



# Service Provision V1.5

<b>Document</b>	Service Provision Booklet
<b>Purpose</b>	How to input Service Provisions and incorporate processes
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<b>Owner</b>	ICT Business Transformation Team / Adults System Support
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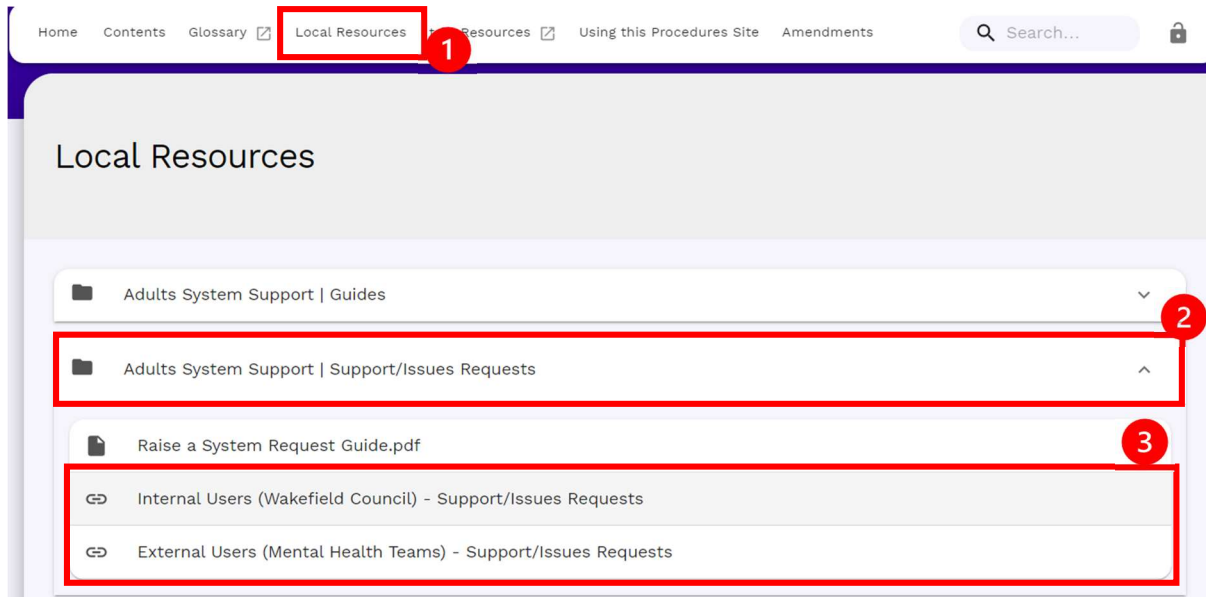
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## Adults System Support

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It is important before entering new Service Provisions that you check that any unused out-of-date Service Provisions have/ are ended/ ending.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.

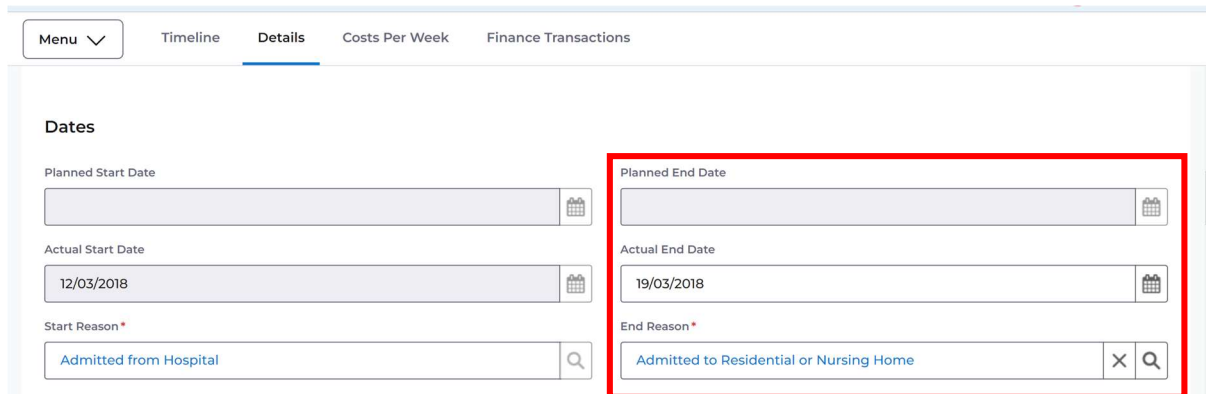
References toward the Co-Ordination Team within this booklet – this is the Team who source the Providers from a **Booking Request** and does not refer to Co-Ordination Support Officers or Care Co-ordinators.

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).



The screenshot shows a web interface for service provision details. At the top, there are tabs: 'Menu', 'Timeline', 'Details' (selected), 'Costs Per Week', and 'Finance Transactions'. Below the tabs, there are two columns of date and reason fields. The right column is highlighted with a red border. The fields in the right column are: 'Planned End Date' (empty), 'Actual End Date' (19/03/2018), and 'End Reason' (Admitted to Residential or Nursing Home). The left column contains: 'Planned Start Date' (empty), 'Actual Start Date' (12/03/2018), and 'Start Reason' (Admitted from Hospital).

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.

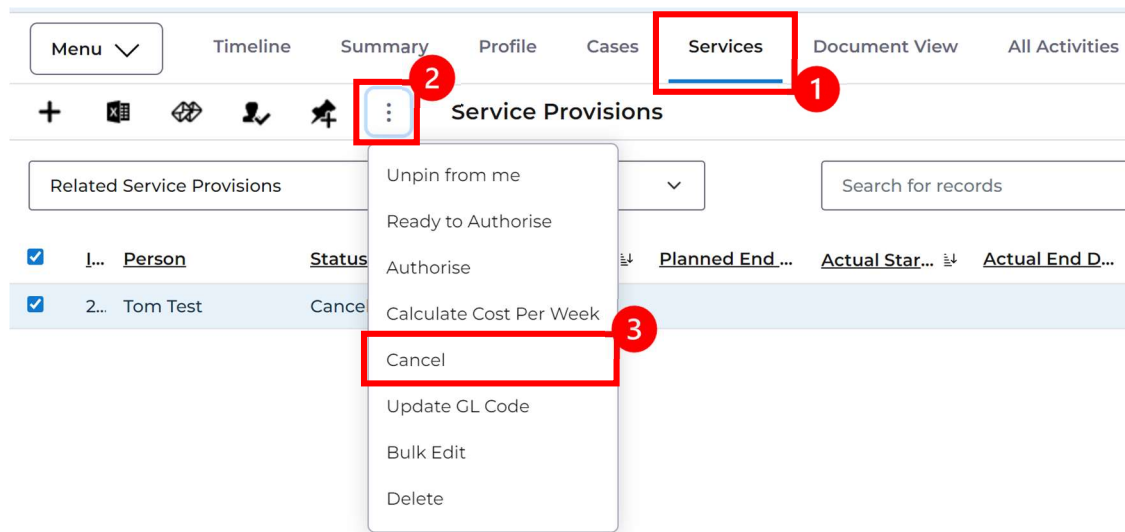
## Cancelling & Deleting Service Provisions

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**.

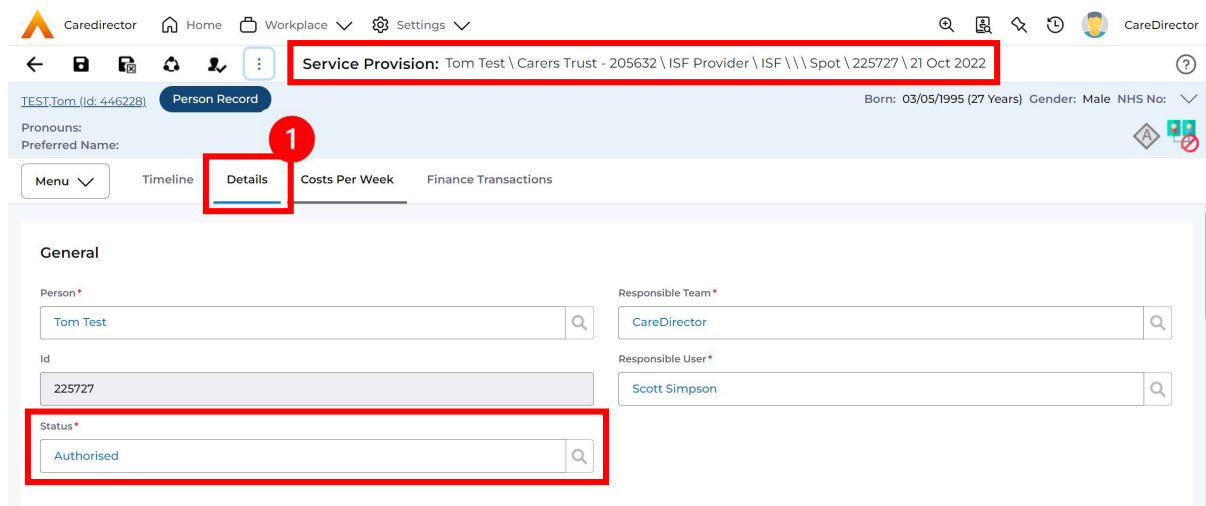
The screenshot shows the CareDirector interface for a person record. At the top, the navigation bar includes 'Caredirector', 'Home', 'Workplace', and 'Settings'. The user is logged in as 'CareDirectorTest'. The main header shows 'Person: TEST Tom' with a red box around it. Below this, the person's details are shown: 'TOM,TEST (Id: 444267)', 'Person Record', 'Born: 21/06/2022 (13 Weeks, 3 Days)', 'Gender: Male', and 'NHS No:'. A red box and a circled '1' highlight the 'Services' tab in the navigation menu. A notification titled 'Task Created' is displayed, indicating that a new record of task was created by Scott Simpson on 21/09/2022 at 13:42:01. The notification details include: Responsible Team: CareDirectorTest, Responsible User: Scott Simpson, and Subject: Referral has been Allocated.

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](#).

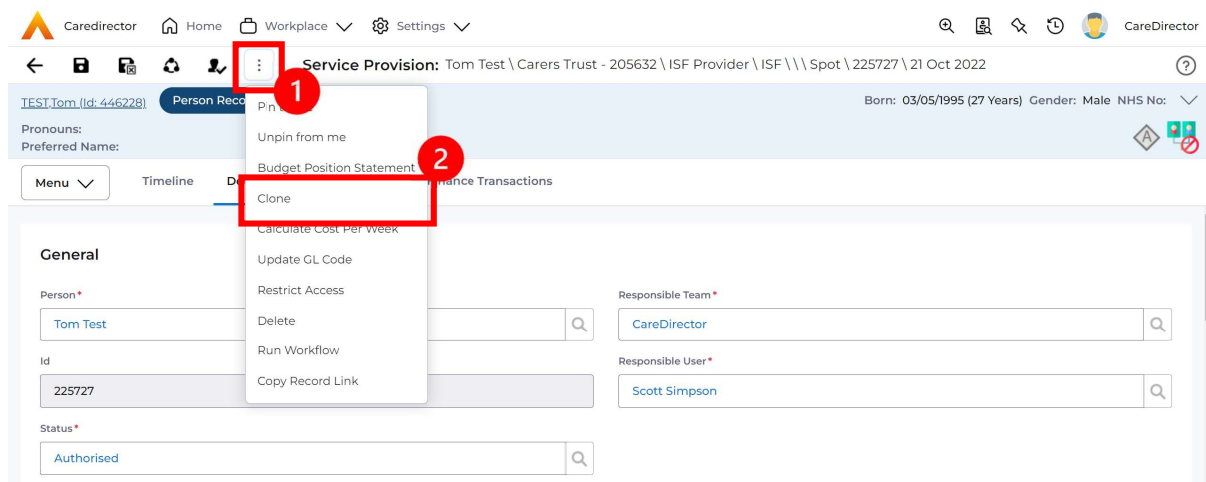
The screenshot shows the 'Service Provisions' section of the CareDirector interface. The navigation bar is the same as in the previous screenshot. The 'Services' tab is selected. A red box highlights the '+' icon in the toolbar, which is used to create a new record. Below the toolbar, there is a search bar and a table of service provisions. The table has the following columns: Id, Person, Id [Person], Status, Planned Start Date, Planned End Date, Actual Start Date, Actual End Date, and Service Element. The 'Actual End Date' column is highlighted with a red box. The table contains one row of data: Id: 220022, Person: TEST Tom, Id [Person]: 444267, Status: Draft, Planned Start Date: 08/08/2022, and Service Element: Adult Residen...

## How to Clone a Service Provision

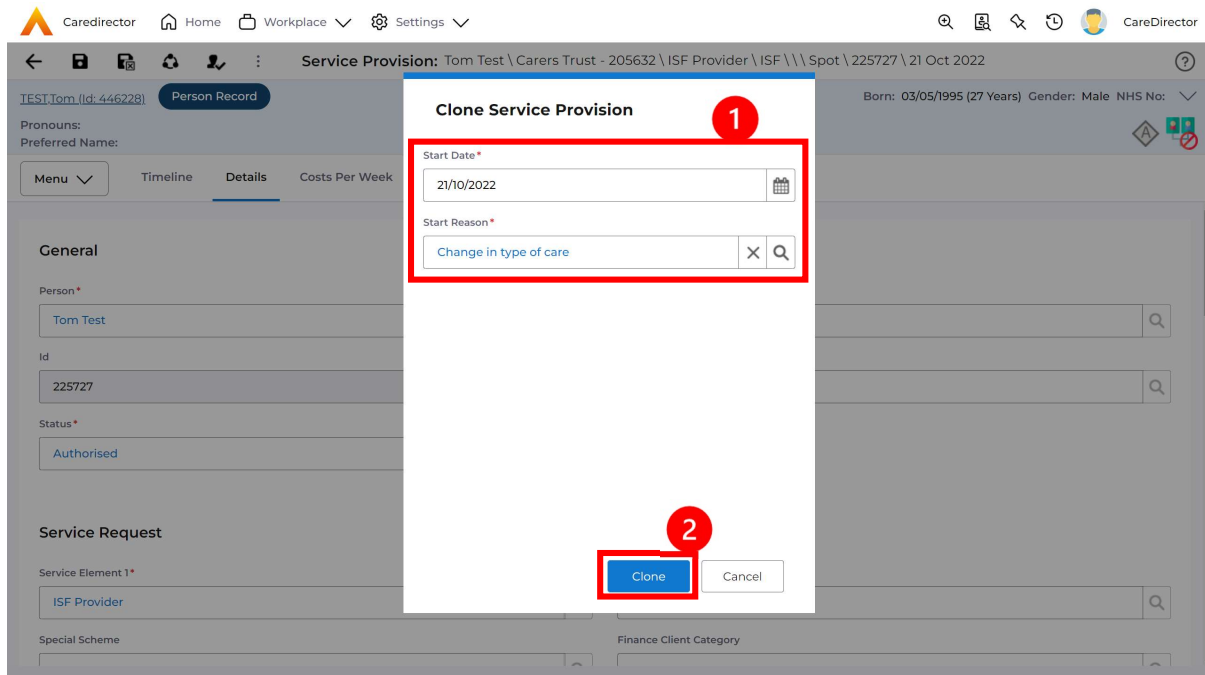
1. Occasionally, it is beneficial to clone a service provision so that information can be carried over whilst also being able to change details in many ways. **However**, cloning a Service Provision will automatically add an **actual** start date, therefore, this functionality should **not** be used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

The screenshot shows the CareDirector interface for a person record. The breadcrumb 'Service Provision' is highlighted with a red box and a '1'. Below it, the 'Menu' dropdown is highlighted with a red box and a '1'. In the main content area, the 'Related Items' option is highlighted with a red box and a '2', and the 'Notes' option is highlighted with a red box and a '3'.

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

The screenshot shows the 'Notes' form in the CareDirector interface. The '+' icon for creating a new record is highlighted with a red box and a '1'.

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**

Person: Tom Test

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

Pronouns: Preferred Name: [dropdown]

Menu Timeline Summary Profile Cases **Services** Document View All Activities

Service Provisions

Related Service Provisions [dropdown] Search for records [input] [search icon] [refresh icon]

<input type="checkbox"/>	Id	Status	Planned St...	Planned End...	Actual Star...	Actual End D...	Service Element 1	Service Element 2	Provider/Cs
<input type="checkbox"/>	229954	Authorised		22/02/2023	20/02/2023		Adult Residential Care	Respite for Client	1 ALMSHO
<input type="checkbox"/>	229955	Authorised		22/02/2023	20/02/2023		Adult Residential Care	Interim Placement	AEGIS CAF
<input type="checkbox"/>	229946	Cancelled	20/02/2023				Adult Residential Care	Long-Term Care	1 HILL CLC
<input type="checkbox"/>	229953	Authorised	20/02/2023				Nursing Care	Long-Term Care	Acorn Nur
<input type="checkbox"/>	229952	Authorised	20/02/2023		20/02/2023	20/02/2023	Adult Residential Care	Long-Term Care	2 HILL CLC
<input type="checkbox"/>	229956	Authorised	21/02/2023				Adult Residential Care	ACP Long Term Plac...	2 HILL CLC

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**

Person: Tom Test

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

Pronouns: Preferred Name: [dropdown]

Menu Timeline Summary Profile Cases **Services** Document View All Activities

Service Provisions

Related Service Provisions [dropdown] Search for records [input] [search icon] [refresh icon]

<input type="checkbox"/>	Id	Status	Planned St...	Planned End...	Actual Star...	Actual End D...	Service Element 1	Service Element 2	Provider/Cs
<input type="checkbox"/>	229988	Authorised					SDS - Managed Acco...	Telecare Rapid Resp...	Telecare
<input type="checkbox"/>	229989	Authorised					Advocacy	Advocacy	Advocacy
<input type="checkbox"/>	229991	Authorised					Professional Support	Social Work	Own Loca
<input type="checkbox"/>	229994	Authorised					Visual Impairment R...	Visual Impairment R...	Own Loca
<input checked="" type="checkbox"/>	229995	Ready for Autho...					Equipment	Occupational Therapy	Own Loca
<input type="checkbox"/>	229975	Authorised			28/04/2023		SDS - Managed Acco...	Extra Care	De Lacy G

## 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.

## Adults Support Request

Support Request

System \*

**Caredirector** Hospital 2 Home

Support Request \*

Unable to Access System Deletion Request Lock Down Request  
Merge Request Re-Open Request New User Request Change Request  
Finance Support Report / View Request **Other Request**  
< Previous ✕ Cancel Next >



- 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: XXXXXXXX  
Address: XXXXXXXX  
Phone Number: XXXXXXXXX

Please upload screenshots to help explain your request (optional)

Drop files here to upload -

Uploaded: 0 of 4

## 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](#).

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

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

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\* Long-Term Care  
 Special Scheme Finance Client Category Learning Disability  
 GL Code Rate Unit\* Per Week Pro Rata

**Dates**

Planned Start Date 20/02/2023 Planned End Date  
 Actual Start Date Actual End Date  
 Start Reason\* Formerly Self Funding

**Commissioning**

Purchasing Team Adults Connecting Care Team East Frequency in Weeks\* 1  
 Service Provided 2 HILL CLOSE \ Adult Residential Care \ Long-Term Care \ Learn... 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

5. Select **Save** when completed.

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\*  Responsible Team\*

Id  Responsible User\*

Status\*

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.

