Service Provision** with the new **Service Deliveries** (the existing **Service Provision** can be **cloned**, amended and the original ended). Remember to start the new **Service Provision** from the date of the change and end the previous **Service Provision** the day before the new one starts. The **Status** on the **Service Provision** will then be set to **Ready for Authorisation.**

3. **Service Provisions** that are set to **Ready for Authorisation** will be picked up via an **Advanced Search** and **Authorised** (How to Authorise a Service Provision) by Team Managers/ Support Services Co-ordinator.

Extra Care Whinn Dale & Frickley Mews

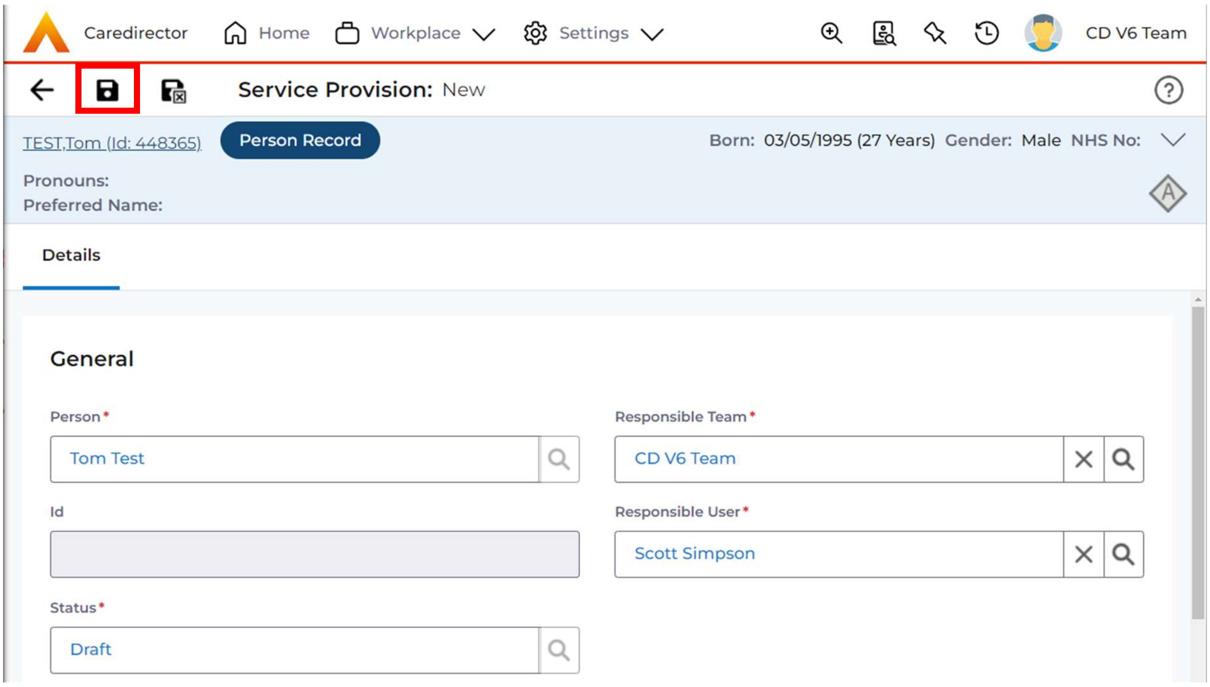
1. The fields below are available in the new Service Provision screen. Please locate the relevant **person record > services > create new record** then enter the information side into the according field.
   For more information follow: How to find Service Provisions and Create New.

Field	Information
Service Element 1:	**SDS – Managed Account**
Service Element 2:	**Extra Care.**
Rate Unit:	**Per 1 Hour \ Hours (Whole) \ Hours (Part)**
Planned Start Date:	Leave blank
Actual Start Date:	**Input date provided by Practitioner** who will have already agreed this with the Provider.
Planned End Date:	Leave blank
Actual End Date:	Leave blank
Start Reason:	Choose appropriate option, usually ‘New Placement’.
Purchasing Team:	Choose appropriate Team.
Service Provided:	Choose appropriate Provider.
Status:	**Draft.**
Placement Room Type:	Auto populates to ‘Not Applicable’
Responsible Team:	Auto populated with the user’s default team.
Responsible User:	Auto populated with the user’s name
Related Case:	Select relevant case

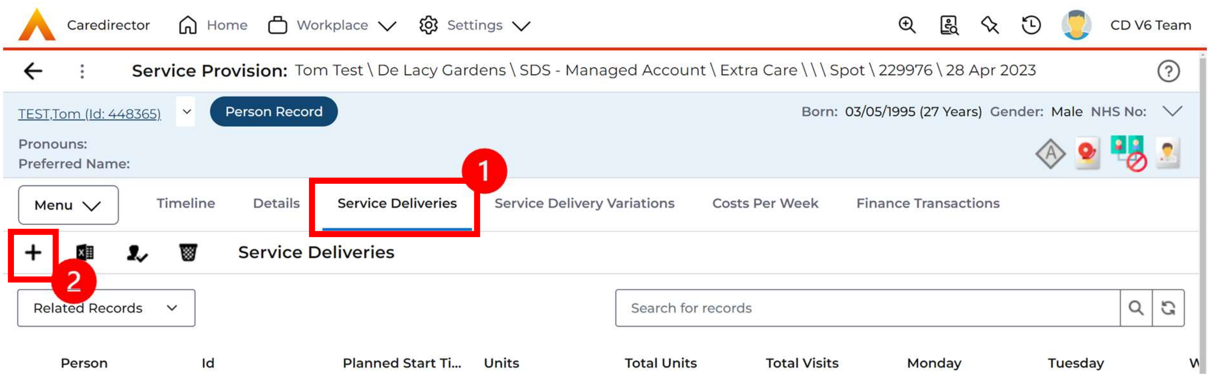


Caredirector
Home
Workplace
Settings
CD V6 Team
Service Provision: New
TEST,Tom (Id: 448365)
Person Record
Born: 03/05/1995 (27 Years) Gender: Male NHS No:
Pronouns:
Preferred Name:
Details
Some data is not correct. Please review the data in the Form.
General
Person*
Tom Test
Responsible Team*
CD V6 Team
Id
Responsible User*
Scott Simpson
Status*
Draft
Service Request
Service Element 1*
SDS - Managed Account
Service Element 2*
Extra Care
Special Scheme
Finance Client Category
GL Code
Rate Unit*
Per 1 Hour \ Hours (Whole) \ Hours (Part)
Dates
Planned Start Date
28/04/2023
Planned End Date
Actual Start Date
Actual End Date
Start Reason*
Change in type of care
Commissioning
Purchasing Team
Adults Connecting Care Team East
Frequency in Weeks*
1
Service Provided
De Lacy Gardens \ SDS - Managed Account \ Extra Care \ \ \ Spot
Provider/Carer
De Lacy Gardens
Rate Required*
Yes
No
Total Units
0.0000
Authorisation Detail
Authorised By
Authorisation Date
Related Information
Placement Room Type*
Not Applicable
Related Assessment
Related Case

2. Select **Save** when completed.

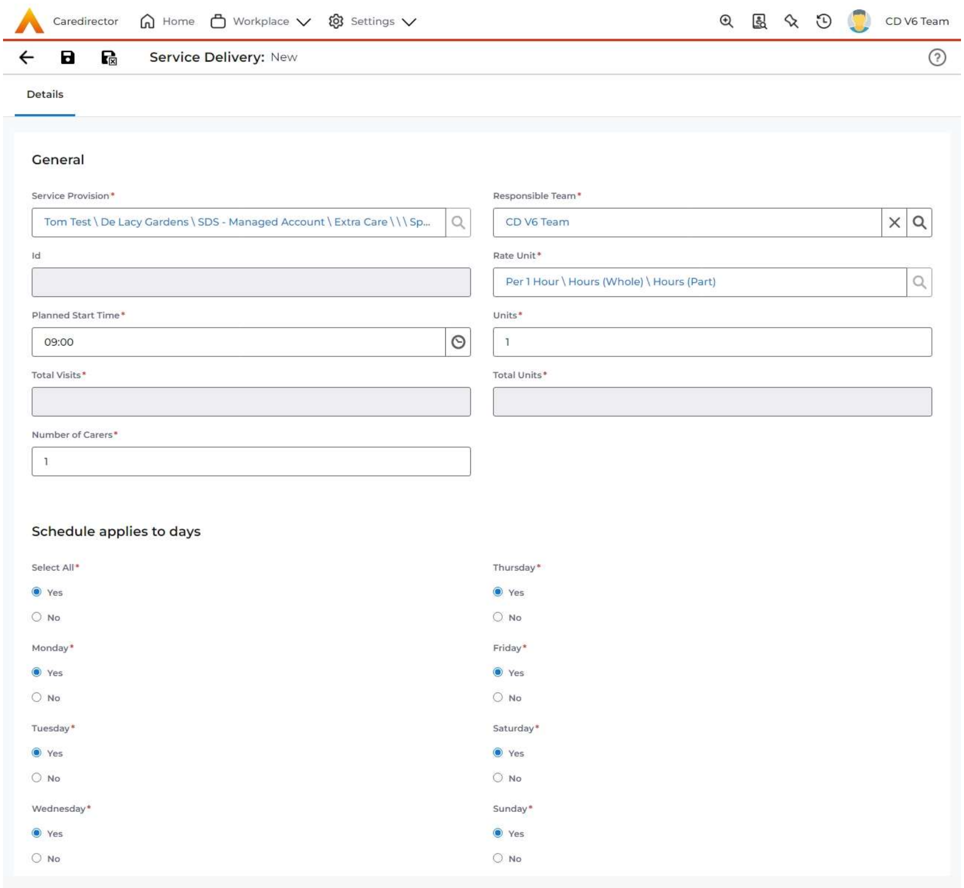


3. You will now need to record **Service Deliveries**. Select **Service Deliveries** from the tabs and select **Create New Record** from the toolbar.

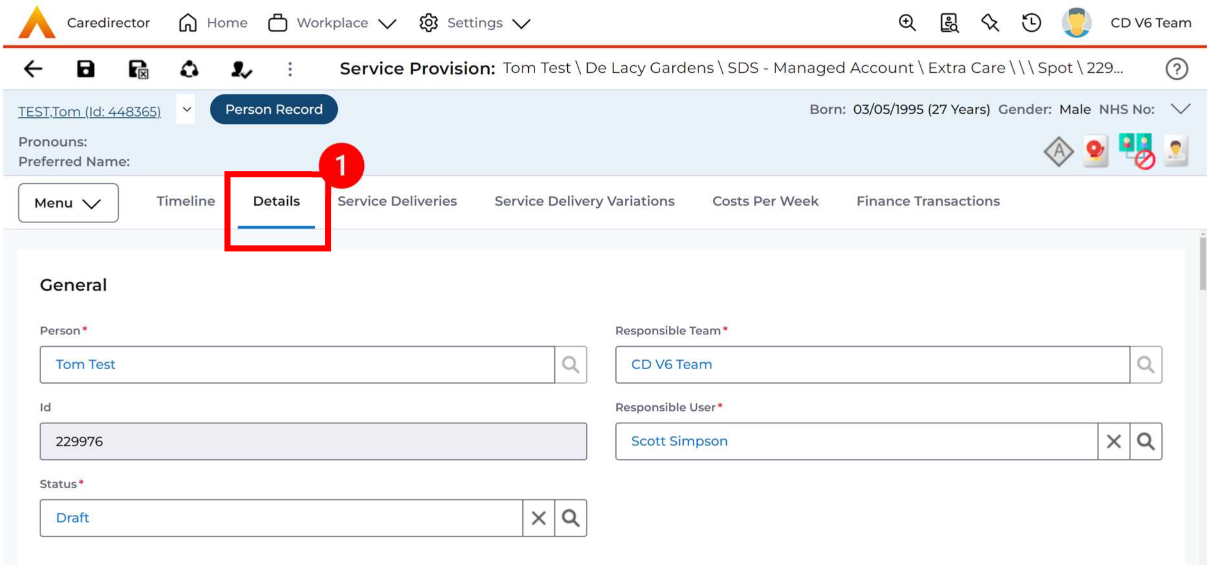


4. Now select your times and days of the week by completing the following information:
    a. If the Client needs more than one visit per day your will need to record each time band separately
    b. If the Client needs two carers you will need to change the **Number of Carers** field to the amount needed.
    c. Add the **Planned Start Time.**
    d. Add the **Units** (Duration of visit), in hours, using decimals e.g 1 hour = 1 or ½ hour = 30. Please see annexed table of Rate Unit Amounts, below.

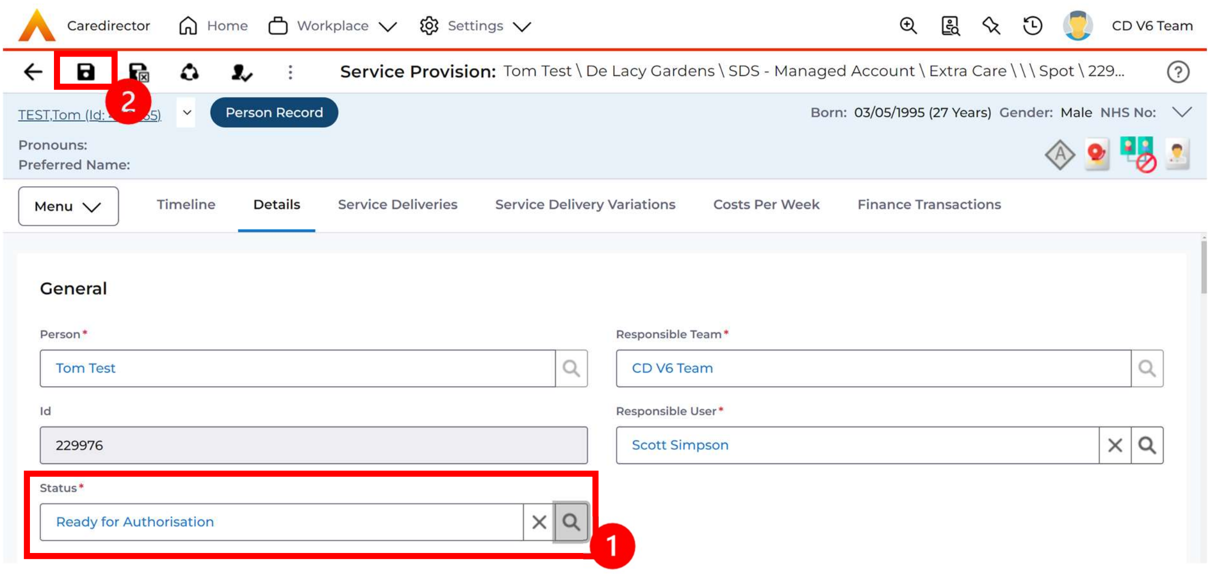
5. Then select **Save and Return to Previous Page.**



6. This will take you back to the Service Provision **timeline**. To change the **Status** to **Ready for Authorisation** select **Details** tab. This Service Provision can then be authorised ([How to Authorise a Service Provision](#)) by your manager.



7. Change **Status** to **Ready for Authorisation** using the **Lookup function** and select **Save**.



8. **Service Provisions** that are set to **Ready for Authorisation** will be picked up via an **Advanced Search** and **Authorised** (How to Authorise a Service Provision) by Team Managers/ Support Services Co-ordinator.

Changes to Extra Care Whinn Dale and Frickley Mews

1. The Practitioner will complete an **Adult Change** in **Service Request Form** in the usual way and **clone** the **Care Plan** to record the changes. When the **Care Plan** is closed it will trigger an **Activity** which will be picked up via the **Business Support Dashboard** and the **CSO/Admin** will record a new **Service Provision** (or clone the existing one – How to Clone a Service Provision) and input the new **Service Deliveries** and **Actual Start Date** and then set **Status** to **Ready for Authorisation**. The **CSO/Admin** will also enter an **Actual End Date** on the previous **Service Provision.**

2. **Service Provisions** that are set to **Ready for Authorisation** will be picked up via an **Advanced Search** and **Authorised** (How to Authorise a Service Provision) by Team Managers/ Support Services Co-ordinator.

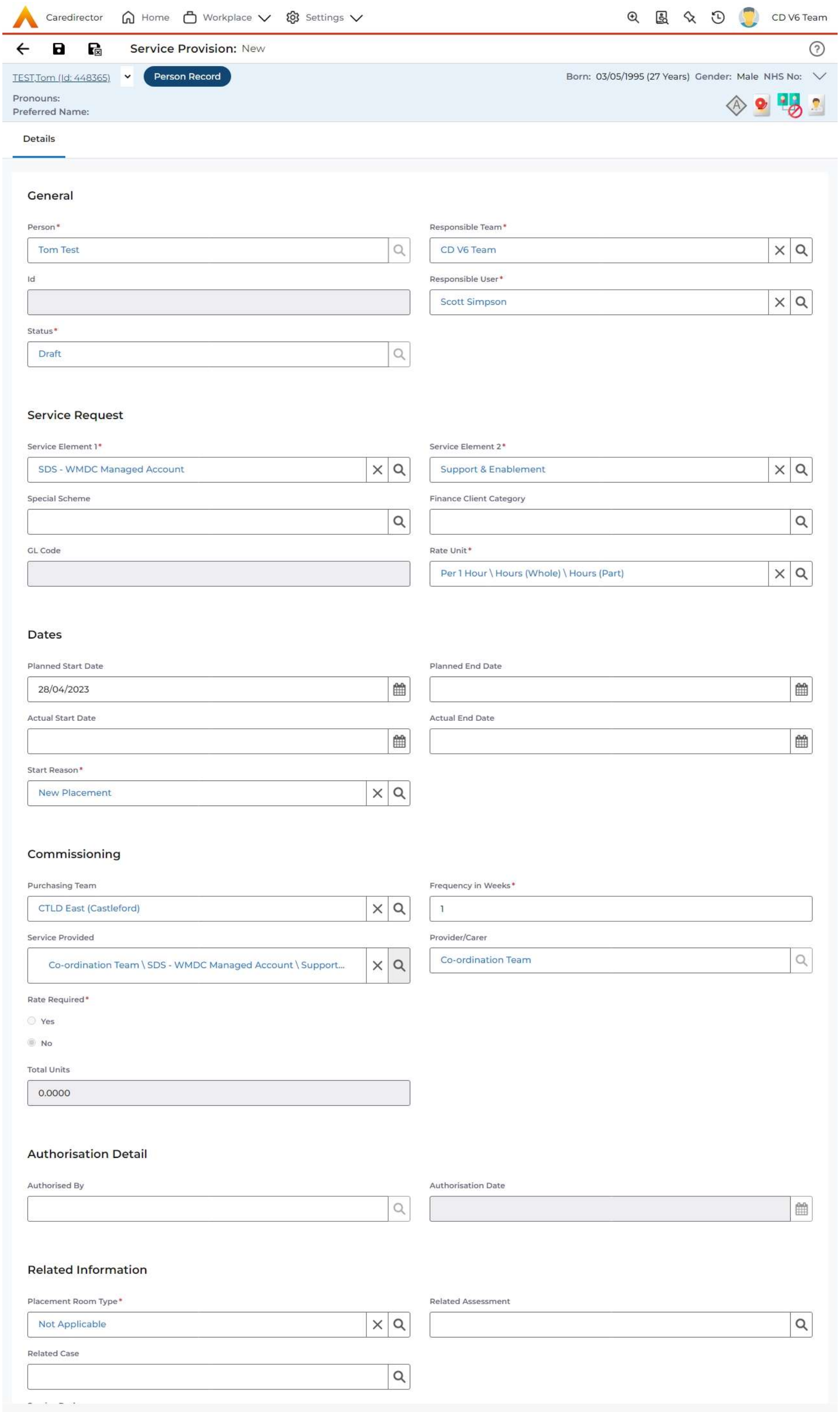
Support & Enablement – 1:1 Care /Waking Nights /Sleep Ins (Booking Request)

1. **Co-ordination Team** have confirmed that they don't need a separate **Booking Request** for **1:1 Care, Sleep-Ins** or **Waking Nights** but just the one **Booking for Support** and **Enablement** with the details of support needed recorded in the **Notes** field.

2. Please note that **Choice Support Services** (or any other **Provider** commissioned directly by Practitioner) are inputted the same as below however the **Co-ordination Team** must be informed by the **Practitioner/CSO/Admin** who the **Provider** is and the **Actual Start Date** (these details will be contained in the **Care & Support Plan).**

3. The fields below are available in the new Service Provision screen. Please locate the relevant **person record > services > create new record** then enter the information side into the according field.
   For more information follow: How to find Service Provisions and Create New.

Field	**Information**
Service Element 1:	**SDS – WMDC Managed Account**
Service Element 2:	**Support & Enablement**
Rate Unit:	**Per 1 Hour \ Hours (Whole) \ Hours (Part)**
Planned Start Date:	**Today's Date**
Actual Start Date:	Leave blank
Planned End Date:	Leave blank
Actual End Date:	Leave blank (Can only be inputted on the day of the **Planned End Date** or after it).
Start Reason:	Choose appropriate option, usually 'New placement'.
Purchasing Team:	Choose appropriate Team.
Service Provided:	Search for **Co-ordination Team**.
Status:	**Draft.**
Placement Room Type:	Auto populates to 'Not Applicable'.
Responsible Team:	Auto populated with the user's default team.
Responsible User:	Auto populated with the user's name
Related Case:	Select relevant case



Caredirector Home Workplace Settings CD V6 Team

Service Provision: New

TEST,Tom (Id: 448365) Person Record Born: 03/05/1995 (27 Years) Gender: Male NHS No:

Pronouns:
Preferred Name:

Details

General

Person*: Tom Test
Responsible Team*: CD V6 Team
Id:
Responsible User*: Scott Simpson
Status*: Draft

Service Request

Service Element 1*: SDS - WMDC Managed Account
Service Element 2*: Support & Enablement
Special Scheme:
Finance Client Category:
GL Code:
Rate Unit*: Per 1 Hour \ Hours (Whole) \ Hours (Part)

Dates

Planned Start Date: 28/04/2023
Planned End Date:
Actual Start Date:
Actual End Date:
Start Reason*: New Placement

Commissioning

Purchasing Team: CTLD East (Castleford)
Frequency in Weeks*: 1
Service Provided: Co-ordination Team \ SDS - WMDC Managed Account \ Support...
Provider/Carer: Co-ordination Team
Rate Required*: Yes / No
Total Units: 0.0000

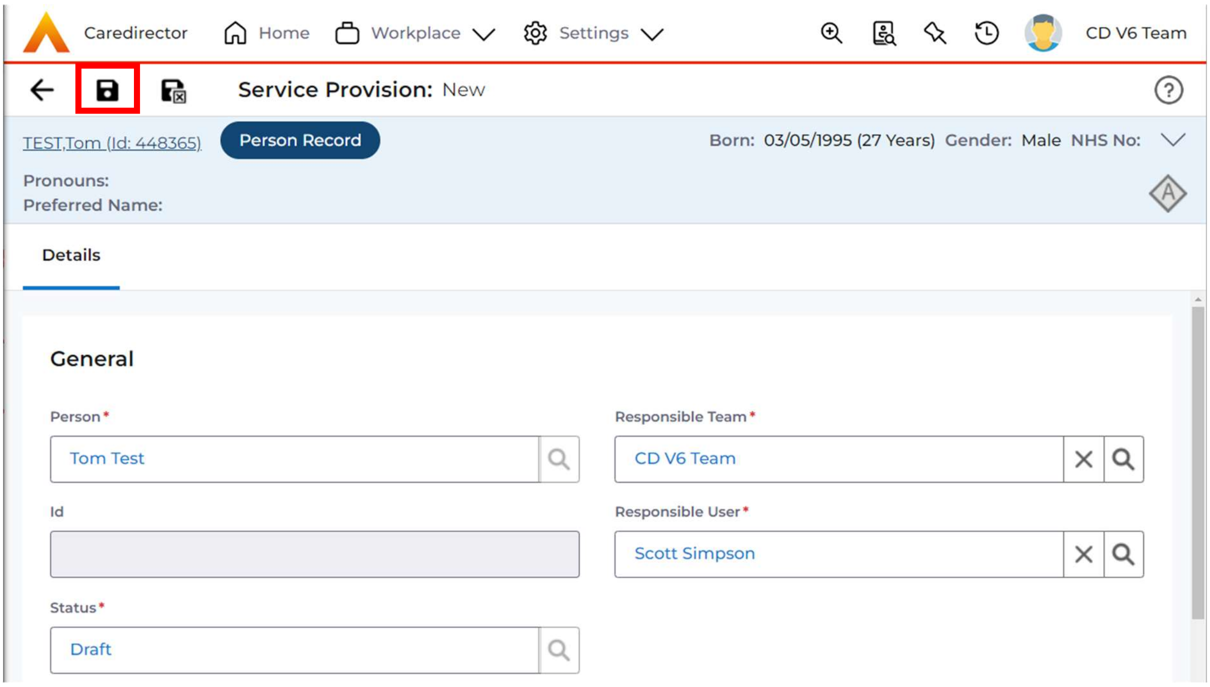
Authorisation Detail

Authorised By:
Authorisation Date:

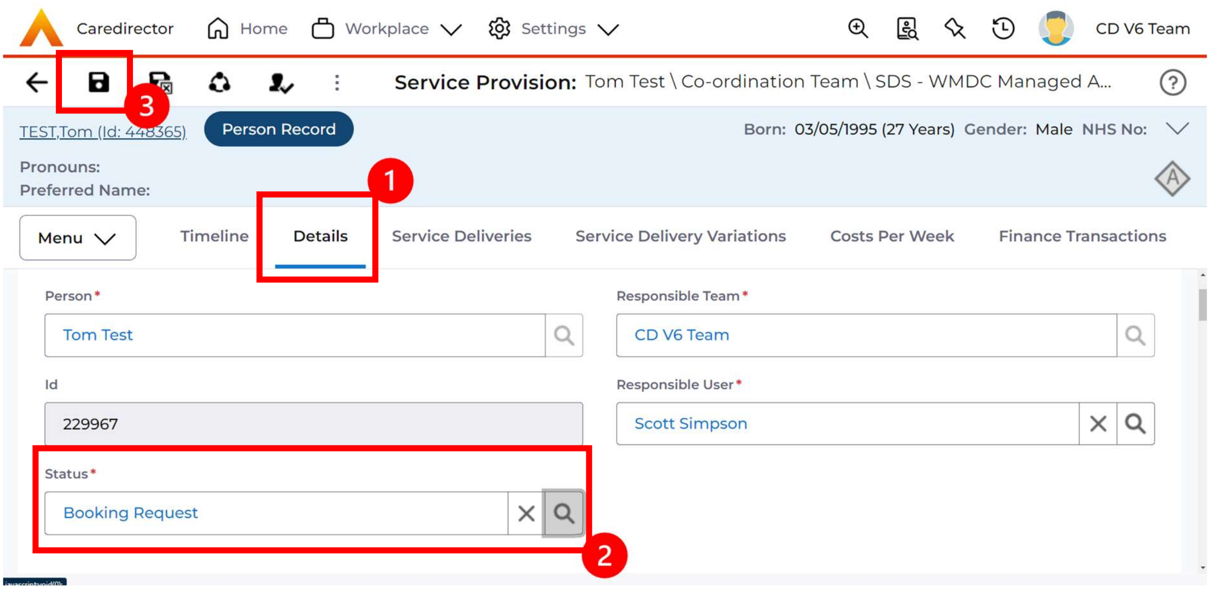
Related Information

Placement Room Type*: Not Applicable
Related Assessment:
Related Case:

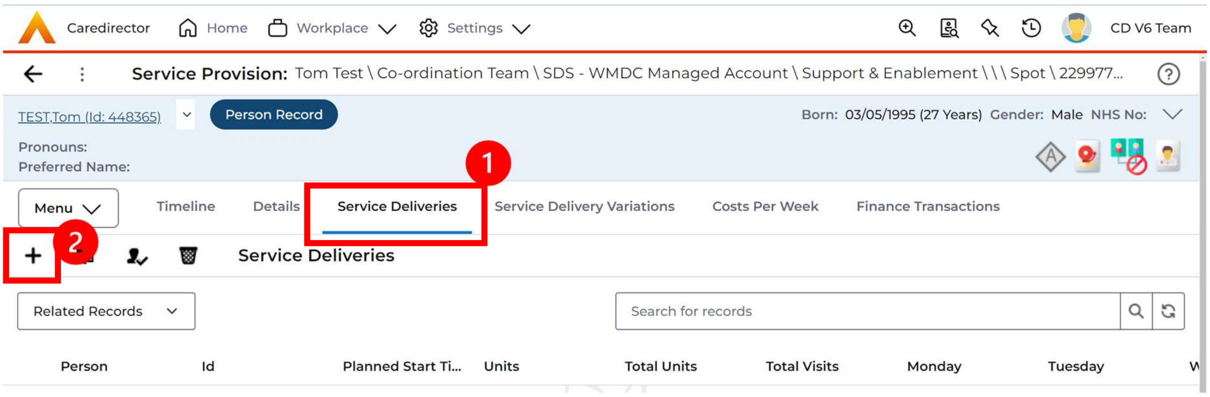
4. Select **Save** when completed.



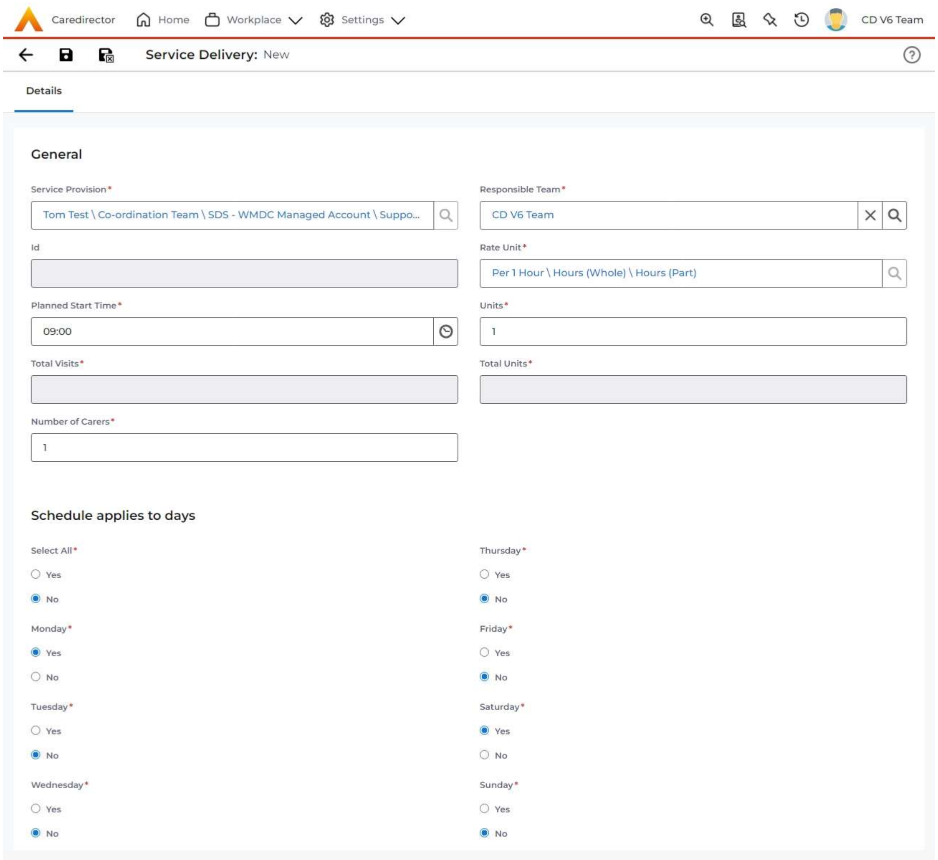
6. When saved, go back into details as it will default you to the **Timeline** tab and select **Booking Request** then **Save.**



7. You will now need to record **Service Deliveries**. Select **Save** from the toolbar. Then select the **Service Deliveries** tab. Then **Create New Record.**



8. Now select your times and days of the week by completing the following information:
    a. If the Client needs more than one visit per day your will need to record each time band separately
    b. If the Client needs two carers you will need to change the **Number of Carers** field to the amount needed.
    c. Add the **Planned Start Time.**
    d. Add the **Units** (Duration of visit), in hours, using decimals e.g 1 hour = 1 or ½ hour = 30. Please see annexed table of Rate Unit Amounts, below.


Caredirector
Home
Workplace
Settings
CD V6 Team
Service Delivery: New
Details
General
Service Provision*
Tom Test \ Co-ordination Team \ SDS - WMDC Managed Account \ Suppo...
Responsible Team*
CD V6 Team
Id
Rate Unit*
Per 1 Hour \ Hours (Whole) \ Hours (Part)
Planned Start Time*
09:00
Units*
1
Total Visits*
Total Units*
Number of Carers*
1
Schedule applies to days
Select All*
Yes
No
Thursday*
Yes
No
Monday*
Yes
No
Friday*
Yes
No
Tuesday*
Yes
No
Saturday*
Yes
No
Wednesday*
Yes
No
Sunday*
Yes
No

9. The **Booking Request** will be picked up via the **Co-ordination Team Dashboard**. They will then:
    a. Source a **Provider**
    b. Change the **Service Provision Service Element 1** from **SDS – WMDC Managed Account to SDS – Managed Account**
    c. Re-enter the **Rate Unit – Per 1 Hour \ Hours (Whole) \ Hours (Part)**
    d. Re-enter the appropriate **Start Reason**
    e. Enter in the **Actual Start Date** from when the charging is set to start.
    f. Ensure the **Service Deliveries** are correct.
    g. Set to the correct **Provider**
    h. Change the **Status** to **Ready for Authorisation.**

10. **Service Provisions** that are set to **Ready for Authorisation** will be picked up via an **Advanced Search** and **Authorised** (How to Authorise a Service Provision) by Team Managers/ Support Services Co-ordinator.

