



Service Provision V1.5

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

Home Contents	Glossary 🛛 Local Resources 🖓 Using this Procedures Site Amendments	Q Search	â
Local R	esources		
Adult:	System Support Guides		× 2
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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It is important before entering new Service Provisions that you check that any unused out-of-date Service Provisions have/ are ended/ ending.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**, <u>due to Financial</u> <u>Regulations, the system will not allow the same person who has input the Service</u> <u>Provision to authorise it.</u> 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).

<u>Once a Service Provision has been authorised it cannot be deleted</u>. If the service does not commence for any reason, then the Service Provision **must** be <u>cancelled</u>. 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 <u>remember to change the</u> <u>**Purchasing Team**</u> 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 <u>updated following any change in care</u> <u>need</u> 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).

Menu 🗸 Timeline	Details Costs Per Week	Finance Transactio	ons	
Dates				
Planned Start Date			Planned End Date	
		#		雦
Actual Start Date			Actual End Date	
12/03/2018		m	19/03/2018	雦
Start Reason*			End Reason*	
Admitted from Hospital		Q	Admitted to Residential or Nursing Home	Q

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 <u>Adults System Support section</u> 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 <u>not</u> 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.



Menu V Timeline	Summary	Profile Case	es Services	Document View	All Activities
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	Update G	GL Code			
	Bulk Edit				
	Delete				

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 <u>Adults System</u> <u>Support</u> 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**.

Caredirector 🞧	Home 🗂 Workplace 🗸	👸 Settings 🗸	Œ	रे 🛃 🛠 🖸 🌅 CareDirectorTest
< ₰ ₰ ₽	Person: TEST Tom			?
<u>TOM,TEST (Id: 444267)</u>	rson Record		Born: 21/06/2022 (13	Weeks, 3 Days) Gender: Male NHS No: ∨
Pronouns: Preferred Name:		1		I I I I I I I I I I I I I I I I I I I
Menu 🗸 Timelin	e Summary Profile	e Cases Services Do	cument View All Activities	
Filter By		SEP 2022 <u>Task Created</u> A new record of task was creat	ed by Scott Simpson.	21/09/2022 13:42:01
то		Responsible Team: CareDirectorTest	Responsible User: Scott Simpson	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 <u>Service Provisions section</u>.

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Related Records	~	Search for records			Q 3
□ Id = Person	Id [Person] Status	Planned Start D Planned End I	Da Actual Start Date	Actual End Date	<u>Service Eleme</u>
220022 TEST Tom	444267 Draft	08/08/2022			Adult Residen





How to Clone a Service Provision

- 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.

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🔶 🖬 🗟 🎝 🗜 🗄 Service Provision: Tom Test \ Carers Trust - 205632 \ ISF Provider \ ISF \\\ Spot \ 225727 \ 21	Oct 20	022				?
TEST.Tom (ld: 446228) Person Record Born: 03/0	5/1995	(27 Ye	ars) Ge	nder:	Male	NHS No: 🗸
Pronouns: Preferred Name:						la 🕹 🛞
Menu V Timeline Details Costs Per Week Finance Transactions						
General						
Person* Responsible Team*						
Tom Test Q CareDirector						Q
Id Responsible User*						
225727 Scott Simpson						Q
Status*						
Authorised						

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**.

Caredirector 🞧 Home 🕻	🖞 Workplace 🗸 🔅 Settings	\sim			€	Ę	\Diamond	€	٢	CareDirector
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General	Update GL Code									
Person*	Restrict Access			Responsible Team *						
Tom Test	Delete		Q	CareDirector						Q
Id	Run Workflow			Responsible User*						
225727	Copy Record Link			Scott Simpson						Q
Status*										
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👗 Caredirector 🎧 Home 🗂 Workplace 🗸 🔅 S	ettings 🗸	Q R 🛠 D 🧔	CareDirector
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TESTTom ((d: 446223) Person Record	Clone Service Provision	Born: 03/05/1995 (27 Years) Gender: Male 🕅	No: 🗸
Menu V Timeline Details Costs Per Week	Start Date* 21/10/2022 Start Reason*		
Person*			٩
ld 225727 Status*			Q
Authorised			
Service Request	Cione Cancel		
ISF Provider			Q
Special Scheme	Finance Client Category		

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).



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



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Note									
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CD V6 Team								×	Q
ext									
Note text									

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.

Caredirector	Home	🖞 Workplace 🗸	ලි Sett	ings 🗸		€	Ę	\Diamond	3		CD V6 Te	am
← 🖬 🖪	Service	Provision: New									(?
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Planned Start Date				Planned Er	nd Date							
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Actual Start Date				Actual End	Date							
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Start Reason*												
			Q									

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**

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Pron Prefe	ouns: erred Name:				1			۵ 📀	
M	enu 🗸	Timeline Sum	nmary Profile	Cases Se	ervices Docu	ment View Al	Activities		
+		₽ ₽, \$: Service	Provisions					
Re	lated Service	Provisions		~	Se	earch for records			QG
	ld	<u>Status</u>	Planned St 💱	Planned End	<u>Actual Star</u> ≝↓	Actual End D	Service Element 1	Service Element 2	Provider/Ca
	229954	Authorised		22/02/2023	20/02/2023		Adult Residential Care	Respite for Client	1 ALMSHO
	229955	Authorised		22/02/2023	20/02/2023		Adult Residential Care	Interim Placement	AEGIS CAF
	229946	Cancelled	20/02/2023				Adult Residential Care	Long-Term Care	1 HILL CLC
	229953	Authorised	20/02/2023				Nursing Care	Long-Term Care	Acorn Nur
	229952	Authorised	20/02/2023		20/02/2023	20/02/2023	Adult Residential Care	Long-Term Care	2 HILL CLC
	229956	Authorised	21/02/2023				Adult Residential Care	ACP Long Term Plac	2 HILL CLC
									,

 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

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TEST.	. <u>Tom (Id: 4483</u>	65) × Person	Record			Born: 03/05/1995 (27	Years) Gender: Male NH	HS No: 🗸
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Re	lated Service I	Provisions	Unpin from me	~	Search for records			Q 3
	ld	<u>Status</u>	Authorise	d End Actual	Star ᆋ Actual End D	Service Element 1	Service Element 2	Provider/Ca
	229988	Authorised	Calculate Cost Per Week			SDS - Managed Acco	Telecare Rapid Resp	Telecare
	229989	Authorised	Cancel			Advocacy	Advocacy	Advocacy
	229991	Authorised	Update GL Code			Professional Support	Social Work	Own Loca
<u> </u>	29994	Authorised	Bulk Edit			Visual Impairment R	Visual Impairment R	Own Loca
	229995	Ready for Autho	Delete			Equipment	Occupational Therapy	Own Loca
	229975	Authorised	20/04/2023	28/04/2	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 <u>Adults System Support section</u> 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	
<pre></pre>	3



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

Service

Select a Service *

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

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

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

Please upload screenshots to help explain your request (optional)

	Drop files here to upload -	🌲 upload	
<			Uploaded: 0 of 4



✓ Submit



Service Provisions

Long Term - Residential Care (For High-Cost Residential Placements please see <u>High-Cost Residential Placements</u>)

- 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.
- 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: <u>How to find Service Provisions and Create New</u>.

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



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



- R Service Provision: New			
Tam (id: 4/4755) Person Record		Born: 03/05/1995 (27	Vears) Gender: Male NHS No
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eferred Name:			
Details			
General			
Person*		Responsible Team*	
Tom Test	Q	CD V6 Team	×
ld		Responsible User*	
		Scott Simpson	×
Status*			
Draft	Q		
Service Request			
Service Element 1*		Service Element 2*	
Adult Residential Care	XQ	Long-Term Care	×
Special Scheme		Finance Client Category	
	Q	Learning Disability	×
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Dates Planned Start Date		Planned End Date	
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5. Select **Save** when completed.



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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.

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

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- Service Provisions that are set to Ready for Authorisation can be found via an Advanced Find and Authorised (<u>How to Authorise a Service Provision</u>) by a Team Manager/ Support Services Co-Ordinator.
- 9. If a client has a **S117** a Service Provision will still need entering on to the system for **Residential**, **Nursing Care or High-Cost Placements** in order to generate a payment to the Care Home. However, it is important to remember to indicate on the Financial Assessment Form that the Client has a S117 so that no contribution is collected from the Client.



Long Term - Nursing Care

- 1. This Service Provision is recorded based on the service costs and not what the client is contributing.
- 2. Previous self-funders are where the financial assessment case confirms that the service user is a previous self-funder then please follow the guidance below to **Record a Long-Term Residential Care Service Provision**.
- 3. The Personalisation and Assessment team will determine the Actual Start Date and record this in the Service Provision to generate payment to the care home. In the event that the Actual Start Date determined is prior to the Planned Start Date recorded, the P & A team will notify you of this, as in this situation a new service provision will be required.
- 4. The fields below are available in the new Service Provision screen. Please locate the relevant person record > services > create new record then enter the information side into the according field. For more information follow: How to find Service Provisions and Create New.

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



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7. Select **Save** when completed.



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 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 (<u>How to Authorise a Service Provision</u>) by your manager.





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

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Status*		
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- 10. Service Provisions that are set to **Ready for Authorisation** will be found via an **Advanced Find** and **Authorised** (<u>How to Authorise a Service Provision</u>) by a Team Manager/ Support Services Co-Ordinator.
- 11. If a client has a **S117** a Service Provision will still need entering on to the system for **Residential**, **Nursing Care or High-Cost Placements** in order to generate a payment to the Care Home. However, it is important to remember to indicate on the Financial Assessment Form that the Client has a S117 so that no contribution is collected from the Client.



Respite for Client / Respite for Carer and Respite Extensions.

- 1. This Service Provision is recorded based on the service costs and not what the client is contributing.
- 2. The 'Planned End Date' will cease payments to the Provider and the collection of contributions from the Client. Therefore if the Practitioner becomes aware that the 'Planned End Date' has changed details of the change must be sent to the Personalisation and Assessment Team for them to update the Service Provision (see Section on Respite Extensions). The 'Actual End Date' should only be entered once the service ceases on or after the 'Planned End Date' for data integrity purposes.
- 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: <u>How to find Service Provisions and Create New</u>.