Service Provision: Tom Test \ 2 HILL CLOSE \ Adult Residential Care \ Long-Term Care \ Learni...

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

Pronouns: Preferred Name:

Menu  **Timeline** **Details** Costs Per Week Finance Transactions

Filter By

From

To

Team

**FEB 2023**

**Service Provision Cost Per Week Created** Today at 13:50

A new record of service provision cost per week was created by Scott Simpson.

Cost per Week: £630.23 End Date: Start Date: 20/02/2023

**Service Provision Created** Today at 13:50

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

The screenshot shows the 'Person Record' page for 'TEST, Tom (Id: 448365)'. The 'Status' dropdown is set to 'Ready for Authorisation'. The 'Person' dropdown is set to 'Tom Test'. The 'Responsible Team' is 'CD V6 Team' and the 'Responsible User' is 'Scott Simpson'. The 'Id' is '229952'. The 'Status' dropdown is highlighted with a red box and a red circle containing the number '1'. The 'Person' dropdown is highlighted with a red box and a red circle containing the number '2'.

- 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.
- 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](#).

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



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 \*     
 Responsible Team \*     
 Id   
 Responsible User \*     
 Status \*

**Service Request**

Service Element 1\*     
 Service Element 2\*     
 Special Scheme    
 Finance Client Category     
 GL Code   
 Rate Unit\*

**Dates**

Planned Start Date    
 Planned End Date    
 Actual Start Date    
 Actual End Date    
 Start Reason\*

**Commissioning**

Purchasing Team     
 Frequency in Weeks\*   
 Service Provided     
 Provider/Carer    
 Rate Required\*  Yes  No

**Authorisation Detail**

Authorised By    
 Authorisation Date

**Related Information**

Placement Room Type\*     
 Related Assessment    
 Related Case

7. Select **Save** when completed.

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: [dropdown]

Pronouns: Preferred Name: [dropdown]

Details

General

Person\* Tom Test [search]

Responsible Team\* CD V6 Team [x] [search]

Id [input]

Responsible User\* Scott Simpson [x] [search]

Status\* Draft [search]

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.

Caredirector Home Workplace Settings CD V6 Team

Service Provision: Tom Test \ Acorn Nursing Home \ Nursing Care \ Long-Term Care \ Older P... [dropdown]

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

Pronouns: Preferred Name: [dropdown]

Menu Timeline Details Costs Per Week Finance Transactions

Filter By [dropdown]

From [calendar]

To [calendar]

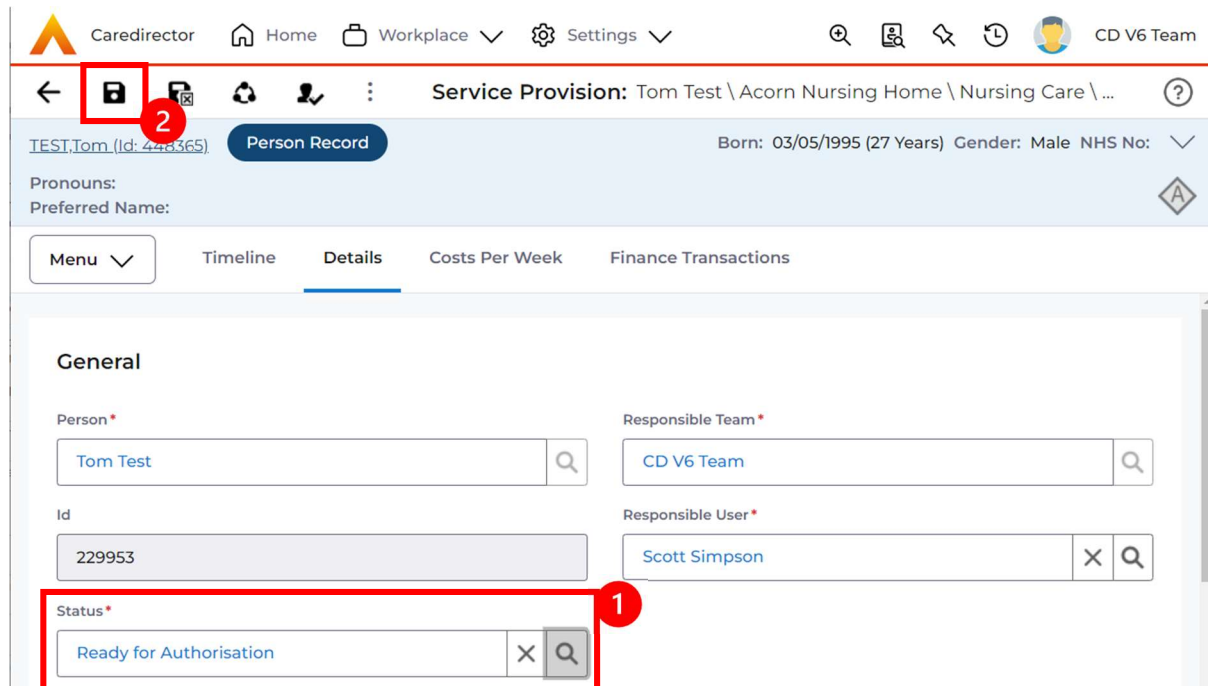
FEB 2023

[Service Provision Cost Per Week Created](#) Today at 14:02

A new record of service provision cost per week was created by Scott Simpson.

Cost per Week: £0.00	End Date:	Start Date: 20/02/2023
----------------------	-----------	------------------------

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



The screenshot shows the CareDirector interface for a service provision record. The breadcrumb trail is: Service Provision: Tom Test \ Acorn Nursing Home \ Nursing Care \ ... The record is for 'TEST, Tom (Id: 448365)' with a 'Person Record' button. The status is 'Ready for Authorisation'. The 'Status' dropdown is highlighted with a red box and a '1' in a red circle. The 'Save' button in the top navigation bar is highlighted with a red box and a '2' in a red circle. Other fields include 'Person' (Tom Test), 'Responsible Team' (CD V6 Team), 'Id' (229953), and 'Responsible User' (Scott Simpson).

- 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.
- 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.](#)

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

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

CAREDIRECTOR SERVICE PROVISION

Caredirector Home Workplace Settings

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 X Q

Service Element 2\* Respite for Client X Q

Special Scheme

Finance Client Category Older People X Q

GL Code

Rate Unit\* Per Week Pro Rata X Q

**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 X Q

**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 X Q

Related Assessment

Related Case

Service Package

**Notes**

Notes

5. Select **Save** when completed.

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\*

Responsible Team\*

Id

Responsible User\*

Status\*

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.

Service Provision: Tom Test \ 1 ALMSHOUSE LANE \ Adult Residential Care \ Respite for Client...

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

Pronouns:   
Preferred Name:

Menu  **Timeline** **Details**  Costs Per Week Finance Transactions

Filter By

From

To

Team

**FEB 2023**

[Service Provision Cost Per Week Created](#) Today at 14:46

A new record of service provision cost per week was created by Scott Simpson.

Cost per Week:	End Date:	Start Date:
£0.00	22/02/2023	20/02/2023

**Service Provision Created** Today at 14:46

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

The screenshot shows the CareDirector interface for a 'Person Record'. The top navigation bar includes 'Caredirector', 'Home', 'Workplace', 'Settings', and a user profile for 'CD V6 Team'. Below the navigation bar, the breadcrumb trail is 'Service Provision: Tom Test \ 1 ALMSHOUSE LANE \ Adult Residenti...'. The main header shows 'TEST, Tom (Id: 448365)' and 'Person Record'. Below this, there are fields for 'Born: 03/05/1995 (27 Years)', 'Gender: Male', and 'NHS No:'. A 'Menu' dropdown is visible, with tabs for 'Timeline', 'Details', 'Costs Per Week', and 'Finance Transactions'. The 'Details' tab is active, showing a 'General' section with the following fields:

- Person\***: Tom Test
- Responsible Team\***: CD V6 Team
- Id**: 229954
- Responsible User\***: Scott Simpson
- Status\***: Ready for Authorisation

The 'Status' field is highlighted with a red box and a red circle containing the number 1. The 'Save' icon in the top navigation bar is also highlighted with a red box and a red circle containing the number 2.

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)



**Person Record** | Born: 03/05/1995 (27 Years) Gender: Male NHS No: [dropdown]

**Details**

**General**

Subject\*

Description

Manager has given approval for this to be accepted. A respite extension is required on this Service Provision.

body p Characters (with HTML): 118/100000

**Details**

Regarding\*

Responsible Team\*

Reason

Responsible User

Priority

Category

Due\*

Sub-Category

Status\*

Outcome

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.](#)

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

TFST/Tom | (ref: 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.

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\*  Responsible Team\*

Id  Responsible User\*

Status\*

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.

Service Provision: Tom Test \ AEGIS CARE SOLUTIONS (FORMERLY TREES RESIDENTIAL CAR...)

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

Pronouns: Preferred Name:

Menu  **Timeline** **Details**  Costs Per Week Finance Transactions

Filter By

From

To

Team

**FEB 2023**

**Service Provision Cost Per Week Created** Today at 15:40

A new record of service provision cost per week was created by Scott Simpson.

Cost per Week: £607.76	End Date: 22/02/2023	Start Date: 20/02/2023
---------------------------	-------------------------	---------------------------

**Service Provision Created** Today at 15:40

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

The screenshot shows the 'Person Record' for Tom Test (Id: 229955) in the CareDirector system. The interface includes a top navigation bar with 'Caredirector', 'Home', 'Workplace', and 'Settings'. The main content area shows the 'Person Record' for Tom Test, with fields for 'Person', 'Responsible Team', 'Id', 'Responsible User', and 'Status'. The 'Status' dropdown menu is currently set to 'Ready for Authorisation' and is highlighted with a red box and a red circle containing the number '1'. The 'Save' icon in the top navigation bar is also highlighted with a red box and a red circle containing the number '2'.

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.](#)

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

A

**Details**

**General**

Person\*

Id

Status\*

Responsible Team\*

Responsible User\*

**Service Request**

Service Element 1\*

Special Scheme

GL Code

Service Element 2\*

Finance Client Category

Rate Unit\*

**Dates**

Planned Start Date

Actual Start Date

Start Reason\*

Planned End Date

Actual End Date

**Commissioning**

Purchasing Team

Service Provided

Rate Required\*  
 Yes  
 No

Frequency in Weeks\*

Provider/Carer

**Authorisation Detail**

Authorised By

Authorisation Date

**Related Information**

Placement Room Type\*

Related Case

Related Assessment



4. Select **Save** when completed.

Caredirector Home Workplace Settings CD V6 Team

← **Save** Service Provision: New

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

Pronouns: Preferred Name: A

**Details**

**General**

Person\*  Responsible Team\*  X Q

Id  Responsible User\*  X Q

Status\*  Q

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

Caredirector Home Workplace Settings CD V6 Team

← Service Provision: Tom Test \ 2 HILL CLOSE \ Adult Residential Care \ ACP Long Term Placem... ?

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

Pronouns: Preferred Name: A

Menu ▾ Timeline **Rate Periods** Costs Per Week Finance Transactions

**+** Service Provision Rate Periods

Approved Rate Periods ▾ Search for records Q ↻

Rate Unit	Approval Status	Start Date	End Date	Service Provision
-----------	-----------------	------------	----------	-------------------

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**.

Service Provision Rate Period: New

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

Pronouns:  Preferred Name:

**Details**

**General**

Service Provision\*

Responsible Team\*

Rate Unit\*

Approval Status\*

Start Date\*

End Date

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.

Service Provision: Tom Test \ 2 HILL CLOSE \ Adult Residential Care \ ACP Long Term Placem...

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

Pronouns:  Preferred Name:

Menu  Timeline Details **Rate Periods** Costs Per Week Finance Transactions

**Service Provision Rate Periods**

Pending Rate Periods

**System Views**

- Approved Rate Periods
- Cancelled Rate Periods
- Pending Rate Periods**
- Related Records

Status	Start Date	End Date	Service Provision
Pending	21/02/2023		Tom Test \ 2 HILL CLOSE \ Adult Resid...

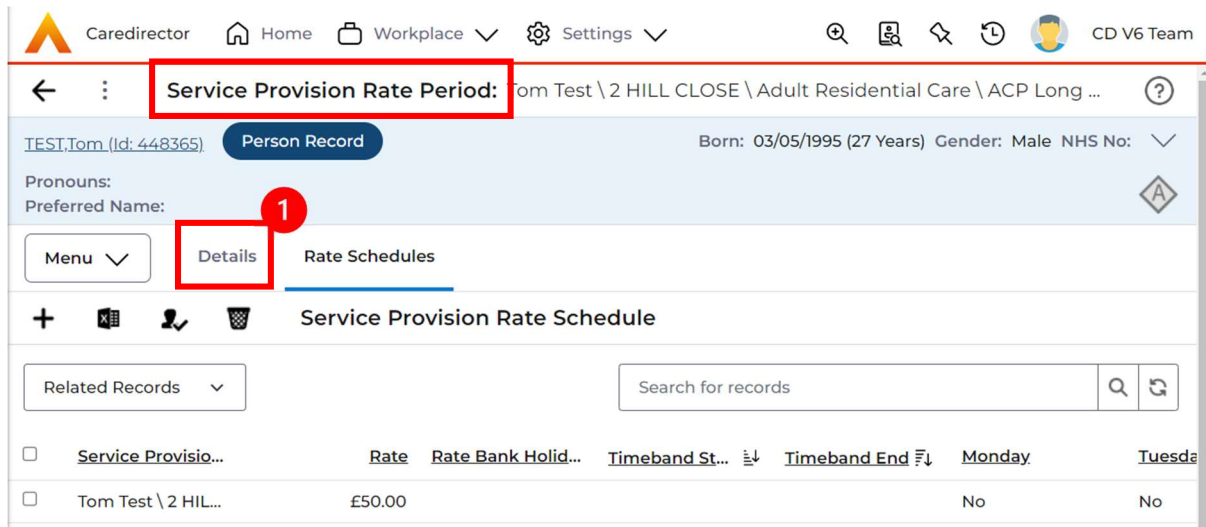
8. Select the pending **rate period** and open the **Service Provision Rate Period** screen. Then a new tab called **Rate Schedules** will show. Select this and **Create New Record**.

The screenshot shows the 'Person Record' for Tom Test (ID: 448365). The 'Rate Schedules' tab is selected and highlighted with a red box and a '1' in a red circle. Below the tabs, a '+ Create New Record' button is highlighted with a red box and a '2' in a red circle. The 'Service Provision Rate Schedule' table is visible below, with columns for 'Service Provision...', 'Rate', 'Rate Bank Holid...', 'Timeband Start', 'Timeband End', 'Monday', and 'Tuesda'.

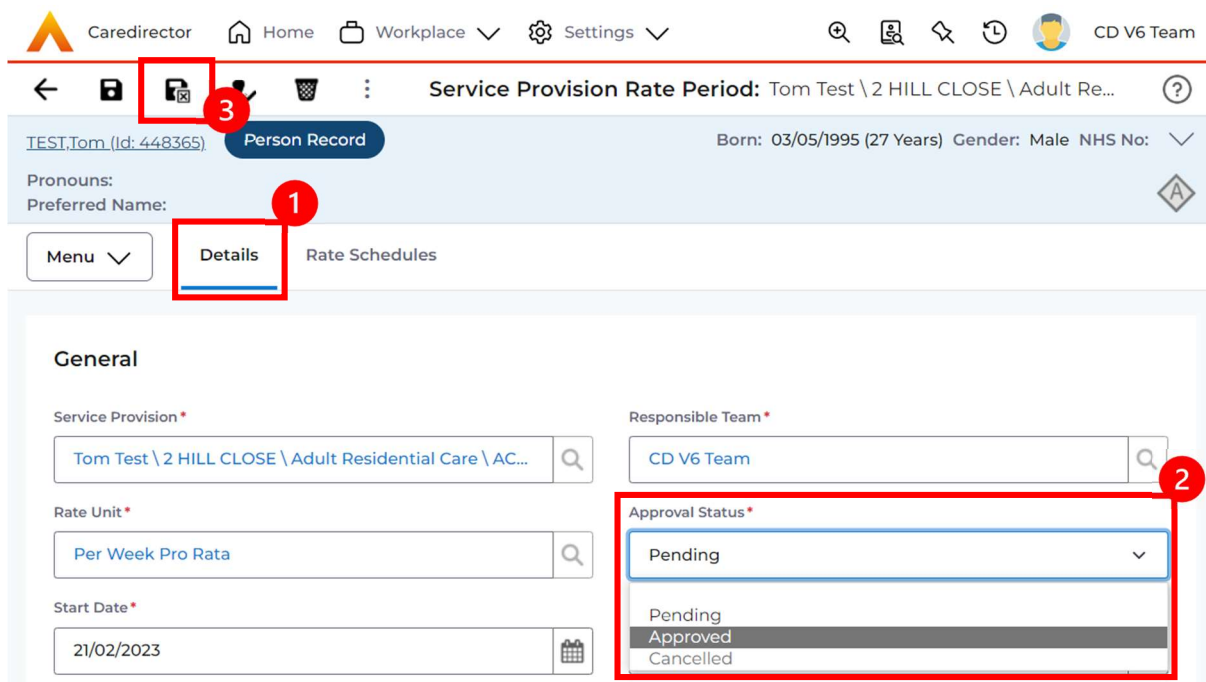
9. Enter the **Rate** in the **Rate** field, as per the agreed weekly amount (this amount will have been agreed at the Adult Commissioning Panel). Then **Save and Return to Previous Page**.