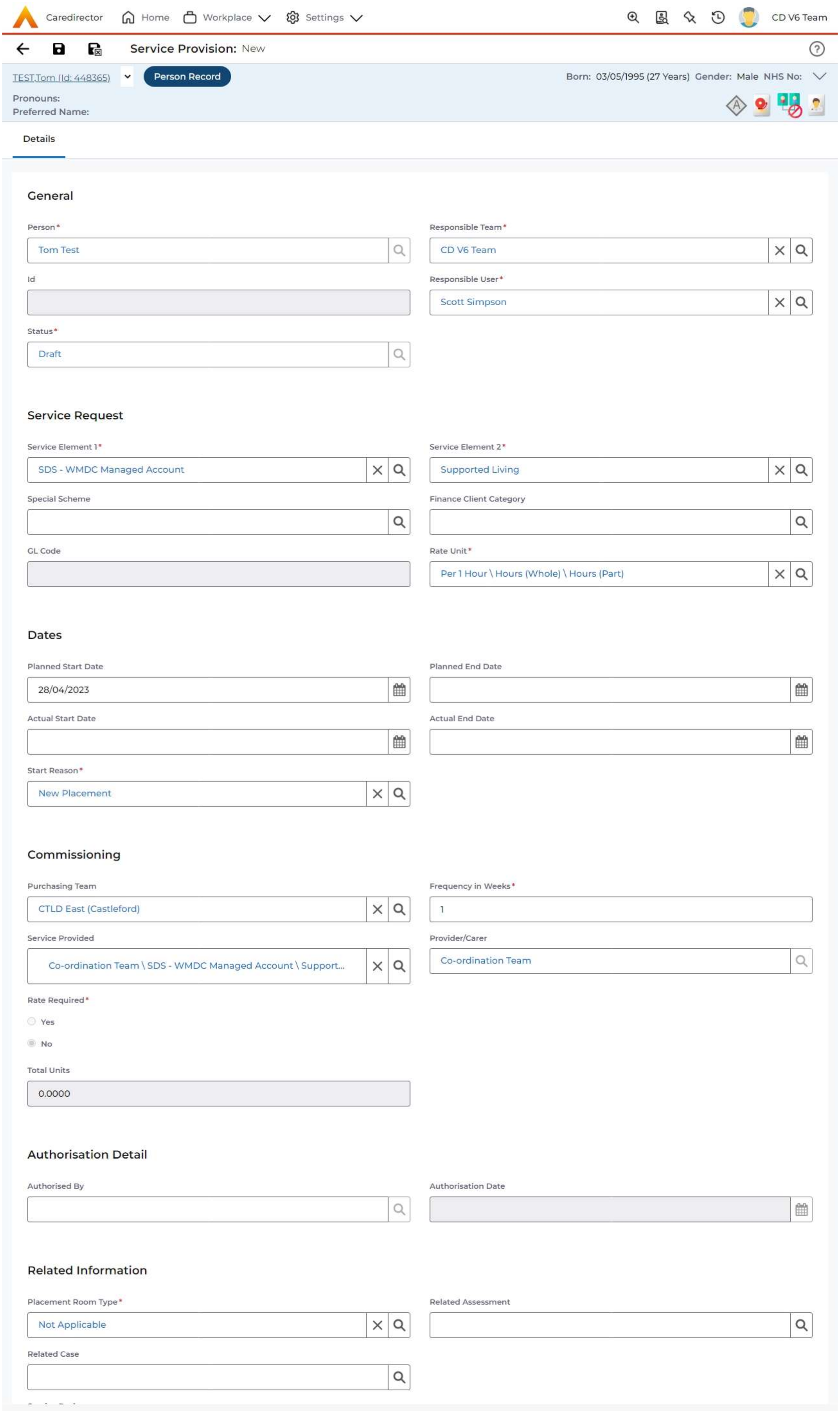
Supported Living – 1:1 Care /Waking Nights /Sleep Ins (Booking Request)

1. **Co-ordination Team** have confirmed that they don't need a separate **Booking Request** for 1:1 Care, Sleep-Ins or Waking Nights but just the one Booking for **Supported Living** with the details of support needed recorded in the **Notes** field.

2. Please note that **Choice Support Services** (or any other **Provider** commissioned directly by Practitioner) are input the same as below however the **Co-ordination Team** must be informed by the Practitioner/CSO/Admin who the **Provider** is and the **Actual Start Date** (these details will be contained in the **Care & Support Plan**).

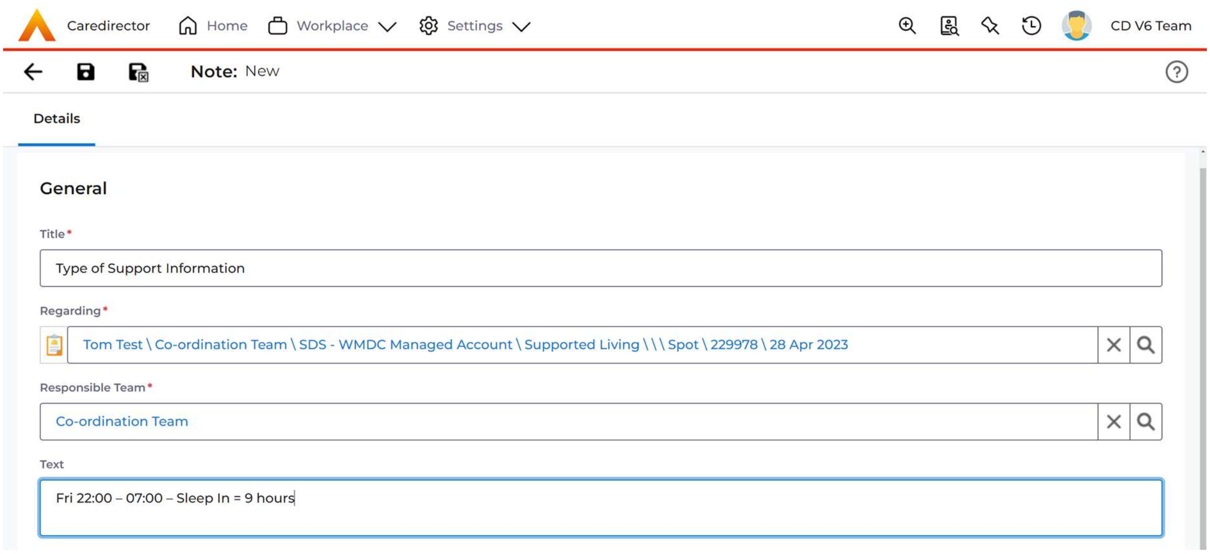
3. This fields below are available in the new Service Provision screen. Please locate the relevant **person record > services > create new record** then enter the information side into the according field.
   For more information follow: How to find Service Provisions and Create New.

Field	**Information**
Service Element 1:	**SDS –WMDC Managed Account**
Service Element 2:	**Supported Living**
Rate Unit:	**Per 1 Hour \ Hours (Whole) \ Hours (Part)**
Planned Start Date:	**Enter Today's Date**
Actual Start Date:	Leave blank
Planned End Date:	Leave blank
Actual End Date:	Leave blank (Can only be inputted on the day of the **Planned End Date** or after it).
Start Reason:	Choose appropriate option, usually 'New Placement'.
Purchasing Team:	Choose appropriate Team.
Service Provided:	Search for **Co-ordination Team**.
Status:	**Draft.**
Placement Room Type:	Auto populates to 'Not Applicable'
Responsible Team:	Auto populated with the user's default team.
Responsible User:	Auto populated with the user's name
Related Case:	Select relevant case

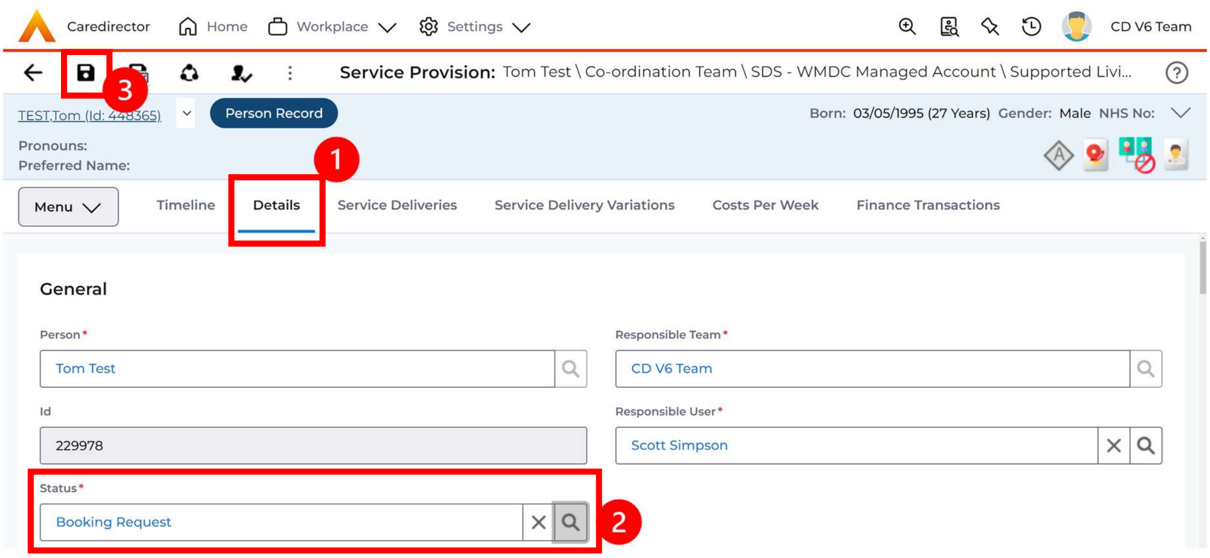

Caredirector
Home
Workplace
Settings
CD V6 Team
Service Provision: New
TEST,Tom (Id: 448365)
Person Record
Born: 03/05/1995 (27 Years) Gender: Male NHS No:
Pronouns:
Preferred Name:
Details
General
Person*
Tom Test
Responsible Team*
CD V6 Team
Id
Responsible User*
Scott Simpson
Status*
Draft
Service Request
Service Element 1*
SDS - WMDC Managed Account
Service Element 2*
Supported Living
Special Scheme
Finance Client Category
GL Code
Rate Unit*
Per 1 Hour \ Hours (Whole) \ Hours (Part)
Dates
Planned Start Date
28/04/2023
Planned End Date
Actual Start Date
Actual End Date
Start Reason*
New Placement
Commissioning
Purchasing Team
CTLD East (Castleford)
Frequency in Weeks*
1
Service Provided
Co-ordination Team \ SDS - WMDC Managed Account \ Support...
Provider/Carer
Co-ordination Team
Rate Required*
Yes
No
Total Units
0.0000
Authorisation Detail
Authorised By
Authorisation Date
Related Information
Placement Room Type*
Not Applicable
Related Assessment
Related Case

3. Select **Save**. Then add a **Note** (How to add a Note) and select **Save and Return to Previous Page**.

Field	**Information**
Title	Type of Support Information
Responsible Team	**Co-ordination Team**
Text	e.g. Mon – Fri 21:00 to 23:00 – 1:1 hours = 10 hours Tues & Thurs 18:00 to 20:00 – Walking Nights = 20 hours Fri 22:00 – 07:00 – Sleep In = 9 hours



4. Go back into **Details** and change the **Status** to **Booking Request** and then select **Save**.



5. The **Booking Request** will be picked up via the **Co-ordination Team Dashboard**. They will then:
    a. Source a **Provider**
    b. Change the **Service Provision Service Element 1** from **SDS – WMDC Managed Account to SDS – Managed Account**
    c. Re-enter the **Rate Unit – Per 1 Hour \ Hours (Whole) \ Hours (Part)**
    d. Re-enter the appropriate **Start Reason**
    e. Enter in the **Actual Start Date** from when the charging is set to start.
    f. Ensure the **Service Deliveries** are correct.
    g. Set to the correct **Provider**
6. Change the **Status** to **Ready for Authorisation.**

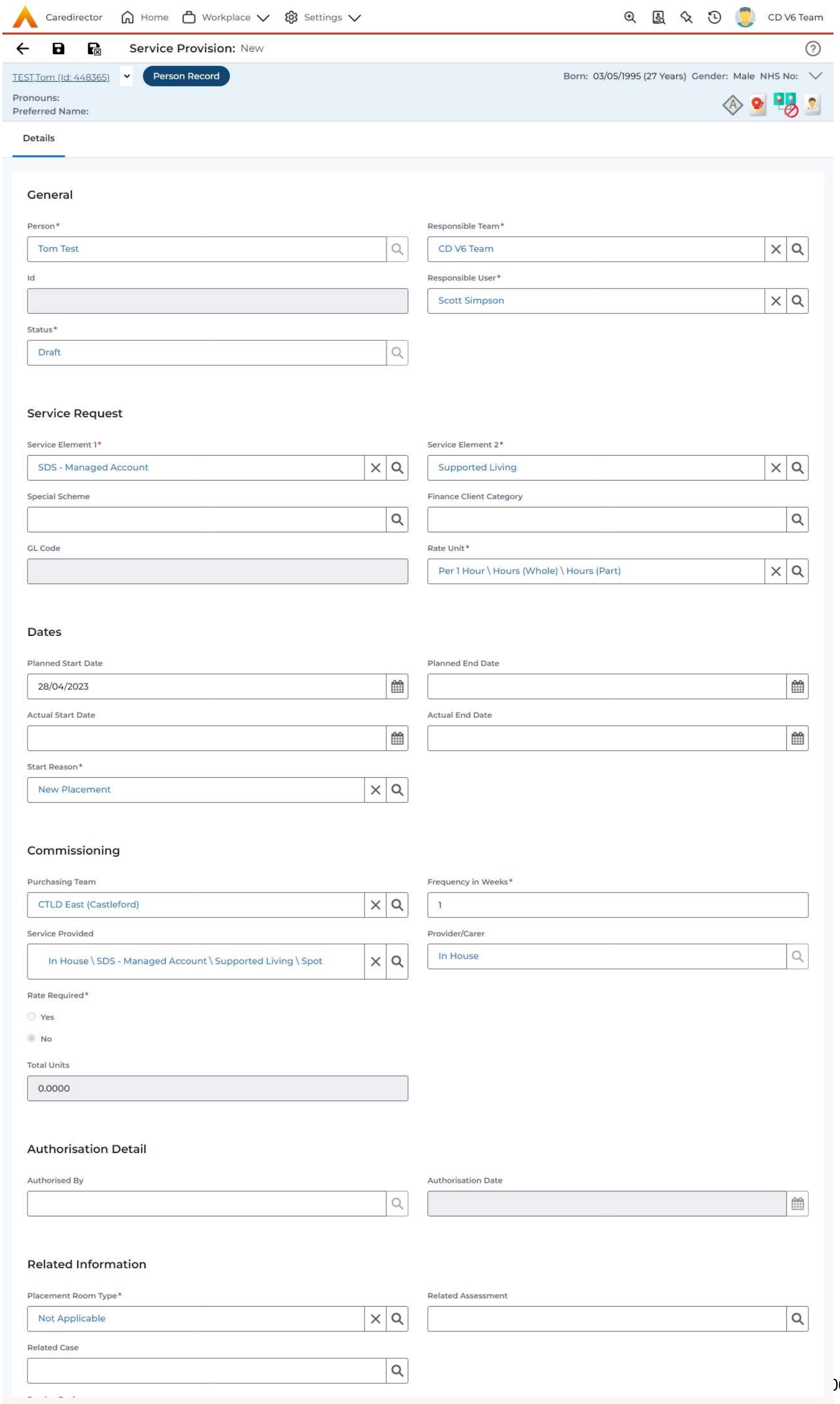
7. **Service Provisions** that are set to **Ready for Authorisation** will be picked up via an **Advanced Search** and **Authorised** (How to Authorise a Service Provision) by Team Managers/ Support Services Co-ordinator.

In House Supported Living - Home Care (Domiciliary Care)

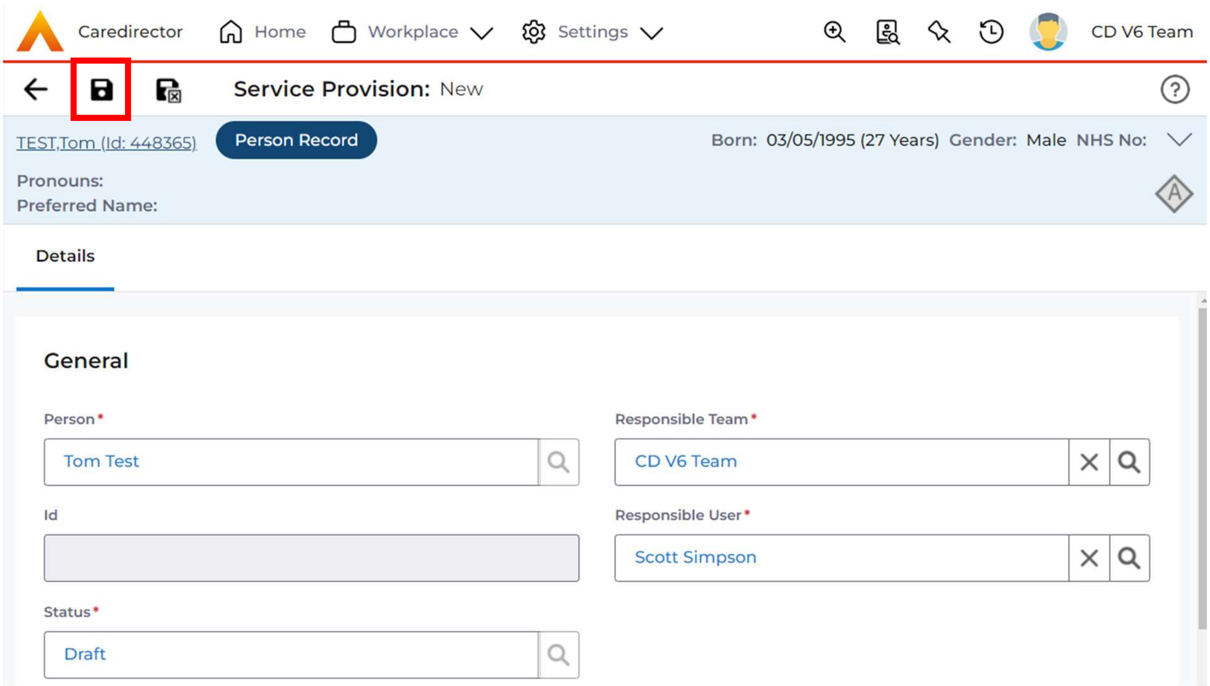
1. **In house Supported Living** is not commissioned by the **Co-ordination Team**, therefore a full-**Service Provision** is required to be recorded as opposed to a **Booking Request**. The cost of the service will have been calculated by the Practitioner based on the current **Pricing Matrix.**

2. The fields below are available in the new Service Provision screen. Please locate the relevant **person record > services > create new record** then enter the information side into the according field.
   For more information follow: How to find Service Provisions and Create New.

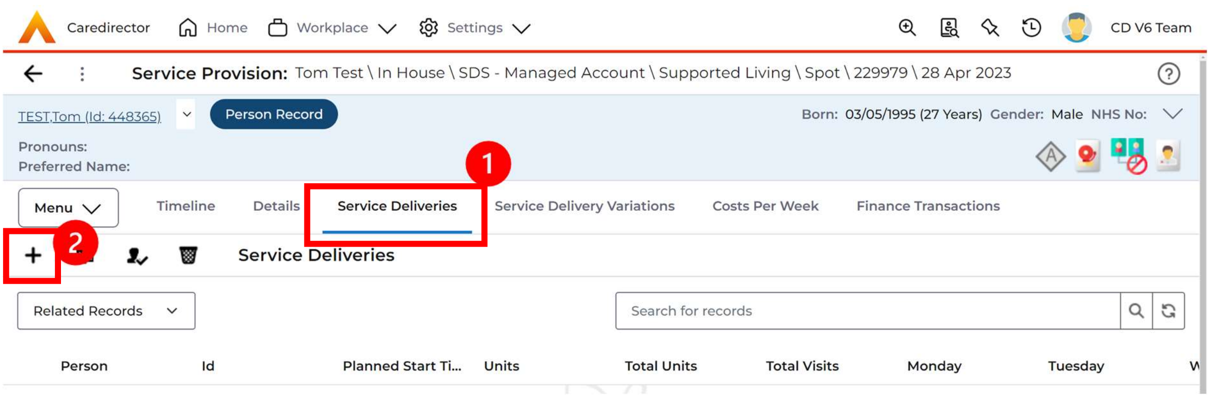
Field	Information
Service Element 1:	**SDS – Managed Account**
Service Element 2:	**Supported Living**
Rate Unit:	**Per 1 Hour \ Hours (Whole) \ Hours (Part)**
Planned Start Date:	Leave blank
Actual Start Date:	**Enter date service is to start as payment commences on this date.**
Planned End Date:	Leave blank
Actual End Date:	Leave blank (Can only be inputted on the day of the **Planned End Date** or after it).
Start Reason:	Choose appropriate option, usually 'New Placement' or 'Change in Type of Care'.
Purchasing Team:	Choose appropriate Team.
Service Provided:	Search for **In House**.
Status:	**Draft.**
Placement Room Type:	Auto populates to 'Not Applicable'
Responsible Team:	Auto populated with the user's default team.
Responsible User:	Auto populated with the user's name
Related Case:	Select relevant case


Caredirector
Home
Workplace
Settings
CD V6 Team
Service Provision: New
TEST,Tom (Id: 448365)
Person Record
Born: 03/05/1995 (27 Years) Gender: Male NHS No:
Pronouns:
Preferred Name:
Details
General
Person*
Tom Test
Responsible Team*
CD V6 Team
Id
Responsible User*
Scott Simpson
Status*
Draft
Service Request
Service Element 1*
SDS - Managed Account
Service Element 2*
Supported Living
Special Scheme
Finance Client Category
GL Code
Rate Unit*
Per 1 Hour \ Hours (Whole) \ Hours (Part)
Dates
Planned Start Date
28/04/2023
Planned End Date
Actual Start Date
Actual End Date
Start Reason*
New Placement
Commissioning
Purchasing Team
CTLD East (Castleford)
Frequency in Weeks*
1
Service Provided
In House \ SDS - Managed Account \ Supported Living \ Spot
Provider/Carer
In House
Rate Required*
Yes
No
Total Units
0.0000
Authorisation Detail
Authorised By
Authorisation Date
Related Information
Placement Room Type*
Not Applicable
Related Assessment
Related Case

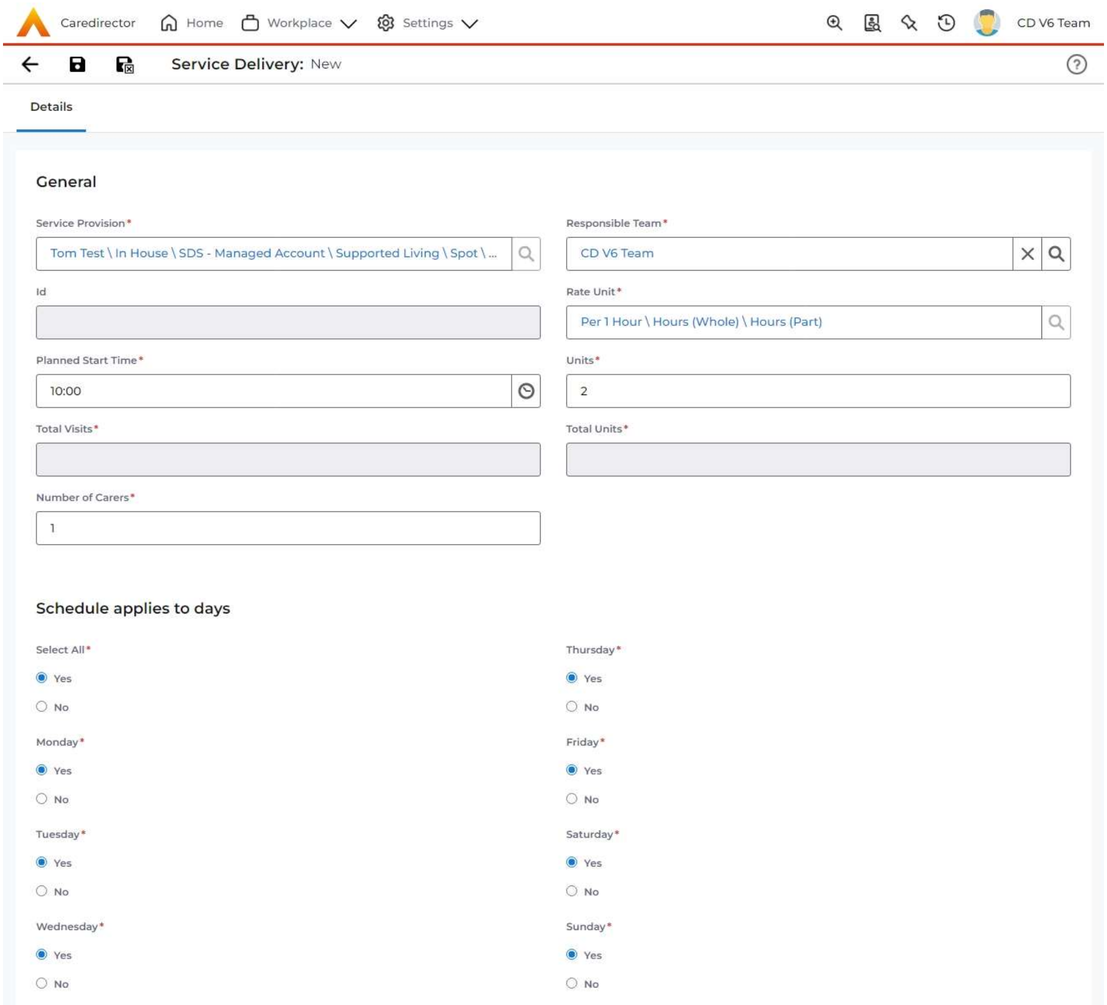
4. Select **Save** when completed.



5. You will now need to record **Service Deliveries**. Select **Save** from the toolbar. Then select the **Service Deliveries** tab. Then **Create New Record.**

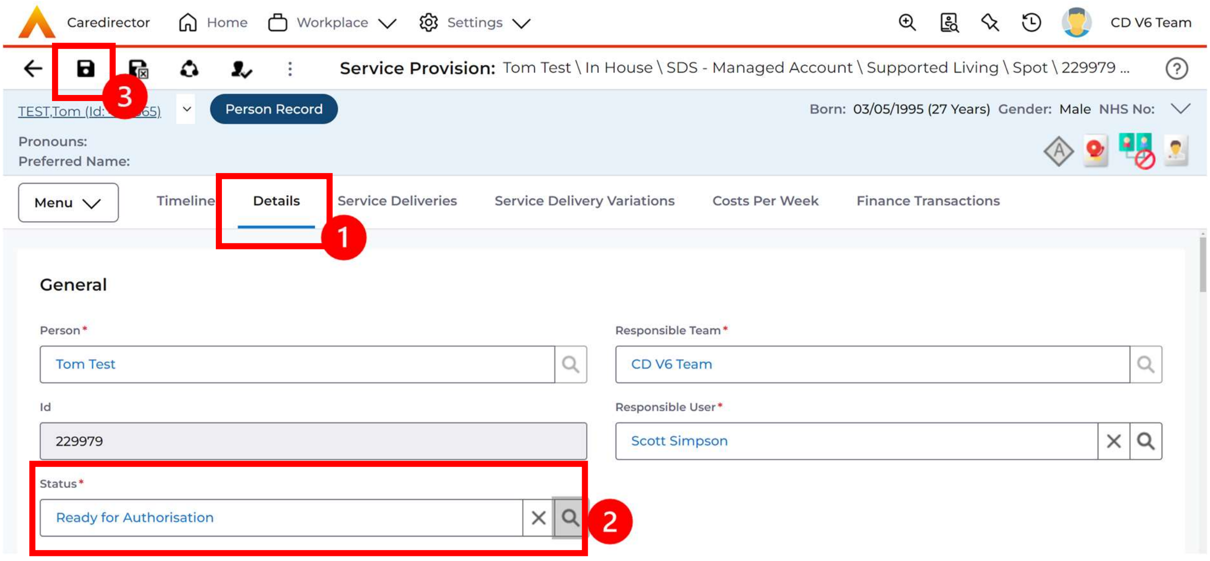


6. Now select your times and days of the week by completing the following information:
    a. If the Client needs more than one visit per day your will need to record each time band separately
    b. If the Client needs two carers you will need to change the **Number of Carers** field to the amount needed.
    c. Add the **Planned Start Time.**
    d. Add the **Units** (Duration of visit), in hours, using decimals e.g 1 hour = 1 or ½ hour = 30. Please see annexed table of Rate Unit Amounts, below.
    e. **Save and Return to Previous Page**



7. When finished select **Save and Return to Previous Page** on the toolbar.

8. Locate the **Service Provision Details** tab and change the **Status** to **Ready for Authorisation** and **Save.**



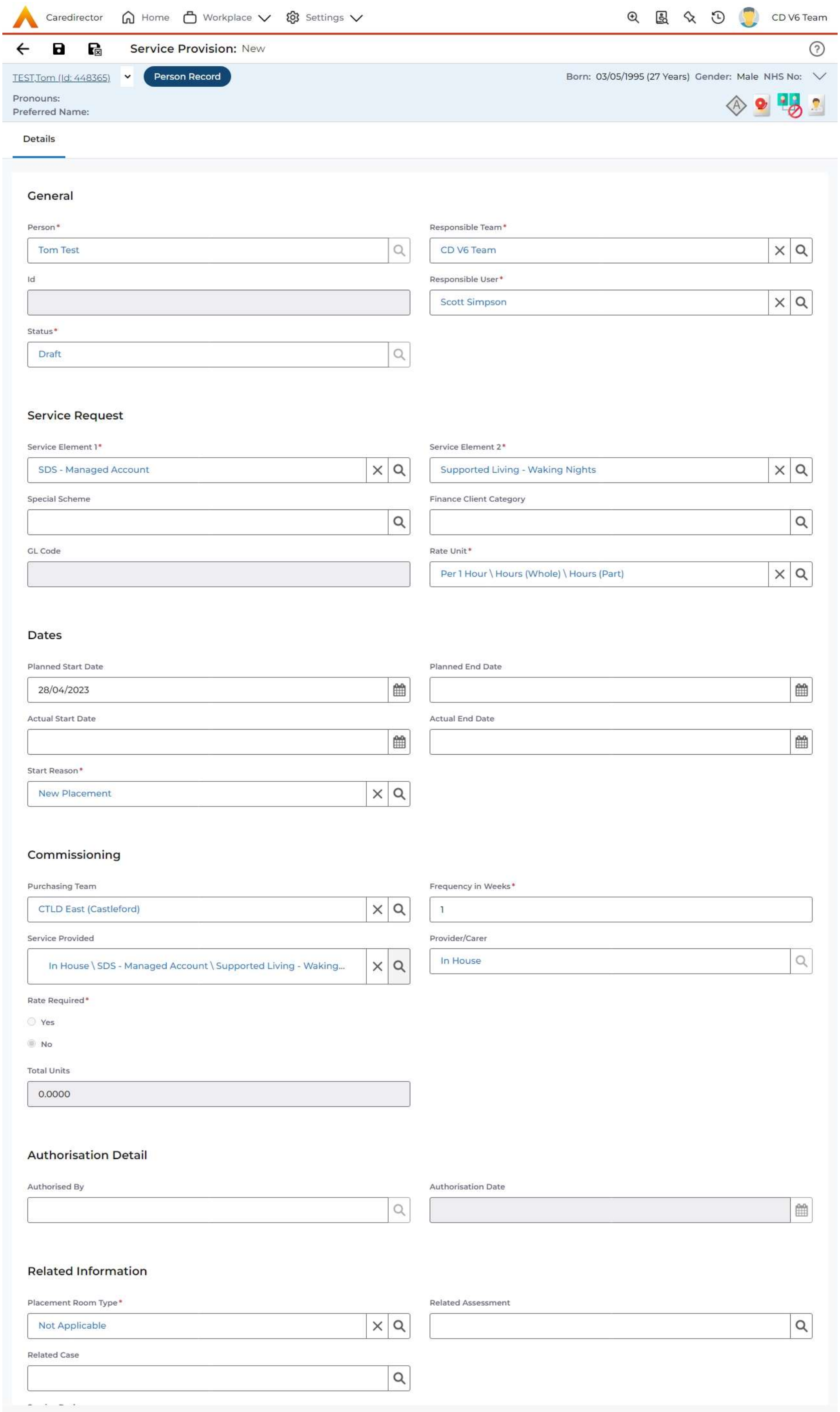
9. **Service Provisions** that are set to **Ready for Authorisation** will be picked up via an **Advanced Search** and **Authorised** ([How to Authorise a Service Provision]) by Team Managers/ Support Services Co-ordinator.