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

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



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5. Select Save when completed.

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 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 (<u>How to Authorise a Service Provision</u>) by your manager.





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

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- Service Provisions that are set to Ready for Authorisation will be found via an Advanced Find and Authorised (<u>How to Authorise a Service Provision</u>) 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 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)



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- 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

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



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3. Select Save when completed.

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 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 (<u>How to Authorise a Service Provision</u>) by your manager.


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

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



Interim Extensions

- 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.
- 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:
- 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: <u>How to find Service Provisions and Create New</u>.

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



Tom (id: 448365) Person Record		Born: 03/05/1995 (27 Years) Gen	der: Male NHS No:
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4. Select **Save** when completed.

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

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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.**

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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.

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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.**

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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**.

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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.

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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.

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

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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.

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





ACP or Non-Commissioned Services

- These are non-commissioned Providers. If you come across a noncommissioned provider that has not be set up yet, please follow <u>Non-Commission Providers – Set Up Process.</u>
- 2. This Service Provision is recorded based on the service costs and not what the client/other organisations (e.g. health) are contributing.
- 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: <u>How to find Service Provisions and Create New</u>.

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



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5. Select **Save** when completed.

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Pronouns: Preferred Name:											$\langle \! \! \! \rangle$
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6. When saved it will bring you to the timeline tab, select the tab **Rate Periods**, and **Create New Record**.

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TEST,Tom (ld: 448365) Person Record Born: 03/02	5/1995 (27 Years) Gender: Male NHS No: ∨
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+ 📲 🏖 🦻 Service Provision Rate Periods	
Approved Rate Periods V	Q 3
Rate Unit Approval Status Start Date End Date S	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.**

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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.

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System Views Approved Rate Periods Cancelled Pate Periods	Start Date 🗐	End Date	Service Pr	rovision	<u>1</u>			
Pending Rate Periods Related Records	21/02/2023		Tom Test	1 Ark (Group	SDS - Mar	nag	



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.**

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

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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.

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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.

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

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Status*	2	
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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.

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21/02/2023 £5	0.00 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 (<u>How to Authorise a Service</u> <u>Provision</u>) 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 @ \pounds 12.07 or \pounds 13.59 per hour (22/23 rates) = \pounds

PA - Self Employed No / Yes / TBC

Date referred to Penderels – DD/MM/YYYY



Agency Provider – (INSERT NAME)Number of hoursX @ £18.50 per hour (22/23 rates) = £Number of visitsX @ £1.50 per visit (22/23 rates) = £

Day Centre – (INSERT CENTRE)

Number of sessions – X

Cost per day / session – £XXX

Commissioned services - Managed Account

Please enter service provision

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

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

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

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

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

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

2. Select Save.

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

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





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



Cash Direct Payment for a Carer

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

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

a. Subject: PB - Cash Direct Payment - Agreement

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

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

Confirm Agreement is saved in Attachments.

2. Select Save.

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

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

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

Title - PB - Cash Direct Payment - Agreement

Cash Direct Payment start date - DD/MM/YYYY

Total cost of care per week – £XXX

Is there a top up? YES / NO

Top Up contribution – £XXX

Personal Assistant

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

PA - Self Employed No / Yes / TBC

Date referred to Penderels – DD/MM/YYYY





Agency Provider – (INSERT NAME)

Number of hours $X @ \pounds 18.50$ per hour (22/23 rates) = \pounds

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).



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



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5. Select **Save** when completed.

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	fom Test			Q	CD V6	Team						XQ	
Id					Responsib	le User*							
					Scott S	impson						XQ	
Sta	Jraft			0									
	Jait			~									

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

Caredirector	G Home	🖒 Work	place 🗸	හි Sett	ings 🗸	C	Ð R	\mathcal{D}	Ð		CD V6 1	īeam
← 🖬 🕞	۵ ۱ /	:	Service	Provisic	n: Tom Test \	Personalis	ation & .	Assess	ment	Team	\	?
TEST,Tom (Id: 44-365)	Person Re	cord			Bo	orn: 03/05/19	995 (27 Ye	ars) Ge	ender:	Male N	IHS No:	\sim
Pronouns: Preferred Name:	_		1									$\langle \! \land \! \rangle$
Menu 🗸 Tir	neline D	Details	Rate Perio	ds Co	osts Per Week	Finance	Transacti	ons				
General Person*					Responsible Tea	am*						
Tom Test				Q	CD V6 Tean	n					Q	
Id					Responsible Us	er*				~		
229965					Scott Simp	son				2	XQ	
Status*					2							
Booking Request				x Q								





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

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)

🔪 Caredirector 🎧 Home 📥 Workplace 🗸 🔞 Settings 🗸	€	Ę	\Diamond	↺	CD V6 Team
- B R Note: New					?
Details					
General					
Title*					
NAME OF ISF PROVIDER					
Regarding*					
Tom Test \ Personalisation & Assessment Team \ ISF Provider \ ISF \\\ Spot \ 229966	\ 06 M	ar 202	3		XQ
Responsible Team *					
CD V6 Team					XQ
Text					
The weekly Actual Budget agreed = £XXXXXX The weekly Indicative Budget (as generated by the Adults Overview Assessment in Care	Direct	or) = £	xxxxx		

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

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

My 1	Teams Servio	ce Provisions - Boo	king Requests				
+	×11 - 42) l, 4	:				
	Person Id	Person	ld	Service Element 1	Service Element 2	<u>Actual Start</u> ≜↓	<u>Actual</u>
	448365	Tom Test	229966	ISF Provider	ISF		
4							•
M	< 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			
Purchasing Team			Frequency in Weeks*
Adults Connecting Care Team East	×	Q	1
Service Provided			Provider/Carer
ISF Provider \ ISF \ Sp	×	۹	Q
Date Dequired			Cost Per Week
			0.00
 res No 			



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

- 🖬 🗟 🗔 🎝 E Service Provis	sion: 1	ōm T	est \ Personalisation & Assessment Team \ ISF Provider \ ISF	
ST Tom (Id: 448365) Person Record			Born: 03/05/1995 (27 Years) Gender: Male NHS I	No:
prouns:				
ferred Name:				
Menu V Timeline Details Costs Per Week	Fina	ince T	ransactions	
		_		
Ready for Authorisation	×	2		
		_		
Service Request				
Service Element 1*			Service Element 2*	
ISF Provider	×	2	ISF X	۹
Special Scheme			Finance Client Category	
	0	2		0
				~
GL Code			Rate Unit *	_
			Per Week Pro Rata X	٩
Datas				
Dates				
Planned Start Date			Planned End Date	
06/03/2023	Ê		1	
Actual Start Date			Actual End Date	_
06/03/2023	6	*	6	<u>}</u>
00,00,2020	E	#		###
Start Reason*				



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.

	Caredirector	Home	- Work	kplace 🗸	ැබූ Sett	tings 🗸					G	Q	Ę	\Diamond	9	٢	CDV	6 Team
←	: Serv	vice Provisio	on: Tom	Test 🚬				680 \ IS	F Provi	der \ ISI	F\Spot	12	29966	5\06	Mar 2	2023		?
TEST	<u>,Tom (Id: 448365)</u>	Person Rec	cord						1	Born: 03	8/05/1995	5 (27	Years) Gen	der: N	lale NI	IS No:	\sim
Pron	ouns: erred Name:																	$\langle \! A \! \rangle$
M	enu 🗸 Ti	meline D	etails	Costs Per	Week	Finance Tr	Trans	sactions										
×	L Ser	vice Provisi	on Cost	Per Wee	k													
Re	lated Records			~]			Search fo	or record	s							Q	G
	<u>Start Date</u> ₹↓	End Date	t≣↓	Cost p	er Week	Service Pr	Provis	sion										
	06/03/2023				£176.72	Tom Test	TA			PK 25968	BO \ ISF F	Prov	ider \	ISF				

11. Service Provisions that are set to Ready for Authorisation will be picked up via an Advanced Search and Authorised (<u>How to Authorise a Service</u> <u>Provision</u>) 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:

<u>Field</u> Subject esponsible Team Description Due Status	Information Change to Indiv Personalisation Must contain de Today's date Open	idual Service Fund and Assessment stails of the change	d Tea	am		
人 Caredirector 🔓 Home 🖨 Workp	lace 🗸 🔞 Settings 🗸		Q	<u>s</u> <	2 🖸	CD V6 Team
	Task: Change to Individual Service	Fund				0
Person Record Pronouns: Person Record		Born: 03/0	5/1995 (27 Years	Gende	r: Male NHS No: V
Preferred Name:						~
General subject* Change to Individual Service Fund Description B I U S x₂ x* ✓ I _X ♯ : ♯ ↓ Styles + Format + Fort + S Must contain details of the change Details	= # ** E 2 4 8 ∞ ्	⊞ ≣ ⊕ Ω →⊐ i ← → Ϙ t _a 賱 ♥ Ω ⊕ Source	8	Che	racters (with	m HTML): 142/100000 a
Regarding*	R0 \ ISE Provider \ ISE \ Spot \ 2	Responsible Team*	0			
Reason		Dassoosible lises	S			~
	Q					Q
Priority		Category				

Q

Θ

~

Sub-Category

Is Case Note?

O Yes

No

Out

Due*

Status*

O Yes

No

Open

Contains Information Provided By A Third Party?

06/03/2023

雦

15:00

Q

Q

Q



- 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 (<u>How to Authorise a Service</u> <u>Provision</u>) 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**)).

 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: <u>How to find Service Provisions and Create New</u>.