The screenshot shows the 'Service Provision Rate Schedule: New' form. The 'Rate' field is highlighted with a red box and a '1' in a red circle, showing a value of £ 50. The 'Service Provision Rate Period' and 'Responsible Team' fields are also visible. The 'Service Provision' field is also highlighted with a red box and a '2' in a red circle.

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**.

The screenshot shows the 'Service Provision' screen for 'Tom Test \ 2 HILL CLOSE \ Adult Residential Care ...'. The 'Details' tab is selected. The 'Status' dropdown is set to 'Ready for Authorisation'. The 'Save' icon in the top navigation bar is highlighted with a red box and the number 3. The 'Details' tab is highlighted with a red box and the number 1. The 'Status' dropdown is highlighted with a red box and the number 2.

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.

The screenshot shows the 'Service Provision' screen for 'Tom Test \ 2 HILL CLOSE \ Adult Residential Care \ ACP Long Term Placem...'. The 'Costs Per Week' tab is selected. A table displays a record for '21/02/2023' with a 'Cost per Week' of '£50.00'. The 'Costs Per Week' and 'Finance Transactions' tabs are highlighted with a red box.

Start Date	End Date	Cost per Week	Service Provision
21/02/2023		£50.00	Tom Test \ 2 HILL CLOSE \ Adult Residential Care \ ACP Lon...

14. **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.

## ACP or Non-Commissioned Services

1. These are non-commissioned Providers. If you come across a non-commissioned provider that has not been 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](#).

<u>Field</u>	<u>Information</u>
<b>Service Element 1:</b>	<b>SDS – Managed Account.</b>
<b>Service Element 2:</b>	Choose <b>ACP/ Non-Commissioned</b> .
<b>Rate Unit:</b>	<b>Per Week Pro Rata.</b>
Planned Start Date:	Leave blank.
<b>Actual Start Date:</b>	<b>Enter date service is to start</b>
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).
<b>Start Reason:</b>	Choose appropriate option. Usually 'New Placement', 'Admitted from Hospital'
<b>Purchasing Team:</b>	Choose appropriate Team.
<b>Service Provided:</b>	Type in <b>Providers Name. Search.</b> Select <b>Provider</b> from list.
<b>Status:</b>	<b>Draft.</b>
Placement Room Type:	Auto populates to 'Not Applicable'
<b>Responsible Team:</b>	Auto populated with the user's default team
<b>Responsible User:</b>	Auto populated with the user's name
<b>Related Case:</b>	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* <input type="text" value="Tom Test"/>	Responsible Team* <input type="text" value="CD V6 Team"/>
Id <input type="text"/>	Responsible User* <input type="text" value="Scott Simpson"/>
Status* <input type="text" value="Draft"/>	

**Service Request**

Service Element 1* <input type="text" value="SDS - Managed Account"/>	Service Element 2* <input type="text" value="ACP/Non Commissioned"/>
Special Scheme <input type="text"/>	Finance Client Category <input type="text"/>
GL Code <input type="text"/>	Rate Unit* <input type="text" value="Per Week Pro Rata"/>

**Dates**

Planned Start Date <input type="text" value="21/02/2023"/>	Planned End Date <input type="text"/>
Actual Start Date <input type="text"/>	Actual End Date <input type="text"/>
Start Reason* <input type="text" value="New Placement"/>	

**Commissioning**

Purchasing Team <input type="text" value="CTLD West (Outwood)"/>	Frequency in Weeks* <input type="text" value="1"/>
Service Provided <input type="text" value="1 Ark Group \ SDS - Managed Account \ ACP/Non Commissione..."/>	Provider/Carer <input type="text" value="1 Ark Group"/>
Rate Required* <input checked="" type="radio"/> Yes <input type="radio"/> No	

**Authorisation Detail**

Authorised By <input type="text"/>	Authorisation Date <input type="text"/>
---------------------------------------	--

**Related Information**

Placement Room Type* <input type="text" value="Not Applicable"/>	Related Assessment <input type="text"/>
Related Case <input type="text"/>	

5. Select **Save** when completed.

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: [dropdown]

Pronouns: Preferred Name: [dropdown]

Details

General

Person\* Tom Test Responsible Team\* CD V6 Team

Id Responsible User\* Scott Simpson

Status\* Draft

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

Caredirector Home Workplace Settings CD V6 Team

Service Provision: Tom Test \ 1 Ark Group \ SDS - Managed Account \ ACP/Non Commissioned...

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

Pronouns: Preferred Name: [dropdown]

Menu Timeline Details **Rate Periods** Costs Per Week Finance Transactions

+ Service Provision Rate Periods

Approved Rate Periods Search for records

Rate Unit	Approval Status	Start Date	End Date	Service Provision
-----------	-----------------	------------	----------	-------------------



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**.

Service Provision Rate Period: New

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

Pronouns: Preferred Name:

Details

**General**

Service Provision \*

Responsible Team \*

Rate Unit \*

Approval Status \*

Start Date \*

End Date

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.

Service Provision: Tom Test \ 1 Ark Group \ SDS - Managed Account \ ACP/Non Commissioned...

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

Pronouns: Preferred Name:

Menu

Service Provision Rate Periods

Pending Rate Periods

Status	Start Date	End Date	Service Provision
Pending	21/02/2023		Tom Test \ 1 Ark Group \ SDS - Manag...

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**.

The screenshot shows the Caredirector interface. At the top, there's a navigation bar with 'Caredirector', 'Home', 'Workplace', and 'Settings'. The main header displays 'Service Provision Rate Period: Tom Test \ 1 Ark Group \ SDS - Managed Account \ ACP/Non ...'. Below this, a 'Person Record' card shows 'TEST, Tom (Id: 448365)', 'Born: 03/05/1995 (27 Years)', 'Gender: Male', and 'NHS No:'. A 'Menu' dropdown is open, with 'Rate Schedules' selected and highlighted by a red box with a '1' in a red circle. Below the menu, a '+' icon in a red box with a '2' in a red circle is visible. The 'Service Provision Rate Schedule' section has a search bar and a table with columns: 'Service Provisio...', 'Rate', 'Rate Bank Holid...', 'Timeband Start', 'Timeband End', 'Monday', and 'Tuesda'.

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

The screenshot shows the 'Service Provision Rate Schedule: New' form. The 'Details' tab is active. Under the 'General' section, there are several fields: 'Service Provision Rate Period\*' (Tom Test \ 1 Ark Group \ SDS - Managed Account \ AC...), 'Responsible Team\*' (CD V6 Team), 'Service Provision\*' (Tom Test \ 1 Ark Group \ SDS - Managed Account \ AC...), and 'Rate\*' (£ 50). The 'Rate\*' field is highlighted with a red box and a '1' in a red circle. A '+' icon in a red box with a '2' in a red circle is also visible in the top left corner of the form area.

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.

Service Provision Rate Period: Tom Test \ 1 Ark Group \ SDS - Managed Account \ ACP/Non ...

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

Details

Service Provision...	Rate	Rate Bank Holid...	Timeband St...	Timeband End	Monday	Tuesda
Tom Test \ 1 Ark ...	£50.00				No	No

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.

Service Provision Rate Period: Tom Test \ 1 Ark Group \ SDS - Man...

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

Details

Approval Status \*

- Pending
- Approved**
- Cancelled

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

Person Record

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

Pronouns: Preferred Name:

Menu  Timeline **Details** Rate Periods Costs Per Week Finance Transactions

**General**

Person\*

Responsible Team\*

Id

Responsible User\*

Status\*

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.

Service Provision: Tom Test \ 1 Ark Group \ SDS - Managed Account \ ACP/Non Commissioned...

Person Record

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

Pronouns: Preferred Name:

Menu  Timeline Details Rate Periods **Costs Per Week** Finance Transactions

Service Provision Cost Per Week

Related Records

<input type="checkbox"/>	Start Date <input type="button" value="F"/> <input type="button" value="D"/>	End Date <input type="button" value="F"/> <input type="button" value="D"/>	Cost per Week	Service Provision
<input type="checkbox"/>	21/02/2023		£50.00	Tom Test \ 1 Ark Group \ SDS - Managed Account \ ACP/No...

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 – Reinstated' 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



CARE DIRECTOR SERVICE PROVISION

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).

The screenshot shows the CareDirector interface for a 'Person Record'. At the top, there is a navigation bar with icons for Home, Workplace, and Settings, along with a search icon and a user profile icon labeled 'CD V6 Team'. Below this is a task bar with a 'Task: New' label and a 'Save' icon highlighted in a red box. The main content area is titled 'Person Record' and includes fields for 'Pronouns' and 'Preferred Name'. Below this is a 'Details' section with a 'General' tab. The 'Subject' field contains 'Change to SDS Carers Cash Direct Payment'. The 'Description' field has a rich text editor with the text 'Must contain details of new Actual Budget together with any other changes'. The 'Details' section includes fields for 'Regarding' (Tom Test [redacted] \ SDS - Financial Representative \ Direct...), 'Responsible Team' (Personalisation and Assessment Team, highlighted in a red box), 'Reason', 'Priority', 'Due' (06/03/2023), 'Status' (Open), 'Responsible User', 'Category', 'Sub-Category', and 'Outcome'.

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.](#)

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

Id

Status\*

Responsible Team\*

Responsible User\*

**Service Request**

Service Element 1\*

Special Scheme

GL Code

Service Element 2\*

Finance Client Category

Rate Unit\*

**Dates**

Planned Start Date

Actual Start Date

Start Reason\*

Planned End Date

Actual End Date

**Commissioning**

Purchasing Team

Service Provided

Rate Required\*   
 Yes   
 No

Frequency in Weeks\*

Provider/Carer

**Authorisation Detail**

Authorised By

Authorisation Date

**Related Information**

Placement Room Type\*

Related Case

Related Assessment

5. Select **Save** when completed.

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: A

**Details**

**General**

Person\* Tom Test

Responsible Team\* CD V6 Team

Id

Responsible User\* Scott Simpson

Status\* Draft

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

Caredirector Home Workplace Settings CD V6 Team

Service Provision: Tom Test \ Personalisation & Assessment Team \ ...

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

Pronouns: Preferred Name: A

Menu ▾ Timeline **Details** Rate Periods Costs Per Week Finance Transactions

**General**

Person\* Tom Test

Responsible Team\* CD V6 Team

Id 229965

Responsible User\* Scott Simpson

Status\* Booking Request

- 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)

**General**

Title \*

NAME OF ISF PROVIDER...

Regarding \*

Tom Test \ Personalisation & Assessment Team \ ISF Provider \ ISF \ \ Spot \ 229966 \ 06 Mar 2023

Responsible Team \*

CD V6 Team

Text

The weekly Actual Budget agreed = £XXXXXX  
The weekly Indicative Budget (as generated by the Adults Overview Assessment in CareDirector) = £XXXXX  
Start Date of ISF (if known) = XX/XX/XXXX

- 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.

My Teams Service Provisions - Booking Requests							
	Person Id	Person	Id	Service Element 1	Service Element 2	Actual Start ...	Actual
<input type="checkbox"/>	448365	Tom Test	229966	ISF Provider	ISF		

Page 1 1 - 1

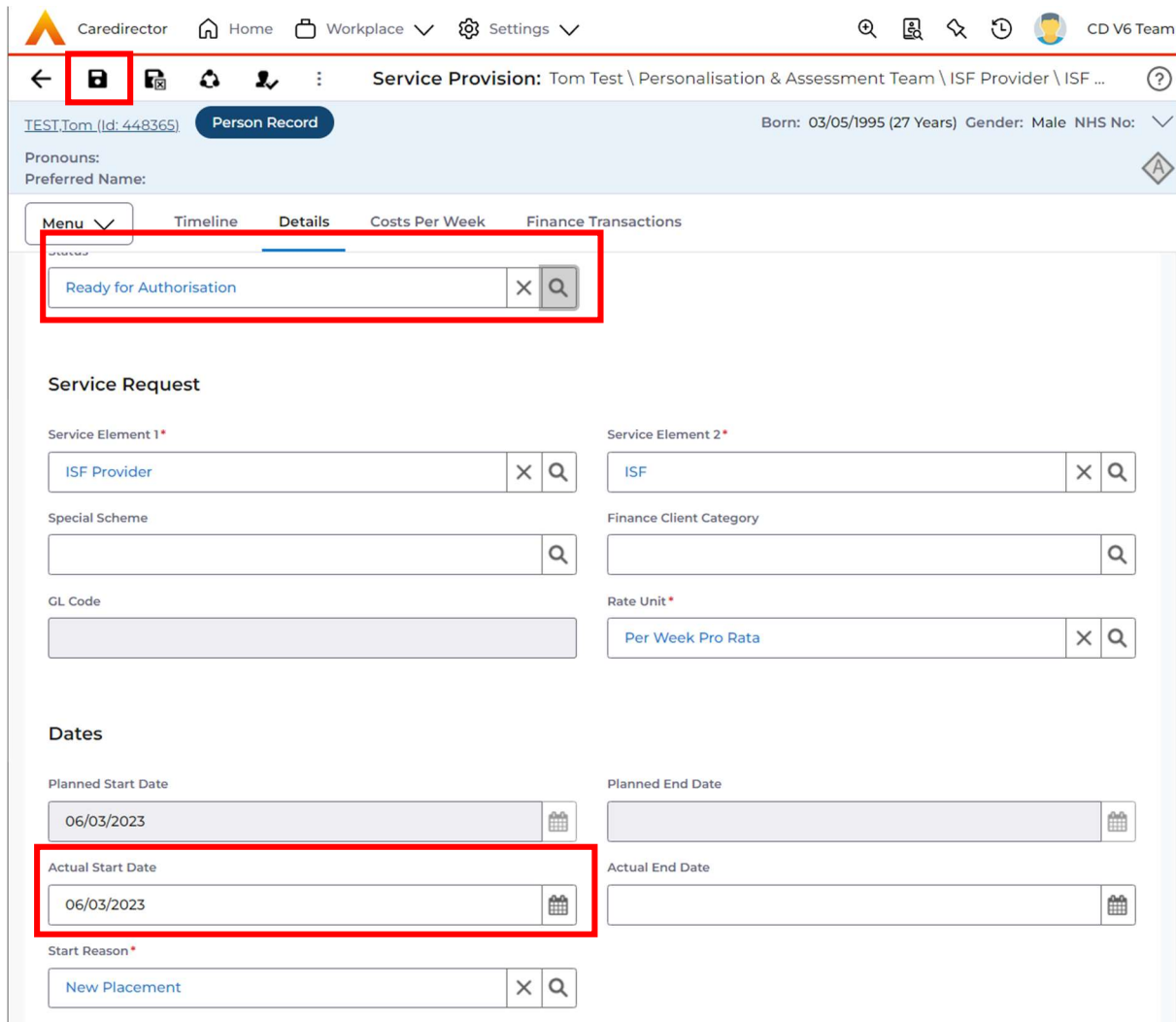
8. When opened, the current **Provider** allocated is **Personalisation and Assessment Team**. What they need to do, is look on **Notes** to find the name of the new provider and select that one from the provided list or create a new provider with the new details. Select this in the **Service Provided**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

**Commissioning**

<p>Purchasing Team</p> <input type="text" value="Adults Connecting Care Team East"/>	<p>Frequency in Weeks*</p> <input type="text" value="1"/>
<p>Service Provided</p> <input type="text" value="229966 \ ISF Provider \ ISF \ Sp..."/>	<p>Provider/Carer</p> <input type="text" value="2299680"/>
<p>Rate Required*</p> <p><input type="radio"/> Yes</p> <p><input checked="" type="radio"/> No</p>	<p>Cost Per Week</p> <input type="text" value="0.00"/>



- 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**.



Caredirector Home Workplace Settings

Service Provision: Tom Test \ Personalisation & Assessment Team \ ISF Provider \ ISF ...

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

Menu Timeline Details Costs Per Week Finance Transactions

Ready for Authorisation

**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 06/03/2023

Actual End Date

Start Reason\* New Placement

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.

The screenshot shows the Caredirector interface for a service provision. The top navigation bar includes 'Caredirector', 'Home', 'Workplace', and 'Settings'. The user is logged in as 'CD V6 Team'. The page title is 'Service Provision: Tom Test'. Below the title, there is a 'Person Record' section with details: 'TEST, Tom (Id: 448365)', 'Born: 03/05/1995 (27 Years)', 'Gender: Male', and 'NHS No:'. A 'Menu' dropdown is visible with options: 'Timeline', 'Details', 'Costs Per Week' (selected), and 'Finance Transactions'. Below the menu, there is a search bar for records. The main content area shows a table of service provision records:

<input type="checkbox"/>	Start Date	End Date	Cost per Week	Service Provision
<input type="checkbox"/>	06/03/2023		£176.72	Tom Test \ A \ ... \ PV \ 19680 \ ISF Provider \ ISF...

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:

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

The screenshot shows the Caredirector interface for creating a task. The task title is "Task: Change to Individual Service Fund". The user is logged in as "CD V6 Team". The task is associated with the person record of "TEST Tom (id: 448365)".

**General Section:**

- Subject:** Change to Individual Service Fund
- Description:** Must contain details of the change

**Details Section:**

- Regarding:** Tom Test (id: 448365) [Redacted]
- Responsible Team:** Personalisation and Assessment Team
- Reason:** [Empty]
- Priority:** [Empty]
- Due:** 06/03/2023, 15:00
- Status:** Open
- Category:** [Empty]
- Sub-Category:** [Empty]
- Outcome:** [Empty]
- Contains Information Provided By A Third Party?**  Yes  No
- Is Case Note?**  Yes  No

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](#).