In House Supported Living – Waking Nights

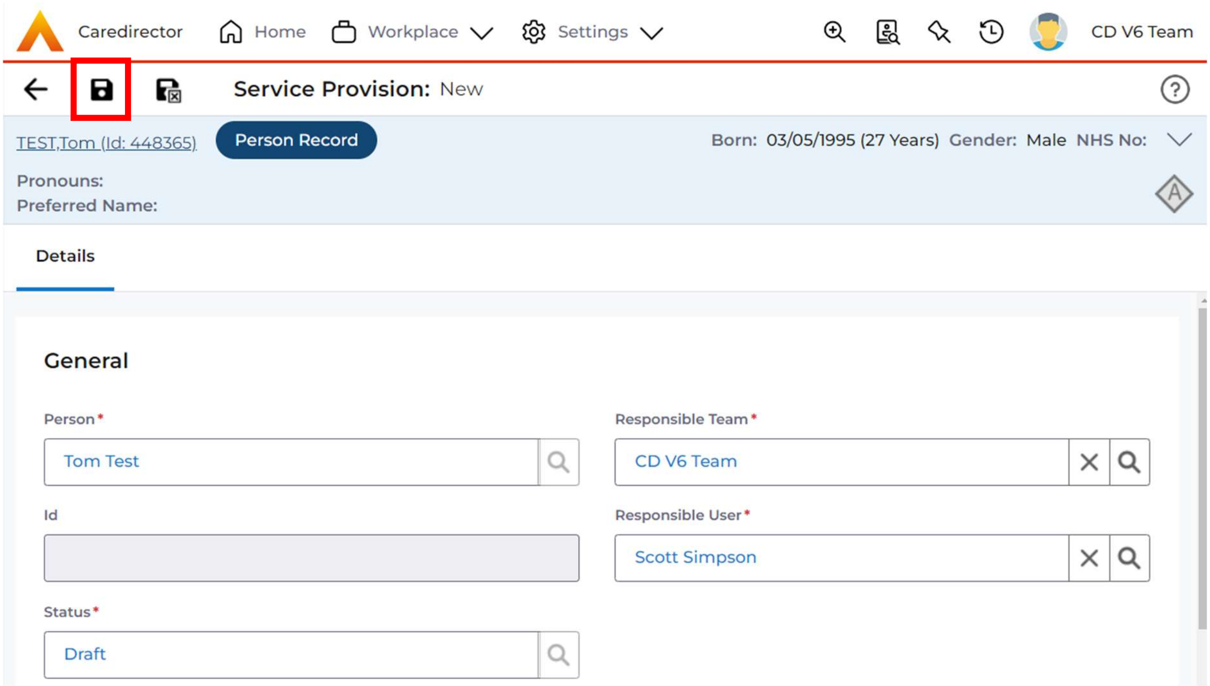
1. **In house Supported Living** is not commissioned by the **Co-ordination Team**, therefore a full **Service Provision** is required to be recorded as opposed to a **Booking Request**. The cost of the service will have been calculated by the Practitioner based on the current **Pricing Matrix.**

2. The fields below are available in the new Service Provision screen. Please locate the relevant **person record > services > create new record** then enter the information side into the according field.
   For more information follow: How to find Service Provisions and Create New.

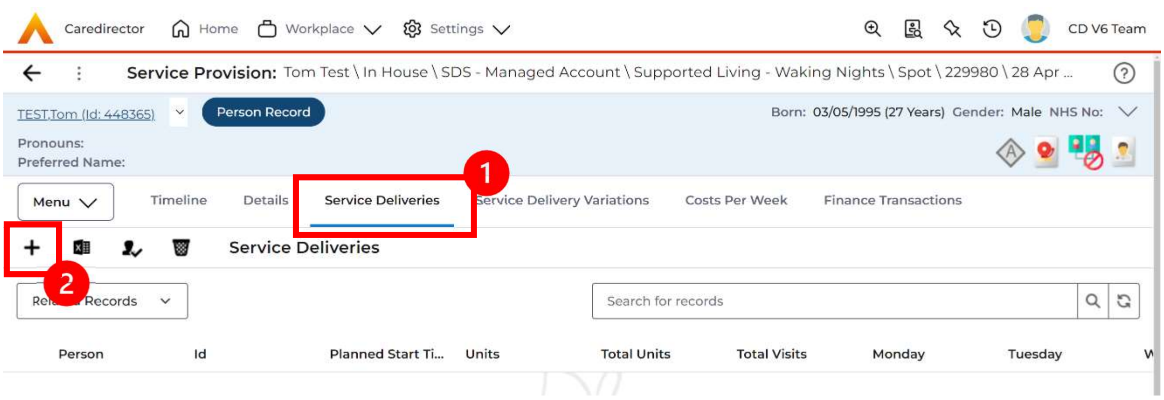
Field	Information
Service Element 1:	**SDS – Managed Account**
Service Element 2:	**Supported Living – Walking Nights**
Rate Unit:	**Per 1 Hour \ Hours (Whole) \ Hours (Part)**
Planned Start Date:	Leave blank
Actual Start Date:	**Enter date service is to start as payment commences on this date.**
Planned End Date:	Leave blank
Actual End Date:	Leave blank (Can only be input on the day of the **Planned End Date** or after it).
Start Reason:	Choose appropriate option.
Purchasing Team:	Choose appropriate Team.
Service Provided:	Search for **In House**.
Status:	**Draft.**
Placement Room Type:	Auto populates to 'Not Applicable'
Responsible Team:	Auto populated with the user's default team.
Responsible User:	Auto populated with the user's name
Related Case:	Select relevant case


Caredirector
Home
Workplace
Settings
CD V6 Team
Service Provision: New
TEST,Tom (Id: 448365)
Person Record
Born: 03/05/1995 (27 Years) Gender: Male NHS No:
Pronouns:
Preferred Name:
Details
General
Person*
Tom Test
Responsible Team*
CD V6 Team
Id
Responsible User*
Scott Simpson
Status*
Draft
Service Request
Service Element 1*
SDS - Managed Account
Service Element 2*
Supported Living - Waking Nights
Special Scheme
Finance Client Category
GL Code
Rate Unit*
Per 1 Hour \ Hours (Whole) \ Hours (Part)
Dates
Planned Start Date
28/04/2023
Planned End Date
Actual Start Date
Actual End Date
Start Reason*
New Placement
Commissioning
Purchasing Team
CTLD East (Castleford)
Frequency in Weeks*
1
Service Provided
In House \ SDS - Managed Account \ Supported Living - Waking...
Provider/Carer
In House
Rate Required*
Yes
No
Total Units
0.0000
Authorisation Detail
Authorised By
Authorisation Date
Related Information
Placement Room Type*
Not Applicable
Related Assessment
Related Case

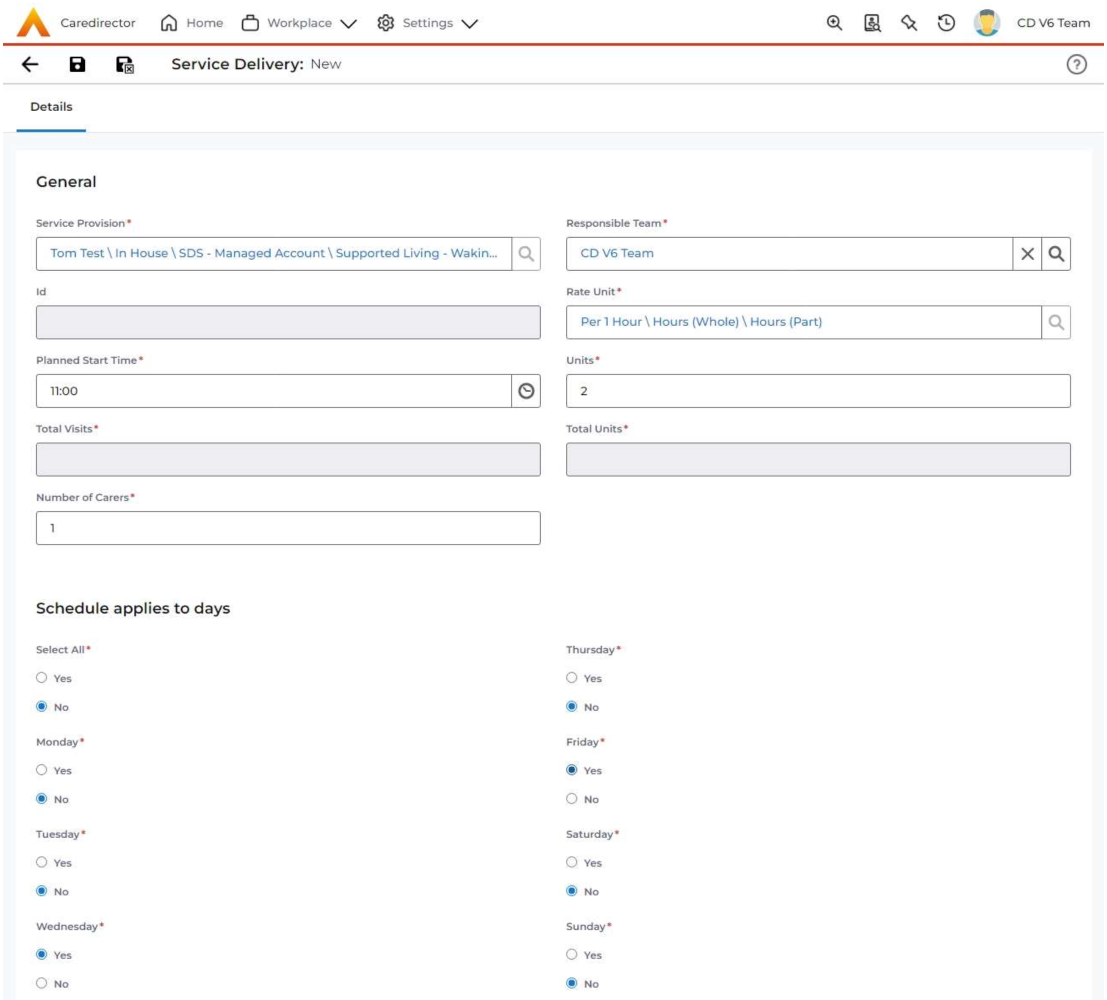
3. Select **Save** when completed.



4. You will now need to record **Service Deliveries**. Select **Save** from the toolbar. Then select the **Service Deliveries** tab. Then **Create New Record.**

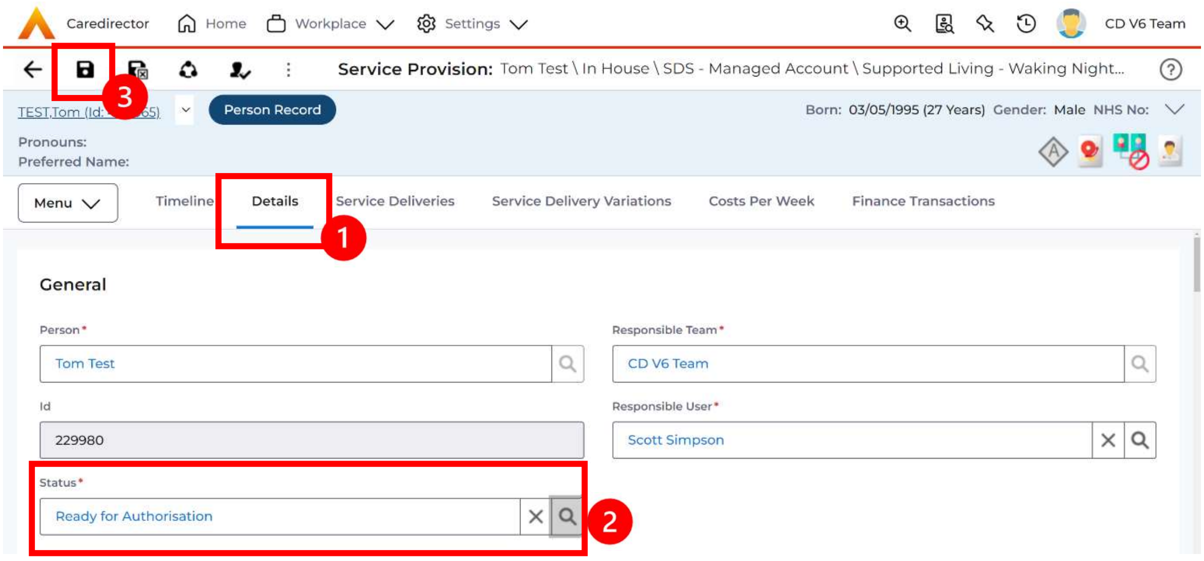


5. Now select your times and days of the week by completing the following information:
    i. If the Client needs more than one visit per day your will need to record each time band separately
    j. If the Client needs two carers you will need to change the **Number of Carers** field to the amount needed.
    k. Add the **Units** (Duration of visit), in hours, using decimals e.g 1 hour = 1 or ½ hour = 30. Please see annexed table of Rate Unit Amounts, below.
    l. Change the **Units.** (Duration of session – e.g. 1 is an hour).
    m. **Save and Return to Previous Page**



7. When finished select **Save and Return to Previous Page** on the toolbar.

8. Locate the **Service Provision Details** tab and change the **Status** to **Ready for Authorisation** and **Save.**



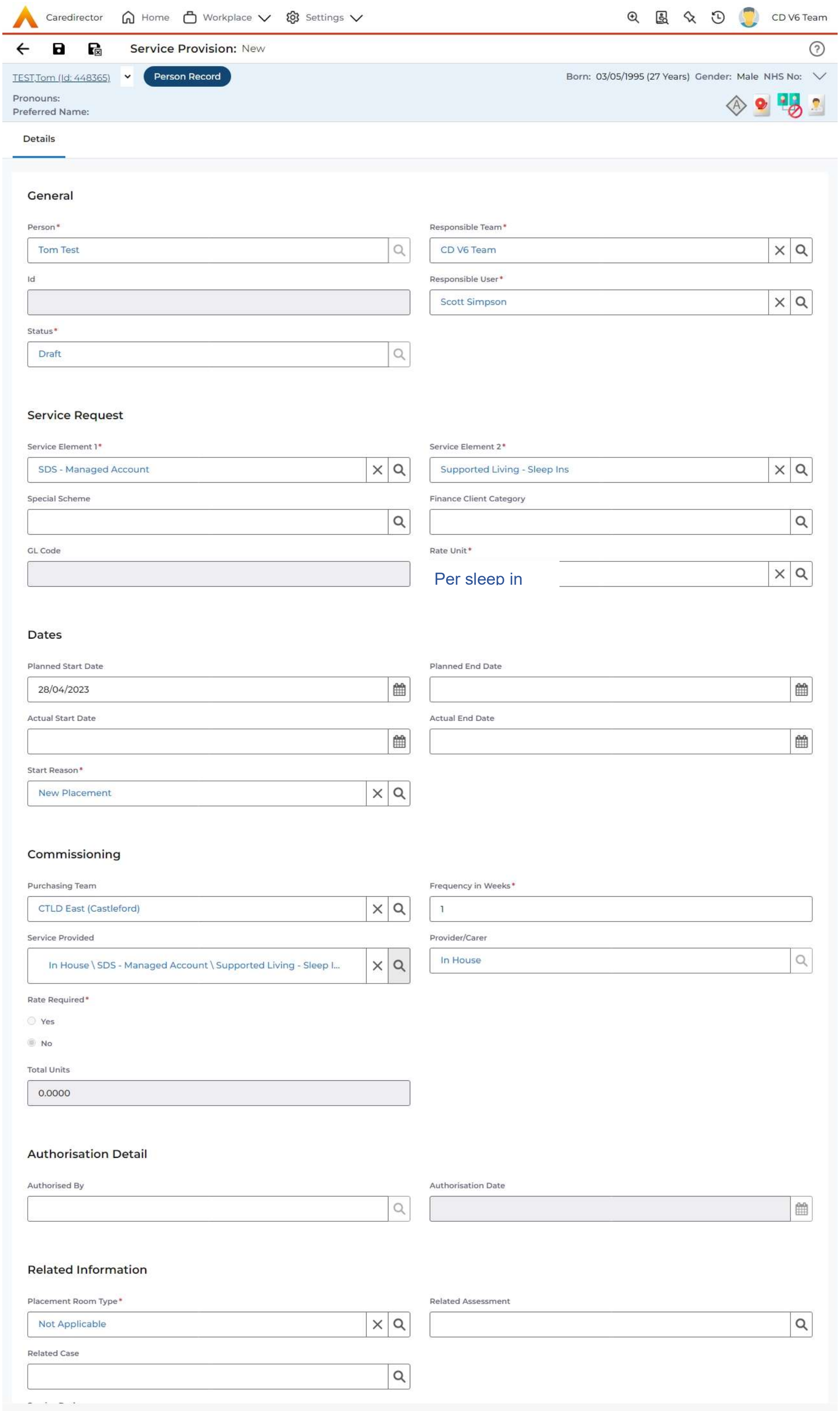
9. **Service Provisions** that are set to **Ready for Authorisation** will be picked up via an **Advanced Search** and **Authorised** (How to Authorise a Service Provision) by Team Managers/ Support Services Co-ordinator.

In House Supported Living – Sleep-Ins

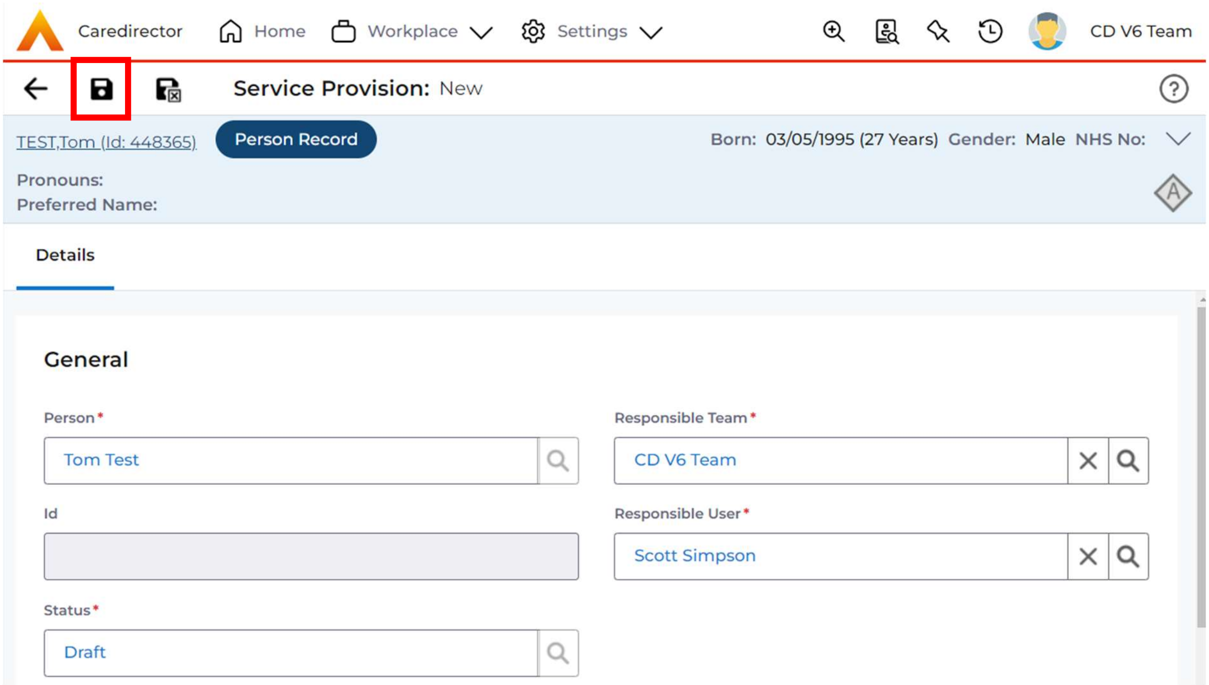
1. **In house Supported Living** is not commissioned by the **Co-ordination Team**, therefore a full **Service Provision** is required to be recorded as opposed to a **Booking Request**. The cost of the service will have been calculated by the Practitioner based on the current **Pricing Matrix.**

2. The fields below are available in the new Service Provision screen. Please locate the relevant **person record > services > create new record** then enter the information side into the according field.
   For more information follow: How to find Service Provisions and Create New.

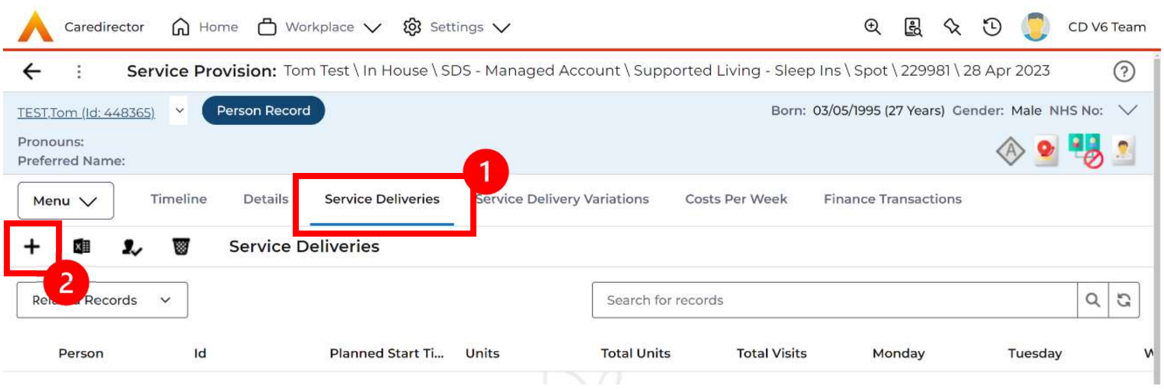
Field	Information
Service Element 1:	**SDS – Managed Account**
Service Element 2:	**Supported Living – Sleep Ins**
Rate Unit:	**Per Sleep In \ Units (Part)**
Planned Start Date:	Leave blank
Actual Start Date:	**Enter date service is to start as payment commences on this date.**
Planned End Date:	Leave blank
Actual End Date:	Leave blank (Can only be input on the day of the **Planned End Date** or after it).
Start Reason:	Choose appropriate option. Usually ‘New Placement’ or ‘Change in Type of Placement’
Purchasing Team:	Choose appropriate Team.
Service Provided:	Search for Provider **In House**.
Status:	**Draft.**
Placement Room Type:	Auto populates to ‘Not Applicable’
Responsible Team:	Auto populated with the user’s default team.
Responsible User:	Auto populated with the user’s name
Related Case:	Select relevant case


Caredirector
Home
Workplace
Settings
CD V6 Team
Service Provision: New
TEST,Tom (Id: 448365)
Person Record
Born: 03/05/1995 (27 Years) Gender: Male NHS No:
Pronouns:
Preferred Name:
Details
General
Person*
Tom Test
Responsible Team*
CD V6 Team
Id
Responsible User*
Scott Simpson
Status*
Draft
Service Request
Service Element 1*
SDS - Managed Account
Service Element 2*
Supported Living - Sleep Ins
Special Scheme
Finance Client Category
GL Code
Rate Unit*
Per sleep in
Dates
Planned Start Date
28/04/2023
Planned End Date
Actual Start Date
Actual End Date
Start Reason*
New Placement
Commissioning
Purchasing Team
CTLD East (Castleford)
Frequency in Weeks*
1
Service Provided
In House \ SDS - Managed Account \ Supported Living - Sleep I...
Provider/Carer
In House
Rate Required*
Yes
No
Total Units
0.0000
Authorisation Detail
Authorised By
Authorisation Date
Related Information
Placement Room Type*
Not Applicable
Related Assessment
Related Case

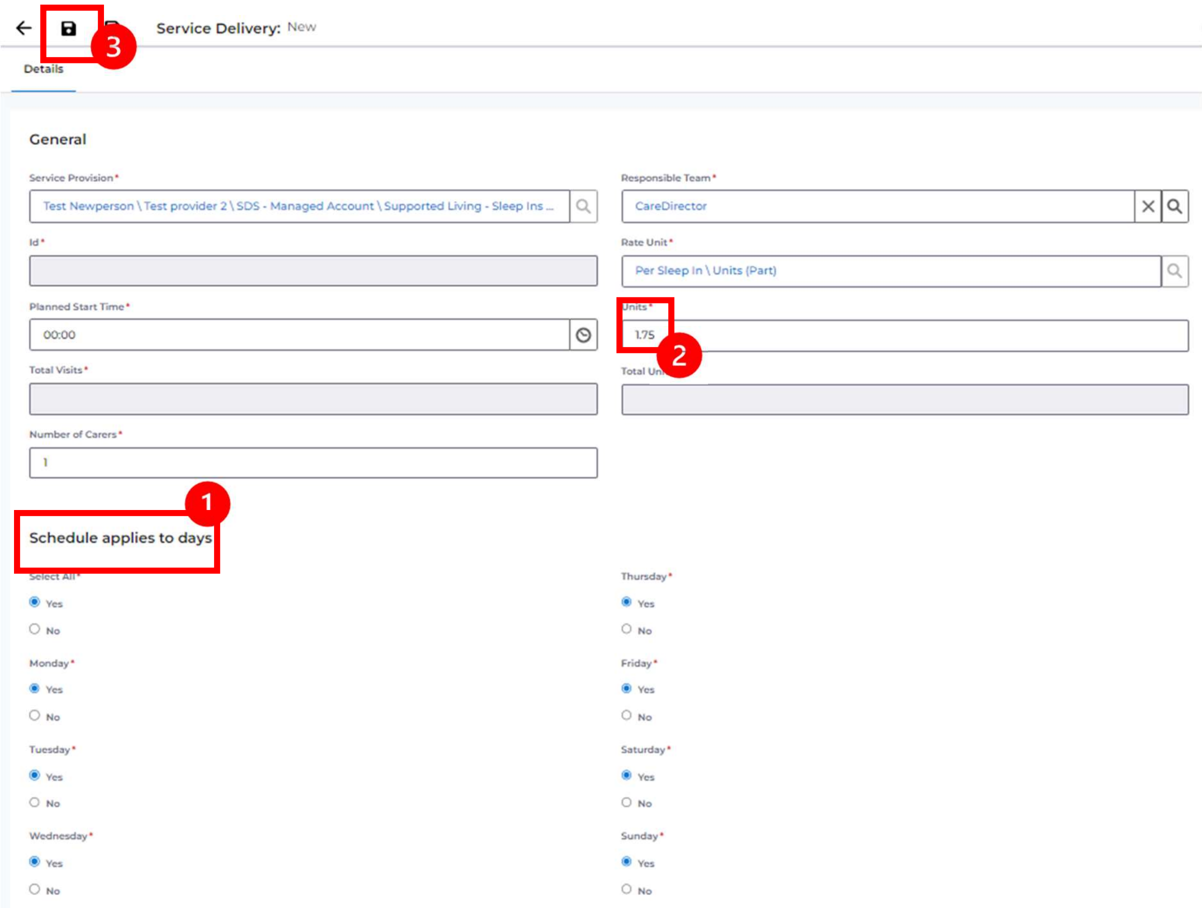
4. Select **Save** when completed.



5. You will now need to record **Service Deliveries**. Select **Save** from the toolbar. Then select the **Service Deliveries** tab. Then **Create New Record.**

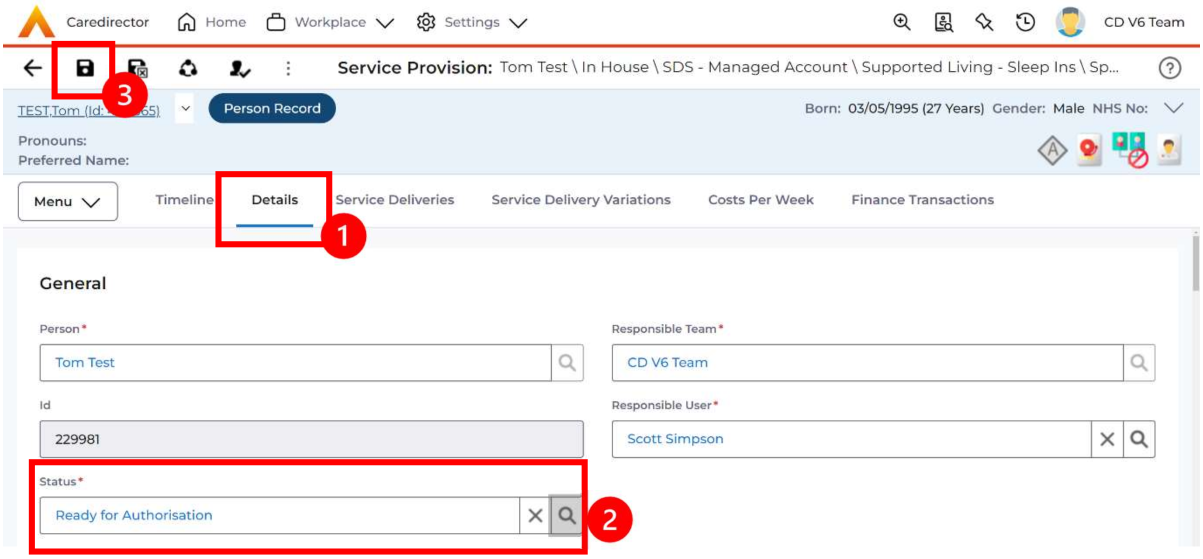


6. Now input the number of sleep-ins:
    a. Tick **one day of the week.**
    b. Add the **Units.** In House Sleep-Ins are charged Per Sleep In as a fixed amount, usually split between several individuals in the same property. Therefore the Care & Support Plan **must** specify how many sleep-ins are provided to the individual each week e.g. “7 sleep-ins, split between 4 people = 1.75 sleeps per person”. So you would input 1.75 units here.
    c. Click Save. The “Total Units” should reflect the total weekly sleep-ins that the person receives (matching the care and support plan).
    d. Click Save and Return to the Previous Page.



7. When finished select **Save and Return to Previous Page** on the toolbar.

8. Locate the **Service Provision Details** tab and change the **Status** to **Ready for Authorisation** and **Save.**



Day Care, 1-1 Care and Expenses provided by Millennium Care

1. Please Note that the Council no longer Contract with Millennium Care.

2. For any changes to existing packages of care with Millennium the Practitioner will be required to complete an **Adult Change in Service Request Form** in **CareDirector** so that the **Co-ordination Team** are aware of the change and can ensure the charges associated are accurate. The **Care and Support Plan** must also be changed accordingly. Closing the **Care Plan** will then trigger an **Activity** to the **Business Support Dashboard** and the CSO/Admin will pick this up and record the new **Service Provision** (the existing **Service Provision** can be cloned, amended and the original ended). Remember to start the new **Service Provision** from the date of the change and end the previous **Service Provision** the day before the new one starts. The **Status** on the **Service Provision** will then be set to **Ready for Authorisation**

3. If it is a completely new package of care then the cost of the total care (i.e. Day Care, 1-1, etc.) needs recording as an **ISF service provision** or **ACP/Non-Commissioned Service** with a **Rate Unit** for the total cost per week, in line with the **Care & Support plan**. Follow guidance for recording an **ISF** on page 60 or **ACP/Non-Commissioned Service** provision on page 46.

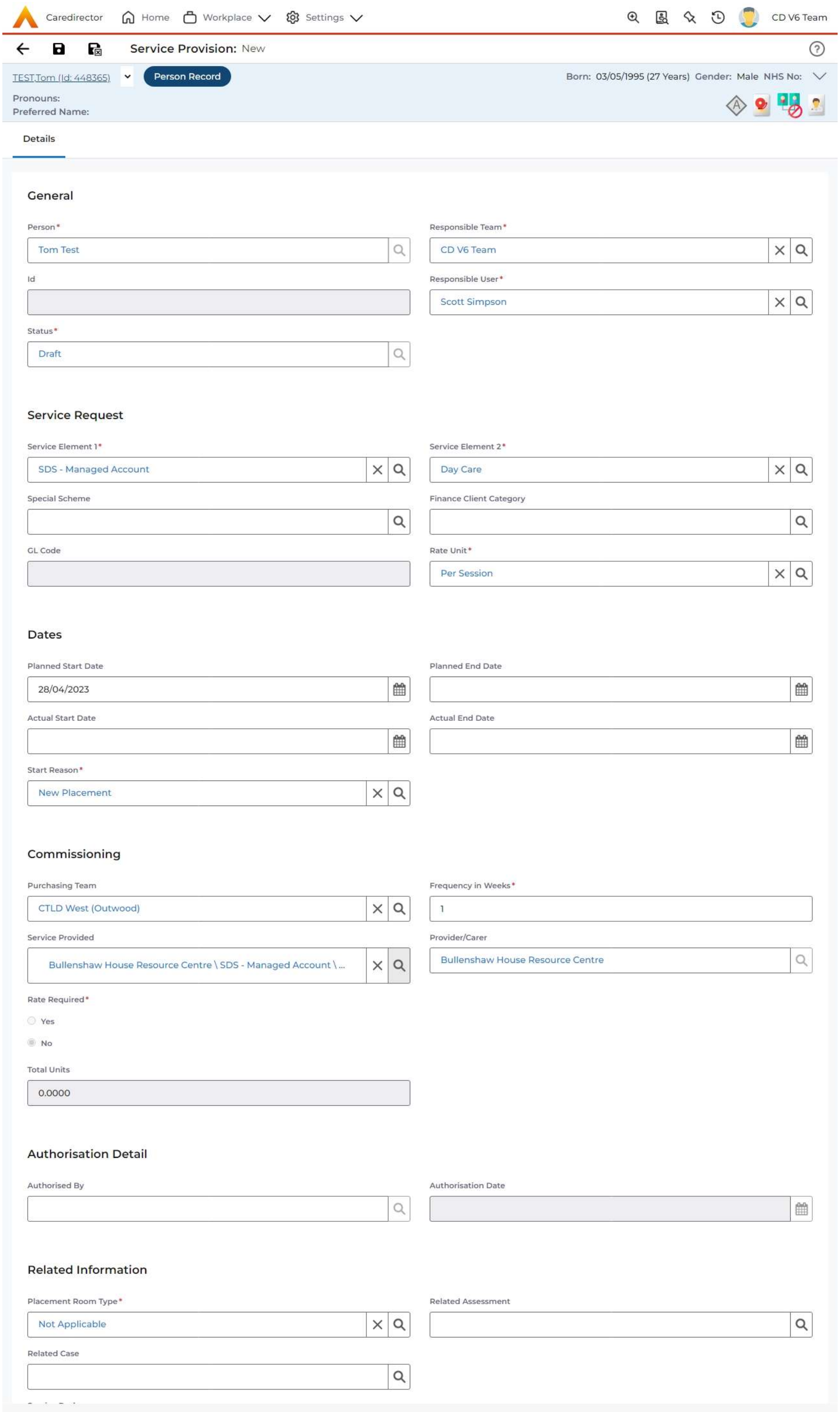
4. **Service Provisions** that are set to **Ready for Authorisation** will be picked up via an **Advanced Search** and **Authorised** (How to Authorise a Service Provision) by Team Managers/ Support Services Co-ordinator.