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



T Tom (id: 448365) Person Record nouns: ferred Name: wetails Ceneral Person* Tom Test d Status*	(٩	Born: 03/05/1995 (27 Years) Gender:	Male NHS No:
nouns: ferred Name: Details Ceneral Person* Tom Test 'd Status*		٩	Responsible Team*	
ferred Name: Details Ceneral Person* Tom Test Id Status*		Q	Responsible Team*	
Ceneral Person* Tom Test Id Status*		٩	Responsible Team *	
Ceneral Person* Tom Test Id Status*		Q	Responsible Team*	
General Person* Tom Test Id Status*		Q	Responsible Team*	
Person* Tom Test Id Status*	(Q	Responsible Team *	
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Status*			Responsible User*	
itatus*			Scott Simpson	X Q
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Service Element 1*			Service Element 2*	
SDS - WMDC Managed Account	×	Q	Home Care	XC
Special Scheme			Finance Client Category	Ĩ
	(Q		C
GL Code		_	Rate Unit*	
2			Per 1 Hour \ Hours (Whole) \ Hours (Part)	XC
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Start Reason*				1
New Placement	×	Q		
Commissioning Purchasing Team			Frequency in Weeks*	
Adults Connecting Care Team East	X	Q	1	
Service Provided			Provider/Carer	
Co-ordination Team \ SDS - WMDC Managed Account \ Home C	×	۹	Co-ordination Team	C
ate Required*				
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No				
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Authorisation Detail			Authorisation Date	
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atal Units 0.0000 Authorisation Detail Buthorised By Related Information		Q	Authorisation Date	



3. Select **Save** when completed.

٨	Caredirector	Home	🖞 Workplace 🗸	ැබූ Settir	ngs 🗸		€	Ę	\Diamond	9	0	CD V6 Team
←	BR	Service	Provision: New									?
TEST,T	<u>om (Id: 448365)</u>	Person Re	ecord			Born: C	3/05/1995	(27 Yea	ars) G	ender:	Male	NHS No: 🗸
Prono Prefer	ouns: rred Name:											$\langle \! \! \diamond \! \! \rangle$
Det	ails											
-												
Ge	eneral											
Per	son*				Responsib	le Team *						
5	Tom Test			Q	CD V6	Team						XQ
Id				<u> </u>	Responsib	le User*						
					Scott S	impson						XQ
Sta	tus*											
	Draft			Q								

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

Caredirector 🞧 Home 🗂 Wor	kplace 🗸 🔞 Settings 🗸) t	& O	C 🜔	D V6 Team				
← 🖪 🚰 🏠 🎣 : Service Provision: Tom Test \ Co-ordination Team \ SDS - WMDC Managed A (?)									
TEST,Tom (Id: 448365) Person Record	Born: 03	3/05/1995 (27 Ye	ars) Gender	: Male NH	S No: 🗸				
Pronouns: Preferred Name:	D				À				
Menu V Timeline Details	Service Deliveries Service Delivery Variations	Costs Per W	eek Fin	ance Trans	actions				
Person*	Responsible Team *								
Tom Test	Q CD V6 Team				Q				
Id	Responsible User*								
229967	Scott Simpson			×	Q				
Status*									
Booking Request	XQ								



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

Caredirector 🎧 Home	💾 Workplace 🗸 🔞 Settings 🗸	/	• 🛃 🛇	🕑 킻 CD V6 Team				
Service Provision: Tom Test \ Co-ordination Team \ SDS - WMDC Managed Account \ Home Care \ \\ Sp								
TEST.Tom (Id: 448365) Person Record Born: 03/05/1995 (27 Years) Gender: Male NHS No: 🗸								
Pronouns: Preferred Name:	1							
Menu V Timeline De	etails Service Deliveries Serv	ice Delivery Variations	Costs Per Week	Finance Transactions				
+ 🛛 🕼 Service Deliveries								
Related Records V		Search for records		Q B				
Person Id	Planned Start Ti Units	Total Units	Total Visits	Monday				
NO RECORDS								
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.


Service Delivery: New			
etails			
General			
ervice Provision*	Responsible Team*		
TEST Tom \ Co-ordination Team \ SDS - WMDC Managed Account \ Home Care \ Sp	CareDirectorTest		 × C
•	Rate Unit*		
	Per 1 Hour Unit		C
anned Start Time*	Units*		
09:00	9		
tal Visits*	Total Units*		
umber of Carers*			
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Imber of Carers* 1 Chedule applies to days lect All* Yes	Thursday*		
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umber of Carers* 1 chedule applies to days Hect All* Ves No onday*	Thursday*		
umber of Carers* 1 chedule applies to days Hect All* 'Yes 'No onday* 'Yes 'Yes '	Thursday* Yes No Friday* Yes		
umber of Carers* 1 chedule applies to days lect All* Yes No onday* Yes No No	Thursday* Yes No Friday* Yes No		
umber of Carers* 1 chedule applies to days elect All* Yes No onday* Yes No esday*	Thursday* Yes No Friday* Yes No Saturday*		
umber of Carers* 1 chedule applies to days elect All* Ves No onday* Ves No usday* Yes	Thursday* • Yes • No Friday* • Yes • No Saturday* • Yes		
umber of Carers* 1 chedule applies to days elect All* Ves No onday* Ves No uesday* Ves No	Thursday* Yes No Friday* Yes No Saturday* Yes No Saturday* Yes No 		
umber of Carers* 1 chedule applies to days elect All* Ves No onday* No uesday* Ves No tednesday*	Thursday* Ves No Friday* Ves No Saturday* Ves No Saturday* No Saturday* Satur		

7. Save and Return to Previous Page

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

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



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TTom (Id: 448365) V Person Record		Born: 03/05/1995 (27 Yea	rs) Gender: Male NHS No:
nouns:			۵ و ا
ferred Name:			V 🖻 😶
etails			
General			
Person*		Responsible Team *	
Tom Test	Q	CD V6 Team	× C
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		Scott Simpson	× C
Status*			
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Service Request			
Service Element 1*		Service Element 2*	
SDS - Managed Account	XQ	Home Care	× C
Special Scheme		Finance Client Category	
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Start Reason*			
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Commissioning			
Commissioning Purchasing Team		Frequency in Weeks*	
Commissioning Purchasing Team Adults Connecting Care Team West	XQ	Frequency in Weeks *	
Commissioning Purchasing Team Adults Connecting Care Team West Service Provided	XQ	Frequency in Weeks* 1 Provider/Carer	
Commissioning Purchasing Team Adults Connecting Care Team West Service Provided Test Care Home \ SDS - Managed Account \ Home Care \\\ Spot	X Q	Frequency in Weeks* 1 Provider/Carer Test Care Home	C
Commissioning Purchasing Team Adults Connecting Care Team West Service Provided Test Care Home \SDS - Managed Account \ Home Care \\\Spot Sate Required*	× Q × Q	Frequency in Weeks * 1 Provider/Carer Test Care Home	C
Commissioning Purchasing Team Adults Connecting Care Team West Service Provided Test Care Home \SDS - Managed Account \Home Care \\\Spot Rate Required* Yes	X Q	Frequency in Weeks * 1 Provider/Carer Test Care Home	C
Commissioning Purchasing Team Adults Connecting Care Team West iservice Provided Test Care Home \SDS - Managed Account \ Home Care \\\Spot Tate Required* > Yes > No	× Q × Q	Frequency in Weeks* 1 Provider/Carer Test Care Home	c
Commissioning Purchasing Team Adults Connecting Care Team West Service Provided Test Care Home \SDS - Managed Account \ Home Care \\\Spot Rate Required* Yes No Intel Units	× Q × Q	Frequency in Weeks* 1 Provider/Carer Test Care Home	C
Commissioning Purchasing Team Adults Connecting Care Team West Service Provided Test Care Home \SDS - Managed Account \ Home Care \\\Spot Tate Required* Yes No	X Q X Q	Frequency in Weeks * 1 Provider/Carer Test Care Home	
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Commissioning Purchasing Team Adults Connecting Care Team West Service Provided Test Care Home \SDS - Managed Account \ Home Care \\\Spot Rate Required* Yes No Total Units 0.0000 Authorisation Detail Authorised By	× Q	Prequency in Weeks * 1 Provider/Carer Test Care Home	c
Commissioning Purchasing Team Adults Connecting Care Team West Service Provided Test Care Home \SDS - Managed Account \ Home Care \\\Spot Test Care Home \SDS - Managed Account \ Home Care \\\Spot No Total Units 0.0000 Authorisation Detail Authorised By	× Q × Q	Frequency in Weeks * 1 Provider/Carer Test Care Home	C
Commissioning Purchasing Team Adults Connecting Care Team West Service Provided Test Care Home \SDS - Managed Account \ Home Care \\\Spot Rate Required* Yes No fotal Units 0.0000 Authorisation Detail Authorised By		Frequency in Weeks* 1 Provider/Carer Test Care Home Authorisation Date	C
Commissioning Purchasing Team Adults Connecting Care Team West Service Provided Test Care Home \SDS - Managed Account \ Home Care \\\Spot Rate Required* Yes No fotal Units 0.0000 Authorisation Detail Authorisate By Related Information		Frequency in Weeks * 1 Provider/Carer Test Care Home	C
Commissioning Purchasing Team Adults Connecting Care Team West Service Provided Test Care Home \SDS - Managed Account \ Home Care \\\Spot Rate Required* Yes No Total Units 0.0000 Authorisation Detail Authorised By Related Information Placement Room Type*		Prequency in Weeks * 1 Provider/Carer Test Care Home	C
Commissioning Purchasing Team Adults Connecting Care Team West Service Provided Test Care Home \SDS - Managed Account \ Home Care \\\Spot Rate Required* Yes No fotal Units 0.0000 Authorisation Detail Authorised By Related Information Nacement Room Type* Not Applicable		Prequency in Weeks* 1 Provider/Carer Test Care Home Authorisation Date	



4. Select **Save** when completed.

٨	Caredirector	Home	🖞 Workplace 🗸	ණි s	Settings	\sim		€	Ę	\Diamond	9		CD V	6 Team
←		Service	Provision: New											?
<u>TEST,T</u>	<u>om (Id: 448365)</u>	Person Re	ecord			Born	: 03/05/1	995	(27 Yea	ars) G	ender:	Male	NHS N	o: 🗸
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Ge	eneral													
Dor					Dec	sponsible Team								
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	Tom Test			Q		CD V6 Team							xu	
Id					Res	sponsible User*								
						Scott Simpsor	n						×Q	
Sta	tus*													
[Draft			Q										

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

Caredirector	Home	Workplace 🗸	හි Sett	ings 🗸	€	Ę	\Diamond	5	CI	D V6 Team
← : Service	e Provision:	Tom Test \ Tes	t Care Ho	me\SDS - I	Managed Accou	nt \ Ho	ome C	Care \\\	Spot	?
TEST,Tom (ld: 448365)	Person Re	ecord			Born: 03/05/1995	(27 Yea	rs) Ge	nder: Ma	ale NHS	No: 🗸
Pronouns: Preferred Name:			6					$\langle A \rangle$	9	0
Menu 🗸 Time	eline Detail	s Service D	eliveries	Service D	elivery Variations	Co	osts Pe	r Week	Fina	nce Tran:
+2 * *	Servic	e Deliveries								
Related Records V				Search	for records					Q 3
Person	Id	Planned	Start Ti	Units	Total Un	its	1	otal Visi	ts	Monda
			NO RE	CORDS						
			ND 12	e 1						

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

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- e. If the Client needs more than one visit per day your will need to record each time band separately
- f. If the Client needs two carers you will need to change the **Number of Carers** field to the amount needed.
- g. Change the Planned Start Time.
- h. Add the Units (Duration of visit), in hours, using decimals e.g 1 hour = 1 or ½ hour = 30. Please see annexed table of Rate Unit Amounts, below.