<u>Field</u>	<u>Information</u>
<b>Service Element 1:</b>	<b>SDS – WMDC Managed Account.</b>
<b>Service Element 2:</b>	Choose <b>Home Care</b> .
<b>Rate Unit:</b>	<b>Per 1 Hour \ Hours (Whole) \ Hours (Part)</b>
<b>Planned Start Date:</b>	<b>Today's date (the Actual Start Date will be entered by the Co-ordination Team).</b>
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).
<b>Start Reason:</b>	Choose appropriate option, usually 'New Placement' or 'Change in Type of Care.'
<b>Purchasing Team:</b>	Choose appropriate Team.
<b>Status:</b>	<b>Draft.</b>
Placement Room Type:	Auto populates to 'Not Applicable'
<b>Responsible Team:</b>	Auto populated with the user's default team.
<b>Responsible User:</b>	Auto populated with the user's name
<b>Related Case:</b>	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:

A

**Details**

**General**

Person\*

Id

Status\*

Responsible Team\*

Responsible User\*

**Service Request**

Service Element 1\*

Special Scheme

GL Code

Service Element 2\*

Finance Client Category

Rate Unit\*

**Dates**

Planned Start Date

Actual Start Date

Start Reason\*

Planned End Date

Actual End Date

**Commissioning**

Purchasing Team

Service Provided

Rate Required\*  
 Yes  
 No

Total Units

Frequency in Weeks\*

Provider/Carer

**Authorisation Detail**

Authorised By

Authorisation Date

**Related Information**

Placement Room Type\*

Related Assessment

3. Select **Save** when completed.

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: A

**Details**

**General**

Person\*

Responsible Team\*

Id

Responsible User\*

Status\*

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

Caredirector Home Workplace Settings CD V6 Team

Service Provision: Tom Test \ Co-ordination Team \ SDS - WMDC Managed A... ?

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

Pronouns: Preferred Name: A

Menu ▾ Timeline 1 **Details** Service Deliveries Service Delivery Variations Costs Per Week Finance Transactions

Person\*

Responsible Team\*

Id

Responsible User\*

Status\* Booking Request   2

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

The screenshot shows the Caredirector interface for a 'Person Record'. The 'Service Deliveries' tab is selected and highlighted with a red box and a red circle containing the number '1'. Below the tabs, a toolbar contains a '+' icon (highlighted with a red box and a red circle containing the number '2'), a calendar icon, a person icon, and a trash icon. Below the toolbar is a search bar and a table header with columns: Person, Id, Planned Start Ti..., Units, Total Units, Total Visits, and Monday. The table content is empty, displaying 'NO RECORDS' and 'No results were found'.

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.



**General**

Service Provision \*

Responsible Team \*

Id\*

Rate Unit\*

Planned Start Time\*

Units\*

Total Visits\*

Total Units\*

Number of Carers\*

**Schedule applies to days**

Select All\*  
 Yes  
 No

Monday\*  
 Yes  
 No

Tuesday\*  
 Yes  
 No

Wednesday\*  
 Yes  
 No

Thursday\*  
 Yes  
 No

Friday\*  
 Yes  
 No

Saturday\*  
 Yes  
 No

Sunday\*  
 Yes  
 No

**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
- Source a **Provider**
  - Change the **Service Provision Service Element 1** from **SDS – WMDC Managed Account** to **SDS – Managed Account**
  - Re-enter the **Rate Unit – Per 1 Hour \ Hours (Whole) \ Hours (Part)**
  - Re-enter the appropriate **Start Reason**
  - Enter in the **Actual Start Date** from when the charging is set to start.
  - Ensure the **Service Deliveries** are correct.
  - Set to the correct **Provider**
  - 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](#).

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

Caredirector
 Home
Workplace
Settings

CD V6 Team

Service Provision: New
Person Record

TEST Tom (Id: 448365)

Pronouns:

Preferred Name:

Born: 03/05/1995 (27 Years) Gender: Male NHS No:

**Details**

**General**

Person \*

Responsible Team \*

Id

Responsible User \*

Status \*

**Service Request**

Service Element 1 \*

Service Element 2 \*

Special Scheme

Finance Client Category

GL Code

Rate Unit \*

**Dates**

Planned Start Date

Planned End Date

Actual Start Date

Actual End Date

Start Reason \*

**Commissioning**

Purchasing Team

Frequency in Weeks \*

Service Provided

Provider/Carer

Rate Required \*

Yes

No

Total Units

**Authorisation Detail**

Authorised By

Authorisation Date

**Related Information**

Placement Room Type \*

Related Assessment

Related Case

4. Select **Save** when completed.

The screenshot shows the 'Service Provision: New' form in Caredirector. The top navigation bar includes 'Caredirector', 'Home', 'Workplace', 'Settings', and a user profile for 'CD V6 Team'. The breadcrumb trail is 'Service Provision: New'. The form header shows 'TEST, Tom (Id: 448365)' and 'Person Record'. Below this, there are fields for 'Born: 03/05/1995 (27 Years)', 'Gender: Male', and 'NHS No:'. The 'Details' section is active, showing a 'General' tab with fields for 'Person' (Tom Test), 'Responsible Team' (CD V6 Team), 'Id', 'Responsible User' (Scott Simpson), and 'Status' (Draft). The 'Save' icon in the top toolbar is highlighted with a red box.

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

The screenshot shows the 'Service Deliveries' tab in Caredirector. The breadcrumb trail is 'Service Provision: Tom Test \ Test Care Home \ SDS - Managed Account \ Home Care \ \ \ Spot ...'. The form header shows 'TEST, Tom (Id: 448365)' and 'Person Record'. Below this, there are fields for 'Born: 03/05/1995 (27 Years)', 'Gender: Male', and 'NHS No:'. The 'Service Deliveries' tab is highlighted with a red box and a '1' in a red circle. The '+ Create New Record' button is highlighted with a red box and a '2' in a red circle. Below the toolbar, there is a search bar and a table with columns: 'Person', 'Id', 'Planned Start Ti...', 'Units', 'Total Units', 'Total Visits', and 'Monda'. The table is currently empty, displaying 'NO RECORDS'.

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 you 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**.

Navigation: Caredirector Home Workplace Settings CD V6 Team

Service Delivery: New

Details

**General**

Service Provision\*  
Tom Test \ Test Care Home \ SDS - Managed Account \ Home Care \ \ \ Sp... [Search]

Responsible Team\*  
CD V6 Team [X] [Search]

Id  
[Empty field]

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

Planned Start Time\*  
09:00 [Clock icon]

Units\*  
2

Total Visits\*  
[Empty field]

Total Units\*  
[Empty field]

Number of Carers\*  
1

Schedule applies to days

Select All\*  
 Yes  
 No

Monday\*  
 Yes  
 No

Tuesday\*  
 Yes  
 No

Wednesday\*  
 Yes  
 No

Thursday\*  
 Yes  
 No

Friday\*  
 Yes  
 No

Saturday\*  
 Yes  
 No

Sunday\*  
 Yes  
 No

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**.

The screenshot shows the CareDirector interface for a service provision. At the top, there is a navigation bar with 'Caredirector', 'Home', 'Workplace', and 'Settings'. Below this is a toolbar with various icons, including a 'Save and Return to Previous Page' icon highlighted with a red box and the number 3. The main content area shows the 'Service Provision: Tom Test \ Test Care Home \ SDS - Managed Acco...' page. The 'Details' tab is selected and highlighted with a red box and the number 1. Below the tabs, there are several input fields: 'Person' (Tom Test), 'Responsible Team' (CD V6 Team), 'Id' (229973), and 'Responsible User' (Scott Simpson). The 'Status' dropdown is highlighted with a red box and the number 2, and it is set 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.

**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](#).

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

Id

Status\*

Responsible Team\*

Responsible User\*

**Service Request**

Service Element 1\*

Special Scheme

GL Code

Service Element 2\*

Finance Client Category

Rate Unit\*

**Dates**

Planned Start Date

Actual Start Date

Start Reason\*

Planned End Date

Actual End Date

**Commissioning**

Purchasing Team

Service Provided

Rate Required\*  
 Yes  
 No

Frequency in Weeks\*

Provider/Carer

**Authorisation Detail**

Authorised By

Authorisation Date

**Related Information**

Placement Room Type\*

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.

The screenshot shows the CareDirector interface for a 'Person Record'. The breadcrumb trail is: Service Provision: Tom Test \ Care UK Prisons \ SDS - Managed Account \ Prison Resi Rate \ Spot \ 229974 \ 28 Apr 2023. The record is for 'Tom Test' (ID: 229974), born 03/05/1995, male. The 'Details' tab is selected. The 'Status' dropdown is set to 'Ready for Authorisation'. The 'Save' button is highlighted with a red box and the number 3. The 'Details' tab is highlighted with a red box and the number 1. The 'Status' dropdown is highlighted with a red box and the number 2.

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](#).

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

Id

Status \*

Responsible Team \*

Responsible User \*

**Service Request**

Service Element 1 \*

Special Scheme

GL Code

Service Element 2 \*

Finance Client Category

Rate Unit \*

**Dates**

Planned Start Date

Actual Start Date

Start Reason \*

Planned End Date

Actual End Date

**Commissioning**

Purchasing Team

Service Provided

Rate Required \*  
 Yes  
 No

Total Units

Frequency in Weeks \*

Provider/Carer

**Authorisation Detail**

Authorised By

Authorisation Date

**Related Information**

Placement Room Type \*

Related Case

Related Assessment

4. Select **Save** when completed.

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

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

Caredirector Home Workplace Settings CD V6 Team

Service Provision: Tom Test \ De Lacy Gardens \ SDS - Managed Account \ Extra Care \ \ \ Spot \ 229...

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

Pronouns: Preferred Name:

Menu ▾ Timeline **Details** 1 Service Deliveries Service Delivery Variations Costs Per Week Finance Transactions

General

Person\* Tom Test

Responsible Team\* CD V6 Team

Id 229975

Responsible User\* Scott Simpson

Status\* Booking Request  2

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:
- If the Client needs more than one visit per day your will need to record each time band separately
  - If the Client needs two carers you will need to change the **Number of Carers** field to the amount needed.
  - Add the **Planned Start Time**.
  - 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\*

Responsible Team\*

Id

Rate Unit\*

Planned Start Time\*

Units\*

Total Visits\*

Total Units\*

Number of Carers\*

Schedule applies to days

Select All\*  
 Yes  
 No

Monday\*  
 Yes  
 No

Tuesday\*  
 Yes  
 No

Wednesday\*  
 Yes  
 No

Thursday\*  
 Yes  
 No

Friday\*  
 Yes  
 No

Saturday\*  
 Yes  
 No

Sunday\*  
 Yes  
 No

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

- 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.](#)

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

Caredirector Home Workplace Settings

CD V6 Team

Service Provision: New
Person Record

TEST Tom (Id: 448365)

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* <input type="text" value="Tom Test"/>	Responsible Team* <input type="text" value="CD V6 Team"/>
Id <input type="text"/>	Responsible User* <input type="text" value="Scott Simpson"/>
Status* <input type="text" value="Draft"/>	

**Service Request**

Service Element 1* <input type="text" value="SDS - Managed Account"/>	Service Element 2* <input type="text" value="Extra Care"/>
Special Scheme <input type="text"/>	Finance Client Category <input type="text"/>
GL Code <input type="text"/>	Rate Unit* <input type="text" value="Per 1 Hour \ Hours (Whole) \ Hours (Part)"/>

**Dates**

Planned Start Date <input type="text" value="28/04/2023"/>	Planned End Date <input type="text"/>
Actual Start Date <input type="text"/>	Actual End Date <input type="text"/>
Start Reason* <input type="text" value="Change in type of care"/>	

**Commissioning**

Purchasing Team <input type="text" value="Adults Connecting Care Team East"/>	Frequency in Weeks* <input type="text" value="1"/>
Service Provided <input type="text" value="De Lacy Gardens \ SDS - Managed Account \ Extra Care \ \ Spot"/>	Provider/Carer <input type="text" value="De Lacy Gardens"/>
Rate Required* <input type="radio"/> Yes <input checked="" type="radio"/> No	
Total Units <input type="text" value="0.0000"/>	

**Authorisation Detail**

Authorised By <input type="text"/>	Authorisation Date <input type="text"/>
---------------------------------------	--

**Related Information**

Placement Room Type* <input type="text" value="Not Applicable"/>	Related Assessment <input type="text"/>
Related Case <input type="text"/>	

2. Select **Save** when completed.

The screenshot shows the 'Service Provision: New' form in Caredirector. The top navigation bar includes 'Caredirector', 'Home', 'Workplace', 'Settings', and a user profile for 'CD V6 Team'. The breadcrumb trail is 'Service Provision: New'. Below this, there's a header for 'TEST, Tom (Id: 448365)' with a 'Person Record' button and personal details like 'Born: 03/05/1995 (27 Years)', 'Gender: Male', and 'NHS No:'. The main content area is titled 'Details' and contains a 'General' section with several dropdown menus: 'Person' (set to 'Tom Test'), 'Responsible Team' (set to 'CD V6 Team'), 'Id' (empty), 'Responsible User' (set to 'Scott Simpson'), and 'Status' (set to 'Draft'). A red box highlights the 'Save' icon in the top toolbar.

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

The screenshot shows the 'Service Deliveries' page in Caredirector. The breadcrumb trail is 'Service Provision: Tom Test \ De Lacy Gardens \ SDS - Managed Account \ Extra Care \ \ \ Spot \ 229976 \ 28 Apr 2023'. The header for 'TEST, Tom (Id: 448365)' is visible. Below the header, there are several tabs: 'Menu', 'Timeline', 'Details', 'Service Deliveries' (highlighted with a red box and labeled '1'), 'Service Delivery Variations', 'Costs Per Week', and 'Finance Transactions'. Below the tabs, there's a toolbar with a '+' icon (highlighted with a red box and labeled '2'), a trash icon, and a 'Service Deliveries' label. Below the toolbar, there's a 'Related Records' dropdown and a search bar for records. At the bottom, there's a table header with columns: 'Person', 'Id', 'Planned Start Ti...', 'Units', 'Total Units', 'Total Visits', 'Monday', 'Tuesday', and 'W'.

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

- If the Client needs more than one visit per day your will need to record each time band separately
- If the Client needs two carers you will need to change the **Number of Carers** field to the amount needed.
- Add the **Planned Start Time**.
- 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.**

The screenshot shows the 'Service Delivery: New' form in the CareDirector system. The 'Details' tab is selected, and the 'General' section contains the following fields:

- Service Provision\***: Tom Test \ De Lacy Gardens \ SDS - Managed Account \ Extra Care \ \ Sp...
- Responsible Team\***: CD V6 Team
- Id**: (Empty)
- Rate Unit\***: Per 1 Hour \ Hours (Whole) \ Hours (Part)
- Planned Start Time\***: 09:00
- Units\***: 1
- Total Visits\***: (Empty)
- Total Units\***: (Empty)
- Number of Carers\***: 1

The 'Schedule applies to days' section has the following settings:

- Select All\***:  Yes
- Monday\***:  Yes
- Tuesday\***:  Yes
- Wednesday\***:  Yes
- Thursday\***:  Yes
- Friday\***:  Yes
- Saturday\***:  Yes
- Sunday\***:  Yes

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.

Caredirector Home Workplace Settings CD V6 Team

Service Provision: Tom Test \ De Lacy Gardens \ SDS - Managed Account \ Extra Care \ \ Spot \ 229...

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

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 229976 Responsible User\* Scott Simpson

Status\* Draft

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

Caredirector Home Workplace Settings CD V6 Team

Service Provision: Tom Test \ De Lacy Gardens \ SDS - Managed Account \ Extra Care \ \ Spot \ 229...

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

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 229976 Responsible User\* Scott Simpson

Status\* 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.

### **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](#).

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

Responsible Team \*

Id

Responsible User \*

Status \*

**Service Request**

Service Element 1 \*

Service Element 2 \*

Special Scheme

Finance Client Category

GL Code

Rate Unit \*

**Dates**

Planned Start Date

Planned End Date

Actual Start Date

Actual End Date

Start Reason \*

**Commissioning**

Purchasing Team

Frequency in Weeks \*

Service Provided

Provider/Carer

Rate Required \*

 Yes  
 No

Total Units

**Authorisation Detail**

Authorised By

Authorisation Date

**Related Information**

Placement Room Type \*

Related Assessment

Related Case



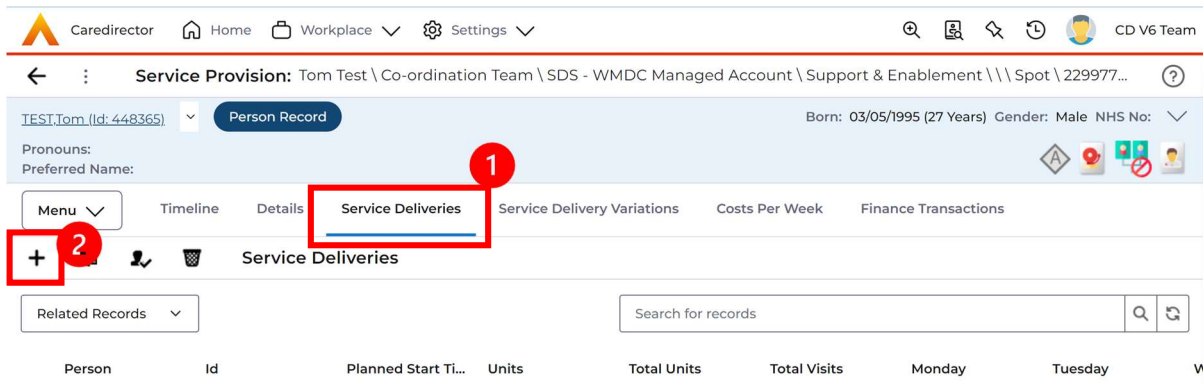
4. Select **Save** when completed.

The screenshot shows the 'Service Provision: New' form in the Caredirector system. The top navigation bar includes 'Caredirector', 'Home', 'Workplace', 'Settings', and a user profile for 'CD V6 Team'. The breadcrumb trail shows 'Service Provision: New'. The form header displays 'TEST, Tom (Id: 448365)' and 'Person Record'. Below this, there are fields for 'Pronouns', 'Preferred Name', and 'Details'. The 'General' section contains several dropdown menus: 'Person' (Tom Test), 'Responsible Team' (CD V6 Team), 'Id' (empty), 'Responsible User' (Scott Simpson), and 'Status' (Draft). A red box highlights the 'Save' icon in the top navigation bar.

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

The screenshot shows the 'Service Provision: Tom Test' form in the Caredirector system. The breadcrumb trail shows 'Service Provision: Tom Test \ Co-ordination Team \ SDS - WMDC Managed A...'. The form header displays 'TEST, Tom (Id: 448365)' and 'Person Record'. Below this, there are fields for 'Pronouns', 'Preferred Name', and a tabbed interface. The 'Details' tab is selected and highlighted with a red box and the number '1'. The 'Status' dropdown is set to 'Booking Request' and highlighted with a red box and the number '2'. The top navigation bar includes 'Caredirector', 'Home', 'Workplace', 'Settings', and a user profile for 'CD V6 Team'. A red box and the number '3' highlight the 'Save' icon in the top navigation bar.