Day Centres (including Block Contracts) and In-House Day Opportunities, Day Care – Health Rate*, Transport and Meals

1. Please be aware that there is a separate Rate for Day Care – Health.

2. The fields below are available in the new Service Provision screen. Please locate the relevant **person record > services > create new record** then enter the information side into the according field.
   For more information follow: How to find Service Provisions and Create New.

Field	Information
Service Element 1:	**SDS – Managed Account**
Service Element 2:	Choose **Day Care, Day Care – Health Rate, Day Care -Transport or Day Care - Meals (currently only Capitor - St Catherine's provide meals)**
Rate Unit:	**Per Session** for **Day Care.** **Per Journey** for **Transport**. **Per Meal** for **Meals.**
Planned Start Date:	**Date the service is expected to start (enter only if this is a future date).**
Actual Start Date:	**Enter start date if this today or in the past.** ***When using a 'Planned Start Date' this must be changed to an 'Actual Start Date' as soon as the service starts. Planned Start Dates will not trigger any payments to Providers or collection of contributions from Clients***
Planned End Date:	Leave blank
Actual End Date:	Leave blank (Can only be input on the day of the **Planned End Date** or after it).
Start Reason:	Choose appropriate option, usually 'New Placement'
Purchasing Team:	Choose appropriate Team.
Service Provided:	Choose the relevant **Day Care Centre**.
Status:	**Draft.**
Placement Room Type:	Auto populates to 'Not Applicable'
Responsible Team:	Auto populated with the user's default team.
Responsible User:	Auto populated with the user's name
Related Case:	Select relevant case



Caredirector Home Workplace Settings CD V6 Team

Service Provision: New

TEST,Tom (Id: 448365) Person Record Born: 03/05/1995 (27 Years) Gender: Male NHS No:

Pronouns:
Preferred Name:

Details

General

Person*: Tom Test
Responsible Team*: CD V6 Team
Id:
Responsible User*: Scott Simpson
Status*: Draft

Service Request

Service Element 1*: SDS - Managed Account
Service Element 2*: Day Care
Special Scheme:
Finance Client Category:
GL Code:
Rate Unit*: Per Session

Dates

Planned Start Date: 28/04/2023
Planned End Date:
Actual Start Date:
Actual End Date:
Start Reason*: New Placement

Commissioning

Purchasing Team: CTLD West (Outwood)
Frequency in Weeks*: 1
Service Provided: Bullenshaw House Resource Centre \ SDS - Managed Account \ ...
Provider/Carer: Bullenshaw House Resource Centre
Rate Required*: Yes / No
Total Units: 0.0000

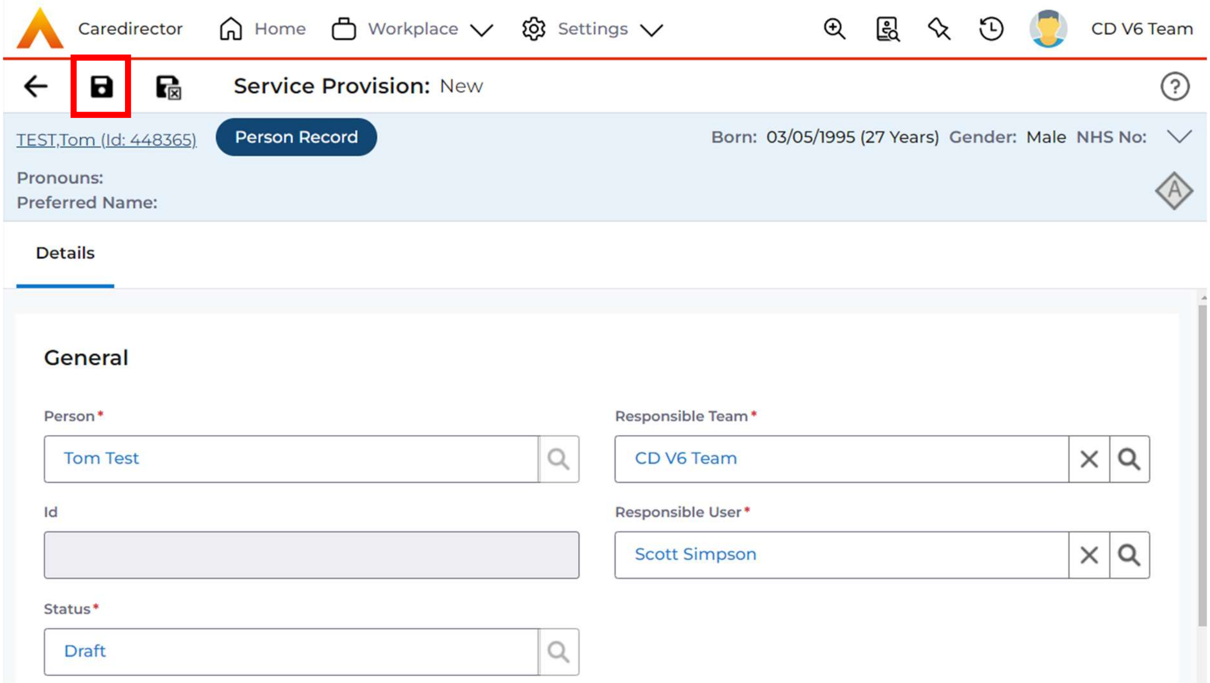
Authorisation Detail

Authorised By:
Authorisation Date:

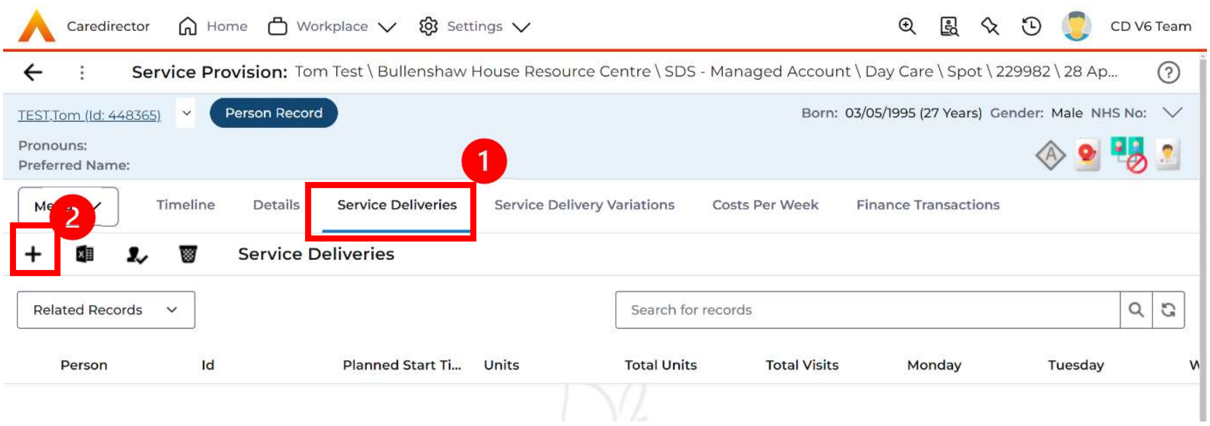
Related Information

Placement Room Type*: Not Applicable
Related Assessment:
Related Case:

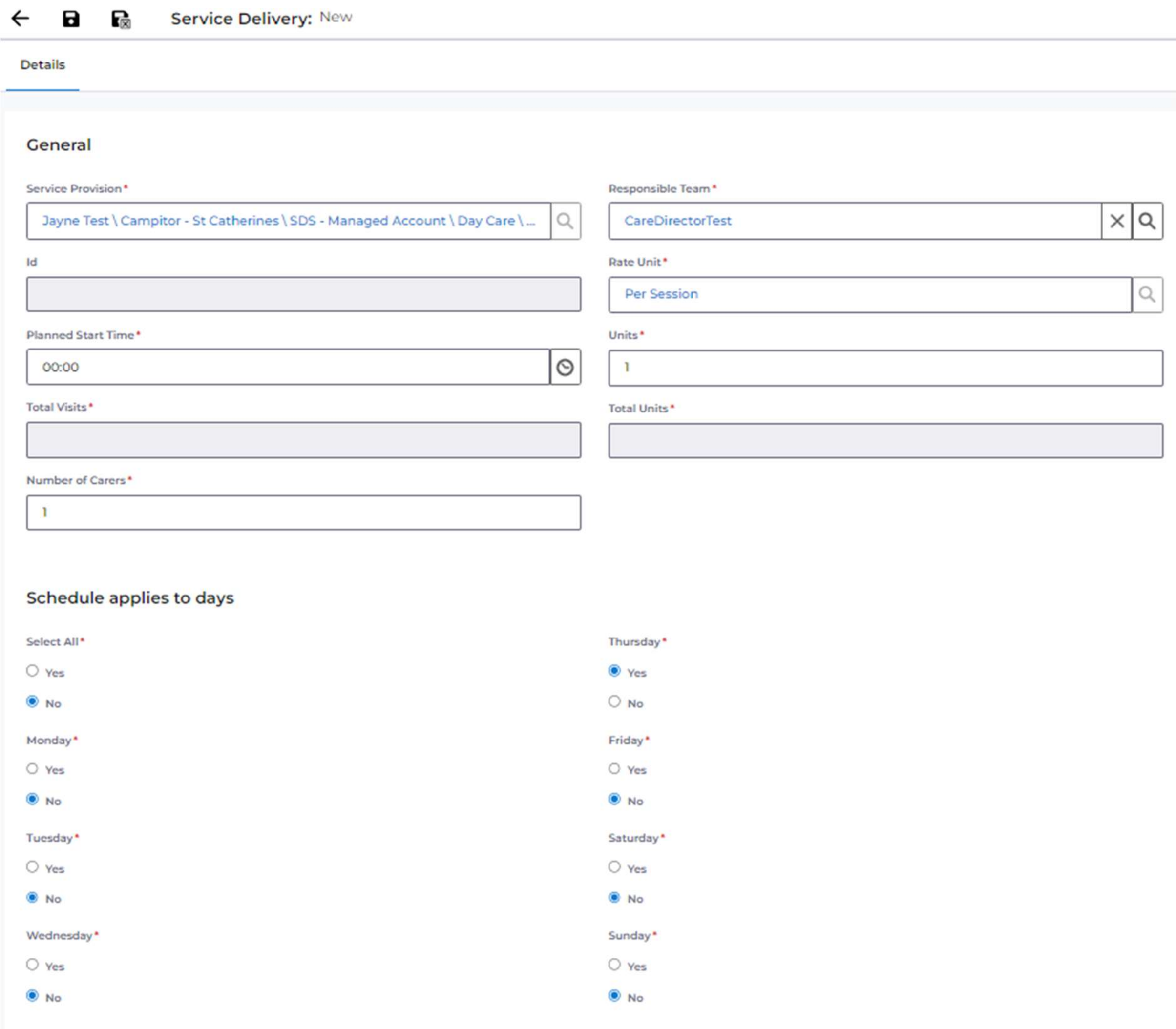
5. Select **Save** when completed.



6. You will now need to record **Service Deliveries**. Select **Service Deliveries** from the tabs and select **Create New Record** from the toolbar.



7. Now select your times and days of the week by completing the following information:
    a. Add the **Planned Start Time** of 00:00.
    b. Units should always be 1.
    c. **Save and Return to Previous Page**



7. Now record each service provision separately (day care, meals and transport each have their own Service Element 2 so you may have to input three separate service provisions).

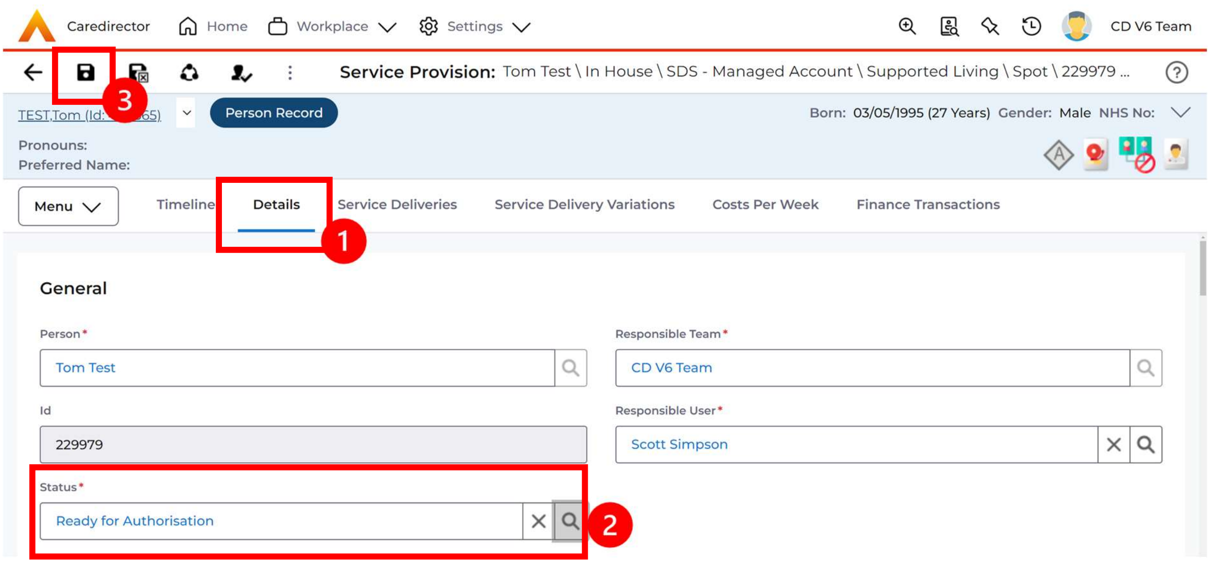
    a. Day Care by ticking appropriate days per week

    b. Meals by ticking appropriate days per week

    c. Transport by ticking appropriate days per week

8. When finished select **Save and Return to Previous Page** on the toolbar.

9. Locate the **Service Provision Details** tab and change the **Status** to **Ready for Authorisation** and **Save.**



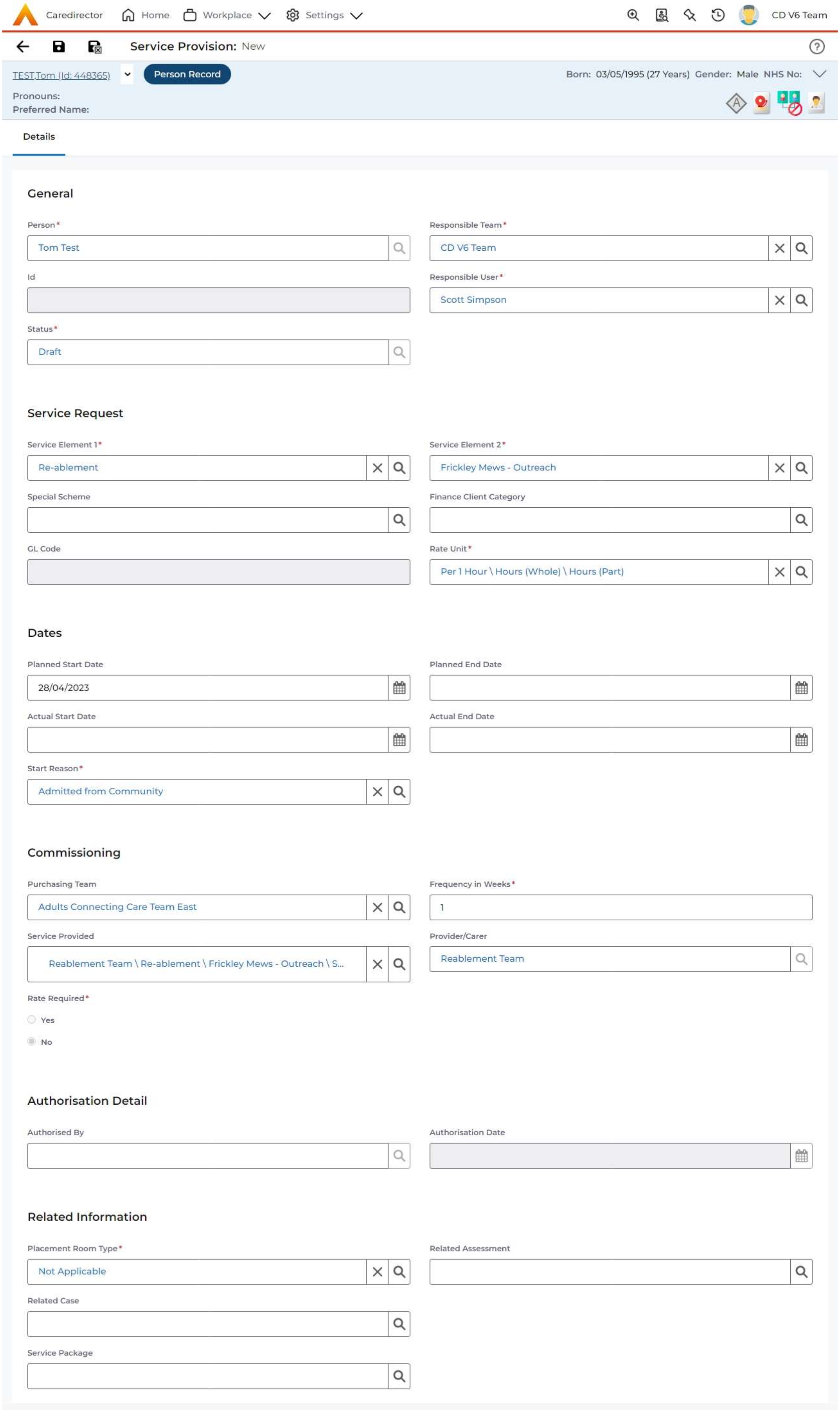
10. **Service Provisions** that are set to **Ready for Authorisation** will be picked up via an **Advanced Search** and **Authorised** (How to Authorise a Service Provision) by Team Managers/ Support Services Co-ordinator.

Re-ablement – Outreach including Frickley Mews – upto 6 weeks (formerly known as 21 days service)

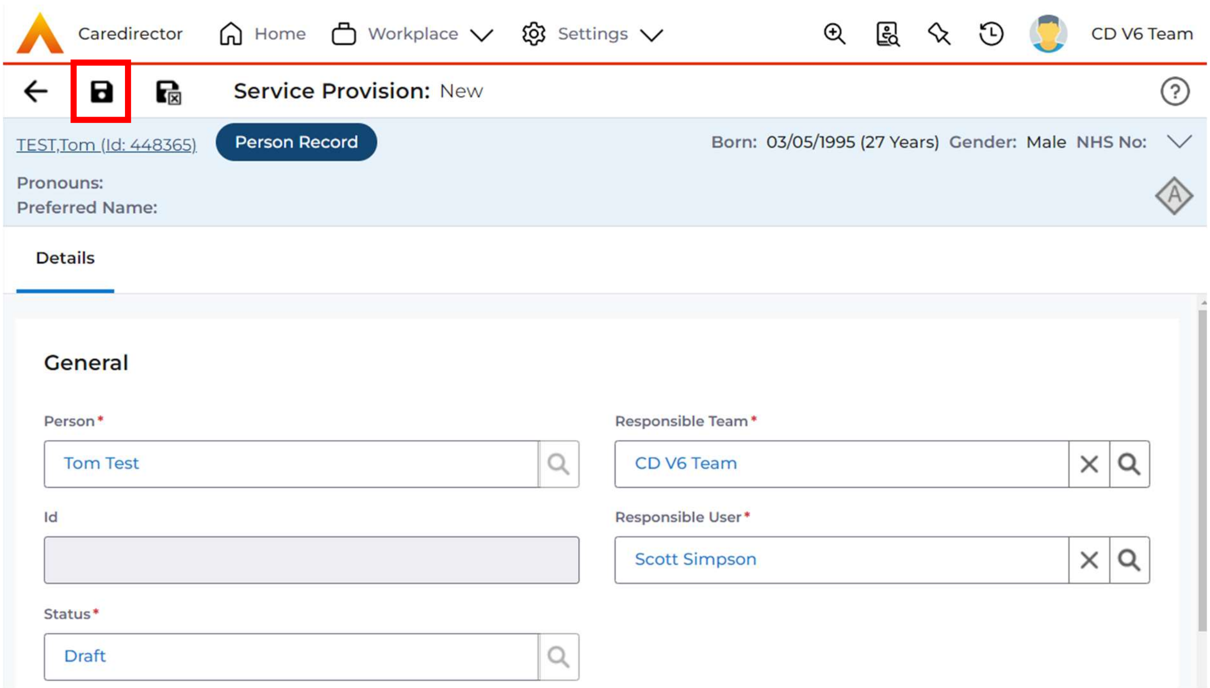
1. The fields below are available in the new Service Provision screen. Please locate the relevant **person record > services > create new record** then enter the information side into the according field.
   For more information follow: How to find Service Provisions and Create New.

2. The Practitioner must have already completed the **Interim Support Plan** on **CareDirector** and left as **In Progress** not set to **Complete**. Complete the following information:

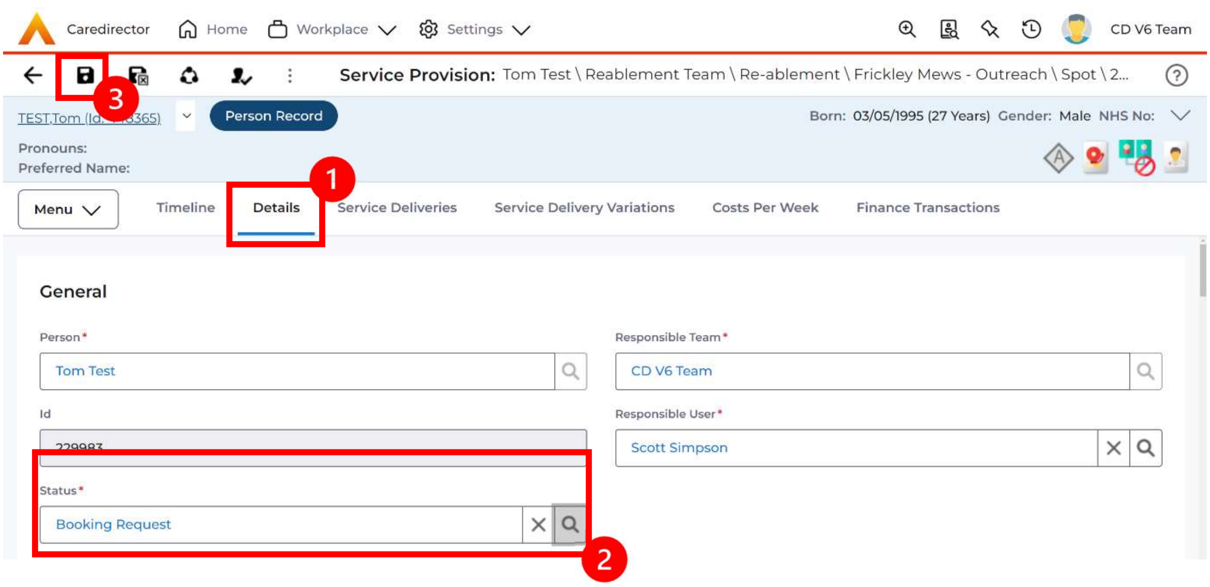
Field	Information
Service Element 1:	**Re-ablement**
Service Element 2:	Choose **Outreach** or **Frickley Mews Outreach**
Rate Unit:	**Per 1 Hour \ Hours (Whole) \ Hours (Part)**
Planned Start Date:	**Today's date**
Actual Start Date:	Leave blank
Planned End Date:	Leave blank
Actual End Date:	Leave blank (Can only be input on the day of the **Planned End Date** or after it).
Start Reason:	Choose **Admitted from Community**.
Purchasing Team:	Choose appropriate Team.
Service Provided:	Choose the **Reablement Team**
Status:	**Draft.**
Placement Room Type:	Auto populates to 'Not Applicable'
Responsible Team:	Auto populated with the user's default team.
Responsible User:	Auto populated with the user's name
Related Case:	Select relevant case


Caredirector
Home
Workplace
Settings
CD V6 Team
Service Provision: New
TEST,Tom (Id: 448365)
Person Record
Born: 03/05/1995 (27 Years) Gender: Male NHS No:
Pronouns:
Preferred Name:
Details
General
Person*
Tom Test
Responsible Team*
CD V6 Team
Id
Responsible User*
Scott Simpson
Status*
Draft
Service Request
Service Element 1*
Re-ablement
Service Element 2*
Frickley Mews - Outreach
Special Scheme
Finance Client Category
GL Code
Rate Unit*
Per 1 Hour \ Hours (Whole) \ Hours (Part)
Dates
Planned Start Date
28/04/2023
Planned End Date
Actual Start Date
Actual End Date
Start Reason*
Admitted from Community
Commissioning
Purchasing Team
Adults Connecting Care Team East
Frequency in Weeks*
1
Service Provided
Reablement Team \ Re-ablement \ Frickley Mews - Outreach \ S...
Provider/Carer
Reablement Team
Rate Required*
Yes
No
Authorisation Detail
Authorised By
Authorisation Date
Related Information
Placement Room Type*
Not Applicable
Related Assessment
Related Case
Service Package

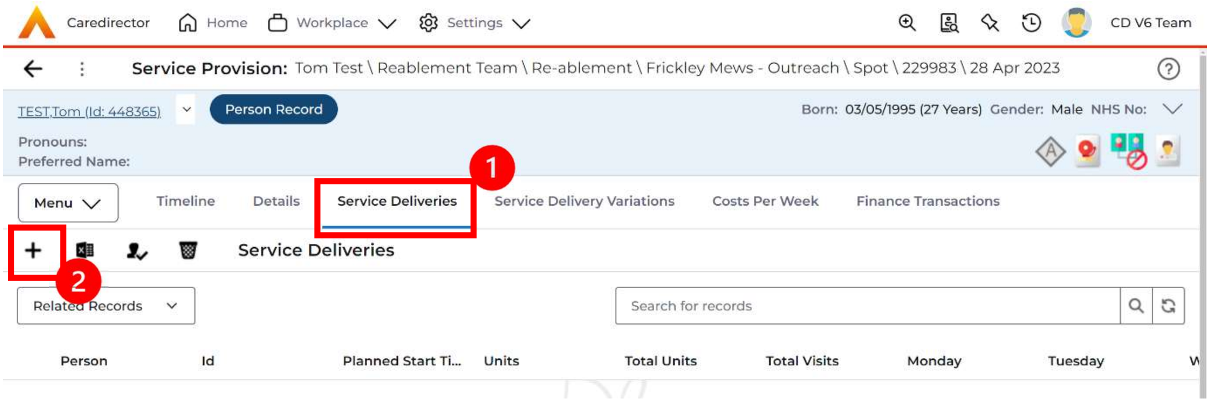
3. Select **Save** when completed.



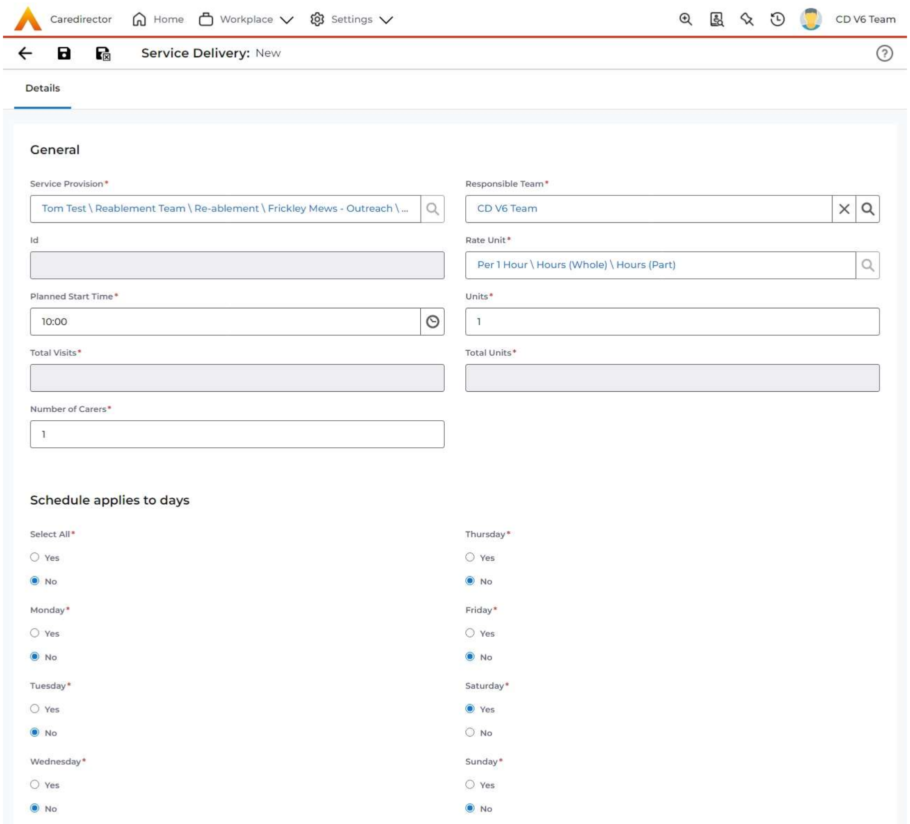
4. When saved, go back into details as it will default you to the **Timeline** tab and select **Booking Request** then **Save.**



5. You will now need to record **Service Deliveries**. Select **Save** from the toolbar. Then select the **Service Deliveries** tab. Then **Create New Record.**



6. Now select your times and days of the week by completing the following information:
    a. If the Client needs more than one visit per day your will need to record each time band separately
    b. If the Client needs two carers you will need to change the **Number of Carers** field to the amount needed.
    c. Add the **Planned Start Time of 9am.**
    d. Change the **Units to 1,** the Reablement Team will add the actual Service Deliveries once these are determined
    e. **Save and Return to Previous Page**.



7. **Service Provisions** that are set to **Booking Request** will be picked up via an **Advanced Search** by the **Re-ablement Team.** They will insert the **Service Deliveries** and **Actual Start Date** and then set the **Status** to **Ready for Authorisation.**

8. **Service Provisions** that are set to **Ready for Authorisation** will be picked up via an **Advanced Search** and **Authorised** (How to Authorise a Service Provision) by Team Managers/ Support Services Co-ordinator.

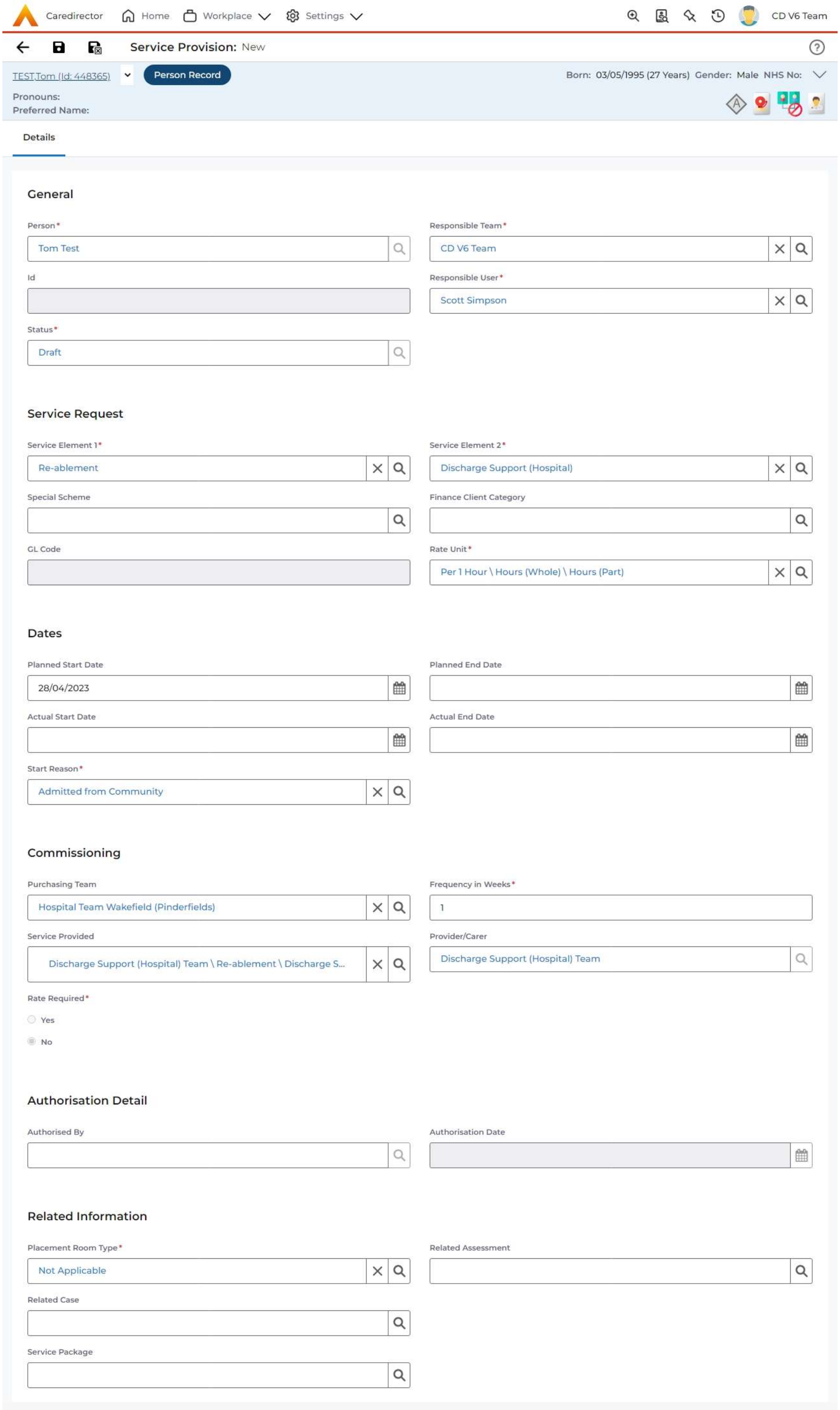
9. Once a **Re-ablement** package becomes stable, a **DOM4** will be sent to the **Co-ordination Team** by the **Re-ablement Co-ordinator** to source a long-term **provider**. However, if an external **Provider** cannot provide the package immediately then a **Re-ablement – Chargeable Service Provision** will be recorded by the CSO/Admin as an interim measure until an external **Provider** is available. The **Support Services Team** will be copied into the email sending the **DOM4** so that they are aware of the agreed **Service Deliveries**. Once the chargeable Service Provision is started the previous **Service Provision** will be ended by the CSO/Admin.