7. Select Save and Return to Previous Page.

Caredirector 🎧 Home 🗂 Workplace 🗸 🔞 Settings 🗸		€ <u>B</u>	& D	
Service Delivery: New				
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ervice Provision*		Responsible Team*		
Tom Test \ Test Care Home \ SDS - Managed Account \ Home Care \ \ \ Sp	Q	CD V6 Team		ХQ
		Rate Unit*		
		Per 1 Hour \ Hours (Whole) \ Hours (Part)		Q
anned Start Time*		Units*		
09:00	Θ	2		
tal Visits*		Total Units*		
umber of Carers*				
1				
chedule applies to days				
elect All*		Thursday*		
No		© No		
onday*		Fridav*		
Yes		Yes		
No		O No		
esday *		Saturday*		
Yes		Yes		
No		O No		
'ednesday*		Sunday*		
Yes		Yes		



- 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.

Caredirector	Home	💾 Work	place 🗸	ැබූ Setti	ngs 🗸	Ð	Ę	\Diamond	€		CD V6	Team
← 🖬 🚮	ô 2,		Service	Provisio	n: Tom Test \ Test	Care Hor	ne\S	DS - N	Manag	ged Acc	:0	?
TEST,Tom (Id: 448365)	 Pers 	on Record			Born: 0	3/05/1995	(27 Yea	ars) G	ender:	Male N	HS No:	\sim
Pronouns: Preferred Name:		1							<	ê 🔮	•	2
Menu 🗸 Ti	imeline	Details	Service De	eliveries	Service Delivery Va	ariations	Co	sts Pe	r Weel	¢ Fi	nance	Trans
Person*					Responsible Team*							
Tom Test				Q	CD V6 Team						Q	
Id					Responsible User*							
229973					Scott Simpson						x Q	
Status*					2							_
Ready for Author	risation			×Q								

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



Residential Rates in Prisons (Domiciliary Care)

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



Service Provision: New						
TJom (Id: 448365) V Person Record			Born: 03/05/1995 (27 Years) Ge	ender: Male	NHS No:
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SDS - Managed Account	X O	Prison Resi Pate				XC
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GL Code		Rate Unit*				
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Actual Start Date	雦	Actual End Date				Ê
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Start Reason*	×O					
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Purchasing Team		Frequency in Weeks*				
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Adults Connecting Care Team West	XQ	1				
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3. Select **Save**. When **Saved** go to the **Details** tab and change the **Status** to **Ready for Authorisation**. Select **Save** again.

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🔶 🖪 🚭 🎄 🥾 🗄 Service Provision: Tom Test \ Care UK Prisons \ SDS - Managed Account \ Prison Resi Rate \	Spot	\ 2299'	74\2	8 Apr	2023		?
IEST.Tom (Id	5/1995	(27 Yea	ars) G	ender:	Male N	IHS N	o: ∨
Pronouns: 1 Preferred Name: 1				<	â> 오		
Menu V Timeline Details Costs Per Week Finance Transactions							
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Tom Test Q CD V6 Team						C	2
Id Responsible User							
229974 2 Scott Simpson						× c	2
Status*							
Ready for Authorisation X Q							

4. Service Provisions that are set to Ready for Authorisation will be picked up via an Advanced Search and Authorised (<u>How to Authorise a Service</u> <u>Provision</u>) 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.
- 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: <u>How to find Service Provisions and Create New</u>.

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



Tiom (Id: 448365) Person Record   nouns: Ferred Name:   etails   etails   Ceneral  Ceneral Ceneral  Ceneral  Ceneral Ceneral Ceneral  Ceneral Ceneral  Cen	α	Born: 03/05/1995 (27 Years) Gender: Male NHS
nouns: ferred Name: etails Ceneral Person* Tom Test d d itatus* Draft Dert: Service Request iervice Element 1* SDS - Managed Account ipecial Scheme 2L Code 2L Code 228/04/2023 tetual Start Date 28/04/2023 tart Reason* New Placement Commissioning tyrchasing Team	α α Χ α α	Responsible Team*         CD V6 Team         Responsible User*         Scott Simpson         Scott Simpson         X         Pinance Client Category         Rate Unit*         Per 1 Hour \ Hours (Whole) \ Hours (Part)         X
ferred Name: etails  Ceneral  Person* Tom Test  d  itatus* Draft  Service Request iervice Element 1* SDS - Managed Account ipecial Scheme  2L Code  Dates Planned Start Date 28/04/2023 tart Reason* New Placement  Commissioning turchasing Team	α α Χ α α	Responsible Team*         CD VG Team       X         Responsible User*       Scott Simpson         Scott Simpson       X         Service Element 2*       X         Extra Care       X         Finance Client Category       X         Rate Unit*       Per 1 Hour \ Hours (Whole) \ Hours (Part)       X         Planned End Date       X
ceneral   Derson*   Tom Test   d   itatus*   Draft    Service Request  iervice Element 1*  SDS - Managed Account  ipecial Scheme		Responsible Team*       X         CD V6 Team       X         Responsible User*       Scott Simpson         Scott Simpson       X         Service Element 2*       X         Extra Care       X         Finance Client Category       X         Rate Unit*       X         Per 1 Hour \ Hours (Whole) \ Hours (Part)       X         Planned End Date       X
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SDS - Managed Account Special Scheme SL Code S	× Q Q	Extra Care X  Extra Care X  Finance Client Category  Rate Unit*  Per 1 Hour \ Hours (Whole) \ Hours (Part) X  Planned End Date
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Start Reason* New Placement Commissioning	Ê	
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No.		
otal Units		
0,0000		
Authorisation Detail		
Authorised By		Authorisation Date
	Q	
Related Information		
viacement Room Type*	X O	Related Assessment
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lelated Case		



4. Select **Save** when completed.

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←		Service	Provision: New									?
TEST,T	<u>om (Id: 448365)</u>	Person Re	ecord			Born:	03/05/19	95 (27 Y	ears) C	ender:	Male	NHS No: 🗸
Prono Prefer	uns: red Name:											$\langle \! \! \wedge \!\! \rangle$
Deta	ails											
Ge	eneral											
Per	son*				Responsib	le Team*						
	fom Test			Q	CD V6	Team						xQ
Id					Responsib	le User*						
					Scott S	Simpson						xQ
Stat	tus*											
[	Draft			Q								

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

人 Caredirector 🎧 Home 📥 Workplace 🗸 🟟 Settings 🗸	€ 5	🛠 🛈 🌅 CD V6 Team
+ 🖪 📲 🎝 Service Provision: Tom Test \ De Lacy Gardens \ SDS - Managed	Account \ Extra	Care \\\ Spot \ 229 🧿
TEST.Tom (Id. 3,65) V Person Record Born:	03/05/1995 (27 Yea	ars) Gender: Male NHS No: 🗸
Pronouns: Preferred Name:		🚸 👱 🔧 🙎
Menu V Timeline Details Service Deliveries Service Delivery Variations Costs Per Week	Finance Transact	ions
Ceneral Person* CD V6 Team		٩
Id Responsible User*           229975         Scott Simpson           Status*         Scott Simpson		XQ
Booking Request X Q		



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

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← : Service Provision: Tom Test \ De Lacy Gar	dens \ SDS - Mana	aged Account \ E	xtra Care \\\ Spot '	\ 229975 \	28 Ap	r 2023		9	0
TEST,Tom (ld: 448365) Y Person Record			Born: 03/0	05/1995 (27	Years)	Gender: I	Male NH	IS No:	$\sim$
Pronouns: Preferred Name:	1						> 오	8	
Menu V Timeline Details Service Deliveries	Service Delivery	Variations Co	sts Per Week Fi	nance Tran	nsactior	15		0	3
Related Records		Search for feed						~	G
Person Id Planned Start Ti	Units	Total Units	Total Visits	Mono	day	T	Tuesday		v
		CORDS							

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



Caredirector 🎧 Home 🗂 Workplace 🗸 😵 Settings 🗸		Q & & O	CD V6 Team
- B B Service Delivery: New			?
Details			
General			
Service Provision*		Responsible Team*	
Tom Test \ De Lacy Gardens \ SDS - Managed Account \ Extra Care \ \\ Sp	Q	CD V6 Team	XQ
ld ld		Rate Unit*	
		Per 1 Hour \ Hours (Whole) \ Hours (Part)	Q
Planned Start Time *		Units*	
09:00	Θ	2	
Total Visits*		Total Units*	
Number of Carers*			
1			
Schedule applies to days			
		Thursday	
Yes		Yes	
О No		O No	
Monday*		Friday*	
Yes		Yes	
O No		Ο Νσ	
Tuesday*		Saturday*	
Yes		Yes	
O No		○ No	
Wednesday*		Sunday*	
Yes		Yes	
○ No		O 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 (<u>How to Authorise a Service</u> <u>Provision</u>) 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 (<u>How to Authorise a Service</u> <u>Provision</u>) 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: <u>How to find Service Provisions and Create New</u>.