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*	Responsible Team*
<input type="text" value="Tom Test \ Co-ordination Team \ SDS - WMDC Managed Account \ Suppo..."/>	<input type="text" value="CD V6 Team"/>
Id	Rate Unit*
<input type="text"/>	<input type="text" value="Per 1 Hour \ Hours (Whole) \ Hours (Part)"/>
Planned Start Time*	Units*
<input type="text" value="09:00"/>	<input type="text" value="1"/>
Total Visits*	Total Units*
<input type="text"/>	<input type="text"/>
Number of Carers*	
<input type="text" value="1"/>	

### Schedule applies to days

Select All*	Thursday*
<input type="radio"/> Yes	<input type="radio"/> Yes
<input checked="" type="radio"/> No	<input checked="" type="radio"/> No
Monday*	Friday*
<input checked="" type="radio"/> Yes	<input type="radio"/> Yes
<input type="radio"/> No	<input checked="" type="radio"/> No
Tuesday*	Saturday*
<input type="radio"/> Yes	<input checked="" type="radio"/> Yes
<input checked="" type="radio"/> No	<input type="radio"/> No
Wednesday*	Sunday*
<input type="radio"/> Yes	<input type="radio"/> Yes
<input checked="" type="radio"/> No	<input checked="" type="radio"/> 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.](#)

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

Responsible Team \*

Id

Responsible User \*

Status \*

**Service Request**

Service Element 1 \*

Service Element 2 \*

Special Scheme

Finance Client Category

GL Code

Rate Unit \*

**Dates**

Planned Start Date

Planned End Date

Actual Start Date

Actual End Date

Start Reason \*

**Commissioning**

Purchasing Team

Frequency in Weeks \*

Service Provided

Provider/Carer

Rate Required \*

Yes

No

Total Units

**Authorisation Detail**

Authorised By

Authorisation Date

**Related Information**

Placement Room Type \*

Related Assessment

Related Case

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

<u>Field</u>	<u>Information</u>
<b>Title</b>	Type of Support Information
<b>Responsible Team</b>	<b>Co-ordination Team</b>
<b>Text</b>	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

**Details**

**General**

Title\*  
Type of Support Information

Regarding\*  
Tom Test \ Co-ordination Team \ SDS - WMDC Managed Account \ Supported Living \ \ Spot \ 229978 \ 28 Apr 2023

Responsible Team\*  
Co-ordination Team

Text  
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**.

**Service Provision: Tom Test \ Co-ordination Team \ SDS - WMDC Managed Account \ Supported Livi...**

Person Record

Born: 03/05/1995 (27 Years) Gender: Male NHS No: ...

Menu | Timeline | **Details** | Service Deliveries | Service Delivery Variations | Costs Per Week | Finance Transactions

**General**

Person\*  
Tom Test

Responsible Team\*  
CD V6 Team

Id  
229978

Responsible User\*  
Scott Simpson

Status\*  
Booking Request

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](#).

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

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.

The screenshot shows the 'Service Provision: New' form in Caredirector. The top navigation bar includes 'Caredirector', 'Home', 'Workplace', 'Settings', and 'CD V6 Team'. The form title is 'Service Provision: New'. Below the title, there is a 'Person Record' button and a dropdown menu showing 'TEST, Tom (Id: 448365)'. The form fields are:
 

- Person: Tom Test
- Responsible Team: CD V6 Team
- Id: (empty)
- Responsible User: Scott Simpson
- Status: Draft

 The 'Save' icon in the top toolbar is highlighted with a red box.

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

The screenshot shows the 'Service Deliveries' tab in Caredirector. The top navigation bar is the same as in the previous screenshot. The form title is 'Service Provision: Tom Test \ In House \ SDS - Managed Account \ Supported Living \ Spot \ 229979 \ 28 Apr 2023'. Below the title, there is a 'Person Record' button and a dropdown menu showing 'TEST, Tom (Id: 448365)'. The form fields are:
 

- Person: Tom Test
- Responsible Team: CD V6 Team
- Id: (empty)
- Responsible User: Scott Simpson
- Status: Draft

 The 'Service Deliveries' tab is highlighted with a red box and a red circle with the number 1. The 'Create New Record' icon (+) in the toolbar is highlighted with a red box and a red circle with the number 2.

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**

**General**

Service Provision\*

Responsible Team\*

Id

Rate Unit\*

Planned Start Time\*

Units\*

Total Visits\*

Total Units\*

Number of Carers\*

**Schedule applies to days**

Select All\*  
 Yes  
 No

Monday\*  
 Yes  
 No

Tuesday\*  
 Yes  
 No

Wednesday\*  
 Yes  
 No

Thursday\*  
 Yes  
 No

Friday\*  
 Yes  
 No

Saturday\*  
 Yes  
 No

Sunday\*  
 Yes  
 No

- When finished select **Save and Return to Previous Page** on the toolbar.
- Locate the **Service Provision Details** tab and change the **Status to Ready for Authorisation and Save.**

The screenshot shows the CareDirector web application interface. At the top, there is a navigation bar with 'Caredirector', 'Home', 'Workplace', and 'Settings'. The main header displays the service provision path: 'Service Provision: Tom Test \ In House \ SDS - Managed Account \ Supported Living \ Spot \ 229979 ...'. Below this, there is a 'Person Record' tab and a dropdown menu for 'TEST, Tom, (id: 229979)'. The 'Details' tab is selected and highlighted with a red box and a '1' in a red circle. The 'General' section contains several fields: 'Person \*' (Tom Test), 'Responsible Team \*' (CD V6 Team), 'Id' (229979), and 'Responsible User \*' (Scott Simpson). The 'Status \*' dropdown menu is highlighted with a red box and a '2' in a red circle, showing the option 'Ready for Authorisation'. A '3' in a red circle is also present near the top navigation icons.

- 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](#).

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

**Responsible Team \***

**Id**

**Responsible User \***

**Status \***

**Service Request**

**Service Element 1 \***

**Service Element 2 \***

**Special Scheme**

**Finance Client Category**

**GL Code**

**Rate Unit \***

**Dates**

**Planned Start Date**

**Planned End Date**

**Actual Start Date**

**Actual End Date**

**Start Reason \***

**Commissioning**

**Purchasing Team**

**Frequency in Weeks \***

**Service Provided**

**Provider/Carer**

**Rate Required \***

Yes

No

**Total Units**

**Authorisation Detail**

**Authorised By**

**Authorisation Date**

**Related Information**

**Placement Room Type \***

**Related Assessment**

**Related Case**

3. Select **Save** when completed.

The screenshot shows the 'Service Provision: New' form in Caredirector. The top navigation bar includes 'Caredirector', 'Home', 'Workplace', 'Settings', and a user profile for 'CD V6 Team'. The form title is 'Service Provision: New'. Below the title, there is a 'Person Record' button and a dropdown menu showing 'TEST, Tom (Id: 448365)'. The form fields are:
 

- Person: Tom Test
- Responsible Team: CD V6 Team
- Id: (empty)
- Responsible User: Scott Simpson
- Status: Draft

 The 'Save' icon in the top toolbar is highlighted with a red box.

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

The screenshot shows the 'Service Deliveries' tab in Caredirector. The top navigation bar is the same as in the previous screenshot. The form title is 'Service Provision: Tom Test \ In House \ SDS - Managed Account \ Supported Living - Waking Nights \ Spot \ 229980 \ 28 Apr ...'. Below the title, there is a 'Person Record' button and a dropdown menu showing 'TEST, Tom (Id: 448365)'. The form fields are:
 

- Person: Tom Test
- Responsible Team: CD V6 Team
- Id: (empty)
- Responsible User: Scott Simpson
- Status: Draft

 The 'Service Deliveries' tab is highlighted with a red box and a '1'. The 'Create New Record' button (+) is highlighted with a red box and a '2'. Below the tabs, there is a 'Records' dropdown menu and a search bar for records. The table below has columns: Person, Id, Planned Start Ti..., Units, Total Units, Total Visits, Monday, Tuesday, and W.



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**

**General**

Service Provision\*

Responsible Team\*

Id

Rate Unit\*

Planned Start Time\*

Units\*

Total Visits\*

Total Units\*

Number of Carers\*

**Schedule applies to days**

Select All\*  Yes  No

Monday\*  Yes  No

Tuesday\*  Yes  No

Wednesday\*  Yes  No

Thursday\*  Yes  No

Friday\*  Yes  No

Saturday\*  Yes  No

Sunday\*  Yes  No

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.**

The screenshot shows the Caredirector interface for a Service Provision. The breadcrumb trail is: Service Provision: Tom Test \ In House \ SDS - Managed Account \ Supported Living - Waking Night... The 'Details' tab is selected. The form fields are as follows:

Field	Value
Person *	Tom Test
Responsible Team *	CD V6 Team
Id	229980
Responsible User *	Scott Simpson
Status *	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.

### 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](#).

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

Caredirector

Home
Workplace
Settings

CD V6 Team

Service Provision: New
Person Record

TEST, Tom (Id: 448365)

Pronouns:

Preferred Name:

Born: 03/05/1995 (27 Years) Gender: Male NHS No:

**Details**

**General**

Person \*

Responsible Team \*

Id

Responsible User \*

Status \*

**Service Request**

Service Element 1 \*

Service Element 2 \*

Special Scheme

Finance Client Category

GL Code

Rate Unit \*

**Dates**

Planned Start Date

Planned End Date

Actual Start Date

Actual End Date

Start Reason \*

**Commissioning**

Purchasing Team

Frequency in Weeks \*

Service Provided

Provider/Carer

Rate Required \*

Yes

No

Total Units

**Authorisation Detail**

Authorised By

Authorisation Date

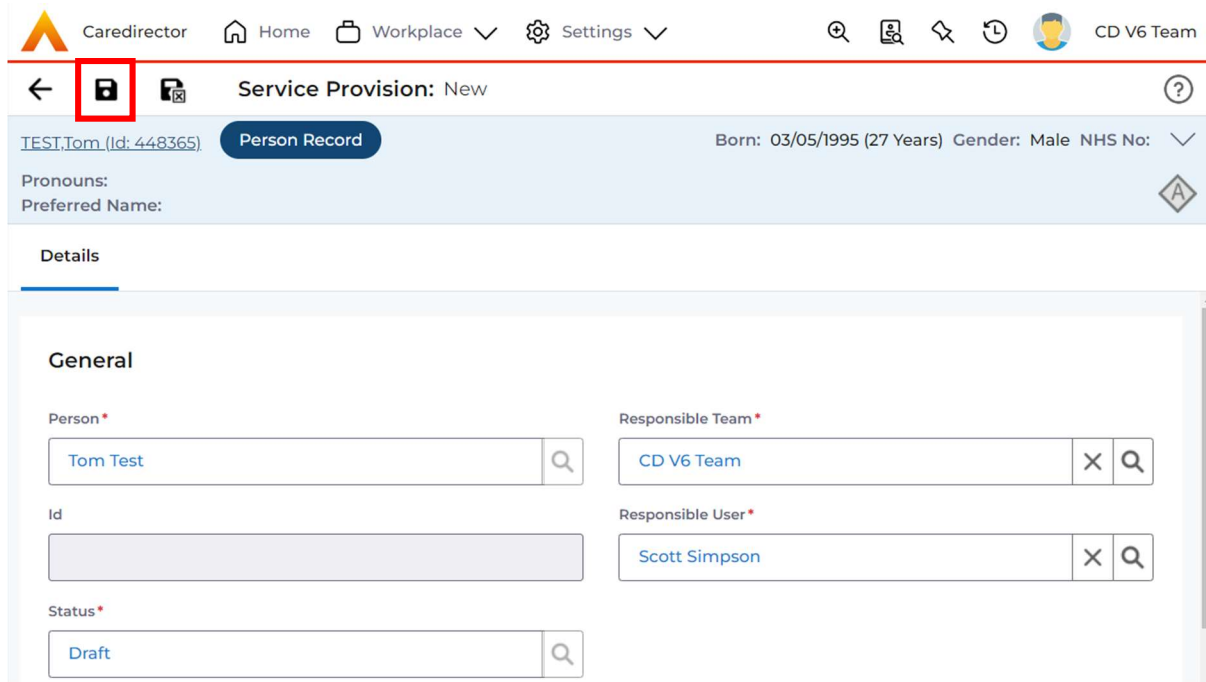
**Related Information**

Placement Room Type \*

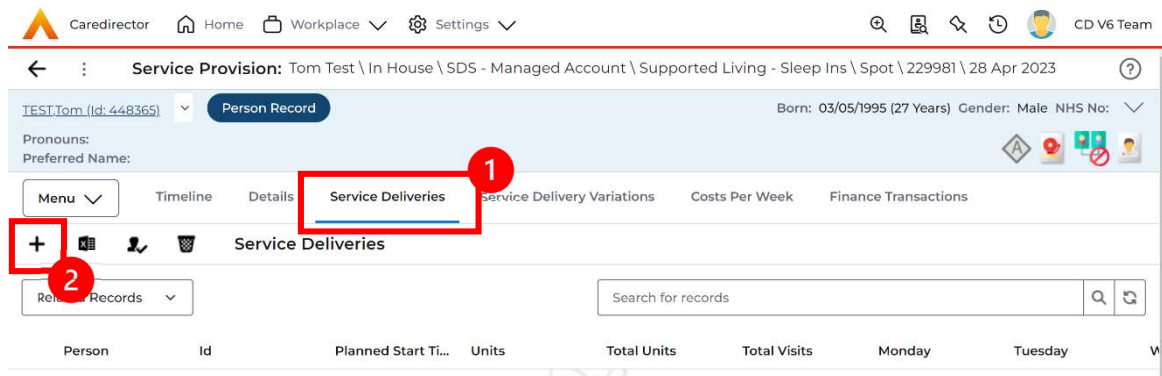
Related Assessment

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.

The screenshot shows the 'Service Delivery: New' form in the CareDirector system. The form is titled 'Details' and contains several input fields. Three red boxes with numbers 1, 2, and 3 highlight specific areas:

- Annotation 1:** A red box highlights the 'Schedule applies to days' section, which includes radio buttons for 'Yes' and 'No' for each day of the week (Monday through Sunday).
- Annotation 2:** A red box highlights the 'Units' input field, which contains the value '1.75'.
- Annotation 3:** A red box highlights the 'Save' button, which is represented by a padlock icon.

The form fields include:

- Service Provision\*:** Test Newperson \ Test provider 2 \ SDS - Managed Account \ Supported Living - Sleep Ins ...
- Responsible Team\*:** CareDirector
- Rate Unit\*:** Per Sleep in \ Units (Part)
- Units\*:** 1.75
- Number of Carers\*:** 1
- Schedule applies to days:** Radio buttons for Yes/No for each day of the week.

- When finished select **Save and Return to Previous Page** on the toolbar.
- Locate the **Service Provision Details** tab and change the **Status to Ready for Authorisation and Save.**

The screenshot displays the CareDirector interface for a service provision record. The breadcrumb trail is: Service Provision: Tom Test \ In House \ SDS - Managed Account \ Supported Living - Sleep Ins \ Sp... The record is for Tom Test, born 03/05/1995, male, with NHS No. The 'Details' tab is selected, and the 'Status' dropdown menu is open, showing 'Ready for Authorisation'. Red boxes and numbers highlight the 'Save and Return to Previous Page' button (3), the 'Details' tab (1), and the 'Status' dropdown (2).

Person Record

Born: 03/05/1995 (27 Years) Gender: Male NHS No:

Menu  **Details**

**General**

Person\*

Responsible Team\*

Id

Responsible User\*

Status\*

## 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.](#)

<u>Field</u>	<u>Information</u>
<b>Service Element 1:</b>	<b>SDS – Managed Account</b>
<b>Service Element 2:</b>	Choose <b>Day Care, Day Care – Health Rate, Day Care -Transport or Day Care - Meals (currently only Capitor - St Catherine’s provide meals)</b>
<b>Rate Unit:</b>	<b>Per Session</b> for Day Care. <b>Per Journey</b> for Transport. <b>Per Meal</b> for Meals.
<b>Planned Start Date:</b>	<b>Date the service is expected to start (enter only if this is a future date).</b>
<b>Actual Start Date:</b>	<b>Enter start date if this today or in the past.</b>
	***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***
<b>Planned End Date:</b>	Leave blank
<b>Actual End Date:</b>	Leave blank (Can only be input on the day of the <b>Planned End Date</b> or after it).
<b>Start Reason:</b>	Choose appropriate option, usually ‘New Placement’
<b>Purchasing Team:</b>	Choose appropriate Team.
<b>Service Provided:</b>	Choose the relevant <b>Day Care Centre</b> .
<b>Status:</b>	<b>Draft.</b>
<b>Placement Room Type:</b>	Auto populates to ‘Not Applicable’
<b>Responsible Team:</b>	Auto populated with the user’s default team.
<b>Responsible User:</b>	Auto populated with the user’s name
<b>Related Case:</b>	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 \*

Responsible Team \*

Id

Responsible User \*

Status \*

**Service Request**

Service Element 1 \*

Service Element 2 \*

Special Scheme

Finance Client Category

GL Code

Rate Unit \*

**Dates**

Planned Start Date

Planned End Date

Actual Start Date

Actual End Date

Start Reason \*

**Commissioning**

Purchasing Team

Frequency in Weeks \*

Service Provided

Provider/Carer

Rate Required \*

 Yes  
 No

Total Units

**Authorisation Detail**

Authorised By

Authorisation Date

**Related Information**

Placement Room Type \*

Related Assessment

Related Case

5. Select **Save** when completed.

The screenshot shows the 'Service Provision: New' form in Caredirector. The top navigation bar includes 'Caredirector', 'Home', 'Workplace', and 'Settings'. The user is logged in as 'CD V6 Team'. The form header shows 'Service Provision: New' with a 'Save' icon highlighted in a red box. Below the header, there are fields for 'Person' (Tom Test), 'Responsible Team' (CD V6 Team), 'Id', 'Responsible User' (Scott Simpson), and 'Status' (Draft). The 'Details' section is expanded to show the 'General' tab.

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

The screenshot shows the 'Service Deliveries' tab selected in the Caredirector interface. The 'Service Deliveries' tab is highlighted with a red box and a '1' in a red circle. The toolbar below the tabs shows a '+' icon highlighted with a red box and a '2' in a red circle. The main content area shows a search bar for records and a table with columns: Person, Id, Planned Start Ti..., Units, Total Units, Total Visits, Monday, Tuesday, and W.