Re-ablement – Discharge Support (Hospital) including Frickley Mews – Hospital to home (formally known as 10 days service or resettlement service)

1. The fields below are available in the new Service Provision screen. Please locate the relevant **person record > services > create new record** then enter the information side into the according field.
   For more information follow: How to find Service Provisions and Create New.

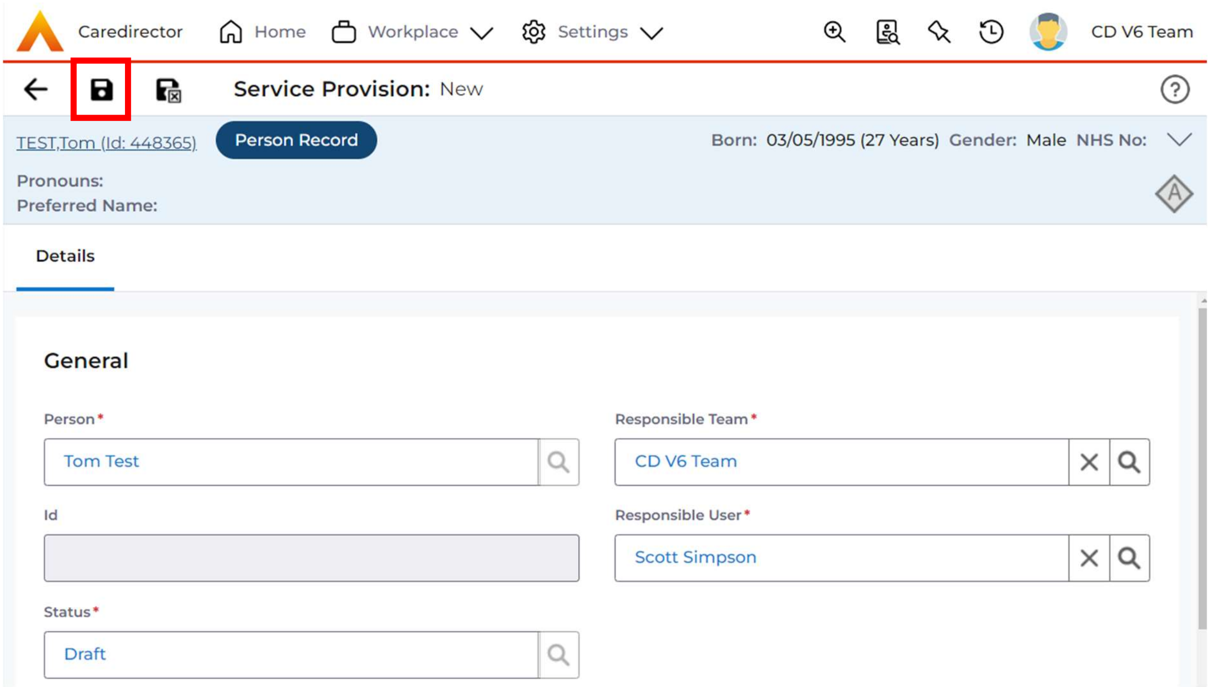
2. The Practitioner must have already completed the **Interim Support Plan** on **CareDirector** and left as **In Progess** not set to **Complete**. Complete the following information:

Field	**Information**
Service Element 1:	**Re-ablement**
Service Element 2:	Choose **Discharge Support (Hospital) or Frickley Mews – Discharge Support (Hospital)**
Rate Unit:	**Per 1 Hour \ Hours (Whole) \ Hours (Part)**
Planned Start Date:	**Date the service is expected to start.**
Actual Start Date:	Leave blank
Planned End Date:	Leave blank
Actual End Date:	Leave blank (Can only be input on the day of the **Planned End Date** or after it).
Start Reason:	Choose **Admitted from Hospital**
Purchasing Team:	Choose appropriate Team.
Service Provided:	Choose the **Discharge Support (Hospital) Team**
Status:	**Draft.**
Placement Room Type:	Auto populates to ‘Not Applicable’
Responsible Team:	Auto populated with the user’s default team.
Responsible User:	Auto populated with the user’s name
Related Case:	Select relevant case

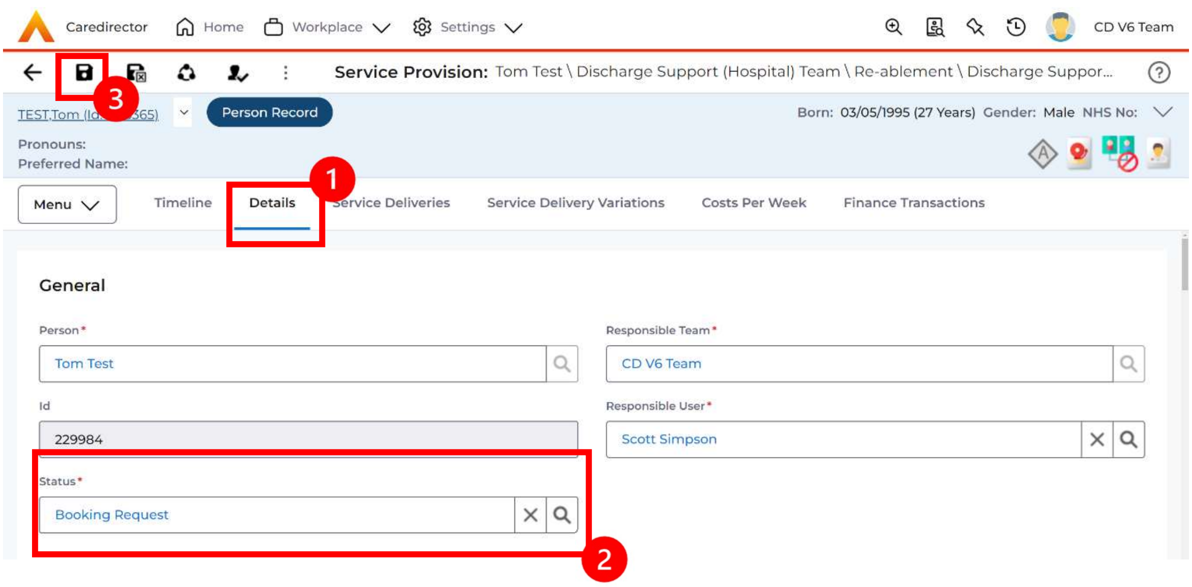


Caredirector
Home
Workplace
Settings
CD V6 Team
Service Provision: New
TEST,Tom (Id: 448365)
Person Record
Born: 03/05/1995 (27 Years) Gender: Male NHS No:
Pronouns:
Preferred Name:
Details
General
Person*
Tom Test
Responsible Team*
CD V6 Team
Id
Responsible User*
Scott Simpson
Status*
Draft
Service Request
Service Element 1*
Re-ablement
Service Element 2*
Discharge Support (Hospital)
Special Scheme
Finance Client Category
GL Code
Rate Unit*
Per 1 Hour \ Hours (Whole) \ Hours (Part)
Dates
Planned Start Date
28/04/2023
Planned End Date
Actual Start Date
Actual End Date
Start Reason*
Admitted from Community
Commissioning
Purchasing Team
Hospital Team Wakefield (Pinderfields)
Frequency in Weeks*
1
Service Provided
Discharge Support (Hospital) Team \ Re-ablement \ Discharge S...
Provider/Carer
Discharge Support (Hospital) Team
Rate Required*
Yes
No
Authorisation Detail
Authorised By
Authorisation Date
Related Information
Placement Room Type*
Not Applicable
Related Assessment
Related Case
Service Package

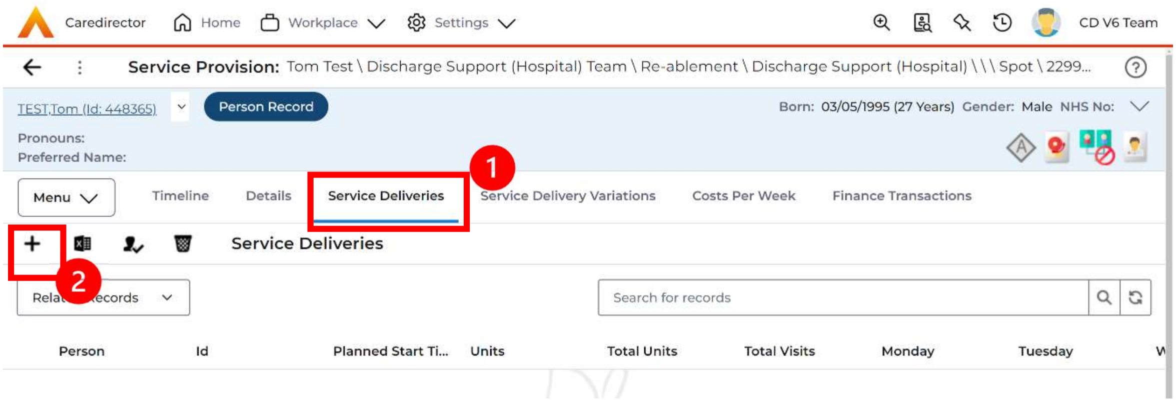
3. Select **Save** when completed.



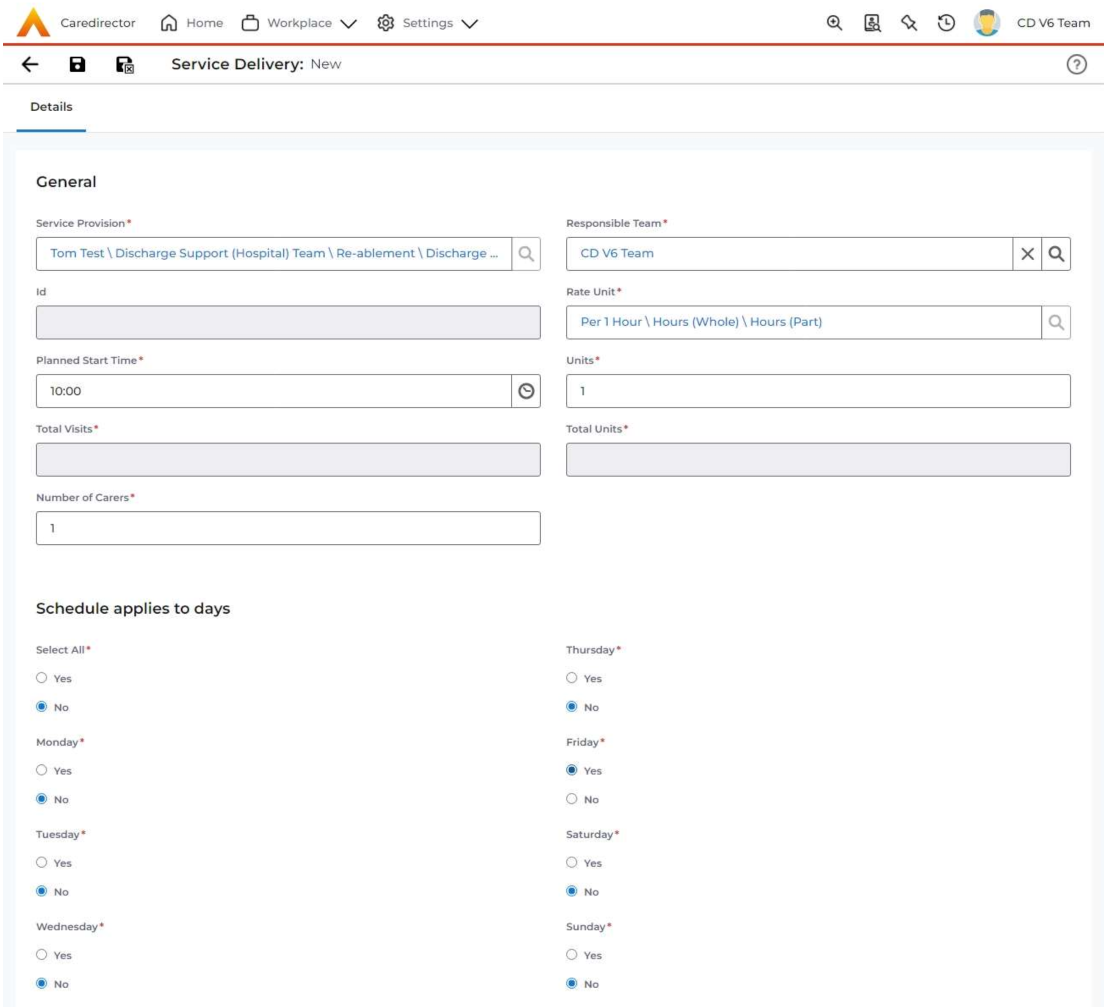
4. When saved, go back into details as it will default you to the **Timeline** tab and select **Booking Request** then **Save.**



5. You will now need to record **Service Deliveries**. Select **Save** from the toolbar. Then select the **Service Deliveries** tab. Then **Create New Record.**



6. Now select your times and days of the week by completing the following information:
    a. If the Client needs more than one visit per day your will need to record each time band separately
    b. If the Client needs two carers you will need to change the **Number of Carers** field to the amount needed.
    c. Add the **Planned Start Time.**
    d. Add the **Units** (Duration of visit), in hours, using decimals e.g 1 hour = 1 or ½ hour = 30. Please see annexed table of Rate Unit Amounts, below.
    e. **Save and Return to Previous Page**.



7. **Service Provisions** that are set to **Booking Request** will be picked up via an **Advanced Search** by the **Re-ablement Team.** They will insert the **Actual Start Date** and then set the **Status** to **Ready for Authorisation.**

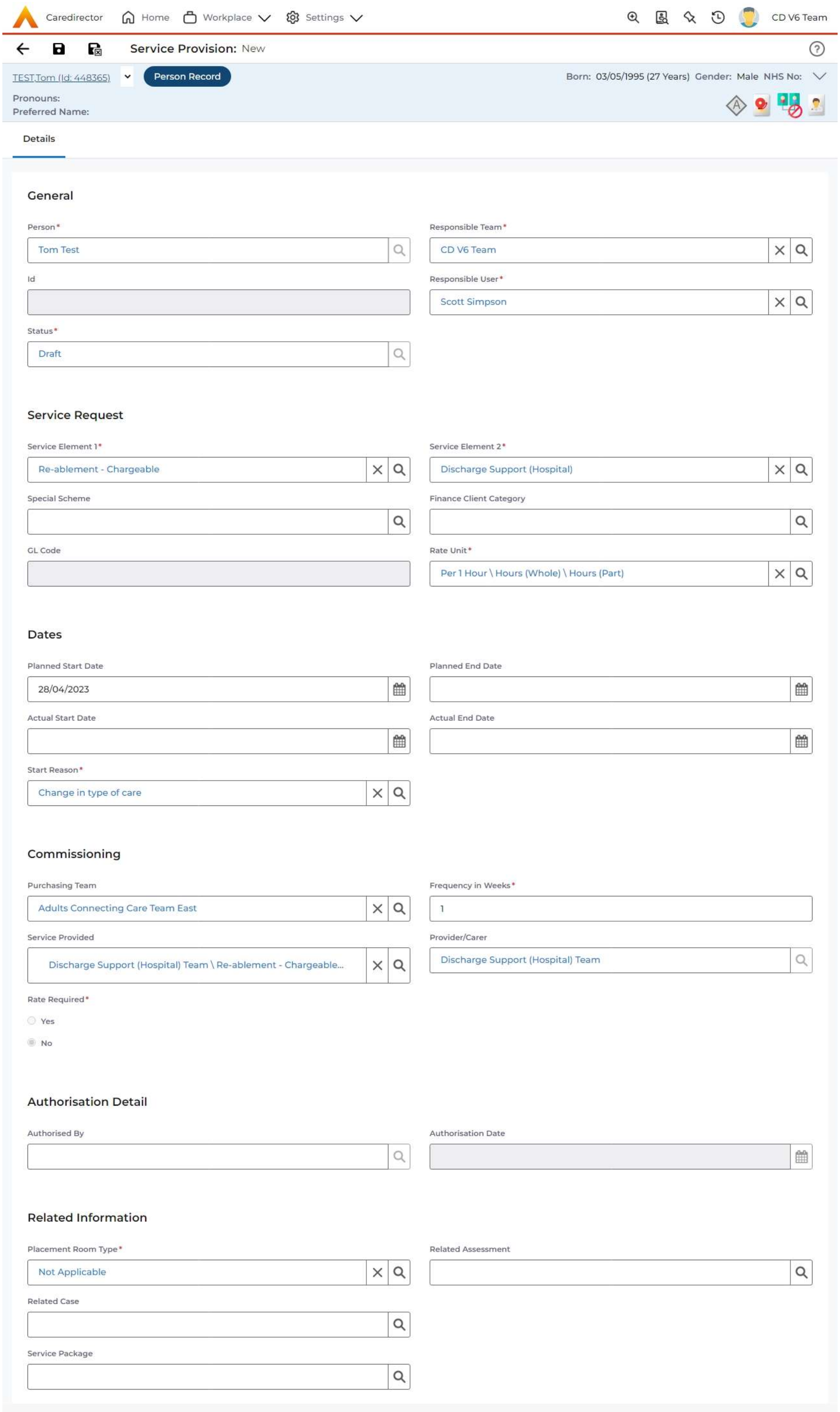
8. **Service Provisions** that are set to **Ready for Authorisation** will be picked up via an **Advanced Search** and **Authorised** (How to Authorise a Service Provision) by Team Managers/ Support Services Co-ordinator.

9. Once a **Re-ablement** package becomes stable, a **DOM4** will be sent to the **Co-ordination Team** by the **Re-ablement Co-ordinator** to source a long-term **provider**. However, if an external **Provider** cannot provide the package immediately then a **Re-ablement – Chargeable Service Provision** will be recorded by the CSO/Admin as an interim measure until an external **Provider** is available. The **Support Services Team** will be copied into the email sending the **DOM4** so that they are aware of the agreed **Service Deliveries**. Once the chargeable Service Provision is started the previous **Service Provision** will be ended by the CSO/Admin.

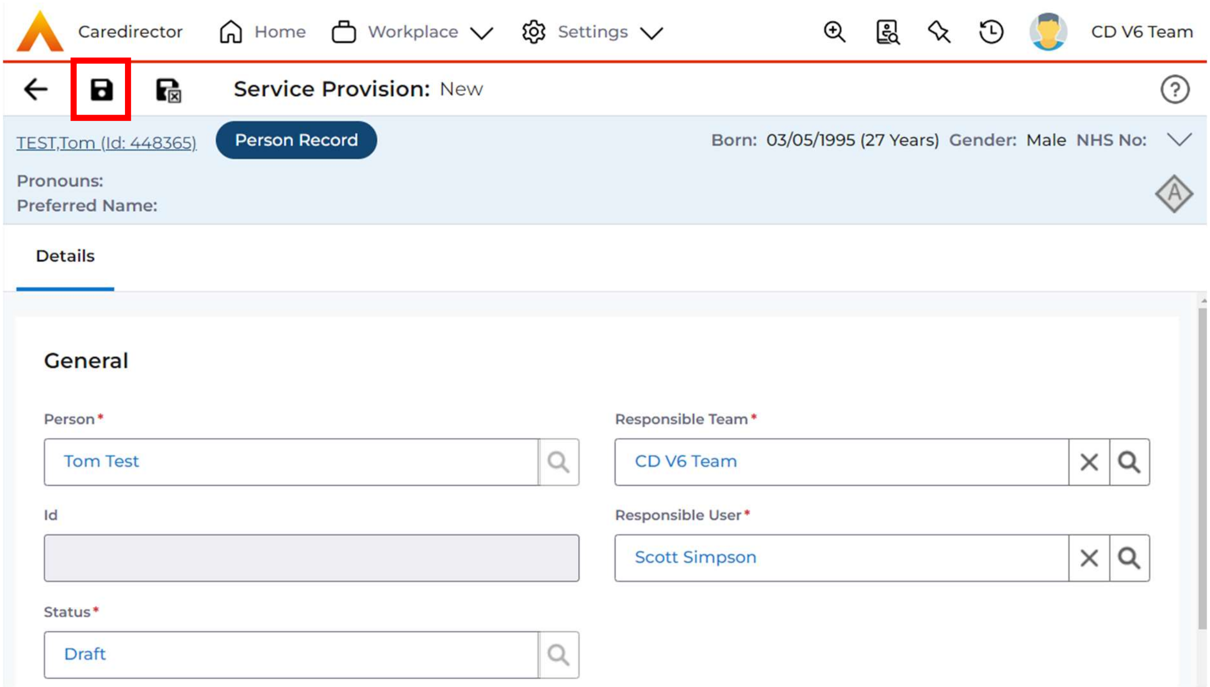
Re-ablement – Chargeable

1. The fields below are available in the new Service Provision screen. Please locate the relevant **person record > services > create new record** then enter the information side into the according field.
   For more information follow: [How to find Service Provisions and Create New](#).

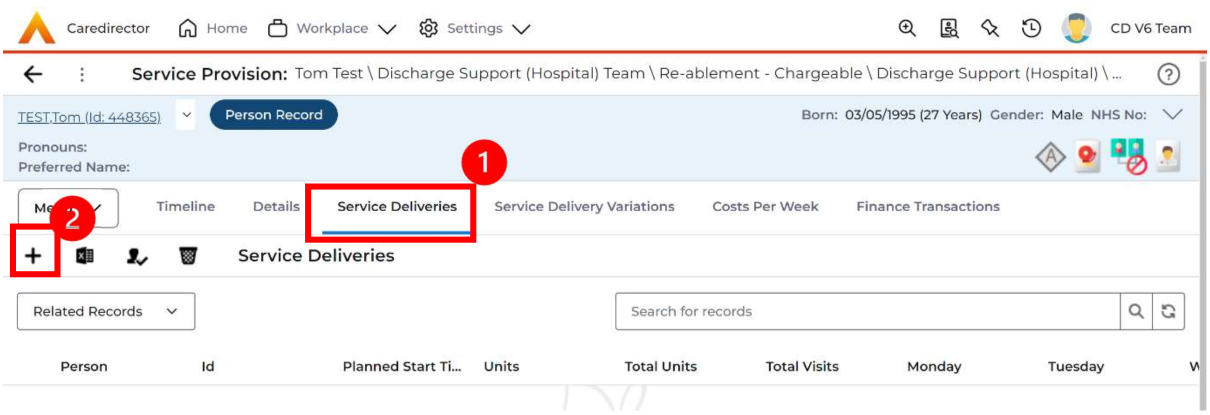
Field	Information
Service Element 1:	**Re-ablement - Chargeable**
Service Element 2:	Choose **Discharge Support (Hospital)** or **Outreach**
Rate Unit:	**Per 1 Hour \ Hours (Whole) \ Hours (Part)**
Planned Start Date:	Leave blank
Actual Start Date:	Stable date (from Re-ablement Team)
Planned End Date:	Leave blank
Actual End Date:	Leave blank (Can only be inputted on the day of the **Planned End Date** or after it).
Start Reason:	Choose **Change in Type of Care**.
Purchasing Team:	Choose appropriate Team.
Service Provided:	Choose the relevant provider.
Status:	**Draft.**
Placement Room Type:	Auto populates to ‘Not Applicable’
Responsible Team:	Auto populated with the user’s default team.
Responsible User:	Auto populated with the user’s name
Related Case:	Select relevant case


Caredirector
Home
Workplace
Settings
CD V6 Team
Service Provision: New
TEST,Tom (Id: 448365)
Person Record
Born: 03/05/1995 (27 Years) Gender: Male NHS No:
Pronouns:
Preferred Name:
Details
General
Person*
Tom Test
Responsible Team*
CD V6 Team
Id
Responsible User*
Scott Simpson
Status*
Draft
Service Request
Service Element 1*
Re-ablement - Chargeable
Service Element 2*
Discharge Support (Hospital)
Special Scheme
Finance Client Category
GL Code
Rate Unit*
Per 1 Hour \ Hours (Whole) \ Hours (Part)
Dates
Planned Start Date
28/04/2023
Planned End Date
Actual Start Date
Actual End Date
Start Reason*
Change in type of care
Commissioning
Purchasing Team
Adults Connecting Care Team East
Frequency in Weeks*
1
Service Provided
Discharge Support (Hospital) Team \ Re-ablement - Chargeable...
Provider/Carer
Discharge Support (Hospital) Team
Rate Required*
Yes
No
Authorisation Detail
Authorised By
Authorisation Date
Related Information
Placement Room Type*
Not Applicable
Related Assessment
Related Case
Service Package

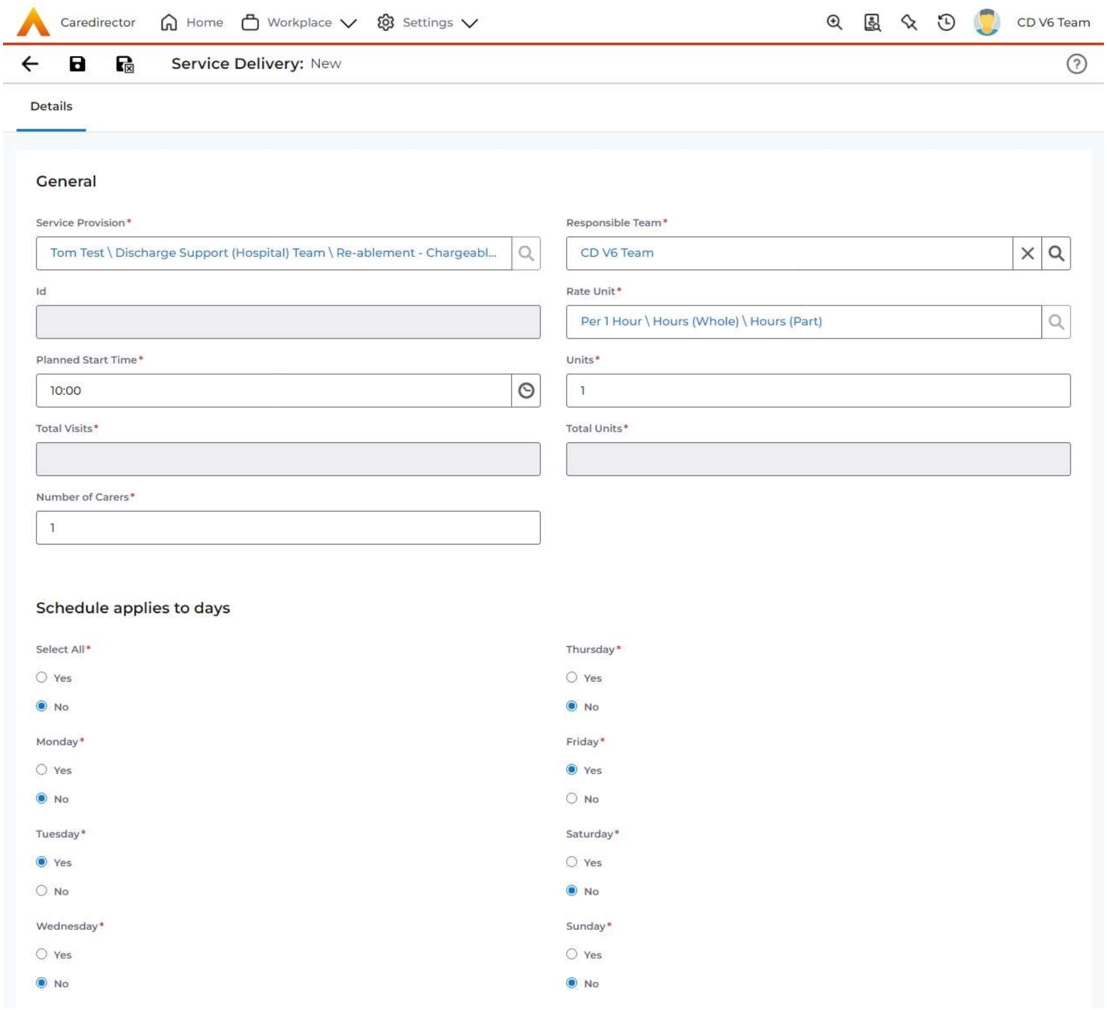
4. Select **Save** when completed.



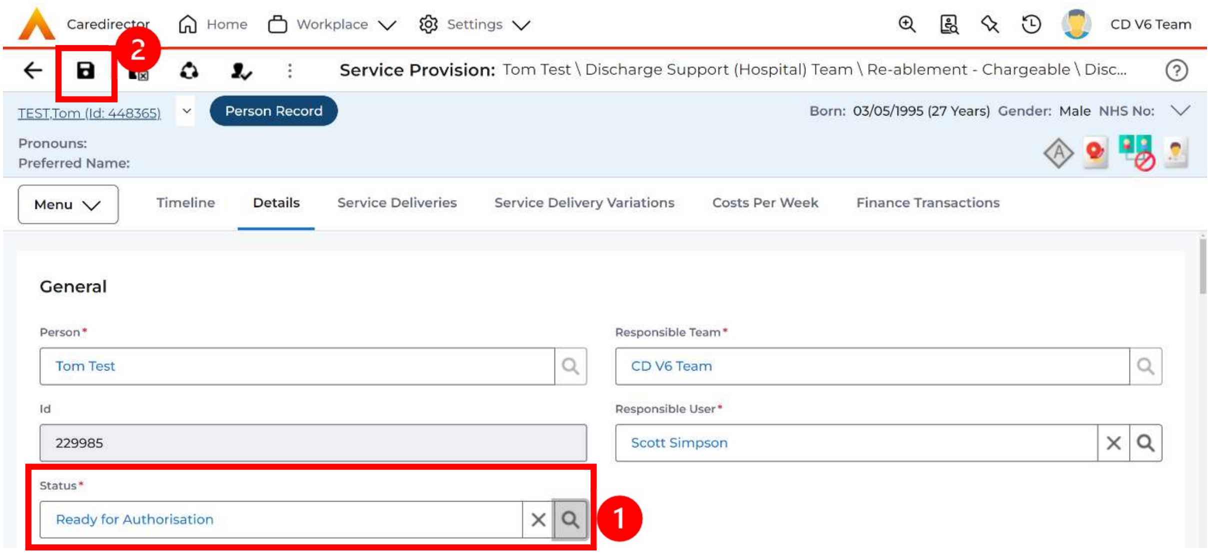
5. You will now need to record **Service Deliveries** recording accurately as per the **DOM4.** Select **Service Deliveries** from the tabs and select **Create New Record** from the toolbar.



6. Now select your times and days of the week by completing the following information:
    a. If the Client needs more than one visit per day your will need to record each time band separately
    b. If the Client needs two carers you will need to change the **Number of Carers** field to the amount needed.
    c. Add the **Units** (Duration of visit), in hours, using decimals e.g 1 hour = 1 or ½ hour = 30. Please see annexed table of Rate Unit Amounts, below.
    d. **Save and Return to Previous Page**.



7. Go back to **Details** and change the **Status** to **Ready for Authorisation** using the **Lookup function** and select **Save**.



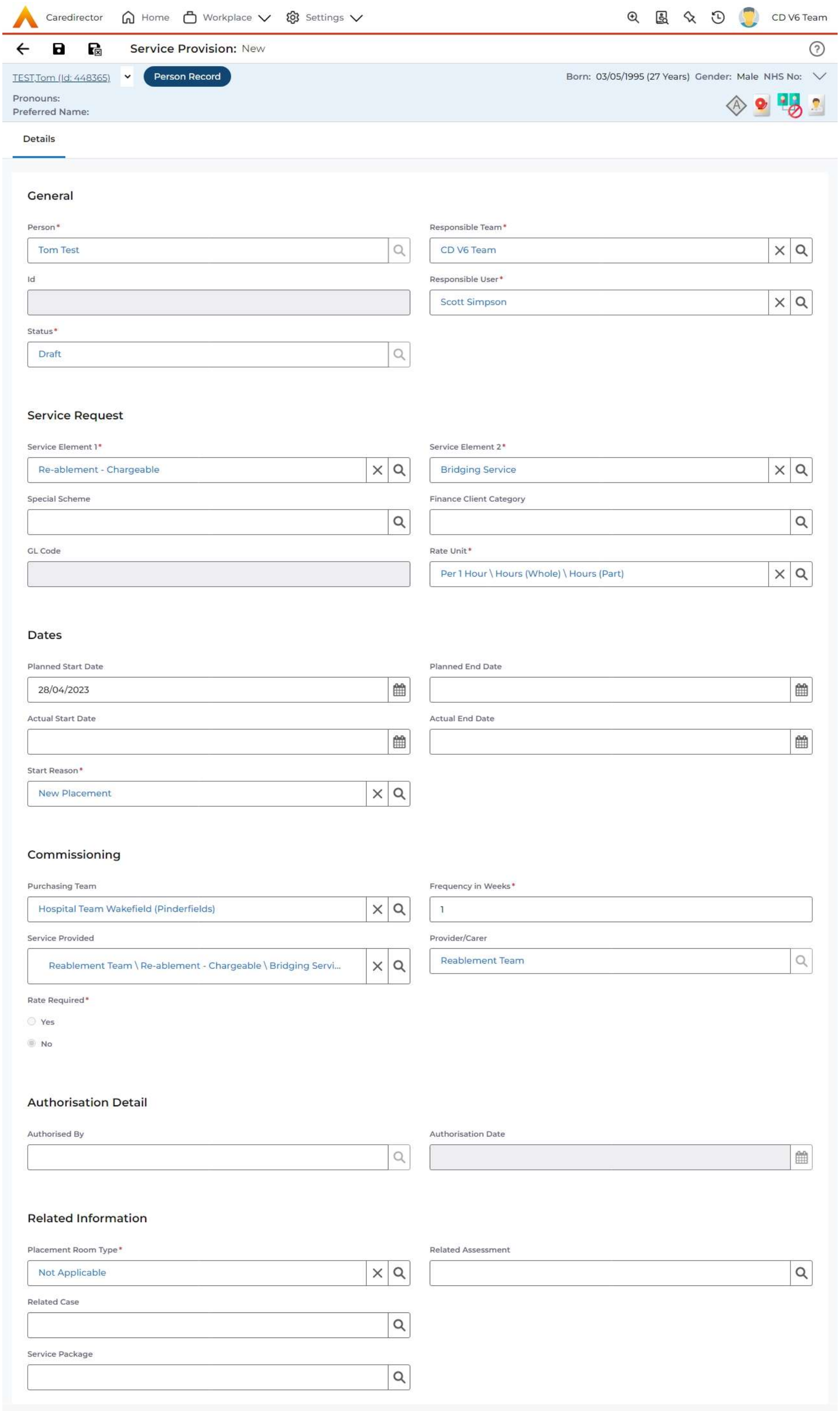
8. Service Provisions that are set to **Ready for Authorisation** can be found via an **Advanced Find** and **Authorised** (How to Authorise a Service Provision) by a Team Manager/ Support Services Co-Ordinator.