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

# viakefieldcouncil working for you

## CAREDIRECTOR SERVICE PROVISION

Service Provision: New			
Tiom (Id: 448365) Y Person Record		Born: 03/05/1995 (27 Years)	Gender: Male NHS No:
nouns:			A 💽 💷
ferred Name:			V 💆 🐨
etails			
ne data is not correct. Please review the data in the Form.			
General			
		Desmansible Team	
Tom Test	Q	CD V6 Team	×
a.		Pesponsible Liser*	
м Ч		Scott Simpson	×
••••			
Draft	0		
	~		
Service Request			
Service Element 1*		Service Element 2*	
SDS - Managed Account	XQ	Extra Care	×
special Scheme		Finance Client Category	
	Q		(
SL Code		Rate Unit*	
		Per 1 Hour \ Hours (Whole) \ Hours (Part)	×
Dates           Manned Start Date           28/04/2023		Planned End Date	1
Dates Planned Start Date 28/04/2023		Planned End Date	ŧ
Dates Planned Start Date 28/04/2023 Actual Start Date		Planned End Date	1
Dates Planned Start Date 28/04/2023 Actual Start Date		Planned End Date Actual End Date	ť
Dates Planned Start Date 28/04/2023 Actual Start Date Start Reason*		Planned End Date	411
Dates Planned Start Date 28/04/2023 Actual Start Date Start Reason* Change in type of care	) () () () () () () () () () () () () ()	Planned End Date Actual End Date	
Dates Planned Start Date 28/04/2023 Actual Start Date tart Reason* Change in type of care		Planned End Date	¥11
Dates Planned Start Date 28/04/2023 ketual Start Date tart Reason* Change in type of care Commissioning		Planned End Date Actual End Date	
Dates Planned Start Date 28/04/2023 Actual Start Date Change in type of care Commissioning Purchasing Team		Planned End Date  Actual End Date  Frequency in Weeks*	
Dates Planned Start Date 28/04/2023 Actual Start Date Change in type of care Commissioning Purchasing Team Adults Connecting Care Team East		Planned End Date	
Dates Planned Start Date 28/04/2023 uctual Start Date tart Reason* Change in type of care Commissioning urchasing Team Adults Connecting Care Team East ervice Provided		Planned End Date  Actual End Date  Frequency in Weeks*  Provider/Carer  Provider/Carer	
Dates Planned Start Date 28/04/2023 Actual Start Date 28/04/2023 Commissioning Purchasing Team Adults Connecting Care Team East service Provided De Lacy Gardens \ SDS - Managed Account \ Extra Care \\ \ Spot		Planned End Date  Actual End Date  Frequency in Weeks*   T  Provider/Carer  De Lacy Gardens	
Planned Start Date 28/04/2023 28/04/2023 Actual Start Date 28/04/2023 Change in type of care Commissioning Purchasing Team Adults Connecting Care Team East iervice Provided De Lacy Cardens \ SDS - Managed Account \ Extra Care \\ \ Spot tate Required*		Planned End Date  Actual End Date  Frequency in Weeks*    Provider/Carer  De Lacy Gardens	
Planed Start Date Planed Start Date 28/04/2023 Actual Start Date  Start Reason* Change in type of care Commissioning Purchasing Team Adults Connecting Care Team East Service Provided De Lacy Cardens \ SDS - Managed Account \ Extra Care \\\ Spot Rate Required* Yes		Planned End Date  Actual End Date  Frequency in Weeks*  1  Provider/Carer De Lacy Gardens	
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Dates   Planned Start Date   28/04/2023   Actual Start Date   Start Reason*   Change in type of care   Commissioning   Purchasing Team   Adults Connecting Care Team East   Service Provided   De Lacy Gardens \SDS - Managed Account \ Extra Care \\\Spot   Rate Required*   \Yes   No   Total Units   0.0000		Planned End Date  Actual End Date  Frequency in Weeks*    Provider/Carer  De Lacy Gardens	
Dates   Planned Start Date   28/04/2023   Actual Start Date   Start Reason*   Change in type of care   Commissioning   Purchasing Team   Adults Connecting Care Team East   Service Provided   De Lacy Gardens \SDS - Managed Account \Extra Care \\\Spot   Rate Required*   Yes   No   Total Units:   0.0000		Planned End Date  Actual End Date  Actual End Date  Frequency in Weeks*  1  Provider/Carer  De Lacy Cardens  Authorisation Date	
Planned Start Date Planned Start Date 28/04/2023 Actual Start Date Start Reason* Change in type of care Commissioning Purchasing Team Adults Connecting Care Team East arvice Provided De Lacy Cardens \SDS - Managed Account \Extra Care \\\Spot Rate Required* Yes No Total Units 0.0000 Authorisation Detail Authorisat By		Planned End Date  Actual End Date  Frequency in Weeks*	
Planned Start Date  Planned Start Date  28/04/2023  Actual Start Date  Start Reason*  Change in type of care  Commissioning Purchasing Team  Adults Connecting Care Team East  ervice Provided  De Lacy Cardens \SDS - Managed Account \Extra Care \\\Spot Tate Required*  Yes No Total Units.  0.0000  Authorisation Detail  Authorisat By		Planned End Date  Actual End Date  Frequency in Weeks*  1  Provider/Carer  De Lacy Gardens  Authorisation Date	
Planned Start Date Planned Start Date 28/04/2023 Actual Start Date Start Reason* Change in type of care Commissioning Purchasing Team Adults Connecting Care Team East Service Provided De Lacy Gardens \SDS - Managed Account \Extra Care \\\Spot Rate Required* Vss No Fotal Units 0.0000 Authorisation Detail Authorised By		Planned End Date  Actual End Date  Frequency in Weeks*  1  Provider/Carer  De Lacy Gardens  Authorisation Date	
Dates Planned Start Date Planned Start Date 28/04/2023 Actual Start Date Commissioning Commissioning Purchasing Team Adults Connecting Care Team East Service Provided De Lacy Gardens' SDS - Managed Account \ Extra Care \\\ Spot Related Information Related Information Related Information		Planned End Date  Actual End Date  Frequency in Weeks*    Provider/Carer  De Lacy Gardens  Authorisation Date	
Dates   Planned Start Date   28/04/2023   Actual Start Date   Start Reason*   Change in type of care   Commissioning   Surchasing Team   Adults Connecting Care Team East   Service Provided   De Lacy Gardens \SDS - Managed Account \Extra Care \\\Spot   Rate Required*   Yes   No   Total Units:   0.0000     Authorisation Detail   withorised By		Planned End Date  Actual End Date  Actual End Date  Frequency in Weeks*  1  Provider/Carer  De Lacy Cardens  Authorisation Date  Related Assessment	

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2. Select Save when completed.

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← 🖬 📾	Service	Provision: New								?
<u>TEST,Tom (Id: 448365)</u>	Person Re	ecord		B	orn: 03/05/19	95 (27 Ye	ars) G	ender:	Male	NHS No: 🗸
Pronouns: Preferred Name:										$\langle \! \! \wedge \!\! \rangle$
Details										
General										- 1
Person*				Responsible Te	am*					
Tom Test			Q	CD V6 Tear	n					XQ
Id				Responsible Us	er*					
				Scott Simp	son					XQ
Status*										
Draft			Q							

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

Caredirector 🎧 Home 🗂 Workplace	e 🗸 🔞 Settings 🗸	🔍 🛃 🔨 讫 🌅 CD V6 Team
← : Service Provision: Tom Test	t \ De Lacy Gardens \ SDS - Managed Account \ Extra Ca	are \\\ Spot \ 229976 \ 28 Apr 2023
TEST,Tom (ld: 448365) Y Person Record		Born: 03/05/1995 (27 Years) Gender: Male NHS No: 🗡
Pronouns: Preferred Name:	1	I 😔 🛂 🧾
Menu V Timeline Details Ser	vice Deliveries Service Delivery Variations Costs Per	Week Finance Transactions
+ 💵 🎝 🗑 Service Delive	ries	
Related Records ~	Search for records	Q 2
Person Id Pla	anned Start Ti Units Total Units To	otal Visits Monday Tuesday W

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

ails eneral vice Provision * Tom Test \ De Lacy Gardens \ SDS - Managed Account \ Extra Care \\\ Sp Q nned Start Time* 09:00 al Visits* mber of Carers*	Responsible Team* CD V6 Team Rate Unit* Per 1 Hours (Whole) \ Hours (Part) Units* 1 Total Units*
aneral vice Provision* Tom Test \ De Lacy Gardens \ SDS - Managed Account \ Extra Care \\\ Sp Q  nned Start Time* 09:00 al Visits* mber of Carers*	Responsible Team* CD V6 Team XQ Rate Unit* Per 1 Hours (Whole) \ Hours (Part) Units* 1 Total Units*
eneral vice Provision* Tom Test \ De Lacy Gardens \ SDS - Managed Account \ Extra Care \\\ Sp Q  nned Start Time* 09:00 al Visits* mber of Carers*	Responsible Team* CD V6 Team XQ Rate Unit* Per 1 Hours (Whole) \ Hours (Part) Units* 1 Total Units*
vice Provision * Tom Test \ De Lacy Gardens \ SDS - Managed Account \ Extra Care \ \ \ Sp Q Inned Start Time * 09:00 al Visits *	Responsible Team*  CD V6 Team  Rate Unit.*  Per 1 Hours (Whole) \ Hours (Part) Units*  1 Total Units*
Tom Test \ De Lacy Gardens \ SDS - Managed Account \ Extra Care \\\ Sp Q nned Start Time* 09:00 al Visits* mber of Carers*	CD V6 Team         X         Q           Rate Unit*         Per1 Hours (Whole) \ Hours (Part)         Q           Units*         1         1           Total Units*         0         0
nned Start Time* 09:00	Rate Unit*           Per 1 Hours (Whole) \ Hours (Part)           Q           Units*           1           Total Units*
nned Start Time * 09:00	Per 1 Hours (Whole) \ Hours (Part)     Q       Units*     1       Total Units*     1
nned Start Time* 09:00	Units*
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esday*	Saturday*
Yes	Yes
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rdnesday*	Sunday*
Yes	Yes

5. Then select Save and Return to Previous Page.

 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 (<u>How to Authorise a Service Provision</u>) by your manager.