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**

← Service Delivery: New

---

Details

---

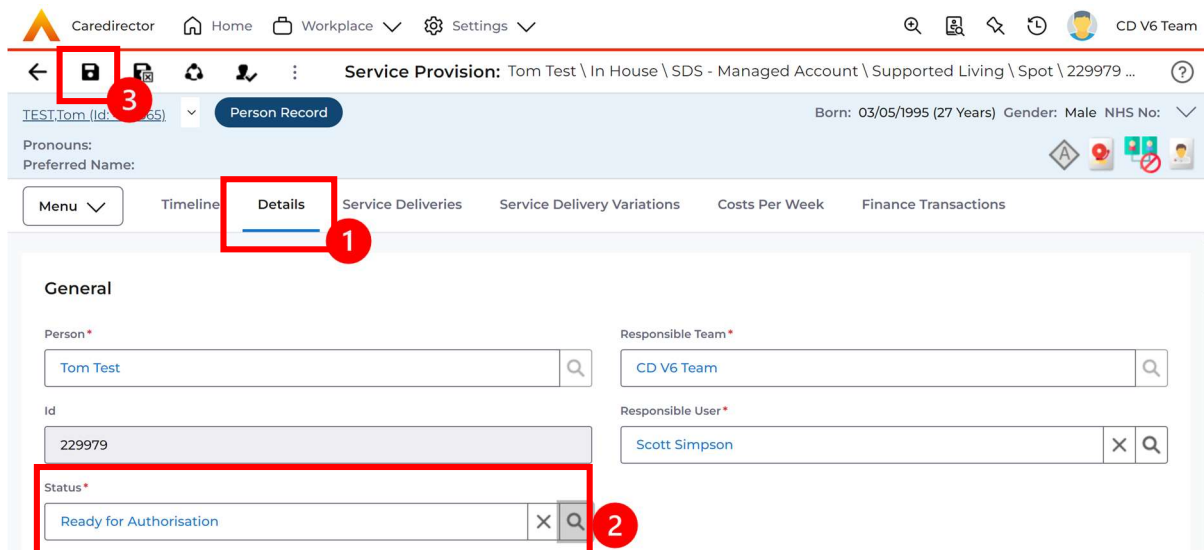
**General**

Service Provision *	Responsible Team *
<input type="text" value="Jayne Test \ Campitor - St Catherines \ SDS - Managed Account \ Day Care \ ..."/>	<input type="text" value="CareDirectorTest"/>
Id	Rate Unit *
<input type="text"/>	<input type="text" value="Per Session"/>
Planned Start Time *	Units *
<input type="text" value="00:00"/>	<input type="text" value="1"/>
Total Visits *	Total Units *
<input type="text"/>	<input type="text"/>
Number of Carers *	
<input type="text" value="1"/>	

**Schedule applies to days**

Select All *	Thursday *
<input type="radio"/> Yes	<input checked="" type="radio"/> Yes
<input checked="" type="radio"/> No	<input type="radio"/> No
Monday *	Friday *
<input type="radio"/> Yes	<input type="radio"/> Yes
<input checked="" type="radio"/> No	<input checked="" type="radio"/> No
Tuesday *	Saturday *
<input type="radio"/> Yes	<input type="radio"/> Yes
<input checked="" type="radio"/> No	<input checked="" type="radio"/> No
Wednesday *	Sunday *
<input type="radio"/> Yes	<input type="radio"/> Yes
<input checked="" type="radio"/> No	<input checked="" type="radio"/> No

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:

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

Responsible Team \*

Id

Responsible User \*

Status \*

**Service Request**

Service Element 1 \*

Service Element 2 \*

Special Scheme

Finance Client Category

GL Code

Rate Unit \*

**Dates**

Planned Start Date

Planned End Date

Actual Start Date

Actual End Date

Start Reason \*

**Commissioning**

Purchasing Team

Frequency in Weeks \*

Service Provided

Provider/Carer

Rate Required \*

 Yes  
 No

**Authorisation Detail**

Authorised By

Authorisation Date

**Related Information**

Placement Room Type \*

Related Assessment

Related Case

Service Package

3. Select **Save** when completed.

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

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

Caredirector Home Workplace Settings CD V6 Team

Service Provision: Tom Test \ Reablement Team \ Re-ablement \ Frickley Mews - Outreach \ Spot \ 2...

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 228987

Responsible User\* Scott Simpson

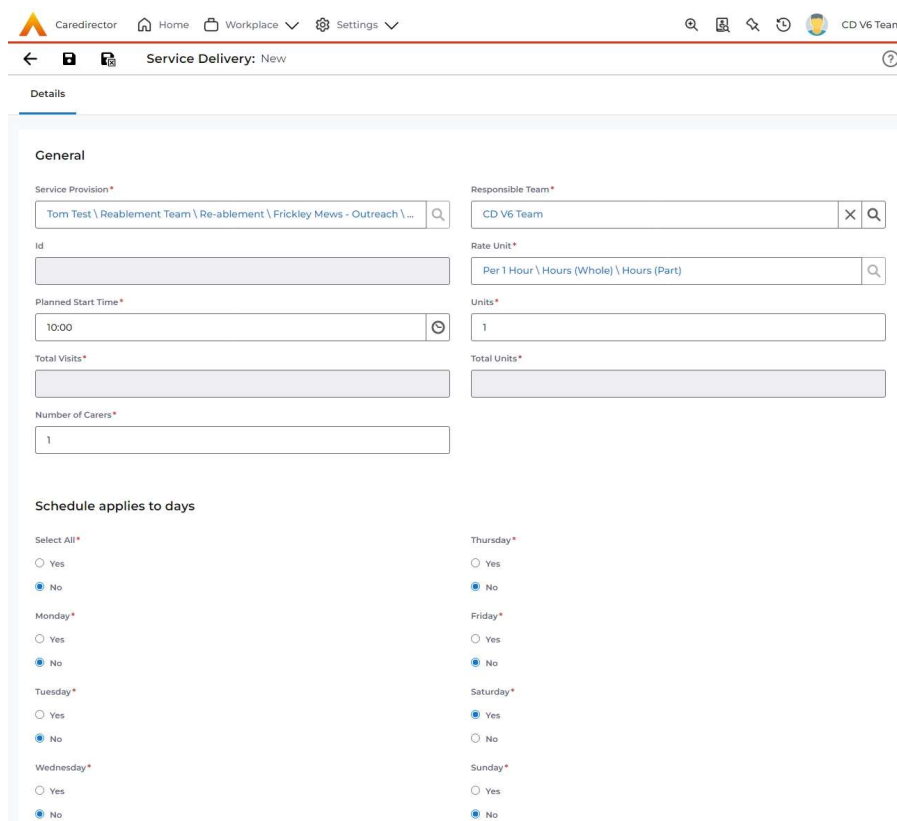
Status\* Booking Request



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

The screenshot shows the CareDirector interface for a person record. The breadcrumb trail is: Service Provision: Tom Test \ Reablement Team \ Re-ablement \ Frickley Mews - Outreach \ Spot \ 229983 \ 28 Apr 2023. The person's details are: TEST, Tom (Id: 448365), Born: 03/05/1995 (27 Years), Gender: Male, NHS No: [redacted]. The 'Service Deliveries' tab is selected and highlighted with a red box and a red circle containing the number '1'. Below the tabs, a toolbar contains a plus sign icon, also highlighted with a red box and a red circle containing the number '2'. The main area shows a table with columns for Person, Id, Planned Start Time, Units, Total Units, Total Visits, and days of the week (Monday, Tuesday).

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**.



**General**

Service Provision\*  
Torn Test \ Reablement Team \ Re-ablement \ Frickley Mews - Outreach \ ...

Responsible Team\*  
CD V6 Team

Id  
[Empty]

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

Planned Start Time\*  
10:00

Units\*  
1

Total Visits\*  
[Empty]

Total Units\*  
[Empty]

Number of Carers\*  
1

**Schedule applies to days**

Select All\*  
 Yes  
 No

Monday\*  
 Yes  
 No

Tuesday\*  
 Yes  
 No

Wednesday\*  
 Yes  
 No

Thursday\*  
 Yes  
 No

Friday\*  
 Yes  
 No

Saturday\*  
 Yes  
 No

Sunday\*  
 Yes  
 No

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 Progress** not set to **Complete**. Complete the following information:

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

Responsible Team \*

Id

Responsible User \*

Status \*

**Service Request**

Service Element 1\*

Service Element 2\*

Special Scheme

Finance Client Category

CL Code

Rate Unit \*

**Dates**

Planned Start Date

Planned End Date

Actual Start Date

Actual End Date

Start Reason \*

**Commissioning**

Purchasing Team

Frequency in Weeks \*

Service Provided

Provider/Carer

Rate Required\*

Yes

No

**Authorisation Detail**

Authorised By

Authorisation Date

**Related Information**

Placement Room Type\*

Related Assessment

Related Case

Service Package

3. Select **Save** when completed.

The screenshot shows the 'Service Provision: New' form in CareDirector. The top navigation bar includes 'Caredirector', 'Home', 'Workplace', 'Settings', and a user profile for 'CD V6 Team'. A red box highlights the 'Save' icon (a floppy disk) in the top left navigation area. Below the navigation bar, the form header shows 'TEST, Tom (Id: 448365)' and 'Person Record'. The main form area is titled 'Details' and contains a 'General' section with the following fields:

- Person\*: Tom Test
- Responsible Team\*: CD V6 Team
- Id: (empty)
- Responsible User\*: Scott Simpson
- Status\*: Draft

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

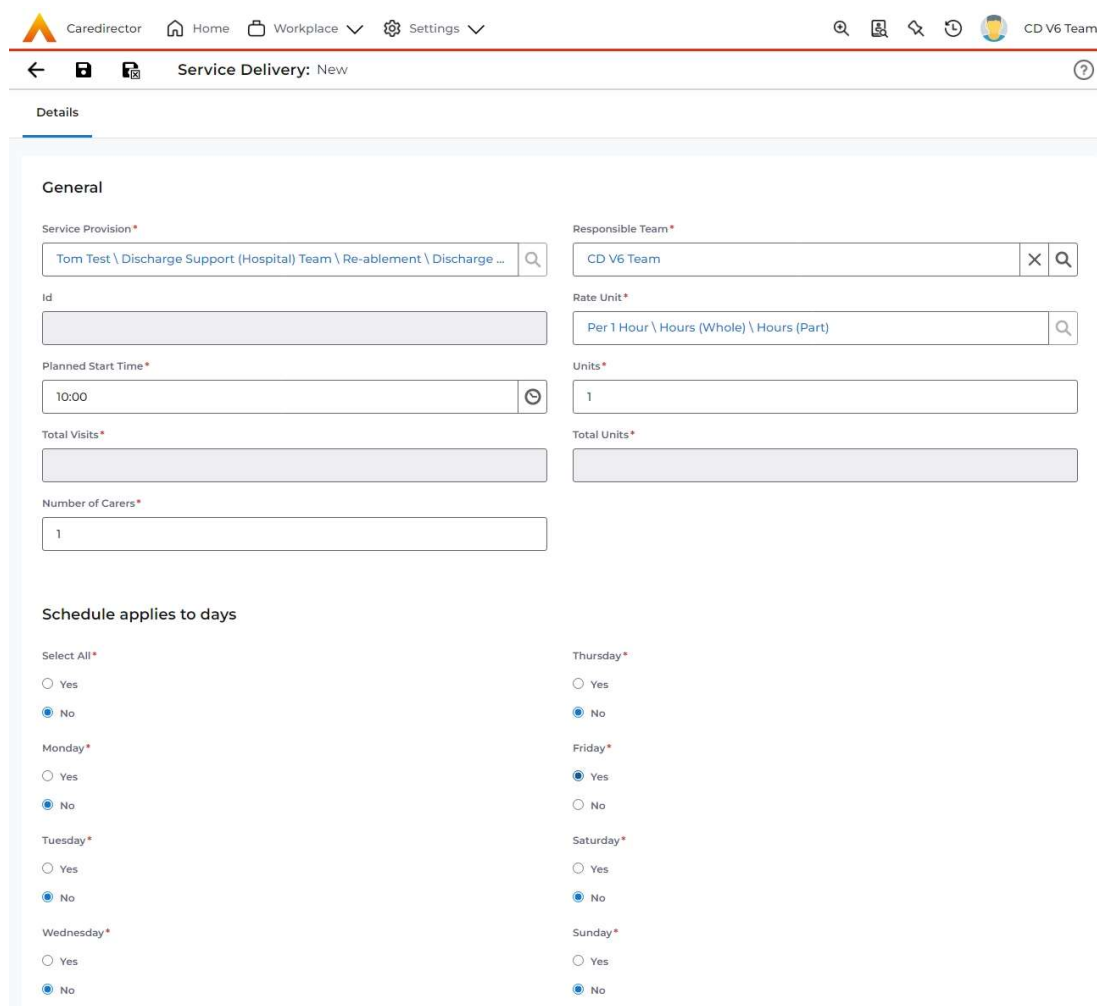
The screenshot shows the 'Service Provision' form for 'Tom Test \ Discharge Support (Hospital) Team \ Re-ablement \ Discharge Suppor...'. The 'Details' tab is selected and highlighted with a red box and the number '1'. The 'Status\*' dropdown menu is set to 'Booking Request' and is highlighted with a red box and the number '2'. The 'Save' icon (floppy disk) in the top navigation bar is highlighted with a red box and the number '3'. The form fields are as follows:

- Person\*: Tom Test
- Responsible Team\*: CD V6 Team
- Id: 229984
- Responsible User\*: Scott Simpson
- Status\*: Booking Request

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

The screenshot shows the CareDirector interface for a person record. The 'Service Deliveries' tab is selected and highlighted with a red box and a red circle containing the number '1'. Below the tab, a toolbar contains a plus sign icon, also highlighted with a red box and a red circle containing the number '2'. The interface shows a person record for 'TEST, Tom (Id: 448365)' with various tabs and a search bar for records.

6. Now select your times and days of the week by completing the following information:
- If the Client needs more than one visit per day your will need to record each time band separately
  - If the Client needs two carers you will need to change the **Number of Carers** field to the amount needed.
  - Add the **Planned Start Time**.
  - 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.
  - Save and Return to Previous Page.**



**General**

Service Provision\*  
Tom Test \ Discharge Support (Hospital) Team \ Re-ablement \ Discharge ...

Responsible Team\*  
CD V6 Team

Id  
[Empty field]

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

Planned Start Time\*  
10:00

Units\*  
1

Total Visits\*  
[Empty field]

Total Units\*  
[Empty field]

Number of Carers\*  
1

**Schedule applies to days**

Select All\*  
 Yes  
 No

Monday\*  
 Yes  
 No

Tuesday\*  
 Yes  
 No

Wednesday\*  
 Yes  
 No

Thursday\*  
 Yes  
 No

Friday\*  
 Yes  
 No

Saturday\*  
 Yes  
 No

Sunday\*  
 Yes  
 No

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.](#)

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

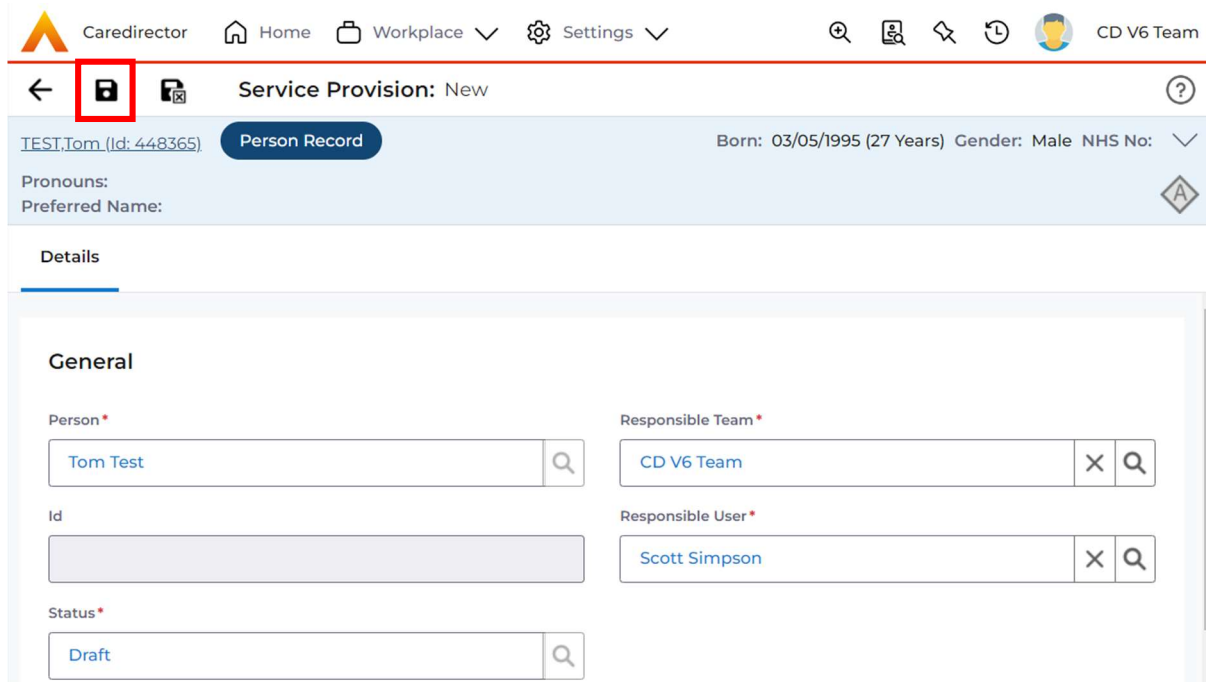
### Authorisation Detail

Authorised By Authorisation Date

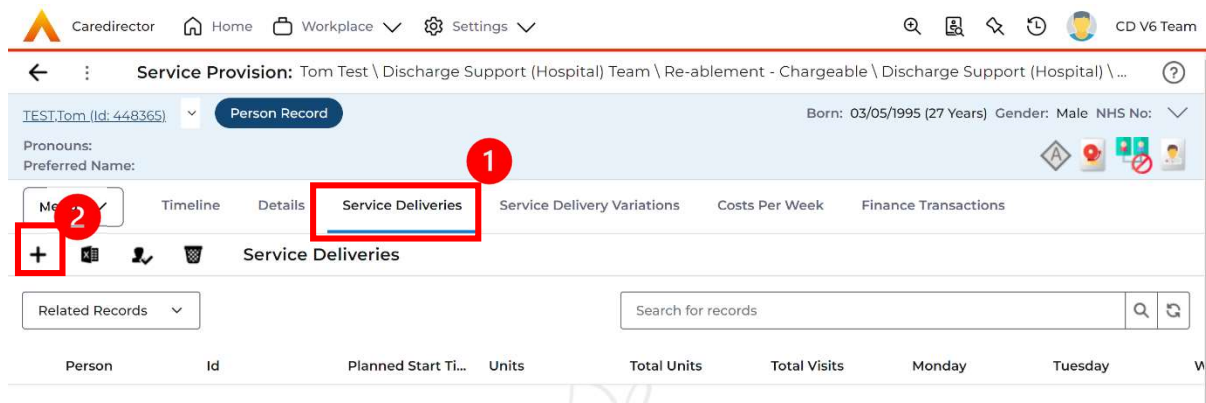
### Related Information

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.**

**Details**

**General**

Service Provision\*  
Tom Test \ Discharge Support (Hospital) Team \ Re-ablement - Chargeabl... Q

Responsible Team\*  
CD V6 Team X Q

Id  
[Empty field]

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

Planned Start Time\*  
10:00 [Clock icon]

Units\*  
1

Total Visits\*  
[Empty field]

Total Units\*  
[Empty field]

Number of Carers\*  
1

**Schedule applies to days**

Select All\*  
 Yes  
 No

Monday\*  
 Yes  
 No

Tuesday\*  
 Yes  
 No

Wednesday\*  
 Yes  
 No

Thursday\*  
 Yes  
 No

Friday\*  
 Yes  
 No

Saturday\*  
 Yes  
 No

Sunday\*  
 Yes  
 No

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

The screenshot shows the Caredirector interface for a service provision. The top navigation bar includes 'Caredirector', 'Home', 'Workplace', and 'Settings'. The main header displays 'Service Provision: Tom Test \ Discharge Support (Hospital) Team \ Re-ablement - Chargeable \ Disc...'. Below this, the 'Person Record' section shows 'TEST, Tom (Id: 448365)' and 'Person Record' buttons. The 'Status' field is set to 'Ready for Authorisation' and is highlighted with a red box and a red circle containing the number '1'. The 'Person' field is set to 'Tom Test' and is highlighted with a red box and a red circle containing the number '2'. Other fields include 'Responsible Team' (CD V6 Team), 'Id' (229985), and 'Responsible User' (Scott Simpson).