Re-ablement – Chargeable Bridging Service (Booking Request)

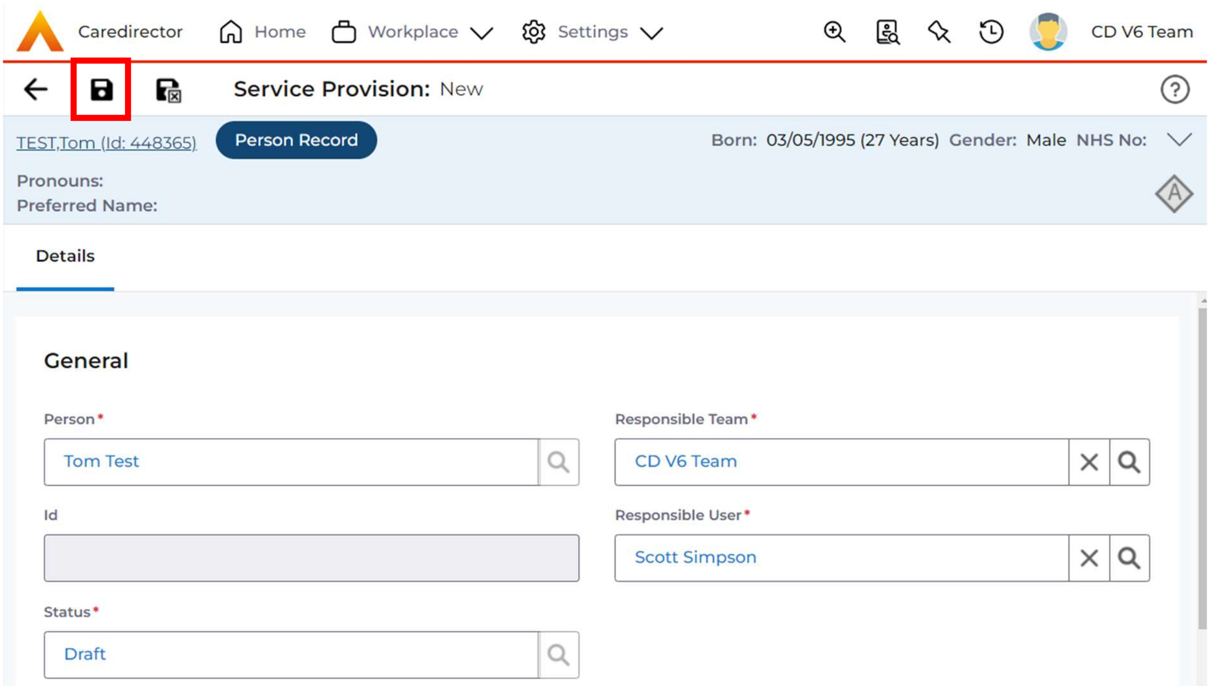
1. The fields below are available in the new Service Provision screen. Please locate the relevant **person record > services > create new record** then enter the information side into the according field.
   For more information follow: How to find Service Provisions and Create New.

2. The Practitioner must have already completed the **Re-ablement Referral Form** on **CareDirector** and left as **In Progress** not set to **Complete**.
   Complete the following information:

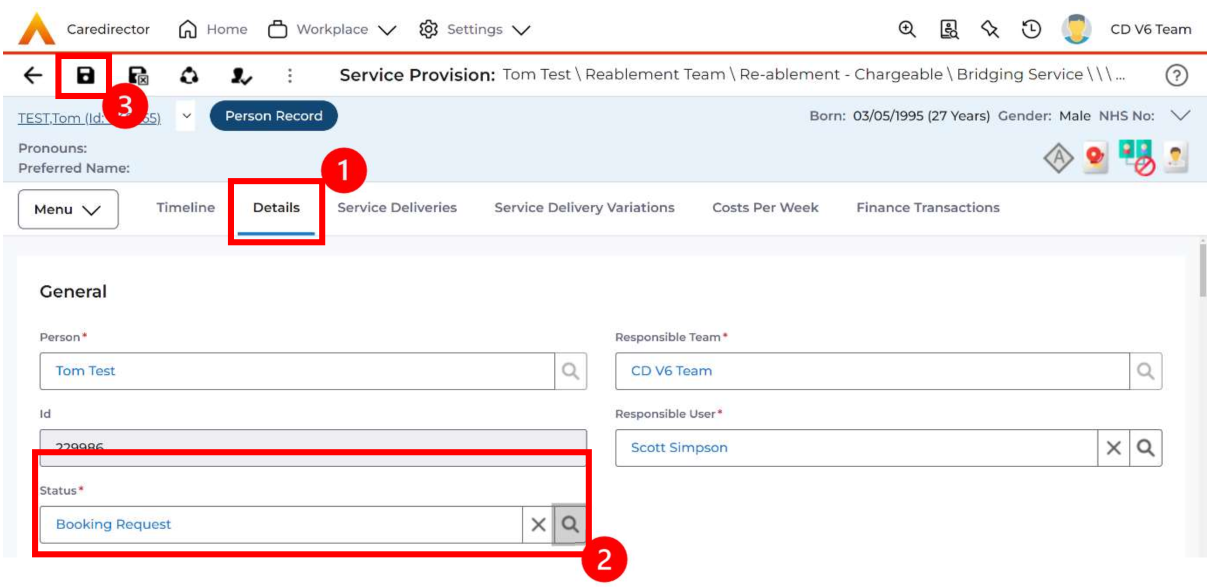
Field	Information
Service Element 1:	**Re-ablement - Chargeable**
Service Element 2:	**Bridging Service**
Rate Unit:	**Per 1 Hour \ Hours (Whole) \ Hours (Part)**
Planned Start Date:	**Date the service is expected to start.**
Actual Start Date:	Leave blank (The Re-ablement team will input the Actual Start Date)
Planned End Date:	Leave blank
Actual End Date:	Leave blank (Can only be input on the day of the Planned End Date or after it).
Start Reason:	Choose appropriate option.
Purchasing Team:	Choose appropriate Team.
Service Provided:	Choose the **Reablement Team**
Status:	**Draft.**
Placement Room Type:	Auto populates to 'Not Applicable'
Responsible Team:	Auto populated with the user's default team.
Responsible User:	Auto populated with the user's name
Related Case:	Select relevant case


Caredirector
Home
Workplace
Settings
CD V6 Team
Service Provision: New
TEST,Tom (Id: 448365)
Person Record
Born: 03/05/1995 (27 Years) Gender: Male NHS No:
Pronouns:
Preferred Name:
Details
General
Person*
Tom Test
Responsible Team*
CD V6 Team
Id
Responsible User*
Scott Simpson
Status*
Draft
Service Request
Service Element 1*
Re-ablement - Chargeable
Service Element 2*
Bridging Service
Special Scheme
Finance Client Category
GL Code
Rate Unit*
Per 1 Hour \ Hours (Whole) \ Hours (Part)
Dates
Planned Start Date
28/04/2023
Planned End Date
Actual Start Date
Actual End Date
Start Reason*
New Placement
Commissioning
Purchasing Team
Hospital Team Wakefield (Pinderfields)
Frequency in Weeks*
1
Service Provided
Reablement Team \ Re-ablement - Chargeable \ Bridging Servi...
Provider/Carer
Reablement Team
Rate Required*
Yes
No
Authorisation Detail
Authorised By
Authorisation Date
Related Information
Placement Room Type*
Not Applicable
Related Assessment
Related Case
Service Package

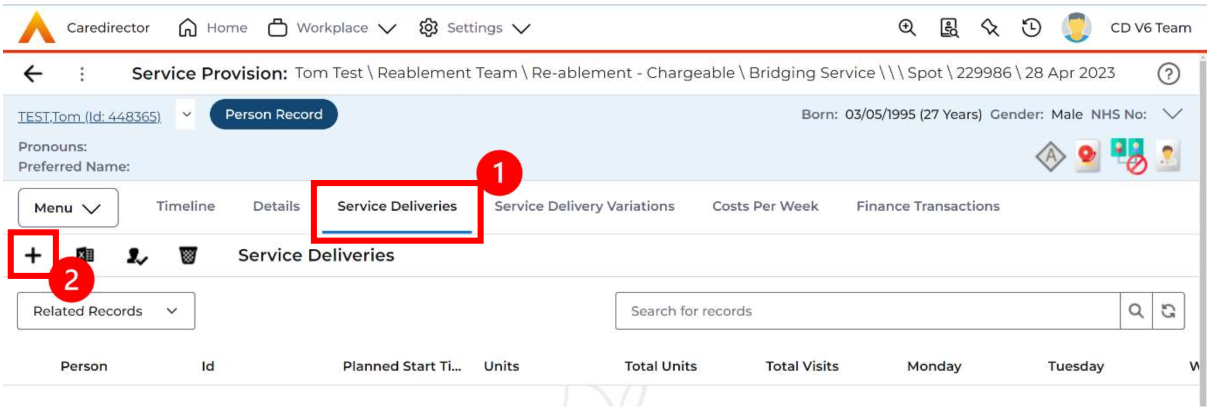
3. Select **Save** when completed.



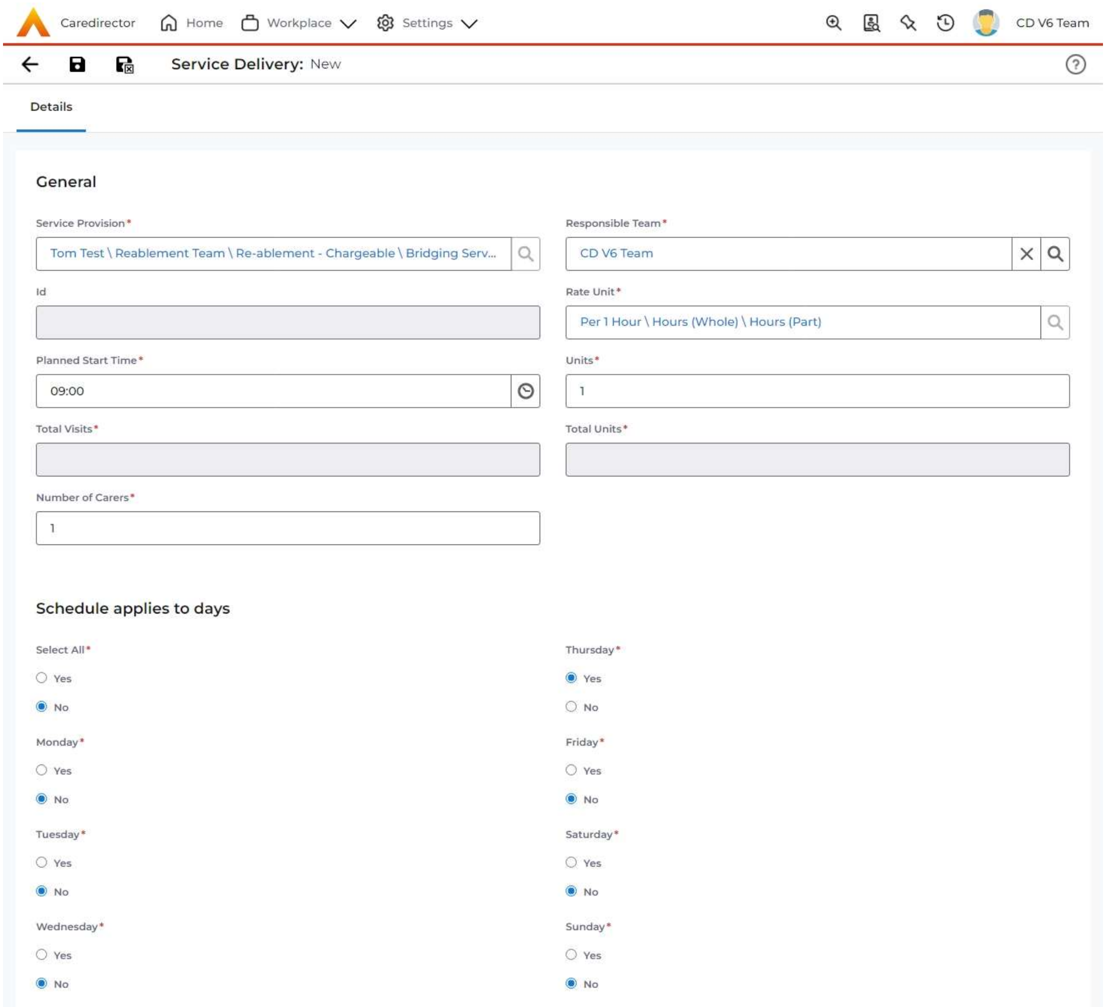
4. When saved, go back into details as it will default you to the **Timeline** tab and select **Booking Request** then **Save.**



5. You will now need to record **Service Deliveries**. Select **Save** from the toolbar. Then select the **Service Deliveries** tab. Then **Create New Record.**



6. Now select your times and days of the week by completing the following information:
    a. If the Client needs more than one visit per day your will need to record each time band separately
    b. If the Client needs two carers you will need to change the **Number of Carers** field to the amount needed
    c. Add the **Planned Start Time**
    d. Add the **Units** (Duration of visit), in hours, using decimals e.g 1 hour = 1 or ½ hour = 30. Please see annexed table of Rate Unit Amounts, below.
    e. **Save and Return to Previous Page.**



7. **Service Provisions** that are set to **Booking Request** will be picked up via an **Advanced Search** by the **Re-ablement Team.** They will insert the **Actual Start Date** and then set the **Status** to **Ready for Authorisation.**

8. **Service Provisions** that are set to **Ready for Authorisation** will be picked up via an **Advanced Search** and **Authorised** (How to Authorise a Service Provision) by Team Managers/ Support Services Co-ordinator.

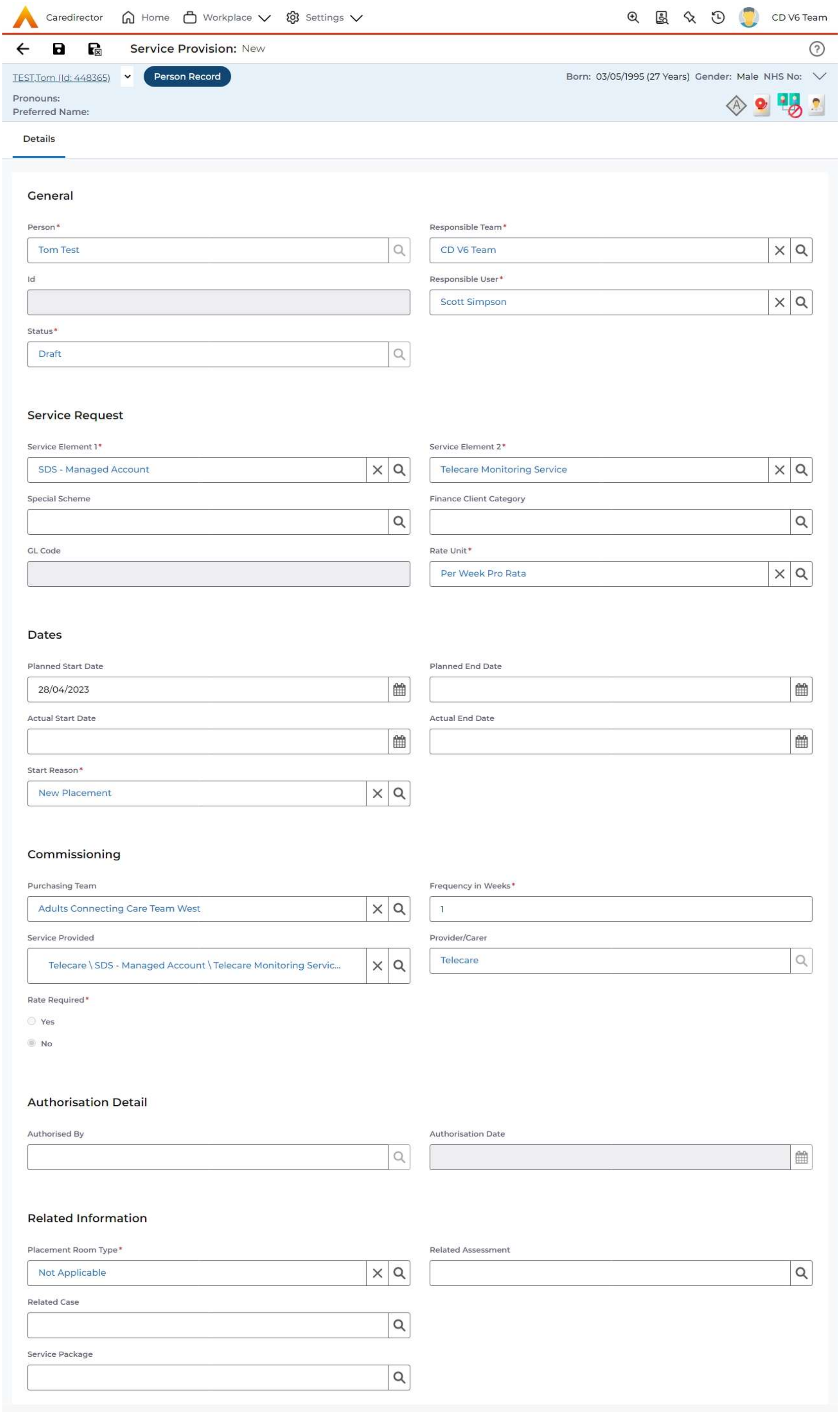
9. Add a **Note** (How to add a Note) in if there are any special requirements (i.e. peg feeding or female carer required).

Telecare – Monitoring Service

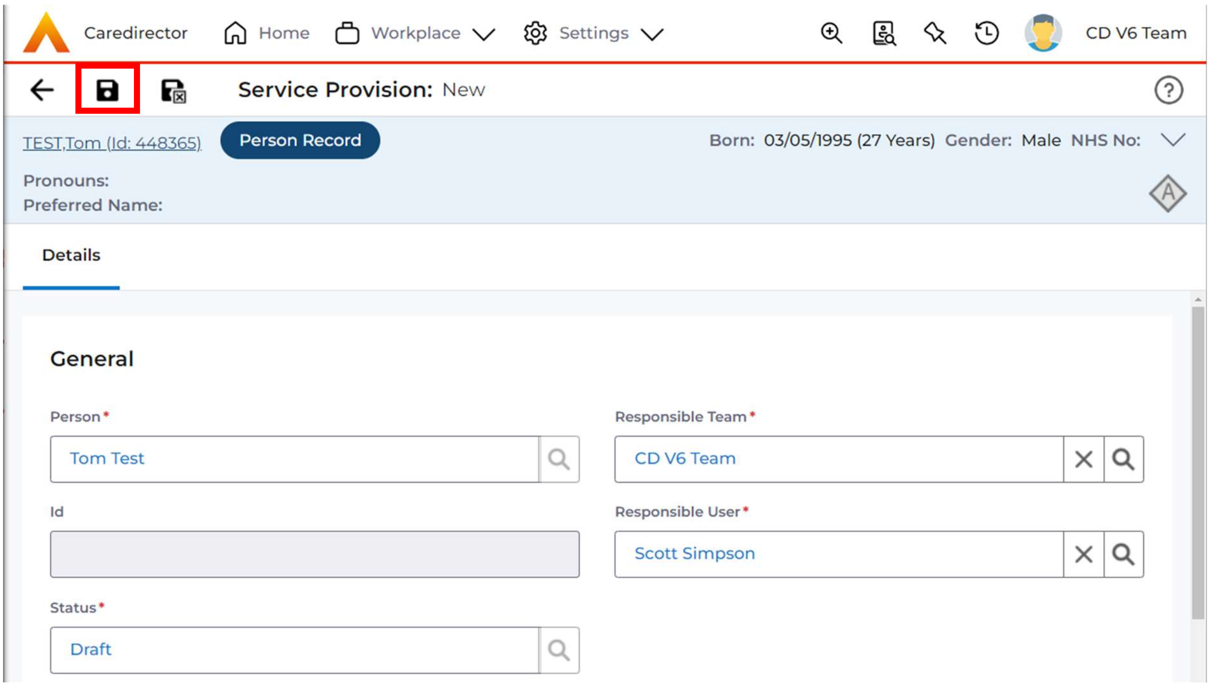
1. This Service is recorded from information on the **activity on the CSO Team dashboard** not from the Care and Support Plan.

2. The fields below are available in the new Service Provision screen. Please locate the relevant **person record > services > create new record** then enter the information side into the according field.
   For more information follow: How to find Service Provisions and Create New.

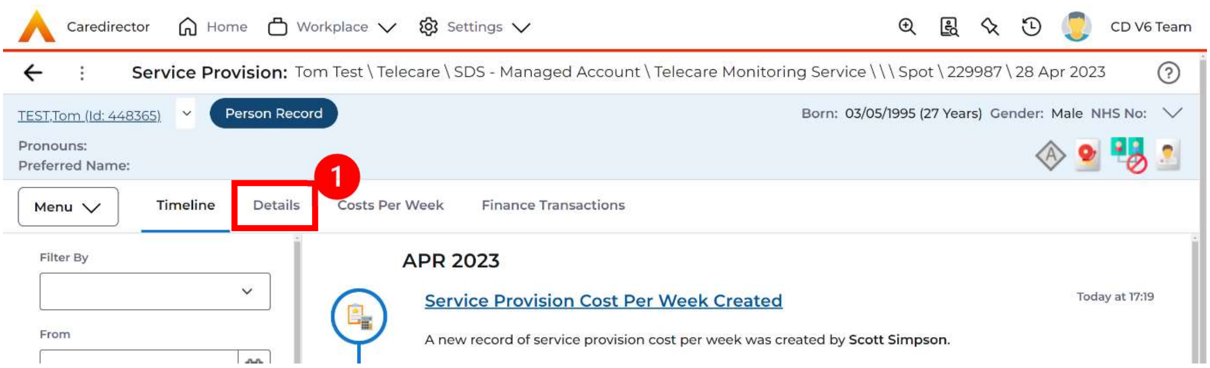
Field	Information
Service Element 1:	**SDS – Managed Account**
Service Element 2:	**Telecare Monitoring Service**
Rate Unit:	**Per Week Pro Rata**
Planned Start Date:	Leave blank
Actual Start Date:	**Enter date of installation of Telecare**
Planned End Date:	Leave blank
Actual End Date:	Leave blank (Can only be input on the day of the **Planned End Date** or after it)
Start Reason:	**New Placement.**
Purchasing Team:	Choose appropriate Team.
Service Provided:	Choose **Telecare**
Status:	**Draft.**
Placement Room Type:	Auto populates to 'Not Applicable'
Responsible Team:	Auto populated with the user's default team.
Responsible User:	Auto populated with the user's name
Related Case:	Select relevant case


Caredirector
Home
Workplace
Settings
CD V6 Team
Service Provision: New
TEST,Tom (Id: 448365)
Person Record
Born: 03/05/1995 (27 Years) Gender: Male NHS No:
Pronouns:
Preferred Name:
Details
General
Person*
Tom Test
Responsible Team*
CD V6 Team
Id
Responsible User*
Scott Simpson
Status*
Draft
Service Request
Service Element 1*
SDS - Managed Account
Service Element 2*
Telecare Monitoring Service
Special Scheme
Finance Client Category
GL Code
Rate Unit*
Per Week Pro Rata
Dates
Planned Start Date
28/04/2023
Planned End Date
Actual Start Date
Actual End Date
Start Reason*
New Placement
Commissioning
Purchasing Team
Adults Connecting Care Team West
Frequency in Weeks*
1
Service Provided
Telecare \ SDS - Managed Account \ Telecare Monitoring Servic...
Provider/Carer
Telecare
Rate Required*
Yes
No
Authorisation Detail
Authorised By
Authorisation Date
Related Information
Placement Room Type*
Not Applicable
Related Assessment
Related Case
Service Package

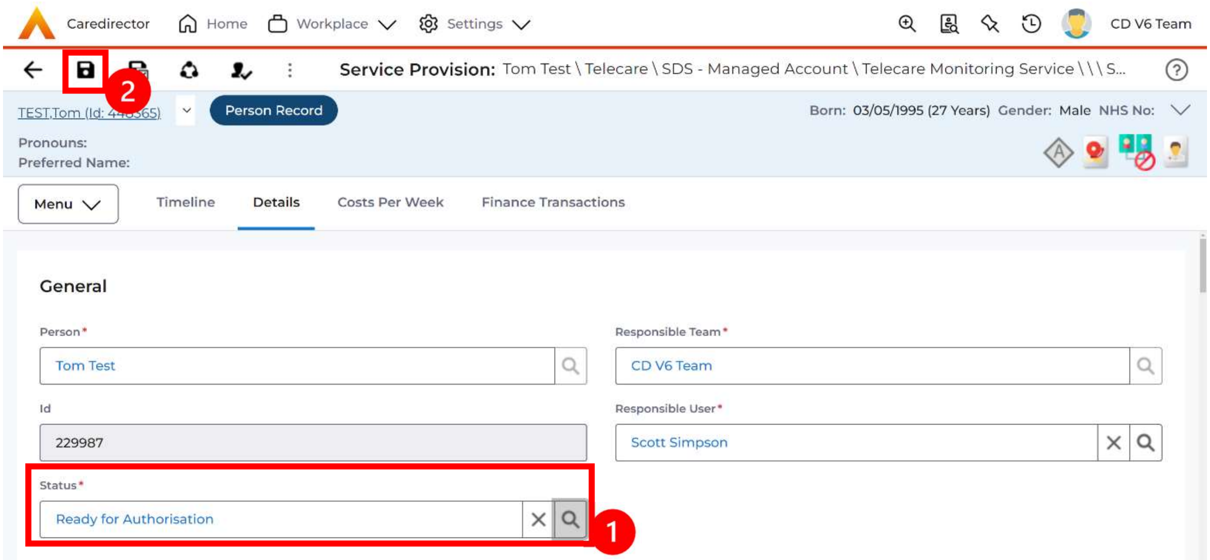
3. Select **Save** when completed.



4. This will take you back to the Service Provision **timeline**. To change the **Status** to **Ready for Authorisation** select **Details** tab. This Service Provision can then be authorised ([How to Authorise a Service Provision]) by your manager.



5. Change **Status** to **Ready for Authorisation** using the **Lookup function** and select **Save**.



6. Service Provisions that are set to **Ready for Authorisation** will be found via an **Advanced Find** and **Authorised** (How to Authorise a Service Provision) by a Team Manager/ Support Services Co-Ordinator.

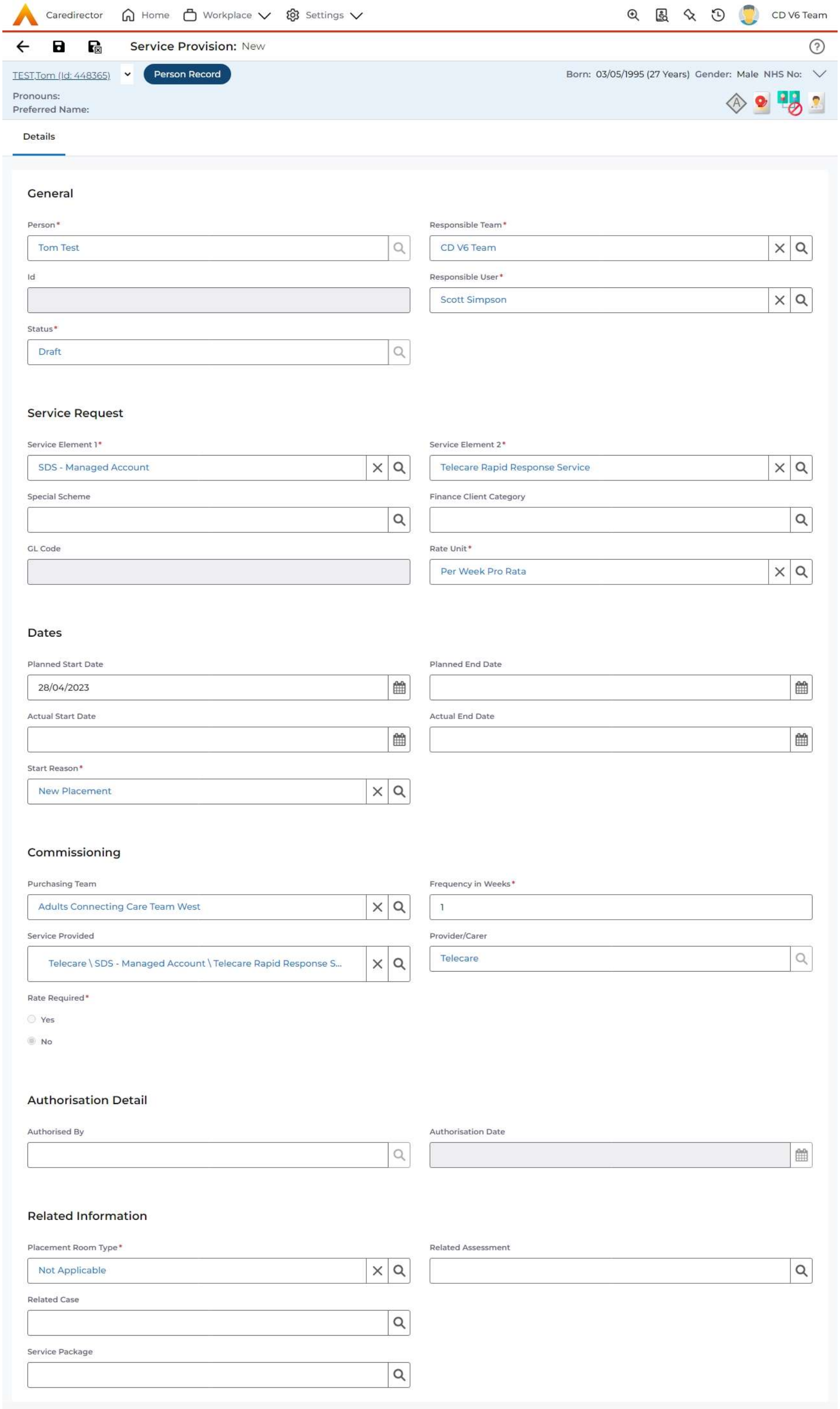
Telecare – Response Service

1. If you are entering a **Response Service Provision** you must have already entered a **Monitoring Service Provision** as you cannot have the **Response Service** on its own, however you can have just a **Monitoring Service.**

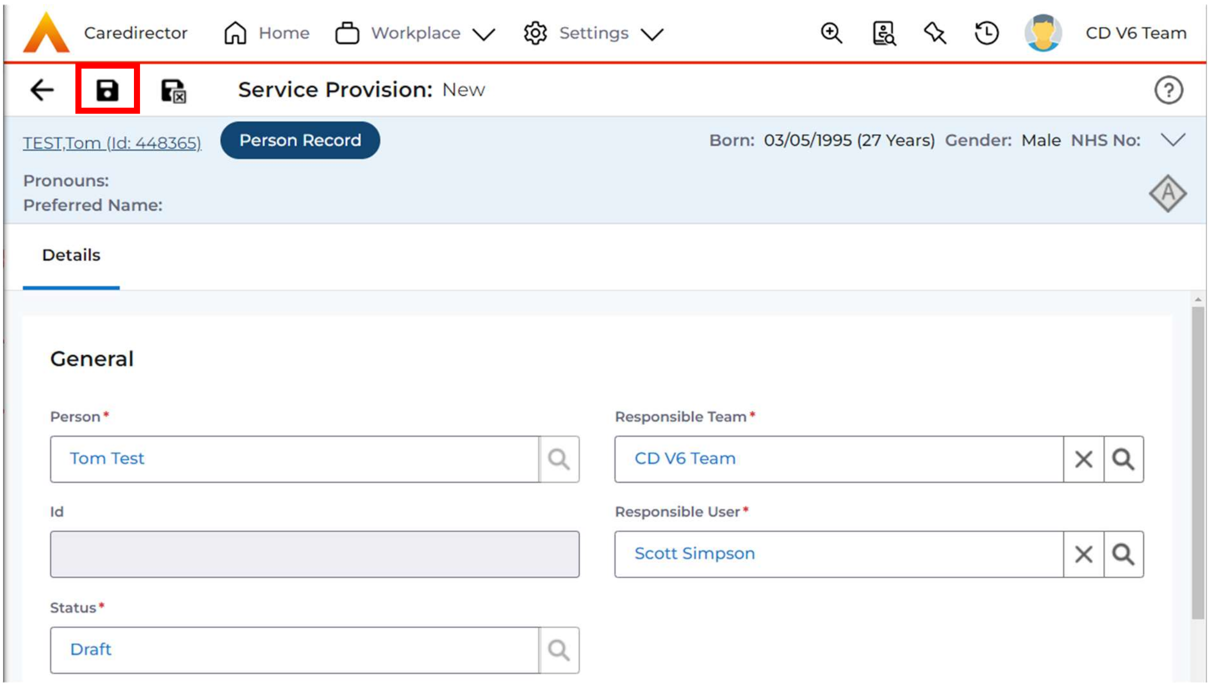
2. This **Service** is recorded from information on the **activity on the CSO Team dashboard** which is sent by the Assistive Technology Development Manager not from the **Care and Support Plan.**

3. The fields below are available in the new Service Provision screen. Please locate the relevant **person record > services > create new record** then enter the information side into the according field.
   For more information follow: How to find Service Provisions and Create New.