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TEST.Tom (Id: 448365) Y Person Record	Born: 03/05/1995 (27 Years) Gender: Male NHS No: 🗸
Pronouns: Preferred Name:	I 😔 🛂 🔊
Menu V Timeline Details Service Deliveries Service Deliver	y Variations Costs Per Week Finance Transactions
General	
Tom Test Q	CD V6 Team
Id	Responsible User*
Status*	
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7. Change **Status** to **Ready for Authorisation** using the **Lookup function** and select **Save**.

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TEST.Tom (Id. 2,5) V Person Record Born: 03/0	5/1995	(27 Yea	ars) G	ender: Male	NHS No:	$\sim$
Pronouns: Preferred Name:				۵ 🔇	2 🥵	
Menu V Timeline Details Service Deliveries Service Delivery Variations Costs Per Week Final	ance Tra	ansact	ions			
Ceneral Person* Responsible Team*						
Tom Test Q CD V6 Team					Q	
Id Responsible User*						
229976 Scott Simpson					XQ	
Status*						
Ready for Authorisation X Q						

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

working for you



## Changes to Extra Care Whinn Dale and Frickley Mews

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



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

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



I.Tom (Id: 448365)   Person Record nouns: ferred Name:			
nouns: ferred Name:		Born: 03/05/1995 (27 Years)	Gender: Male NHS No
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- ·			
General			
Person*		Responsible Team*	
Tom Test	Q	CD V6 Team	×
d		Responsible User*	
		Scott Simpson	×
Status*			
Draft	Q		
Service Request			
Service Element 1*		Service Element 2*	
SDS - WMDC Managed Account	XQ	Support & Enablement	×
Special Scheme		Finance Client Category	I
	Q		
GL Code		Rate Unit*	
2 2		Per 1 Hour \ Hours (Whole) \ Hours (Part)	×
Dates			
Planned Start Date	00	Planned End Date	
28/04/2023			E
Actual Start Date	00	Actual End Date	
			E
Start Reason*	X Q		E
Start Reason* New Placement	XQ		E
Start Reason* New Placement Commissioning	XQ		<u></u>
Start Reason* New Placement Commissioning Purchasing Team	XQ	Frequency in Weeks*	
Start Reason* New Placement Commissioning Purchasing Team CTLD East (Castleford)	× Q	Frequency in Weeks*	t
Start Reason* New Placement Commissioning Purchasing Team CTLD East (Castleford) Service Provided	× Q	Frequency in Weeks *	[
Start Reason* New Placement Commissioning Purchasing Team CTLD East (Castleford) Service Provided Co-ordination Team \ SDS - WMDC Managed Account \ Support	× Q	Frequency in Weeks *       1       Provider/Carer       Co-ordination Team	[
Start Reason* New Placement Commissioning Purchasing Team CTLD East (Castleford) Service Provided Co-ordination Team \SDS - WMDC Managed Account \Support	×     Q       ×     Q       ×     Q	Frequency in Weeks* 1 Provider/Carer Co-ordination Team	
Start Reason* New Placement Commissioning Purchasing Team CTLD East (Castleford) Service Provided Co-ordination Team \ SDS - WMDC Managed Account \ Support Rate Required* Yes	×     Q       ×     Q       ×     Q	Frequency in Weeks*          1         Provider/Carer         Co-ordination Team	
Start Reason* New Placement Commissioning Purchasing Team CTLD East (Castleford) Service Provided Co-ordination Team \SDS - WMDC Managed Account \ Support Rate Required* Yes No	× Q × Q	Frequency in Weeks*          1         Provider/Carer         Co-ordination Team	
Start Reason* New Placement Commissioning Purchasing Team CTLD East (Castleford) Service Provided Co-ordination Team \SDS - WMDC Managed Account \ Support Rate Required* Yes No Total Units	× Q × Q	Frequency in Weeks*          1         Provider/Carer         Co-ordination Team	



4. Select **Save** when completed.

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← 🖬 🖻	Service	Provision: New									?
TEST,Tom (Id: 448365)	Person Re	ecord			Born: 03/0	5/1995	(27 Yea	ars) G	ender:	Male I	NHS No: 🗸
Pronouns: Preferred Name:											$\langle \! \! A \rangle$
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General											- 1
Person*				Responsible	Team *						- 1
Tom Test			Q	CD V6 Te	am						XQ
Id				Responsible	User*						
				Scott Sin	npson						XQ
Status*											
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6. When saved, go back into details as it will default you to the **Timeline** tab and select **Booking Request** then **Save**.

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TEST,Tom (Id: 448365) Person Record	Born: 03/0!	5/1995 (27 Years) Gende	r: Male NHS No: ∨
Pronouns: Preferred Name:			$\langle \! \! \diamond \! \! \rangle$
Menu V Timeline Details S	ervice Deliveries Service Delivery Variations	Costs Per Week Fir	nance Transactions
Person*	Responsible Team *		
Tom Test	Q CD V6 Team		Q
Id	Responsible User*		
229967	Scott Simpson		XQ
Status*			
Booking Request	XQ		
	2		



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

人 Caredirector 🎧 Home 🗂 Workplace 🗸 🕸 Settings 🗸	/	€ ₹ \$	🕑 킻 CD V6 Team
← : Service Provision: Tom Test \ Co-ordination Team	n \ SDS - WMDC Managed Account \ Suppo	ort & Enablement \ \ \ S	pot\229977 🕐
TEST,Tom (ld: 448365) Y Person Record	Born:	03/05/1995 (27 Years) Geno	der: Male NHS No: ∨
Pronouns: Preferred Name:			🚸 👱 🔧 🙎
Menu V Timeline Details Service Deliveries Serv + 2 & Service Deliveries	rice Delivery Variations Costs Per Week	Finance Transactions	
Related Records V	Search for records		0 C
Person Id Planned Start Ti Units	Total Units Total Visits	Monday	Tuesday V

- 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.



Service Derivery. New			(
etails			
General			
iervice Provision*		Responsible Team *	
Tom Test \ Co-ordination Team \ SDS - WMDC Managed Account \ Suppo	Q	CD V6 Team	ХQ
I		Rate Unit*	
		Per 1 Hour \ Hours (Whole) \ Hours (Part)	Q
lanned Start Time *		Units*	
09:00	Θ	1	
otal Visits*		Total Units*	
umber of Carers*			
1			
chedule applies to days			
chedule applies to days		Thursday*	
chedule applies to days elect All* ⁹ Yes		Thursday* O Yes	
chedule applies to days Nect All* ' Yes No		Thursday* O Yes ® No	
chedule applies to days elect All* ) Yes No onday*		Thursday* Ves Priday* Ves	
chedule applies to days Nect All* No No Ves No		Thursday* O Yes ® No Friday* O Yes ® No	
chedule applies to days elect All* Ves No onday* Vos		Thursday* Ves Ro Priday* No Saturday*	
chedule applies to days Nect All* Ves No onday* Vos wesday*		Thursday* Ves No Saturday* Ves Ves	
chedule applies to days stect All* Ves No No uesday* No		Thursday* Ves No Saturday* Ves Ves No Saturday* No	
Schedule applies to days elect All* > Yes > No uesday* > Yes > No Yednesday*		Thursday* Ves No Saturday* Ves No Saturday*	



- 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 (<u>How to Authorise a Service</u> <u>Provision</u>) by Team Managers/ Support Services Co-ordinator.



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

- 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.
- 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).
- 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: <u>How to find Service Provisions and Create New</u>.

Information
SDS –WMDC Managed Account
Supported Living
Per 1 Hour \ Hours (Whole) \ Hours (Part)
Enter Today's Date
Leave blank
Leave blank
Leave blank (Can only be inputted on the day of the <b>Planned End Date</b> or after it).
Choose appropriate option, usually 'New Placement'.
Choose appropriate Team.
Search for Co-ordination Team.
Draft.
Auto populates to 'Not Applicable'
Auto populated with the user's default team.
Auto populated with the user's name Select relevant case