- 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:

<u>Field</u>	<u>Information</u>
<b>Service Element 1:</b>	<b>Re-ablement - Chargeable</b>
<b>Service Element 2:</b>	<b>Bridging Service</b>
<b>Rate Unit:</b>	<b>Per 1 Hour \ Hours (Whole) \ Hours (Part)</b>
<b>Planned Start Date:</b>	<b>Date the service is expected to start.</b>
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).
<b>Start Reason:</b>	Choose appropriate option.
<b>Purchasing Team:</b>	Choose appropriate Team.
<b>Service Provided:</b>	Choose the <b>Reablement Team</b>
<b>Status:</b>	<b>Draft.</b>
<b>Placement Room Type:</b>	Auto populates to 'Not Applicable'
<b>Responsible Team:</b>	Auto populated with the user's default team.
<b>Responsible User:</b>	Auto populated with the user's name
<b>Related Case:</b>	Select relevant case

Caredirector
 Home
Workplace
Settings

CD V6 Team

---

Service Provision: New
?

TEST Tom (Id: 448365) Person Record

Pronouns:

Preferred Name:

Born: 03/05/1995 (27 Years) Gender: Male NHS No:

**Details**

---

**General**

Person \*

Responsible Team \*

Id

Responsible User \*

Status \*

**Service Request**

Service Element 1 \*

Service Element 2 \*

Special Scheme

Finance Client Category

GL Code

Rate Unit \*

**Dates**

Planned Start Date

Planned End Date

Actual Start Date

Actual End Date

Start Reason \*

**Commissioning**

Purchasing Team

Frequency in Weeks \*

Service Provided

Provider/Carer

Rate Required \*

Yes

No

**Authorisation Detail**

Authorised By

Authorisation Date

**Related Information**

Placement Room Type \*

Related Assessment

Related Case

Service Package

3. Select **Save** when completed.

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

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

Caredirector Home Workplace Settings CD V6 Team

Service Provision: Tom Test \ Reablement Team \ Re-ablement - Chargeable \ Bridging Service \ \ \ ...

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 228986

Responsible User\* Scott Simpson

Status\* Booking Request

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

The screenshot shows the CareDirector web application interface. At the top, there is a navigation bar with 'Caredirector', 'Home', 'Workplace', and 'Settings'. The main header displays the service provision path: 'Service Provision: Tom Test \ Reablement Team \ Re-ablement - Chargeable \ Bridging Service \ \ Spot \ 229986 \ 28 Apr 2023'. Below this, a 'Person Record' section shows details for 'TEST, Tom (Id: 448365)', including birth date (03/05/1995), gender (Male), and NHS number. A red box labeled '1' highlights the 'Service Deliveries' tab in the navigation menu. Below the tabs, a toolbar contains a red box labeled '2' around the '+' icon, which is used to create a new record. A table with columns for 'Person', 'Id', 'Planned Start Ti...', 'Units', 'Total Units', 'Total Visits', 'Monday', and 'Tuesday' is partially visible at the bottom.

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.**



Caredirector Home Workplace Settings CD V6 Team

Service Delivery: New

Details

**General**

Service Provision\*  
Tom Test \ Reablement Team \ Re-ablement - Chargeable \ Bridging Serv... Q

Responsible Team\*  
CD V6 Team X Q

Id  
[Empty Field]

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

Planned Start Time\*  
09:00 ⌚

Units\*  
1

Total Visits\*  
[Empty Field]

Total Units\*  
[Empty Field]

Number of Carers\*  
1

**Schedule applies to days**

Select All\*  
 Yes  
 No

Monday\*  
 Yes  
 No

Tuesday\*  
 Yes  
 No

Wednesday\*  
 Yes  
 No

Thursday\*  
 Yes  
 No

Friday\*  
 Yes  
 No

Saturday\*  
 Yes  
 No

Sunday\*  
 Yes  
 No

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.](#)

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

Id

Status\*

Responsible Team\*

Responsible User\*

**Service Request**

Service Element 1\*

Special Scheme

GL Code

Service Element 2\*

Finance Client Category

Rate Unit\*

**Dates**

Planned Start Date

Actual Start Date

Start Reason\*

Planned End Date

Actual End Date

**Commissioning**

Purchasing Team

Service Provided

Rate Required\*  Yes  No

Frequency in Weeks\*

Provider/Carer

**Authorisation Detail**

Authorised By

Authorisation Date

**Related Information**

Placement Room Type\*

Related Case

Service Package

Related Assessment

3. Select **Save** when completed.

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

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.

Caredirector Home Workplace Settings CD V6 Team  
 Service Provision: Tom Test \ Telecare \ SDS - Managed Account \ Telecare Monitoring Service \ \ Spot \ 229987 \ 28 Apr 2023  
 TEST, Tom (Id: 448365) Person Record Born: 03/05/1995 (27 Years) Gender: Male NHS No:   
 Pronouns: Preferred Name:   
 Menu Timeline **Details** Costs Per Week Finance Transactions  
 Filter By  
 From  
**APR 2023**  
[Service Provision Cost Per Week Created](#) Today at 17:19  
 A new record of service provision cost per week was created by Scott Simpson.

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

The screenshot shows the CareDirector interface for a 'Person Record'. The breadcrumb trail is: Service Provision: Tom Test \ Telecare \ SDS - Managed Account \ Telecare Monitoring Service \ \ S... The person's name is TEST, Tom. (Id: 449365). The 'Details' tab is selected. In the 'General' section, the 'Person' field contains 'Tom Test' and is highlighted with a red box and a red circle with the number 2. The 'Status' field contains 'Ready for Authorisation' and is highlighted with a red box and a red circle with the number 1. Other fields include 'Responsible Team' (CD V6 Team), 'Responsible User' (Scott Simpson), and 'Id' (229987). The top navigation bar includes 'Caredirector', 'Home', 'Workplace', and 'Settings'. The user profile at the top right shows 'CD V6 Team'.

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](#).

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

⚠
🚫
👤

**Details**

---

**General**

Person \*

Id

Status \*

Responsible Team \*

Responsible User \*

**Service Request**

Service Element 1 \*

Special Scheme

GL Code

Service Element 2 \*

Finance Client Category

Rate Unit \*

**Dates**

Planned Start Date

Actual Start Date

Start Reason \*

Planned End Date

Actual End Date

**Commissioning**

Purchasing Team

Service Provided

Rate Required \*  
 Yes  
 No

Frequency in Weeks \*

Provider/Carer

**Authorisation Detail**

Authorised By

Authorisation Date

**Related Information**

Placement Room Type \*

Related Case

Service Package

Related Assessment

4. Select **Save** when completed.

The screenshot shows the 'Service Provision: New' form in Caredirector. At the top, there is a navigation bar with 'Caredirector', 'Home', 'Workplace', and 'Settings'. The user is logged in as 'CD V6 Team'. Below the navigation bar, there are icons for back, save (highlighted with a red box), and print. The form title is 'Service Provision: New'. Below the title, there is a 'Person Record' button and a dropdown menu showing 'TEST, Tom (Id: 448365)'. To the right, there is a summary of the person: 'Born: 03/05/1995 (27 Years) Gender: Male NHS No:'. Below this, there are fields for 'Pronouns:' and 'Preferred Name:'. The main section is titled 'Details' and contains a 'General' tab with the following fields:
 

- Person\*: Tom Test
- Responsible Team\*: CD V6 Team
- Id: (empty)
- Responsible User\*: Scott Simpson
- Status\*: Draft

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.

The screenshot shows the 'Service Provision: Tom Test' timeline view in Caredirector. The navigation bar is the same as in the previous screenshot. The breadcrumb trail is 'Service Provision: Tom Test \ Telecare \ SDS - Managed Account \ Telecare Rapid Response Service \ \ Spot \ 229988 \ 28 Apr ...'. Below the breadcrumb trail, there is a dropdown menu showing 'TEST, Tom (Id: 448365)' and a 'Person Record' button. To the right, there is a summary of the person: 'Born: 03/05/1995 (27 Years) Gender: Male NHS No:'. Below this, there are fields for 'Pronouns:' and 'Preferred Name:'. The main section has a 'Menu' dropdown and several tabs: 'Timeline', 'Details' (highlighted with a red box and a red circle containing the number 1), 'Costs Per Week', and 'Finance Transactions'. Below the tabs, there is a 'Filter By' dropdown menu. The main content area shows a timeline for 'APR 2023' with a 'Service Provision Cost Per Week Created' entry. The current time is 'Today at 17:25'.



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

The screenshot shows the CareDirector interface for a 'Person Record'. The breadcrumb trail is 'Service Provision: Tom Test \ Telecare \ SDS - Managed Account \ Telecare Rapid Response Service ...'. The person's details include: Born: 03/05/1995 (27 Years), Gender: Male, NHS No: [redacted]. The 'Details' tab is selected, showing the 'General' section with the following fields:

- Person\*: Tom Test
- Responsible Team\*: CD V6 Team
- Id: 229988
- Responsible User\*: Scott Simpson
- Status\*: Ready for Authorisation

The 'Status' field is highlighted with a red box and a red circle containing the number 1. The 'Save' icon in the top navigation bar is highlighted with a red circle containing the number 2.

- 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.](#)

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

Responsible Team \*

Id

Responsible User \*

Status \*

**Service Request**

Service Element 1 \*

Service Element 2 \*

Special Scheme

Finance Client Category

GL Code

Rate Unit \*

**Dates**

Planned Start Date

Planned End Date

Actual Start Date

Actual End Date

Start Reason \*

**Commissioning**

Purchasing Team

Frequency in Weeks \*

Service Provided

Provider/Carer

Rate Required \*

Yes

No

**Authorisation Detail**

Authorised By

Authorisation Date

**Related Information**

Placement Room Type \*

Related Assessment

Related Case

Service Package

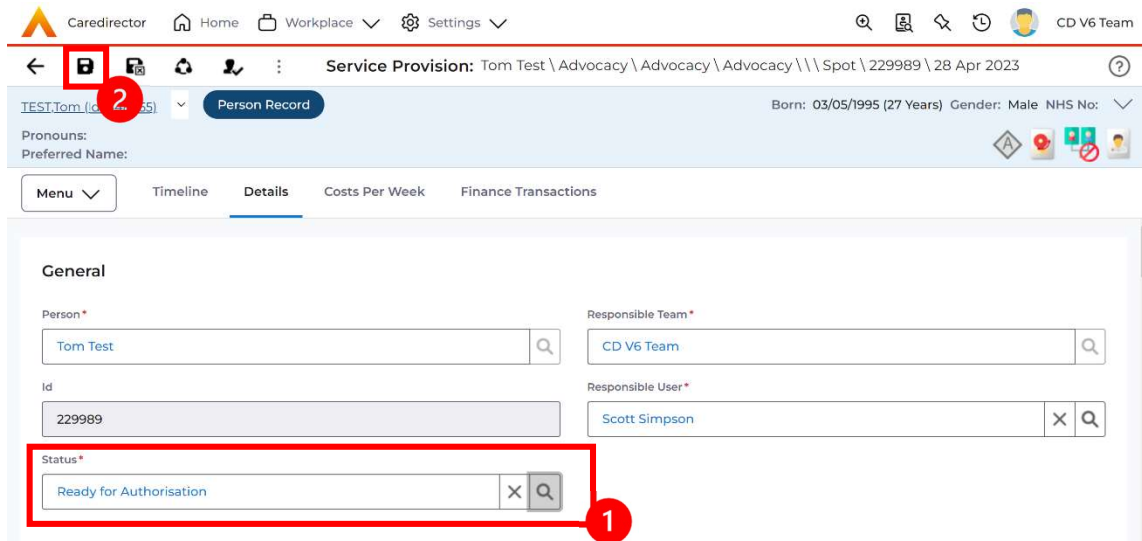
3. Select **Save** when completed.

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

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.

Caredirector Home Workplace Settings CD V6 Team  
 Service Provision: Tom Test \ Advocacy \ Advocacy \ Advocacy \ Spot \ 229989 \ 28 Apr 2023  
 TEST, Tom (Id: 448365) Person Record Born: 03/05/1995 (27 Years) Gender: Male NHS No:   
 Pronouns: Preferred Name:   
 Menu Timeline **Details** Costs Per Week Finance Transactions  
 Filter By APR 2023  
 Service Provision Cost Per Week Created Today at 17:28

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



The screenshot shows the Caredirector interface for a 'Service Provision' record. The breadcrumb trail is 'Service Provision: Tom Test \ Advocacy \ Advocacy \ Advocacy \ \ Spot \ 229989 \ 28 Apr 2023'. The record is for 'TEST, Tom (229989)' with a 'Person Record' button. The 'General' section contains the following fields:

- Person\***: Tom Test
- Responsible Team\***: CD V6 Team
- Id**: 229989
- Responsible User\***: Scott Simpson
- Status\***: Ready for Authorisation

The 'Status' field is highlighted with a red box and a red circle containing the number 1. The 'Person' field is also highlighted with a red box and a red circle containing the number 2.

- 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.
- 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

- 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.](#)

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

### General

Person* Tom Test <span style="float: right; font-size: 0.8em;">x</span> <span style="float: right; font-size: 0.8em;">q</span>	Responsible Team* CD V6 Team <span style="float: right; font-size: 0.8em;">x</span> <span style="float: right; font-size: 0.8em;">q</span>
Id 229990	Responsible User* Scott Simpson <span style="float: right; font-size: 0.8em;">x</span> <span style="float: right; font-size: 0.8em;">q</span>
Status* Draft <span style="float: right; font-size: 0.8em;">x</span> <span style="float: right; font-size: 0.8em;">q</span>	

### Service Request

Service Element 1* Professional Support <span style="float: right; font-size: 0.8em;">x</span> <span style="float: right; font-size: 0.8em;">q</span>	Service Element 2* Social Work <span style="float: right; font-size: 0.8em;">x</span> <span style="float: right; font-size: 0.8em;">q</span>
Special Scheme <span style="border: 1px solid #ccc; padding: 2px 5px;"> </span> <span style="float: right; font-size: 0.8em;">q</span>	Finance Client Category Not Applicable <span style="float: right; font-size: 0.8em;">x</span> <span style="float: right; font-size: 0.8em;">q</span>
GL Code <span style="border: 1px solid #ccc; padding: 2px 5px;"> </span>	Rate Unit* Per Session <span style="float: right; font-size: 0.8em;">x</span> <span style="float: right; font-size: 0.8em;">q</span>

### Dates

Planned Start Date 28/04/2023 <span style="float: right; font-size: 0.8em;">q</span>	Planned End Date <span style="border: 1px solid #ccc; padding: 2px 5px;"> </span> <span style="float: right; font-size: 0.8em;">q</span>
Actual Start Date <span style="border: 1px solid #ccc; padding: 2px 5px;"> </span> <span style="float: right; font-size: 0.8em;">q</span>	Actual End Date <span style="border: 1px solid #ccc; padding: 2px 5px;"> </span> <span style="float: right; font-size: 0.8em;">q</span>
Start Reason* New Placement <span style="float: right; font-size: 0.8em;">x</span> <span style="float: right; font-size: 0.8em;">q</span>	

### Commissioning

Purchasing Team CMHT Older People Team East <span style="float: right; font-size: 0.8em;">x</span> <span style="float: right; font-size: 0.8em;">q</span>	Frequency in Weeks* 1
Service Provided Own Local Authority \ Professional Support \ Social Work \ Not ... <span style="float: right; font-size: 0.8em;">x</span> <span style="float: right; font-size: 0.8em;">q</span>	Provider/Carer Own Local Authority <span style="float: right; font-size: 0.8em;">q</span>
Rate Required* <input type="radio"/> Yes <input checked="" type="radio"/> No	Cost Per Week 0.00
Total Units <span style="border: 1px solid #ccc; padding: 2px 5px;"> </span>	

### Authorisation Detail

Authorised By <span style="border: 1px solid #ccc; padding: 2px 5px;"> </span> <span style="float: right; font-size: 0.8em;">q</span>	Authorisation Date <span style="border: 1px solid #ccc; padding: 2px 5px;"> </span> <span style="float: right; font-size: 0.8em;">q</span>
--	---

### Related Information

Placement Room Type* Not Applicable <span style="float: right; font-size: 0.8em;">x</span> <span style="float: right; font-size: 0.8em;">q</span>	Related Assessment <span style="border: 1px solid #ccc; padding: 2px 5px;"> </span> <span style="float: right; font-size: 0.8em;">q</span>
Related Case <span style="border: 1px solid #ccc; padding: 2px 5px;"> </span> <span style="float: right; font-size: 0.8em;">q</span>	

2. Select **Save** when completed.

The screenshot shows the 'Service Provision: New' form in Caredirector. The top navigation bar includes 'Caredirector', 'Home', 'Workplace', 'Settings', and a user profile for 'CD V6 Team'. The breadcrumb trail is 'Service Provision: New'. The form header shows 'TEST, Tom (Id: 448365)' and 'Person Record'. Below this, there are fields for 'Pronouns' and 'Preferred Name'. The 'Details' section is active, showing a 'General' tab with the following fields: 'Person\*' (Tom Test), 'Responsible Team\*' (CD V6 Team), 'Id' (empty), 'Responsible User\*' (Scott Simpson), and 'Status\*' (Draft). The 'Save' icon in the top navigation bar is highlighted with a red box.