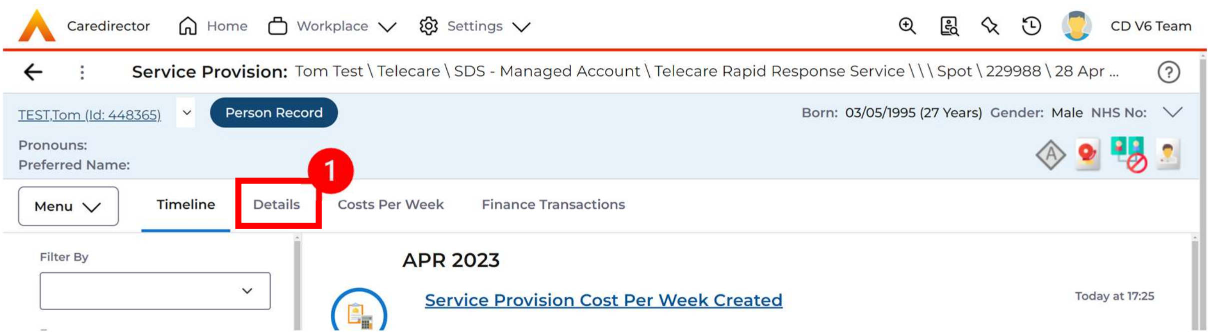
Field	Information
Service Element 1:	**SDS – Managed Account**
Service Element 2:	**Telecare Rapid Response Service**
Rate Unit:	**Per Week Pro Rata**
Planned Start Date:	Leave blank
Actual Start Date:	**The date of installation.**
Planned End Date:	Leave blank
Actual End Date:	Leave blank (Can only be input on the day of the **Planned End Date** or after it).
Start Reason:	**New Placement.**
Purchasing Team:	Choose appropriate Team.
Service Provided:	Choose **Telecare**
Status:	**Draft.**
Placement Room Type:	Auto populates to 'Not Applicable'
Responsible Team:	Auto populated with the user's default team.
Responsible User:	Auto populated with the user's name
Related Case:	Select relevant case


Caredirector
Home
Workplace
Settings
CD V6 Team
Service Provision: New
TEST,Tom (Id: 448365)
Person Record
Born: 03/05/1995 (27 Years) Gender: Male NHS No:
Pronouns:
Preferred Name:
Details
General
Person*
Tom Test
Responsible Team*
CD V6 Team
Id
Responsible User*
Scott Simpson
Status*
Draft
Service Request
Service Element 1*
SDS - Managed Account
Service Element 2*
Telecare Rapid Response Service
Special Scheme
Finance Client Category
GL Code
Rate Unit*
Per Week Pro Rata
Dates
Planned Start Date
28/04/2023
Planned End Date
Actual Start Date
Actual End Date
Start Reason*
New Placement
Commissioning
Purchasing Team
Adults Connecting Care Team West
Frequency in Weeks*
1
Service Provided
Telecare \ SDS - Managed Account \ Telecare Rapid Response S...
Provider/Carer
Telecare
Rate Required*
Yes
No
Authorisation Detail
Authorised By
Authorisation Date
Related Information
Placement Room Type*
Not Applicable
Related Assessment
Related Case
Service Package

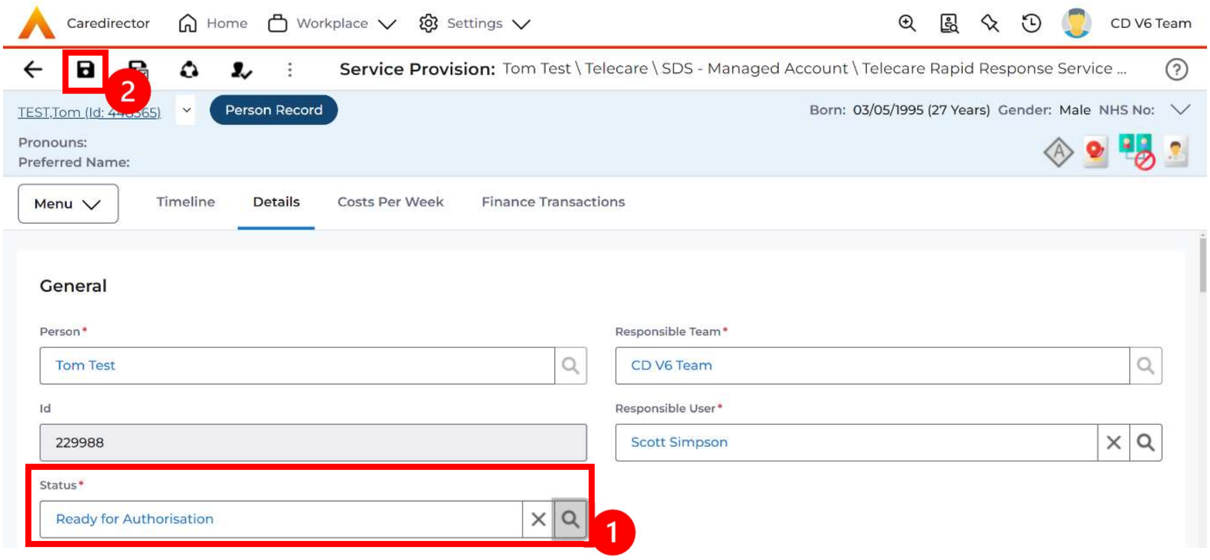
4. Select **Save** when completed.



5. This will take you back to the Service Provision **timeline**. To change the **Status** to **Ready for Authorisation** select **Details** tab. This Service Provision can then be authorised (How to Authorise a Service Provision) by your manager.



6. Change **Status** to **Ready for Authorisation** using the **Lookup function** and select **Save**.



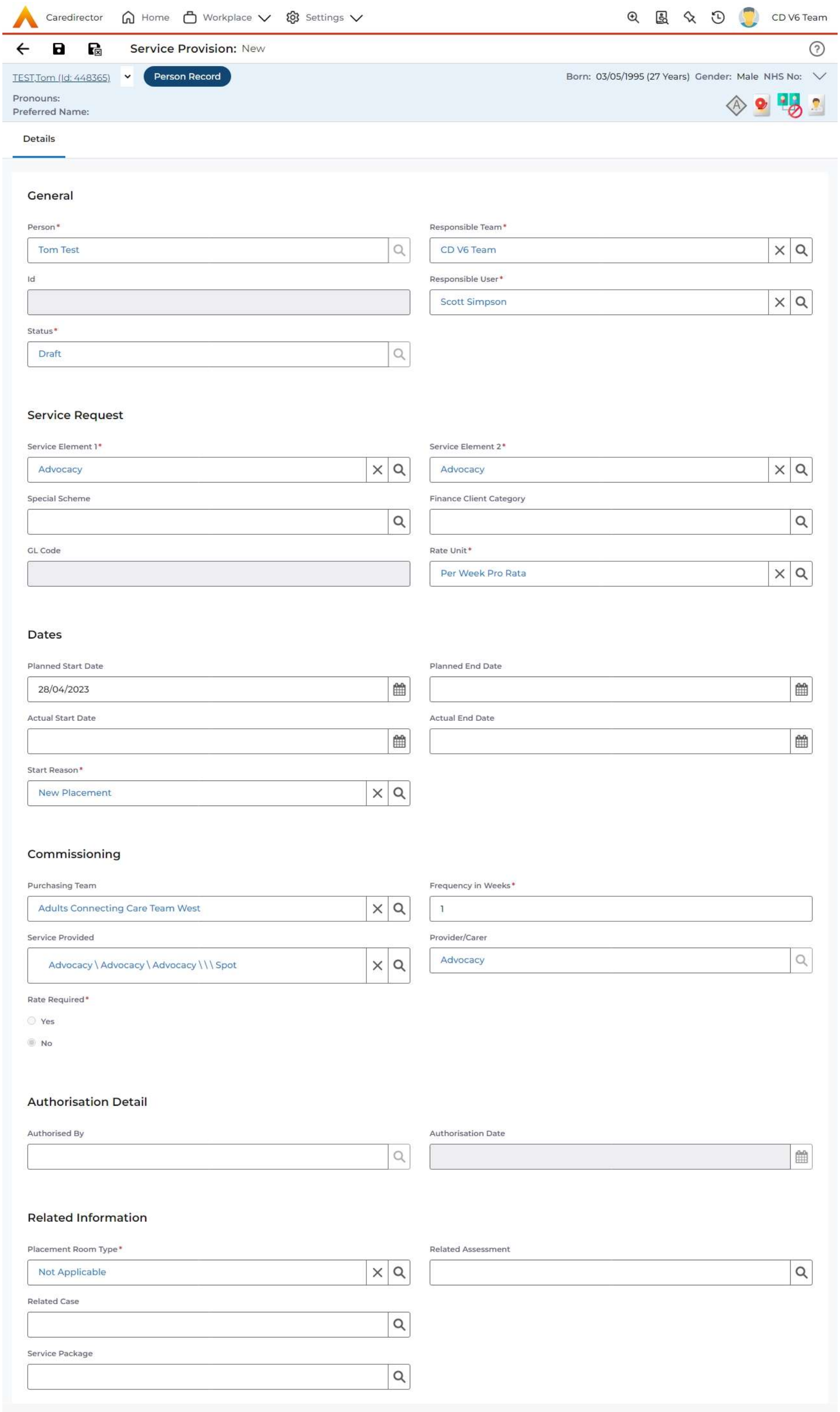
7. Service Provisions that are set to **Ready for Authorisation** will be found via an **Advanced Find** and **Authorised** (How to Authorise a Service Provision) by a Team Manager/ Support Services Co-Ordinator.

Recording Advocacy

1. **Do not** record if Advocate is a family member or friend.

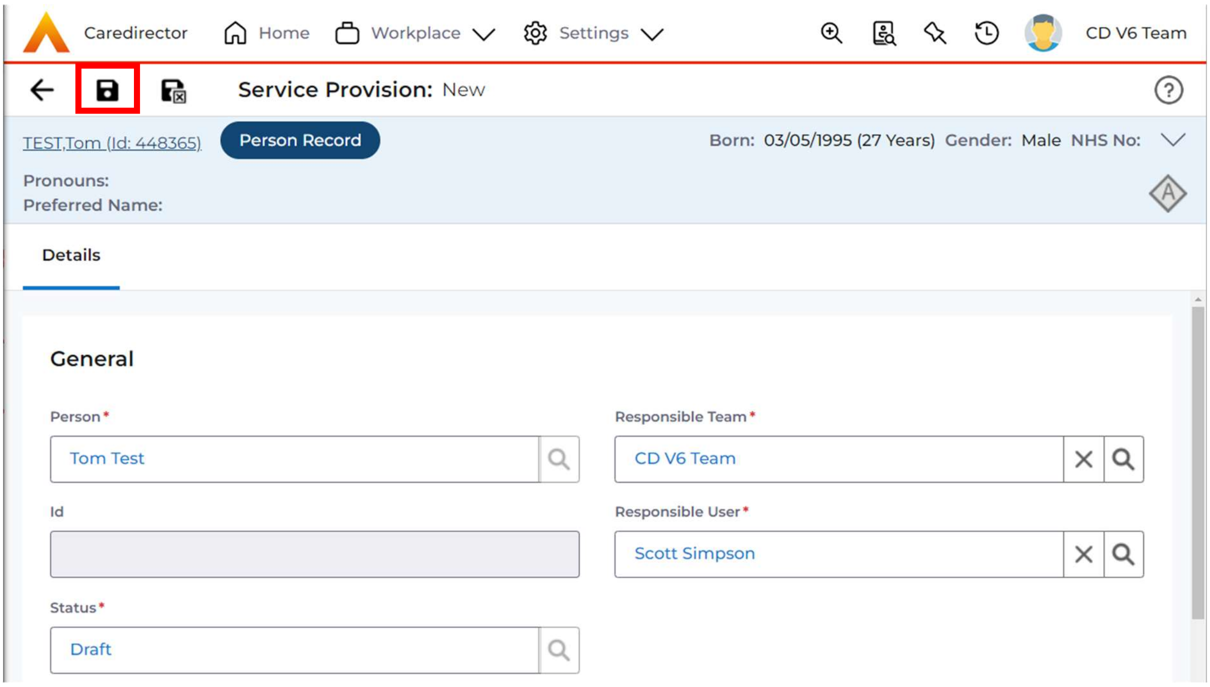
2. The fields below are available in the new Service Provision screen. Please locate the relevant **person record > services > create new record** then enter the information side into the according field.
   For more information follow: How to find Service Provisions and Create New.

Field	Information
Service Element 1:	**Advocacy**
Service Element 2:	**Advocacy**
Rate Unit:	**Per Week Pro Rata**
Planned Start Date:	Leave blank
Actual Start Date:	**The date of service starting** (from the Care & Support Plan or from a dashboard task from the practitioner)
Planned End Date:	Leave blank
Actual End Date:	Leave blank (Can only be input on the day of the **Planned End Date** or after it)
Start Reason:	**New Placement.**
Purchasing Team:	Choose appropriate Team.
Service Provided:	Choose **Advocacy.**
Status:	**Draft.**
Placement Room Type:	Auto populates to ‘Not Applicable’
Responsible Team:	Auto populated with the user’s default team.
Responsible User:	Auto populated with the user’s name
Related Case:	Select relevant case

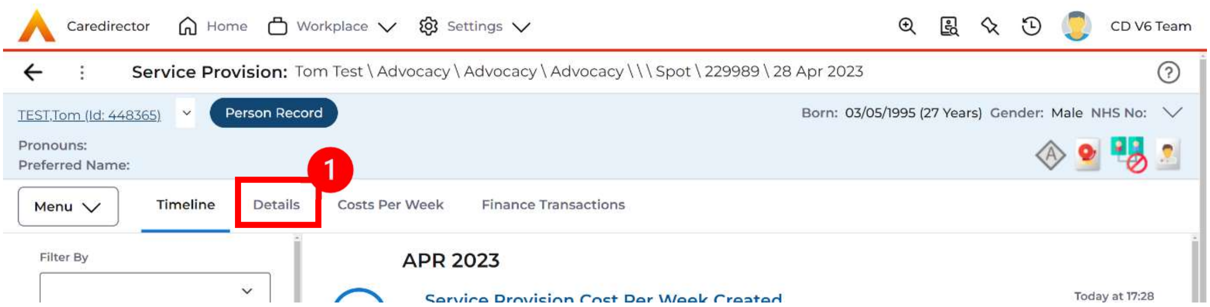


Caredirector
Home
Workplace
Settings
CD V6 Team
Service Provision: New
TEST,Tom (Id: 448365)
Person Record
Born: 03/05/1995 (27 Years) Gender: Male NHS No:
Pronouns:
Preferred Name:
Details
General
Person*
Tom Test
Responsible Team*
CD V6 Team
Id
Responsible User*
Scott Simpson
Status*
Draft
Service Request
Service Element 1*
Advocacy
Service Element 2*
Advocacy
Special Scheme
Finance Client Category
GL Code
Rate Unit*
Per Week Pro Rata
Dates
Planned Start Date
28/04/2023
Planned End Date
Actual Start Date
Actual End Date
Start Reason*
New Placement
Commissioning
Purchasing Team
Adults Connecting Care Team West
Frequency in Weeks*
1
Service Provided
Advocacy \ Advocacy \ Advocacy \ \ \ Spot
Provider/Carer
Advocacy
Rate Required*
Yes
No
Authorisation Detail
Authorised By
Authorisation Date
Related Information
Placement Room Type*
Not Applicable
Related Assessment
Related Case
Service Package

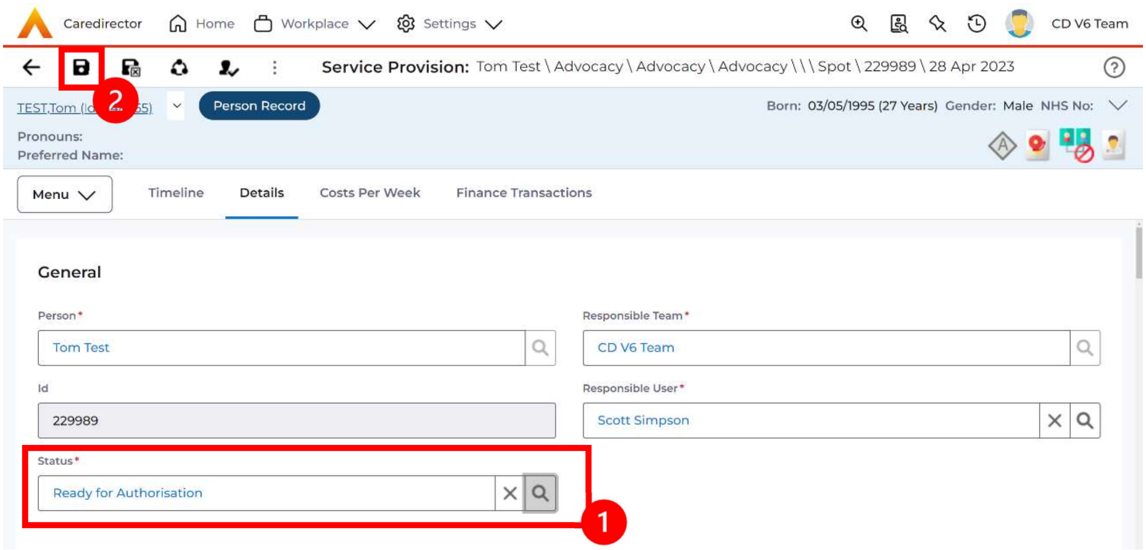
3. Select **Save** when completed.



4. This will take you back to the Service Provision **timeline**. To change the **Status** to **Ready for Authorisation** select **Details** tab. This Service Provision can then be authorised ([How to Authorise a Service Provision](#)) by your manager.



5. Change **Status** to **Ready for Authorisation** using the **Lookup function** and select **Save**.



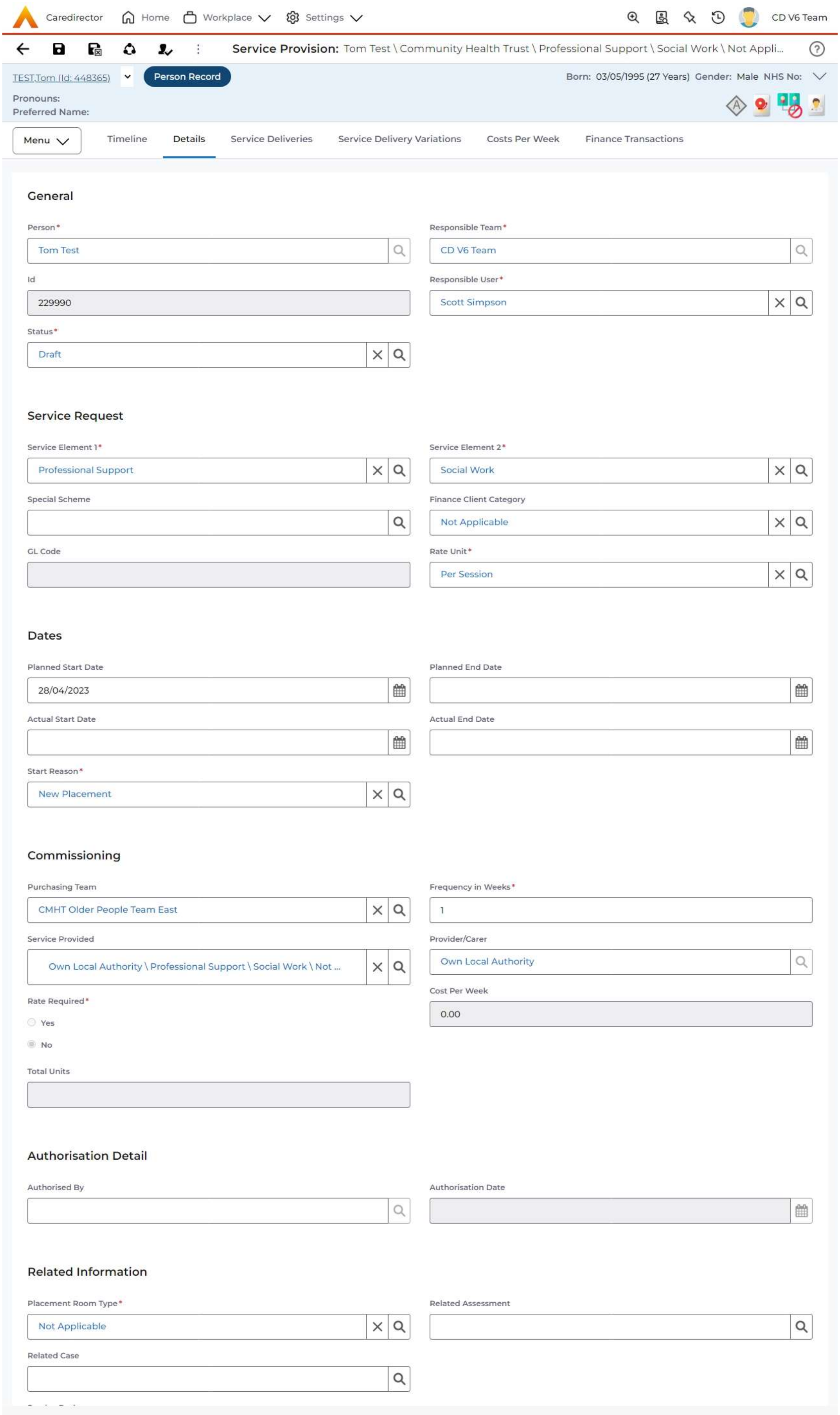
6. Service Provisions that are set to **Ready for Authorisation** will be found via an **Advanced Find** and **Authorised** (How to Authorise a Service Provision) by a Team Manager/ Support Services Co-Ordinator.

7. In addition to recording the **Service Provision** Information add a **Note** (See How to add a Note) to show the **Advocate's full name** and **Company Name/Address** (if applicable) (this information should be recorded in the **Care and Support Plan**).

Professional Support – Social Work and Mental Health

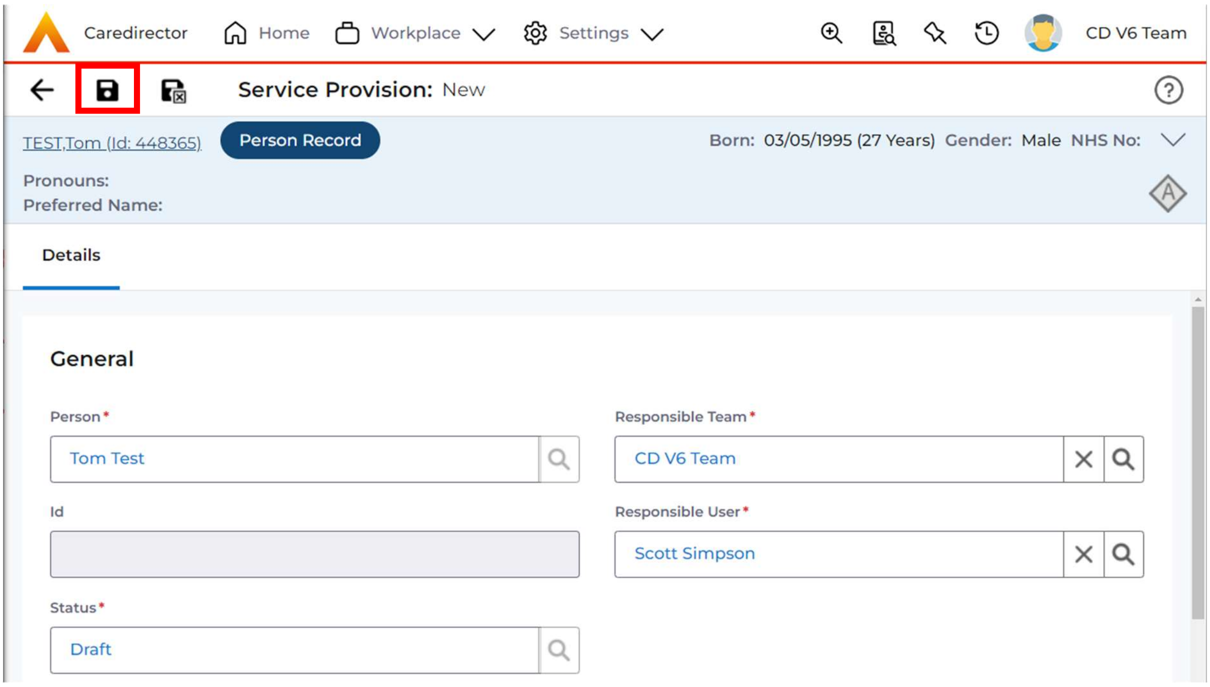
1. The fields below are available in the new Service Provision screen. Please locate the relevant **person record > services > create new record** then enter the information side into the according field.
   For more information follow: [How to find Service Provisions and Create New](#).

Field	Information
Service Element 1:	**Professional Support** or **Professional Support – Mental Health**
Service Element 2:	Choose **Social Work** or **Professional Support – Mental Health Support**
Rate Unit:	**Per Week Pro Rata**
Planned Start Date:	Leave blank
Actual Start Date:	**The date of service starting.**
Planned End Date:	Leave blank
Actual End Date:	Leave blank (Can only be input on the day of the **Planned End Date** or after it)
Start Reason:	**New Placement**
Purchasing Team:	Choose appropriate Team.
Service Provided:	Choose **Advocacy.**
Status:	**Draft.**
Placement Room Type:	Auto populates to 'Not Applicable'
Responsible Team:	Auto populated with the user's default team.
Responsible User:	Auto populated with the user's name
Related Case:	Select relevant case

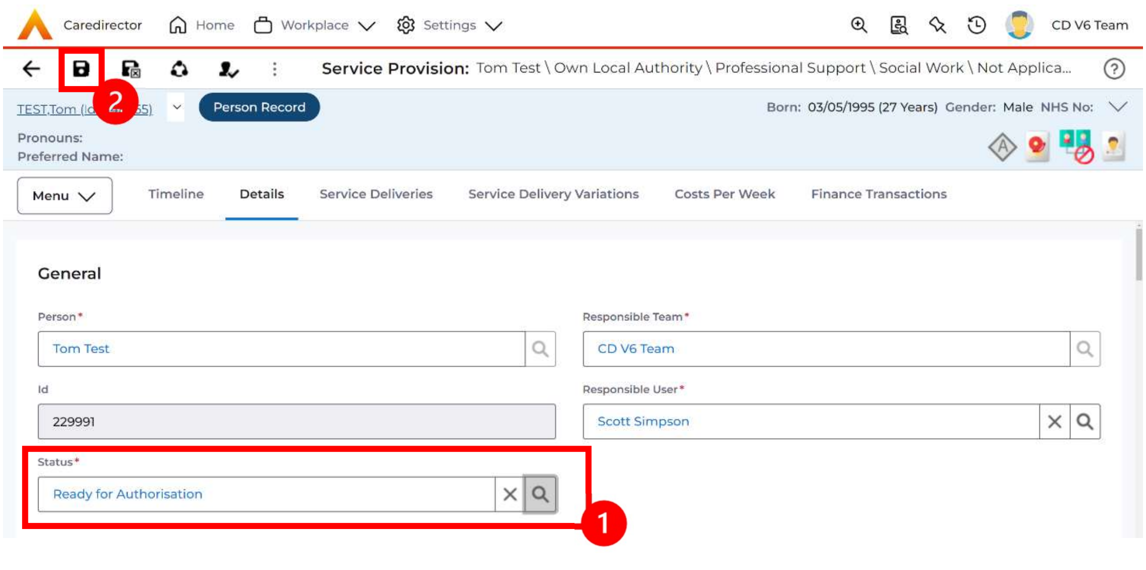


Caredirector
Home
Workplace
Settings
CD V6 Team
Service Provision: Tom Test \ Community Health Trust \ Professional Support \ Social Work \ Not Appli...
TEST,Tom (Id: 448365)
Person Record
Born: 03/05/1995 (27 Years) Gender: Male NHS No:
Pronouns:
Preferred Name:
Menu
Timeline
Details
Service Deliveries
Service Delivery Variations
Costs Per Week
Finance Transactions
General
Person*
Tom Test
Responsible Team*
CD V6 Team
Id
229990
Responsible User*
Scott Simpson
Status*
Draft
Service Request
Service Element 1*
Professional Support
Service Element 2*
Social Work
Special Scheme
Finance Client Category
Not Applicable
GL Code
Rate Unit*
Per Session
Dates
Planned Start Date
28/04/2023
Planned End Date
Actual Start Date
Actual End Date
Start Reason*
New Placement
Commissioning
Purchasing Team
CMHT Older People Team East
Frequency in Weeks*
1
Service Provided
Own Local Authority \ Professional Support \ Social Work \ Not ...
Provider/Carer
Own Local Authority
Rate Required*
Cost Per Week
0.00
Yes
No
Total Units
Authorisation Detail
Authorised By
Authorisation Date
Related Information
Placement Room Type*
Not Applicable
Related Assessment
Related Case

2. Select **Save** when completed.



3. Change Status to Ready for Authorisation using the Lookup function and select Save.



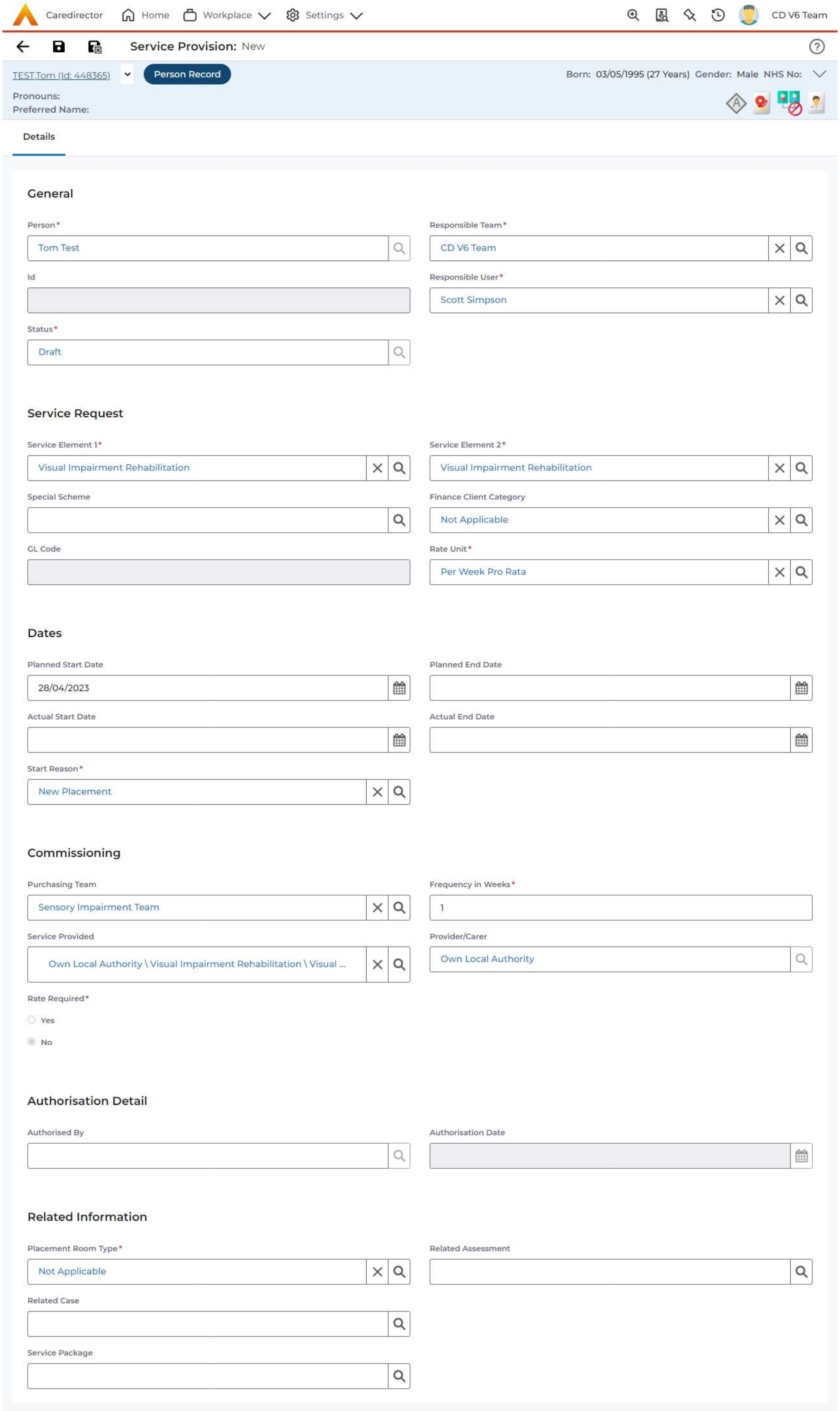
4. Service Provisions that are set to **Ready for Authorisation** will be found via an **Advanced Find** and **Authorised** (How to Authorise a Service Provision) by a Team Manager/ Support Services Co-Ordinator.