ST.Tom (Id: 448365)   Person Record		Born: 03/05/1995 (27 Years) Gende	er: Male NHS No:
phouns:			₼ • •
/ferred Name:			V 1 40
Details			
General			
Person*		Responsible Team*	
Tom Test	Q	CD V6 Team	× c
ld		Responsible User*	
		Scott Simpson	×C
Status*			
Draft	Q		
Service Request			
Service Element 1*	× o	Service Element 2*	~ ~
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	Q		C
GL Code		Rate Unit*	
		Per 1 Hour \ Hours (Whole) \ Hours (Part)	×C
Actual Start Date	<b>#</b>	Actual End Date	A
	Ê		Ê
Start Reason*			
New Placement	XQ		
Commissioning			
Commissioning Purchasing Team		Frequency in Weeks*	
Commissioning ^{Purchasing} Team CTLD East (Castleford)	XQ	Frequency in Weeks*	
Commissioning Purchasing Team CTLD East (Castleford) Service Provided	XQ	Frequency in Weeks* 1 Provider/Carer	
Commissioning Purchasing Team CTLD East (Castleford) Service Provided Co-ordination Team \ SDS - WMDC Managed Account \ Support	х Q х Q	Frequency in Weeks* 1 Provider/Carer Co-ordination Team	C
Commissioning Purchasing Team CTLD East (Castleford) Service Provided Co-ordination Team \ SDS - WMDC Managed Account \ Support Rate Required*	х Q Х Q	Frequency in Weeks* 1 Provider/Carer Co-ordination Team	с
Commissioning Purchasing Team CTLD East (Castleford) Service Provided Co-ordination Team \ SDS - WMDC Managed Account \ Support Rate Required* Yes	х Q х Q	Frequency in Weeks*          1         Provider/Carer         Co-ordination Team	C
Commissioning Purchasing Team CTLD East (Castleford) Service Provided Co-ordination Team \SDS - WMDC Managed Account \Support Rate Required* Yes No	× Q × Q	Frequency in Weeks*          1         Provider/Carer         Co-ordination Team	C
Commissioning Purchasing Team CTLD East (Castleford) Service Provided Co-ordination Team \ SDS - WMDC Managed Account \ Support Rate Required* Yes No Total Units	X Q X Q	Frequency in Weeks* 1 Provider/Carer Co-ordination Team	c
Commissioning Purchasing Team CTLD East (Castleford) Service Provided Co-ordination Team \ SDS - WMDC Managed Account \ Support Rate Required* Yes No Total Units 0.0000	× Q × Q	Frequency in Weeks* 1 Provider/Carer Co-ordination Team	C
Commissioning Purchasing Team CTLD East (Castleford) Service Provided Co-ordination Team \ SDS - WMDC Managed Account \ Support Rate Required* Yes No Total Units 0.0000	× Q × Q	Frequency in Weeks* 1 Provider/Carer Co-ordination Team	C
Commissioning Purchasing Team CTLD East (Castleford) Service Provided Co-ordination Team \ SDS - WMDC Managed Account \ Support Rate Required* Ves No Total Units 0.0000 Authorisation Detail	× Q × Q	Frequency in Weeks* 1 Provider/Carer Co-ordination Team	c
Commissioning Purchasing Team CTLD East (Castleford) Service Provided Cco-ordination Team \SDS - WMDC Managed Account \Support Rate Required* Yes No Total Units 0.00000 Authorisation Detail Authorised By	× Q × Q	Frequency in Weeks*  1  Provider/Carer  Co-ordination Team	c
Commissioning Purchasing Team CTLD East (Castleford) Service Provided Co-ordination Team \SDS - WMDC Managed Account \ Support Rate Required* Yes No Total Units 0.0000 Authorisation Detail Authorised By		Frequency in Weeks* 1 Provider/Carer Co-ordination Team Authorisation Date	C
Commissioning Purchasing Team CTLD East (Castleford) Service Provided Co-ordination Team \SDS - WMDC Managed Account \Support Rate Required* Yes No Total Units 0.0000 Authorisation Detail Authorised By	x Q x Q	Frequency in Weeks* 1 Provider/Carer Co-ordination Team Authorisation Date	C
Commissioning Purchasing Team CTLD East (Castleford) Service Provided Co-ordination Team \SDS - WMDC Managed Account \Support Rate Required* Ves No Total Units 0.0000 Authorisation Detail Authorised By		Frequency in Weeks*  1 Provider/Carer Co-ordination Team  Authorisation Date	
Commissioning Purchasing Team CTLD East (Castleford) Service Provided Co-ordination Team \SDS - WMDC Managed Account \Support Rate Required* Yes No Total Units 0.0000 Authorisation Detail Authorised By Related Information		Frequency in Weeks*  1  Provider/Carer  Co-ordination Team  Authorisation Date	C
Commissioning Purchasing Team CTLD East (Castleford) Service Provided Co-ordination Team \SDS - WMDC Managed Account \Support Rate Required* Ves No Total Units 0.0000 Authorisation Detail Authorised By Related Information Placement Room Type*		Frequency in Weeks*	
Commissioning Purchasing Team CTLD East (Castleford) Service Provided CCo-ordination Team \SDS - WMDC Managed Account \Support Rate Required* Ves No Total Units 0.0000 Authorisation Detail Authorised By Related Information Placement Room Type* Not Applicable		Frequency in Weeks*          1         Provider/Carer         Co-ordination Team	



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

Field<br/>TitleInformationTitleType of Support InformationResponsible Team<br/>TextCo-ordination Teame.g. Mon – Fri 21:00 to 23:00 – 1:1 hours = 10 hours<br/>Tues & Thurs 18:00 to 20:00 – Walking Nights = 20<br/>hours<br/>Fri 22:00 – 07:00 – Sleep In = 9 hours

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- D R Note: New						?
Details						
General Title*						
Type of Support Information						
Regarding *						
Tom Test \ Co-ordination Team \ SDS - WMDC Managed Account \ Supported Living \\\ Spot \ 229978 \ 28 Apr 2023						XQ
Responsible Team*						
Co-ordination Team						XQ
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**.

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Id Responsible User*	
229978 Scott Simpson	× Q
Status* Booking Request X Q 2	



- 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**.
- Service Provisions that are set to Ready for Authorisation will be picked up via an Advanced Search and Authorised (<u>How to Authorise a Service</u> <u>Provision</u>) 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.
- The fields below are available in the new Service Provision screen. Please locate the relevant person record > services > create new record then enter the information side into the according field.
   For more information follow: How to find Service Provisions and Create New.

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



			C
		Deres 07/05/0005 (05)/sees). Const	
1.1om (Id: 448365)  Person Record		Born: 03/09/1995 (27 Years) Gend	er: Male NHS No:
ferred Name:			(A) 2
etails			
General			
Person *		Responsible Team *	24.0
Iom lest	Q	CD V6 leam	XQ
4		Responsible User*	
		Scott Simpson	XQ
tatus*			
Draft	Q		
Service Request			
ervice Element 1*		Service Element 2*	~~~
SUS - Managed Account	XQ	Supported Living	XQ
pecial Scheme		Finance Client Category	1-1
	Q		Q
iL Code		Rate Unit*	
		Per 1 Hour \ Hours (Whole) \ Hours (Part)	XQ
ictual Start Date	<u>66</u>	Actual End Date	00
	雦		雦
start Reason*			
New Placement	XQ		
Commissioning			
Commissioning		Frequency in Weeks*	
Commissioning Purchasing Team CTLD East (Castleford)	XQ	Frequency in Weeks*	
Commissioning Purchasing Team CTLD East (Castleford) ervice Provided	XQ	Frequency in Weeks*	
Commissioning urchasing Team CTLD East (Castleford) ervice Provided	XQ	Frequency in Weeks* 1 Provider/Carer In House	
Commissioning Purchasing Team CTLD East (Castleford) ervice Provided In House \SDS - Managed Account \ Supported Living \ Spot	× Q × Q	Frequency in Weeks* 1 Provider/Carer In House	Q
Commissioning Purchasing Team CTLD East (Castleford) ervice Provided In House \SDS - Managed Account \ Supported Living \ Spot tate Required*	× Q × Q	Frequency in Weeks* 1 Provider/Carer In House	٩
Commissioning Purchasing Team CTLD East (Castleford) envice Provided In House \SDS - Managed Account \ Supported Living \ Spot tate Required* > Yes	× Q × Q	Frequency in Weeks* 1 Provider/Carer In House	 م
Commissioning Purchasing Team CTLD East (Castleford) envice Provided In House \SDS - Managed Account \ Supported Living \ Spot Nate Required* > Yes No	× Q × Q	Frequency in Weeks*  1  Provider/Carer In House	Q
Commissioning Purchasing Team CTLD East (Castleford) ervice Provided In House \ SDS - Managed Account \ Supported Living \ Spot tate Required* > Yes > No otal Units	× Q × Q	Frequency in Weeks* 1 Provider/Carer In House	Q
Commissioning Purchasing Team CTLD East (Castleford) Service Provided In House \SDS - Managed Account \ Supported Living \ Spot Rate Required* Yes No Total Units	× Q × Q	Frequency in Weeks* 1 Provider/Carer In House	Q
Commissioning Purchasing Team CTLD East (Castleford) iervice Provided In House \SDS - Managed Account \ Supported Living \ Spot Rate Required* Yes No total Units 0.0000	× Q × Q	Frequency in Weeks*  1  Provider/Carer In House	Q
Commissioning Purchasing Team CTLD East (Castleford) ervice Provided In House \SDS - Managed Account \ Supported Living \ Spot tate Required* Yes No tate Units 0.0000 Authorisation Detail	× Q × Q	Frequency in Weeks*  1  Provider/Carer In House	Q
Commissioning Purchasing Team CTLD East (Castleford) ervice Provided In House \SDS - Managed Account \ Supported Living \ Spot tate Required* > Yes No otal Units 0.0000 Authorisation Detail	× Q × Q	Frequency in Weeks*  1  Provider/Carer In House	α
Commissioning Purchasing Team CTLD East (Castleford) envice Provided In House \SDS - Managed Account \ Supported Living \ Spot tate Required* > Yes No ctal Units 0.0000 Authorisation Detail withorised By		Frequency in Weeks*  1  Provider/Carer In House Authorisation Date	α
Commissioning Purchasing Team  CTLD East (Castleford)  service Provided  In House \SDS - Managed Account \ Supported Living \ Spot Authorised Required*  Yes No Octal Units 0.0000  Authorisation Detail  suthorised By	× Q × Q	Frequency in Weeks*	Q
Commissioning Purchasing Team  CTLD East (Castleford)  service Provided  In House \SDS - Managed Account \ Supported Living \ Spot In House \SDS - Managed Account \ Supported Living \ Spot Atte Required*  Yes No No No Authorisation Detail Authorised By	× Q × Q	Frequency in Weeks*  1  Provider/Carer In House  Authorisation Date	Q.
Commissioning Purchasing Team  CTLD East (Castleford)  ervice Provided  In House \SDS - Managed Account \ Supported Living \ Spot  Authorised Required*  No  Authorisation Detail  wuthorised By  Related Information	× Q × Q	Prequency in Weeks*  1  Provider/Carer In House  Authorisation Date	Q
Commissioning Purchasing Team CTLD East (Castleford) in House \ SDS - Managed Account \ Supported Living \ Spot In House \ SDS - Managed Account \ Supported Living \ Spot No Teate Required* No	X Q	Frequency in Weeks*  1  Provider/Carer In House  Authorisation Date	
Commissioning Purchasing Team  CTLD East (Castleford)  crucce Provided  In House \SDS - Managed Account \Supported Living \Spot  Authorised SDS - Managed Account \Supported Living \Spot  ate Required*  Yes  No  cotal Units  0.0000  Authorisation Detail  Authorised By  Related Information  Placement Room Type*		Prequency in Weeks*	
Commissioning Purchasing Team CTLD East (Castleford) CTLD East (Castleford) In House \SDS - Managed Account \Supported Living \Spot In House \SDS - Managed Account \Supported Living \Spot Inter Required* Yes No Coal Units 0.0000 Castle Coal Coal Coal Coal Coal Coal Coal Coal	X Q X Q V Q	Prequency in Weeks*  1  Provider/Carer In House  Authorisation Date	



4. Select **Save** when completed.

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←	BR	Service	Provision: New												?
<u>TEST,T</u>	<u>om (Id: 448365)</u>	Person Re	ecord				Born:	03/05/1	995	(27 Yea	ars) G	ender:	Male	NHS No	: ~
Prono Prefer	uns: red Name:														$\langle \! \! \land \! \! \rangle$
Det	ails														
Ge	eneral														
Per	son*				Re	esponsible	e Team*								
	Tom Test			0	2	CD V6 T	eam							x Q	
Id					Re	esponsible	e User*								
						Scott Si	mpson							x Q	
Sta	tus*														
[	Draft			0	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**.