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

The screenshot shows the 'Service Provision' form for 'Tom Test \ Own Local Authority \ Professional Support \ Social Work \ Not Applica...'. The breadcrumb trail is 'Service Provision: Tom Test \ Own Local Authority \ Professional Support \ Social Work \ Not Applica...'. The form header shows 'TEST, Tom (Id: 448365)' and 'Person Record'. Below this, there are fields for 'Pronouns' and 'Preferred Name'. The 'Details' section is active, showing a 'General' tab with the following fields: 'Person\*' (Tom Test), 'Responsible Team\*' (CD V6 Team), 'Id' (229991), 'Responsible User\*' (Scott Simpson), and 'Status\*' (Ready for Authorisation). The 'Save' icon in the top navigation bar is highlighted with a red box and numbered '2'. The 'Status\*' dropdown menu is highlighted with a red box and numbered '1'.

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](#).

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

Caredirector
 Home
Workplace
Settings

CD V6 Team

Service Provision: New
Person Record

TEST Tom (Id: 448365)

Born: 03/05/1995 (27 Years)
Gender: Male
NHS No:

Pronouns:

Preferred Name:

**Details**

**General**

Person \*

Responsible Team \*

Id

Responsible User \*

Status \*

**Service Request**

Service Element 1 \*

Service Element 2 \*

Special Scheme

Finance Client Category

GL Code

Rate Unit \*

**Dates**

Planned Start Date

Planned End Date

Actual Start Date

Actual End Date

Start Reason \*

**Commissioning**

Purchasing Team

Frequency in Weeks \*

Service Provided

Provider/Carer

Rate Required \*

Yes

No

**Authorisation Detail**

Authorised By

Authorisation Date

**Related Information**

Placement Room Type \*

Related Assessment

Related Case

Service Package

3. Select **Save** when completed.

The screenshot shows the 'Service Provision: New' form in Caredirector. At the top, there are navigation icons and the user 'CD V6 Team'. Below the navigation bar, there are icons for back, save, and print. The 'Save' icon is highlighted with a red box. The form displays the following information:

- Person: Tom Test
- Responsible Team: CD V6 Team
- Id: (empty field)
- Responsible User: Scott Simpson
- Status: Draft

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

The screenshot shows the 'Service Provision' form in the 'Details' tab. The breadcrumb trail is 'Service Provision: Tom Test \ Own Local Authority \ Visual Impairment Rehabilitation \ Visual Impai...'. The 'Status' dropdown is highlighted with a red box and contains the text 'Ready for Authorisation'. A red circle with the number '1' is next to the dropdown. A red circle with the number '2' is next to the save icon in the top navigation bar.

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](#).

<u>Field</u>	<u>Information</u>
<b>Service Element 1:</b>	<b>Equipment</b>
<b>Service Element 2:</b>	<b>Occupational Therapy</b>
<b>Rate Unit:</b>	<b>Per Session</b>
Planned Start Date:	Leave blank
<b>Actual Start Date:</b>	<b>The date of service starting.</b>
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).
<b>Start Reason:</b>	Choose <b>New Placement</b> .
<b>Purchasing Team:</b>	<b>Community Occupational Therapy</b>
<b>Service Provided:</b>	Choose <b>Own Local Authority</b> .
<b>Status:</b>	<b>Draft</b> .
<b>Placement Room Type:</b>	Auto populates to 'Not Applicable'
<b>Responsible Team:</b>	Auto populated with the user's default team.
<b>Responsible User:</b>	Auto populated with the user's name
<b>Related Case:</b>	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 \*

Responsible Team \*

Id

Responsible User \*

Status \*

**Service Request**

Service Element 1 \*

Service Element 2 \*

Special Scheme

Finance Client Category

GL Code

Rate Unit \*

**Dates**

Planned Start Date

Planned End Date

Actual Start Date

Actual End Date

Start Reason \*

**Commissioning**

Purchasing Team

Frequency in Weeks \*

Service Provided

Provider/Carer

Rate Required \*

 Yes  
 No

**Authorisation Detail**

Authorised By

Authorisation Date

**Related Information**

Placement Room Type \*

Related Assessment

Related Case

Service Package

3. Select **Save** when completed.

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

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**.

Caredirector Home Workplace Settings CD V6 Team

Service Provision: Tom Test \ Own Local Authority \ Equipment \ Occupational Therapy \ \ Not Applicable \ Spot \ 229995 \ 28 ...

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

**+** Service Deliveries

Related Records ▾ Search for records

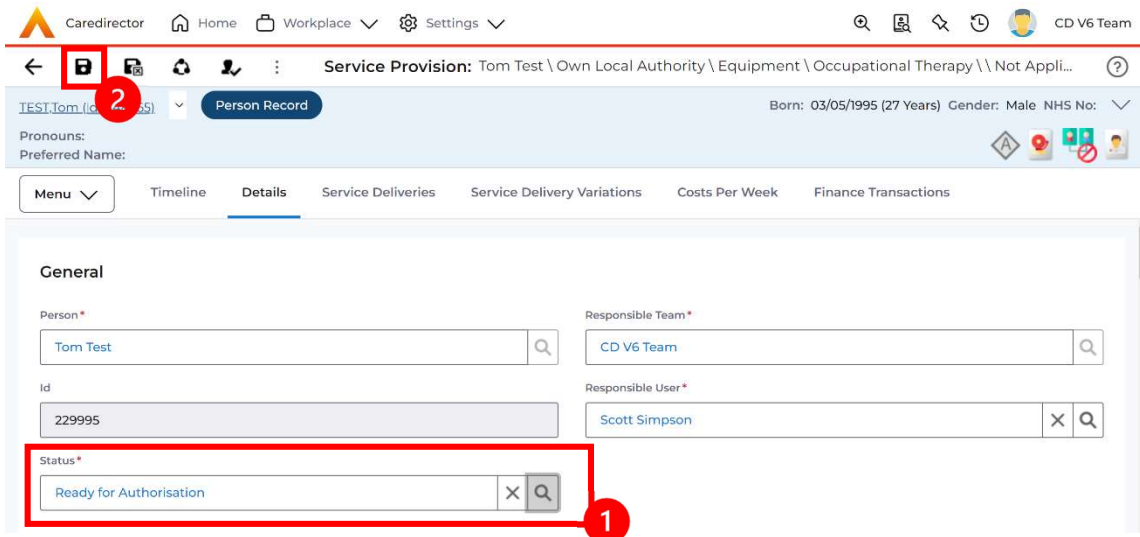
Person	Id	Planned Start Ti...	Units	Total Units	Total Visits	Monday	Tuesday	W
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6. **Planned Start Time** is when the session will begin, record the **Units, 1** being one session a day. Then the **Days** select which days this session will commence.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

The screenshot shows the 'Service Delivery: New' form in the Caredirector system. The form is titled 'Details' and contains the following sections and fields:

- General**
  - Service Provision\***: Tom Test \ Own Local Authority \ Equipment \ Occupational Therapy \ \ N...
  - Responsible Team\***: CD V6 Team
  - Id**: (Empty text field)
  - Rate Unit\***: Per Session
  - Planned Start Time\***: 10:00
  - Units\***: 1
  - Total Visits\***: (Empty text field)
  - Total Units\***: (Empty text field)
  - Number of Carers\***: 1
- Schedule applies to days**
  - Select All\***:
    - Yes
    - No
  - Monday\***:
    - Yes
    - No
  - Tuesday\***:
    - Yes
    - No
  - Wednesday\***:
    - Yes
    - No
  - Thursday\***:
    - Yes
    - No
  - Friday\***:
    - Yes
    - No
  - Saturday\***:
    - Yes
    - No
  - Sunday\***:
    - Yes
    - No

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



The screenshot shows the CareDirector interface for a service provision. The top navigation bar includes 'Caredirector', 'Home', 'Workplace', and 'Settings'. The breadcrumb trail is 'Service Provision: Tom Test \ Own Local Authority \ Equipment \ Occupational Therapy \ \ Not Appli...'. The 'Person Record' tab is active, showing 'TEST, Tom (c...)' with a 'Person Record' button. The 'Details' tab is selected in the main navigation. The 'General' section contains the following fields:

- Person\*: Tom Test
- Responsible Team\*: CD V6 Team
- Id: 229995
- Responsible User\*: Scott Simpson
- Status\*: Ready for Authorisation

The 'Status\*' dropdown is highlighted with a red box and a red circle containing the number 1. The 'Person\*' dropdown is also highlighted with a red box and a red circle containing the number 2.

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:

<u>Mins</u>	<u>Decimal</u>
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

Long Term Residential Care/Nursing Care		Clients in permanent residential or nursing placements
Respite for Client or Respite for Carer		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
High Cost Residential		Placements that have been approved at the Adults Commissioning Panel for Clients who need specialist care that is above the standard residential rate
ACP/Non Commissioned		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
SDS - Cash Direct Payments (Booking Request)		where a Client is requesting a Cash Budget
SDS – Cash Direct Payments Change in Care (Booking Request)		where a Client's needs have changed and the Cash Budget amount needs adjusting
Individual Service Fund (ISF)		These are usually CTLD clients for who we pay certain Suppliers to provide their care on an individual basis
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	Home Care	short bursts of domiciliary care (i.e. 30 mins for washing and dressing)
	Home Care Travel Time	
	Carers Trust	provide Home Care and Support and Enablement but the Practitioner will arrange directly with Provider

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	<p>Overall changes:</p> <ul style="list-style-type: none"> <li>- Title change/ front page wording change.</li> <li>- Version Control updated and reworked</li> <li>- Version number changed according to naming convention</li> <li>- Adults System Support Tri-X support link has given</li> <li>- 'Adult Service Provision Information' changed to 'What triggers a Service Provision Collection.'</li> <li>- Planned Start Date has introduced to inform that this does not trigger a service.</li> <li>- Catherine Jackson references have changed to P&amp;AT</li> <li>- Activities has clarified to which activity.</li> <li>- Format of Subject, Responsible Team, Description has changed.</li> <li>- Owner changed to Responsible Team or User</li> </ul> <p><b>Service Provisions Information Section:</b></p> <ul style="list-style-type: none"> <li>- Wording has corrected.</li> <li>- Cancellation and Deletion request procedure inputted.</li> </ul> <p><b>Ending Service Provisions</b></p> <ul style="list-style-type: none"> <li>- Explained about Actual End Date needed and will stop payments</li> <li>- Whereas planned is not required for every service and can be reviewed.</li> <li>- This section was explained before as planned was the one that stopped payments</li> </ul> <p><b>Cancelling &amp; Deleting Service Provisions</b></p> <ul style="list-style-type: none"> <li>- 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.</li> <li>- Wording has corrected.</li> </ul> <p><b>Recording Dates of Death</b></p> <ul style="list-style-type: none"> <li>- Updated Notes to Task when informing P&amp;AT</li> </ul> <p><b>Service Provision Basics</b></p> <ul style="list-style-type: none"> <li>- Added how to find and create a new SP</li> </ul>	SS	28/04/2023

	<ul style="list-style-type: none"> <li>- How to clone a SP</li> <li>- How to add a related case</li> <li>- How to add a task to a service provision section.</li> <li>- This has changed title from 'Service Provision Procedures'</li> <li>- Section has been updated to bring forward the fundamental of SP's to have a reference guide later.</li> <li>- Cloning can only be done on Status Authorised as the option does not appear otherwise.</li> <li>- Planned and Actual Dates entered to bring clarity on what they do.</li> <li>- How to add a note has been included.</li> <li>- How to authorise a service provision has been added.</li> </ul> <p><b>Providers</b></p> <ul style="list-style-type: none"> <li>- New section introduced</li> <li>- Added non-commissioned providers set up process</li> </ul> <p><b>Service Provisions</b></p> <ul style="list-style-type: none"> <li>- The initial wording has been made clearer</li> <li>- The please create new is done differently</li> <li>- Field and Information headings have been added to SP section.</li> <li>- Screenshots have been updated.</li> <li>- High Cost Residential Placements the Approved or Pending on Rate Periods clarified.</li> <li>- 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)</li> <li>- Orientation and Mobility has been changed to Per Week Pro Rata instead of Per Session.</li> <li>- Support &amp; Enablement, clearer definitions of booking request goes to Co-ordination and they put that as service provision.</li> </ul>		
V1.2	<p>Overall changes:            Title change/ front page wording change            Version Control updated and reworked</p>	SW	21/07/2023

	<p>Version number changed according to naming convention</p> <p>Small amendments/word changes to make guide clearer</p> <p>Removal of instructions on how to add related case.</p> <p>Amendments to state that activities to P&amp;A Team should be added to person record, not as notes on an SP.</p> <p><b>Service Provision Information</b></p> <p>Addition that Service Provisions updated in line with an updated care plan.</p> <p><b>Ending Service Provisions</b></p> <p>Now specifies that home care service provisions should only be ended by Co-ordination Team or Peripatetic Team.</p> <p>Addition of paragraph around Planned End Dates stopping payments to providers and the importance of entering Actual End Dates.</p> <p><b>Cancelling &amp; Deleting Services Provisions</b></p> <p>Clarification on when provisions should be cancelled.</p> <p>Addition of information around cancelling booking requests.</p> <p><b>Service Provision Basics</b></p> <p>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.</p> <p><b>How to Clone a Service Provision</b></p> <p>Additional sentence to say that cloning should not be used for SPs where a planned start date is required.</p> <p><b>How to Authorise a Service Provision</b></p> <p>Amendment to say that these can be authorised by a manager of Support Services Team Leader</p> <p><b>Service Provisions – Long Term Residential Care</b></p> <p>Addition of sentence regarding being notified by P&amp;A Team if actual start date is before planned start date</p> <p>Additional sentence regarding top-up fees</p> <p><b>Throughout</b></p> <p>Service Provision Instructions amended as follows:</p> <p>Actual Start Date: Leave blank</p> <p>Planned End Date: Leave blank</p> <p>Actual End Date: Leave blank</p> <p>Start Reason: listed suggested options</p>		
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	<p>Placement Room Type: Auto populates to 'Not Applicable'</p> <p>Responsible User: Auto populated with the user's name.</p> <p>Addition of Related Case: Select relevant case and removal of paragraph relating to same.</p> <p>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</p> <p><b>Respite for Client / Respite for Carer and Respite Extensions</b></p> <p>Addition of information around 'Planned End Date', now point 2</p> <p>Additional sentence regarding top-up fees</p> <p>Clarification around extending respite SPs where actual end dates have been recorded</p> <p>Addition of sentence regarding retrospective SPs for subsequently suspended providers</p> <p><b>SDS – Cash Direct Payments</b></p> <p>Complete removal of section detailing old procedure and replacement with guidance on revised procedure.</p> <p><b>SDS - Cash Direct Payments Change in Care or change to Third Party Representative/ Third Party Support Account</b></p> <p>Complete removal of section detailing old procedure and replacement with guidance on revised procedure.</p> <p><b>Cash Direct Payment for Carer</b></p> <p>Complete removal of section detailing old procedure and replacement with guidance on revised procedure</p> <p>SDS – Carers Cash Direct Payment Change in Care</p> <p>Removal of section detailing old procedure and replacement with guidance on revised procedure.</p> <p><b>Day Care, 1-1 Care and Expenses provided by Millennium Care</b></p> <p>Amendment of page numbers for ISF and ACP/Non-Commissioned Payments guidance</p> <p><b>Reablement SPs</b></p> <p>Change of wording from 'Reablement referral' to 'Interim Support Plan'</p> <p><b>Reablement Service Deliveries</b></p> <p>Amendment to say planned start time must be 9am</p>		
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	<p>Amendment to say units must be 1 and Reablement Team will add actual deliveries once determined.</p> <p><b>Re-ablement – Outreach including Frickley Mews – upto 6 weeks (formerly known as 21 days service)</b></p> <p>Addition of paragraph regarding DOM4 form</p> <p><b>Telecare – Monitoring Service/Response Service</b></p> <p>Amendment to say that information is found on activity sent to CSO dashboard rather than installation sheet</p> <p><b>Recording Advocacy</b></p> <p>Clarification added as to where to find the Actual Start Date</p> <p>Addition of requirement to add details of advocate</p> <p><b>Glossary</b></p> <p><b>SDS – Cash Direct Payments/Change in Care</b> Changed from personal to cash budget in both rows</p> <p><b>SDS – Managed Accounts – Extra Care</b> Changed from Comfort Call &amp; Synergy to Meridian &amp; Creative Support</p>		
V1.3	<p>Addition of paragraph to <b>Long-Term Residential Care</b> sections advising to cross reference to High-Cost Residential Placements.</p> <p>Addition of note to <b>Home Care (Domiciliary Care)</b> section advising to inform Co-ordination Team when NCPs are selected.</p> <p><b>Day Care/Meals/Transport</b> – Removal of point around adding more visits each day and addition of statement that ‘Planned Start Time’ should be 00:00.</p>	SW	29/12/2023
V1.4	<p>Amendments to In House Supported Living Sleep Ins</p>	SCJ	26/2/2024
V1.5	<p>Amendment to Day Care Service Deliveries – to clarify that the units on the service delivery should be 1.</p>	SCJ	16/4/2024