Orientation and Mobility – Visual Impairment Rehabilitation

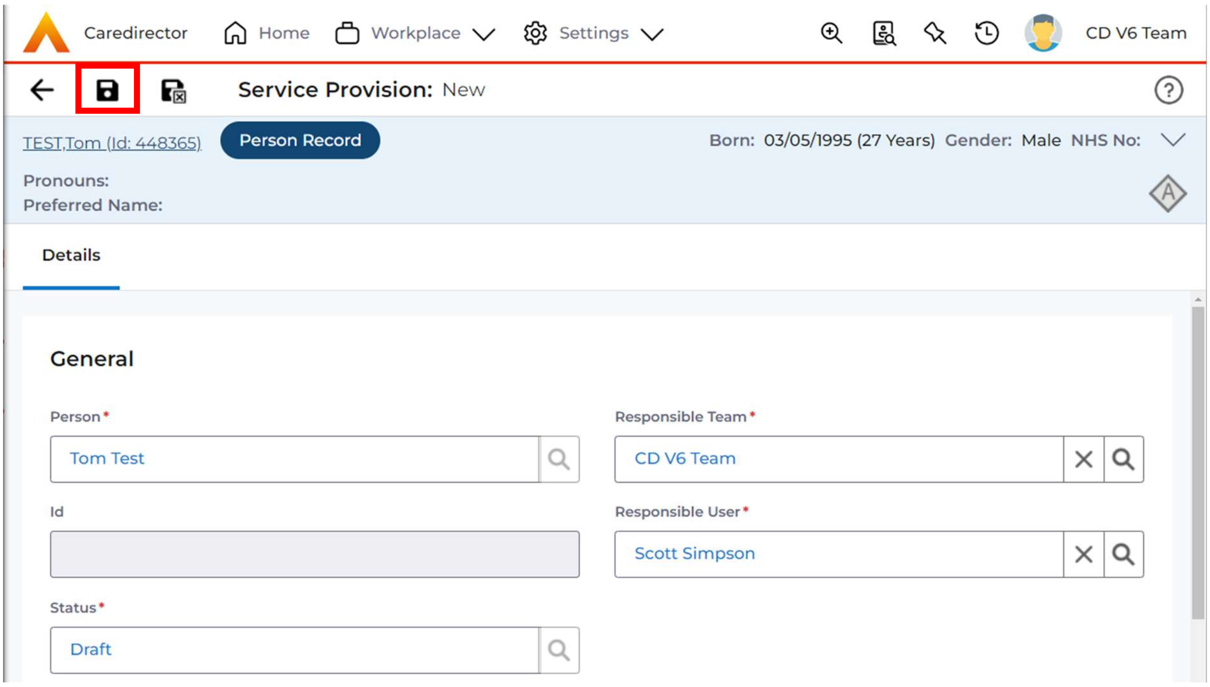
1. This is a **Service Provision** of rehabilitation training and is free and provided in-house through the **Sensory Impairment Team**. The training is provided to the Client on an ongoing basis until the outcomes identified within the **Care & Support Plan** are met. Once the rehabilitation service has ceased the **Service Provision** will end.

2. The fields below are available in the new Service Provision screen. Please locate the relevant **person record > services > create new record** then enter the information side into the according field.
   For more information follow: How to find Service Provisions and Create New.

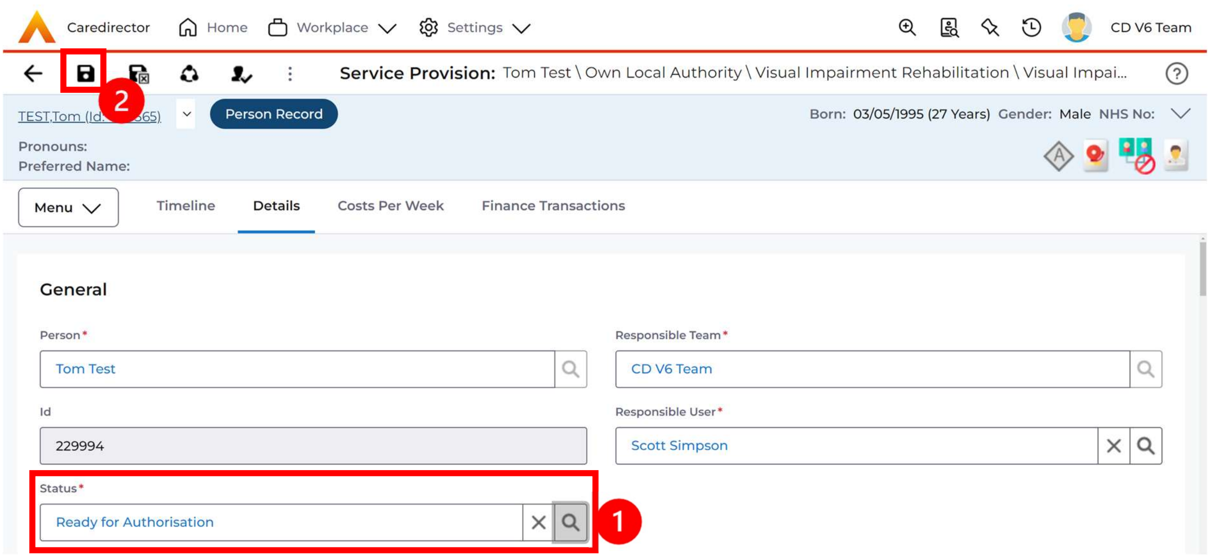
Field	Information
Service Element 1:	**Visual Impairment Rehabilitation**
Service Element 2:	**Visual Impairment Rehabilitation**
Rate Unit:	**Per Week Pro Rata**
Planned Start Date:	Leave blank
Actual Start Date:	**The date of service starting.**
Planned End Date:	Leave blank
Actual End Date:	Leave blank (Can only be input on the day of the Planned End Date or after it).
Start Reason:	Choose **New Placement.**
Purchasing Team:	Choose **Sensory Impairment Team**
Service Provided:	Choose **Own Local Authority**.
Status:	**Draft.**
Placement Room Type:	Auto populates to ‘Not Applicable’
Responsible Team:	Auto populated with the user’s default team.
Responsible User:	Auto populated with the user’s name
Related Case:	Select relevant case


Caredirector
Home
Workplace
Settings
CD V6 Team
Service Provision: New
TEST,Tom (Id: 448365)
Person Record
Born: 03/05/1995 (27 Years) Gender: Male NHS No:
Pronouns:
Preferred Name:
Details
General
Person*
Tom Test
Responsible Team*
CD V6 Team
Id
Responsible User*
Scott Simpson
Status*
Draft
Service Request
Service Element 1*
Visual Impairment Rehabilitation
Service Element 2*
Visual Impairment Rehabilitation
Special Scheme
Finance Client Category
Not Applicable
GL Code
Rate Unit*
Per Week Pro Rata
Dates
Planned Start Date
28/04/2023
Planned End Date
Actual Start Date
Actual End Date
Start Reason*
New Placement
Commissioning
Purchasing Team
Sensory Impairment Team
Frequency in Weeks*
1
Service Provided
Own Local Authority \ Visual Impairment Rehabilitation \ Visual ...
Provider/Carer
Own Local Authority
Rate Required*
Yes
No
Authorisation Detail
Authorised By
Authorisation Date
Related Information
Placement Room Type*
Not Applicable
Related Assessment
Related Case
Service Package

3. Select **Save** when completed.



4. Go to **Details** tab and change **Status** to **Ready for Authorisation** using the **Lookup function** and select **Save**.



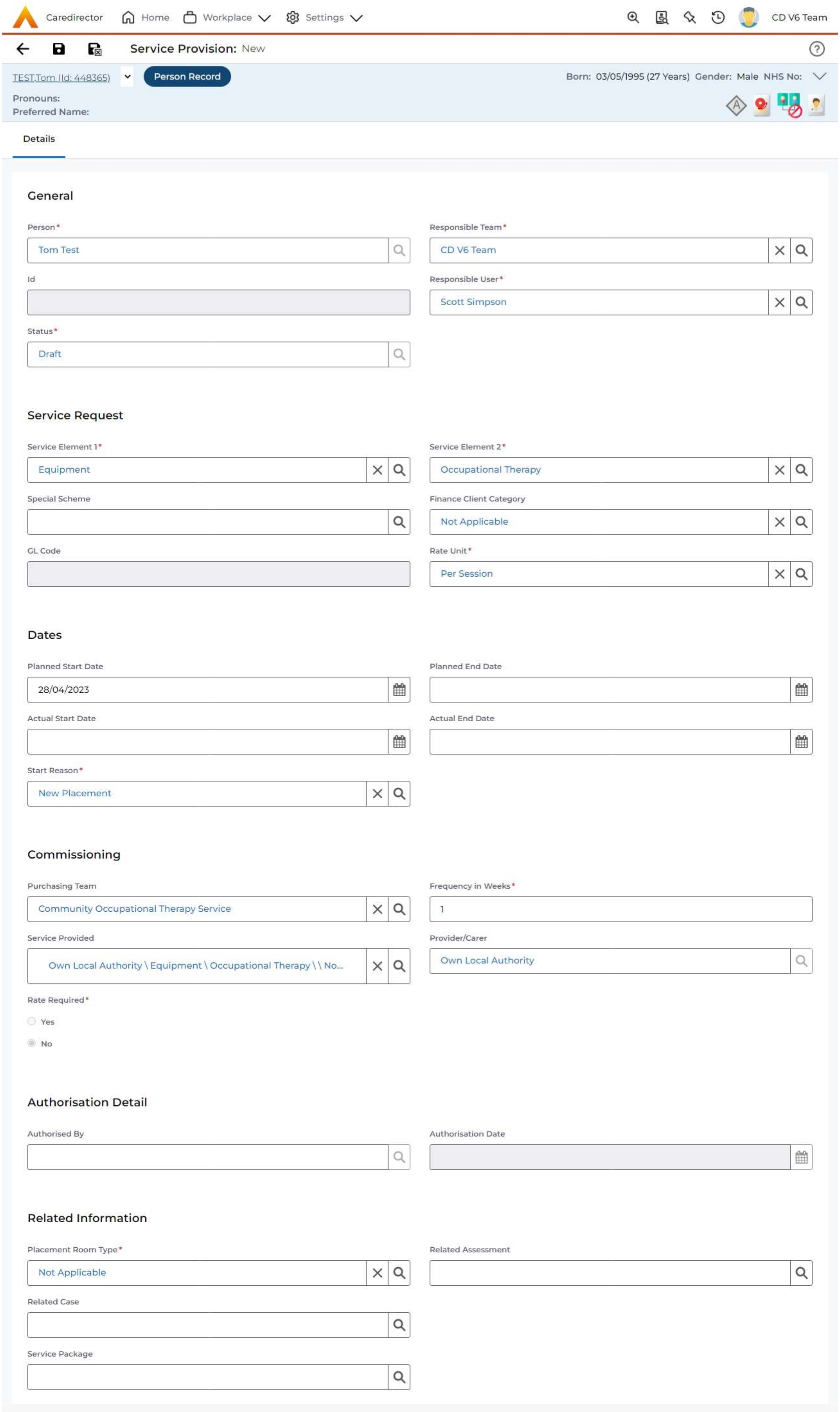
5. In addition to recording the **Service Provision** Information add a **Note** (How to add a Note) show the **Advocate's full name** and **Company Name/Address** (if applicable) as shown below (this information should be recorded in the **Care and Support Plan**).
6. Service Provisions that are set to **Ready for Authorisation** will be found via an **Advanced Find** and **Authorised** (How to Authorise a Service Provision) by a Team Manager/ Support Services Co-Ordinator.

Community Occupational Therapy - Equipment

1. This **Service Provision** is for the **COT** and how they are issuing **COT Equipment**.

2. The fields below are available in the new Service Provision screen. Please locate the relevant **person record > services > create new record** then enter the information side into the according field.
   For more information follow: How to find Service Provisions and Create New.

Field	Information
Service Element 1:	**Equipment**
Service Element 2:	**Occupational Therapy**
Rate Unit:	**Per Session**
Planned Start Date:	Leave blank
Actual Start Date:	**The date of service starting.**
Planned End Date:	Leave blank
Actual End Date:	Leave blank (Can only be input on the day of the Planned End Date or after it).
Start Reason:	Choose **New Placement.**
Purchasing Team:	**Community Occupational Therapy**
Service Provided:	Choose **Own Local Authority**.
Status:	**Draft.**
Placement Room Type:	Auto populates to ‘Not Applicable’
Responsible Team:	Auto populated with the user’s default team.
Responsible User:	Auto populated with the user’s name
Related Case:	Select relevant case


Caredirector | Home | Workplace | Settings | CD V6 Team

Service Provision: New

TEST,Tom (Id: 448365) | Person Record | Born: 03/05/1995 (27 Years) Gender: Male NHS No:

Pronouns:
Preferred Name:

Details

General

Person* Tom Test
Responsible Team* CD V6 Team
Id
Responsible User* Scott Simpson
Status* Draft

Service Request

Service Element 1* Equipment
Service Element 2* Occupational Therapy
Special Scheme
Finance Client Category Not Applicable
GL Code
Rate Unit* Per Session

Dates

Planned Start Date 28/04/2023
Planned End Date
Actual Start Date
Actual End Date
Start Reason* New Placement

Commissioning

Purchasing Team Community Occupational Therapy Service
Frequency in Weeks* 1
Service Provided Own Local Authority \ Equipment \ Occupational Therapy \ \ No...
Provider/Carer Own Local Authority
Rate Required*
Yes
No

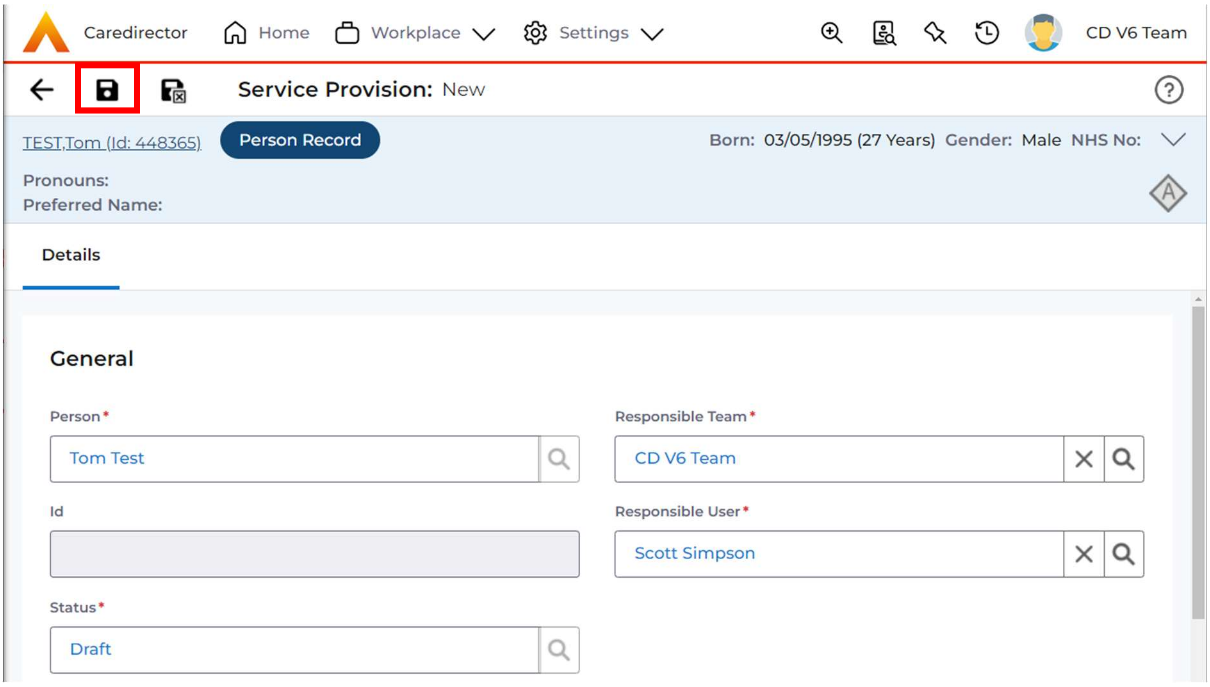
Authorisation Detail

Authorised By
Authorisation Date

Related Information

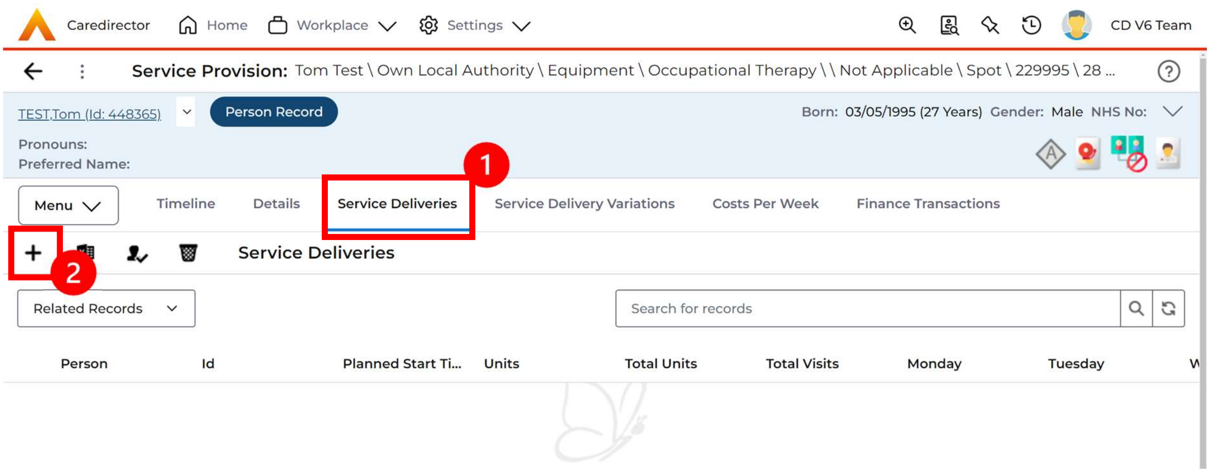
Placement Room Type* Not Applicable
Related Assessment
Related Case
Service Package

3. Select **Save** when completed.

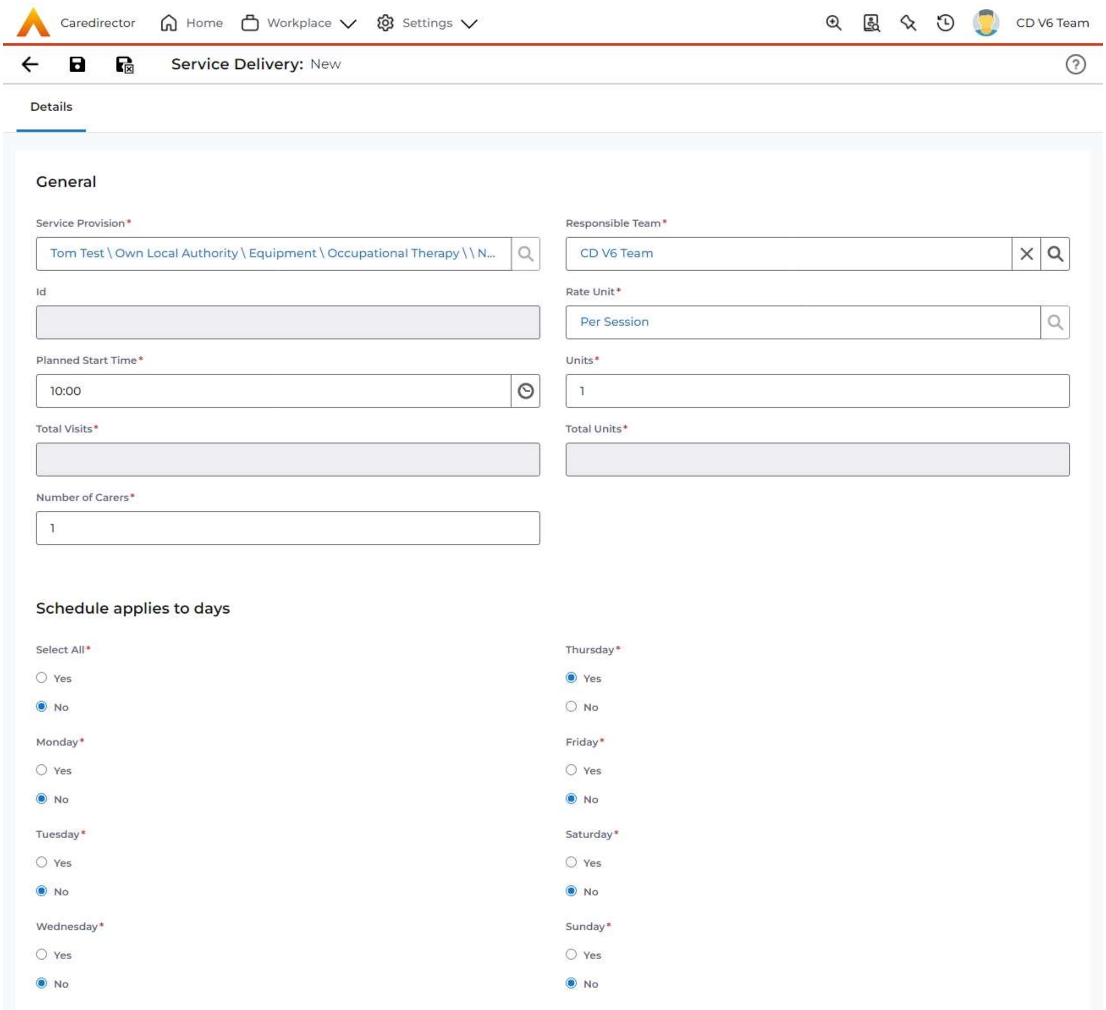


4. Add a **Note** in to say what **Equipment** is to be taken ([How to add a Note](#))

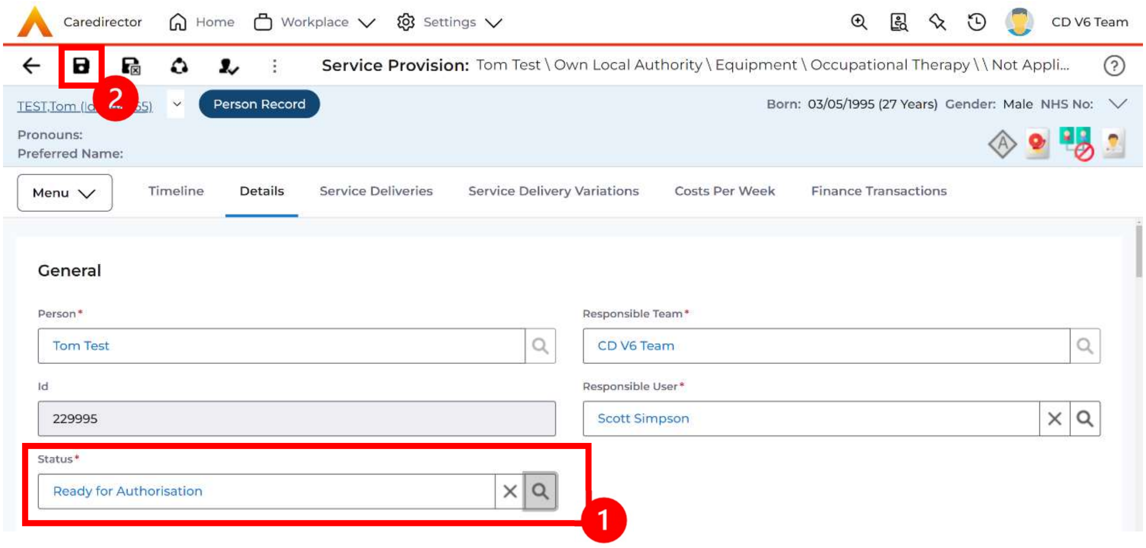
5. A **Service Delivery** needs to be recorded for when the individual has these sessions. Select **Service Deliveries** and **Create New Record**.



6. **Planned Start Time** is when the session will begin, record the **Units**, **1** being one session a day. Then the **Days** select which days this session will commence. If there is more than a day, then enter that in separately. Then select **Save and Return to Previous Page**.



7. Go to **Details** tab and change **Status** to **Ready for Authorisation** using the **Lookup function** and select **Save**.



8. Service Provisions that are set to **Ready for Authorisation** will be found via an **Advanced Find** and **Authorised** (How to Authorise a Service Provision) by a Team Manager/ Support Services Co-Ordinator.

Rate Units Amounts

When adding **Service Deliveries** to **Service Provisions**, the planned start time should be added followed by the number of units in decimal form, please see conversion table below:

Mins	Decimal
5	0.083
10	0.166
15	0.25
20	0.333
25	0.416
30	0.5
35	0.583
40	0.666
45	0.75
50	0.833
55	0.916
60	1.0

Service Provision Glossary

<table>
<tr><td colspan="2">Long Term Residential Care/Nursing Care</td><td>Clients in permanent residential or nursing placements</td></tr>
<tr><td colspan="2">Respite for Client or Respite for Carer</td><td>Clients in short-term residential or nursing care usually up to 4 weeks. Respite for Carer is only in exceptional circumstances and needs Service Manager Approval</td></tr>
<tr><td colspan="2">High Cost Residential</td><td>Placements that have been approved at the Adults Commissioning Panel for Clients who need specialist care that is above the standard residential rate</td></tr>
<tr><td colspan="2">ACP/Non Commissioned</td><td>Similar to a ‘spot purchase’ where the Provider is not a commissioned provider. If the Provider is not recorded on CareDirector you will need to send an email to the CareDirector Support Inbox to request Provider is set up for this service</td></tr>
<tr><td colspan="2">SDS - Cash Direct Payments (Booking Request)</td><td>where a Client is requesting a Cash Budget</td></tr>
<tr><td colspan="2">SDS – Cash Direct Payments Change in Care (Booking Request)</td><td>where a Client’s needs have changed and the Cash Budget amount needs adjusting</td></tr>
<tr><td colspan="2">Individual Service Fund (ISF)</td><td>These are usually CTLD clients for who we pay certain Suppliers to provide their care on an individual basis</td></tr>
<tr><td rowspan="3">SDS – WMDC Managed Accounts (these are for any of the following Services that are commissioned by the Co-ordination Team). These are internal booking requests</td><td>Home Care</td><td>short bursts of domiciliary care (i.e. 30 mins for washing and dressing)</td></tr>
<tr><td>Home Care Travel Time</td><td></td></tr>
<tr><td>Carers Trust</td><td>provide Home Care and Support and Enablement but the Practitioner will arrange directly with Provider</td></tr>
</table>

which is why they have the 'WMDC' in Service Element 1:	Support and Enablement – Home Care	longer burst of domiciliary care (i.e. 3 hours which may include taking out in the community)
	Support and Enablement – Waking Nights	in blocks but per hour, carer remains awake throughout the night
	Support and Enablement – Sleep-Ins	in blocks but per hour, carer sleeps there
	Supported Living – Home Care	as above but in a property shared with other Clients
	Supported Living – Waking Nights	as above but in a property shared with other Clients
	Supported Living – Sleep-Ins	as above but in a property shared with other Clients
Home Care in Prisons and Residential Rates in Prisons		Care provided within the prisons either hourly (Home Care) or continual care (Residential Rates)
SDS – WMDC Managed Account (Booking Request) for Home Care for Delacy Gardens and Sherwood Court		these bookings are picked up by the Support Planner in the Peripatetic Team who liaise with the Practitioner and CSO/Admin regarding care needs
SDS – Managed Accounts (these are for any of the following Services that the Practitioner commissions direct with the provider):	Extra Care (Meridian & Creative Support)	
	Day Centres (including In-House Day Opportunities, Transport and Meals)	
Re-ablement - Outreach		Short-term home care up to a maximum of 21 days
Re-ablement – Discharge Support Hospital		Short-term home care up to a maximum of 10 days or as a bridging service until other permanent care can be sourced following hospital stay

Re-ablement – Chargeable	When Re-ablement Outreach services have come to an end but a permanent provider still needs to be sourced
Re-ablement – Chargeable – Bridging Service	Short-term care, other than Discharge Support, that is chargeable until permanent care starts
Telecare – Monitoring Service needed for all Telecare equipment.	Response only recorded if the Client needs the CareLink call centre to respond to their alarm
Advocacy	only recorded where the Client is using an independent Advocate
Professional Support	only recorded where no other service is in place but support is given to the Client (i.e. visits to help manage finance)
Orientation and Mobility – Visual Impairment Rehabilitation	rehabilitation training that is free and provided in-house through the Sensory Impairment Team

Version Control

V	Change	Author	Date
V1.0	Initial Draft	SS	10/3/22
V1.0.1	Added Rate Unit Amounts	SS	18/11/2022
V1.0.2	Change Rate Periods Approval	SS	25/11/2022
V1.1	Overall changes: - Title change/ front page wording change. - Version Control updated and reworked - Version number changed according to naming convention - Adults System Support Tri-X support link has given - ‘Adult Service Provision Information’ changed to ‘What triggers a Service Provision Collection.’ - Planned Start Date has introduced to inform that this does not trigger a service. - Catherine Jackson references have changed to P&AT - Activities has clarified to which activity. - Format of Subject, Responsible Team, Description has changed. - Owner changed to Responsible Team or User **Service Provisions Information Section:** - Wording has corrected. - Cancellation and Deletion request procedure inputted. **Ending Service Provisions** - Explained about Actual End Date needed and will stop payments - Whereas planned is not required for every service and can be reviewed. - This section was explained before as planned was the one that stopped payments **Cancelling & Deleting Service Provisions** - Cancelling and deleting service provisions have been notified as error in wrong person record then contact adults system support. If entered in error on correct person record then it should be cancelled only. - Wording has corrected. **Recording Dates of Death** - Updated Notes to Task when informing P&AT **Service Provision Basics** - Added how to find and create a new SP	SS	28/04/2023

	- How to clone a SP - How to add a related case - How to add a task to a service provision section. - This has changed title from 'Service Provision Procedures' - Section has been updated to bring forward the fundamental of SP's to have a reference guide later. - Cloning can only be done on Status Authorised as the option does not appear otherwise. - Planned and Actual Dates entered to bring clarity on what they do. - How to add a note has been included. - How to authorise a service provision has been added. **Providers** - New section introduced - Added non-commissioned providers set up process **Service Provisions** - The initial wording has been made clearer - The please create new is done differently - Field and Information headings have been added to SP section. - Screenshots have been updated. - High Cost Residential Placements the Approved or Pending on Rate Periods clarified. - SDS – Cash Direct Payments (Booking Request) changed Service Element 1 to SDS Financial Representative Re-enter the Rate Unit and Start Reason Enter the Actual Start Date. Click on Service Provided and search for the provider (the person or their representative which has already been set up with a weekly £ rate) - Orientation and Mobility has been changed to Per Week Pro Rata instead of Per Session. - Support & Enablement, clearer definitions of booking request goes to Co-ordination and they put that as service provision.		
V1.2	Overall changes: Title change/ front page wording change Version Control updated and reworked	SW	21/07/2023

	Version number changed according to naming convention Small amendments/word changes to make guide clearer Removal of instructions on how to add related case. Amendments to state that activities to P&A Team should be added to person record, not as notes on an SP. **Service Provision Information** Addition that Service Provisions updated in line with an updated care plan. **Ending Service Provisions** Now specifies that home care service provisions should only be ended by Co-ordination Team or Peripatetic Team. Addition of paragraph around Planned End Dates stopping payments to providers and the importance of entering Actual End Dates. **Cancelling & Deleting Services Provisions** Clarification on when provisions should be cancelled. Addition of information around cancelling booking requests. **Service Provision Basics** Amended to say that only Service Provisions which have ended need to have an Actual End Date before adding a new SP, rather than all SPs have to have an actual end date. **How to Clone a Service Provision** Additional sentence to say that cloning should not be used for SPs where a planned start date is required. **How to Authorise a Service Provision** Amendment to say that these can be authorised by a manager of Support Services Team Leader **Service Provisions – Long Term Residential Care** Addition of sentence regarding being notified by P&A Team if actual start date is before planned start date Additional sentence regarding top-up fees **Throughout** Service Provision Instructions amended as follows: Actual Start Date: Leave blank Planned End Date: Leave blank Actual End Date: Leave blank Start Reason: listed suggested options		

	Placement Room Type: Auto populates to 'Not Applicable' Responsible User: Auto populated with the user's name. Addition of Related Case: Select relevant case and removal of paragraph relating to same. Service Delivery Instructions amended to include more detailed explanation of input of units as well as reference to slightly modified annexed table of Rate Unit Amounts **Respite for Client / Respite for Carer and Respite Extensions** Addition of information around 'Planned End Date', now point 2 Additional sentence regarding top-up fees Clarification around extending respite SPs where actual end dates have been recorded Addition of sentence regarding retrospective SPs for subsequently suspended providers **SDS – Cash Direct Payments** Complete removal of section detailing old procedure and replacement with guidance on revised procedure. **SDS - Cash Direct Payments Change in Care or change to Third Party Representative/ Third Party Support Account** Complete removal of section detailing old procedure and replacement with guidance on revised procedure. **Cash Direct Payment for Carer** Complete removal of section detailing old procedure and replacement with guidance on revised procedure SDS – Carers Cash Direct Payment Change in Care Removal of section detailing old procedure and replacement with guidance on revised procedure. **Day Care, 1-1 Care and Expenses provided by Millennium Care** Amendment of page numbers for ISF and ACP/Non-Commissioned Payments guidance **Reablement SPs** Change of wording from 'Reablement referral' to 'Interim Support Plan' **Reablement Service Deliveries** Amendment to say planned start time must be 9am		

	Amendment to say units must be 1 and Reablement Team will add actual deliveries once determined. **Re-ablement – Outreach including Frickley Mews – upto 6 weeks (formerly known as 21 days service)** Addition of paragraph regarding DOM4 form **Telecare – Monitoring Service/Response Service** Amendment to say that information is found on activity sent to CSO dashboard rather than installation sheet **Recording Advocacy** Clarification added as to where to find the Actual Start Date Addition of requirement to add details of advocate **Glossary** **SDS – Cash Direct Payments/Change in Care** Changed from personal to cash budget in both rows **SDS – Managed Accounts – Extra Care** Changed from Comfort Call & Synergy to Meridian & Creative Support		
V1.3	Addition of paragraph to **Long-Term Residential Care** sections advising to cross reference to High-Cost Residential Placements. Addition of note to **Home Care (Domiciliary Care)** section advising to inform Co-ordination Team when NCPs are selected. **Day Care/Meals/Transport** – Removal of point around adding more visits each day and addition of statement that ‘Planned Start Time’ should be 00:00.	SW	29/12/2023
V1.4	Amendments to In House Supported Living Sleep Ins	SCJ	26/2/2024
V1.5	Amendment to Day Care Service Deliveries – to clarity that the units on the service delivery should be 1.	SCJ	16/4/2024