👗 Caredirector 🎧 Home 🗂 Workplace 🗸 🕸 Settings 🗸	€	Ę	$\Diamond$	۵ (	] CD V6	Team		
← : Service Provision: Tom Test \ In House \ SDS - Managed Account \ Supported Living \ Spot \ 229979 \ 28 Apr 2023								
TEST.Tom (ld: 448365)   Person Record Born	: 03/05/1995	27 Year	rs) Ge	nder: Ma	le NHS No:	$\sim$		
Pronouns: Preferred Name:				$\langle A \rangle$	9 🍤	2		
Menu       Timeline       Details       Service Deliveries       Service Delivery Variations       Costs Per Week       Finance Transactions         +       2       2       Service Deliveries       Service Deliveries       Service Delivery Variations       Costs Per Week       Finance Transactions								
Related Records V					Q	G		
Person Id Planned Start Ti Units Total Units Total Visit	s M	onday		Tue	sday	v		



- 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 =  $1 \text{ or } \frac{1}{2} \text{ hour} = 30$ . Please see annexed table of Rate Unit Amounts, below.

人 Caredirector 🔓 Home 📥 Workplace 🗸 🔞 Settings 🗸	🔍 🖳 🛠 🕑 🍔 CD V6 Team
← 🖬 🕅 Service Delivery: New	0
Details	
General	
Service Provision*	Responsible Team*
Tom Test \ In House \ SDS - Managed Account \ Supported Living \ Spot \ Q	CD V6 Team X Q
id	Rate Unit*
	Per 1 Hours (Whole) \ Hours (Part)
Planned Start Time*	Units*
10:00	2
Total Visits*	Total Units*
Number of Carers*	
1	
Schedule applies to days	
Select All*	Thursday*
Yes	Yes
O No	O No
Monday*	Friday*
Yes	Yes
O No	O No
Tuesday*	Saturday*
Yes	Yes
O No	○ No
Wednesday*	Sunday*
• Yes	Yes
O No	O No

e. Save and Return to Previous Page


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

Caredirector 🎧 Home 🗂 Worl	kplace 🗸 🛱 Settings 🗸		€ €	🖸 🧵 CD V6 Team
÷ 🖬 🗟 🎝 🗜 :	Service Provision: Tom Test \ In F	House \ SDS - Managed Accou	nt \ Supported Living	\Spot\229979 🧿
ST,Tom (ld: 55) V Person Record		Borr	n: 03/05/1995 (27 Years) (	Gender: Male NHS No: 🗸
onouns: eferred Name:				🚸 👱 🔧 🙎
Menu 🗸 Timeline Details	Service Deliveries Service Delivery	Variations Costs Per Week	Finance Transactions	
Person*		Responsible Team *		
Person*		Responsible Team*		
Tom Test	Q	CD V6 Team		Q
Id		Responsible User*		
229979		Scott Simpson		XQ
Status*				
Ready for Authorisation	X Q			
L				

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



## In House Supported Living – Waking Nights

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



Service Provision: New			
		Born: 07/06/006 (37 Vest	c) Conder Male NHE No.
prounts:		Born: 03/05/12/ Year:	s) Gender: Male NHS No:
iferred Name:			(4) 2 - O
Details			
General			
Person*		Responsible Team*	
Tom Test	Q	CD V6 Team	× C
Id		Responsible User*	
		Scott Simpson	×C
Status*			II
Draft	Q		
MM 82 MM ADD			
Service Request			
Service Element 1*		Service Element 2*	
SDS - Managed Account	XQ	Supported Living - Waking Nights	×C
Special Scheme		Finance Client Category	
	Q		c
GL Code		Rate Unit*	
		Per 1 Hour \ Hours (Whole) \ Hours (Part)	× c
28/04/2025 Actual Start Date		Actual End Date	
	<b>#</b>		Ê
Start Reason*			
New Placement	XQ		
New Placement	XQ		
New Placement	XQ		
New Placement Commissioning Purchasing Team	XQ	Frequency in Weeks*	
New Placement Commissioning Purchasing Team CTLD East (Castleford)	х Q Х Q	Frequency in Weeks*	
New Placement Commissioning Purchasing Team CTLD East (Castleford) Service Provided	х Q х Q	Frequency in Weeks*       1       Provider/Carer	
New Placement Commissioning Purchasing Team CTLD East (Castleford) Service Provided In House \SDS - Managed Account \ Supported Living - Waking	× Q × Q	Frequency in Weeks*       1       Provider/Carer       In House	C
New Placement Commissioning Purchasing Team CTLD East (Castleford) Service Provided In House \SDS - Managed Account \Supported Living - Waking	х Q х Q х Q	Frequency in Weeks*       1       Provider/Carer       In House	c
New Placement Commissioning Purchasing Team CTLD East (Castleford) Service Provided In House \SDS - Managed Account \Supported Living - Waking Rate Required* Yes	× Q × Q	Frequency in Weeks*          1         Provider/Carer         In House	c
New Placement Commissioning Purchasing Team CTLD East (Castleford) Service Provided In House \SDS - Managed Account \ Supported Living - Waking Rate Required* Yes No	× Q × Q	Frequency in Weeks*          1         Provider/Carer         In House	C
New Placement Commissioning Purchasing Team CTLD East (Castleford) Service Provided In House \SDS - Managed Account \ Supported Living - Waking Rate Required* Yes No Total Units	× Q × Q	Frequency in Weeks*          1         Provider/Carer         In House	c
New Placement Commissioning Purchasing Team CTLD East (Castleford) Service Provided In House \SDS - Managed Account \ Supported Living - Waking Rate Required* Yes No Total Units 0,0000	× Q × Q	Frequency in Weeks*          1         Provider/Carer         In House	C
New Placement Commissioning Purchasing Team CTLD East (Castleford) Service Provided In House \SDS - Managed Account \ Supported Living - Waking Rate Required* Ves No Total Units 0.0000	X Q X Q X Q	Frequency in Weeks*          1         Provider/Carer         In House	C
New Placement Commissioning Purchasing Team CTLD East (Castleford) Service Provided In House \SDS - Managed Account \Supported Living - Waking Rate Required* Yes No Total Units 0.0000	× Q × Q	Frequency in Weeks*          1         Provider/Carer         In House	C
New Placement Commissioning Purchasing Team CTLD East (Castleford) Service Provided In House \SDS - Managed Account \ Supported Living - Waking Rate Required* Yes No Total Units 0.0000 Authorisation Detail	× Q × Q	Frequency in Weeks*          1         Provider/Carer         In House	C
New Placement  Commissioning  Purchasing Team  CTLD East (Castleford)  Service Provided  In House \SDS - Managed Account \ Supported Living - Waking Rate Required*  Yes No Total Units 0.0000  Authorisation Detail  Authorised By		Frequency in Weeks*          1         Provider/Carer         In House	C
New Placement Commissioning Purchasing Team CTLD East (Castleford) Service Provided In House \SDS - Managed Account \ Supported Living - Waking Rate Required* Yes No Total Units 0.0000 Authorisation Detail Authorised By	× Q × Q	Frequency in Weeks*          1         Provider/Carer         In House	C
New Placement Commissioning Purchasing Team CTLD East (Castleford) Service Provided In House \SDS - Managed Account \Supported Living - Waking Rate Required* Yes No Total Units 0.0000 Authorisation Detail Authorised By	x Q x Q x Q	Frequency in Weeks*  1 Provider/Carer In House Authorisation Date	C
New Placement  Commissioning  Purchasing Team  CTLD East (Castleford)  Service Provided  In House \SDS - Managed Account \Supported Living - Waking  Rate Required*  Ves No Total Units  0.0000  Authorisation Detail  Authorised By  Related Information	× Q × Q	Frequency in Weeks*          1         Provider/Carer         In House	C
New Placement  Commissioning  Purchasing Team  CTLD East (Castleford)  Service Provided  In House \SDS - Managed Account \ Supported Living - Waking  Rate Required*  Yes No Total Units 0.0000  Authorisation Detail  Authorised By  Related Information  Piacement Room Type*	× Q × Q	Prequency in Weeks*  1 Provider/Carer In House Authorisation Date	C
New Placement  Commissioning  Purchasing Team  CTLD East (Castleford)  Service Provided  In House \SDS - Managed Account \ Supported Living - Waking  Rate Required*  Yes No Total Units  0.0000  Authorisation Detail  Authorised By  Related Information  Placement Room Type*  Not Applicable	× Q × Q	Frequency in Weeks*	



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←	8 🖻	Service	Provision: New									?
<u>TEST,T</u>	<u>om (Id: 448365)</u>	Person Re	ecord			Born:	03/05/199	5 <mark>(</mark> 27 Ye	ars) G	ender:	Male	NHS No: 🗸
Prono Prefer	uns: red Name:											$\langle \! \! A \rangle$
Det	ails											
-												
Ge	eneral											
Per	son*				Responsib	le Team*						
	Tom Test			Q	CD V6	Team						XQ
Id					Responsib	le User*					I	
					Scott S	impson						XQ
Sta	tus*			)								
[	Draft			Q								

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

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← : Service Provision: Tom Test \ In House \ S	DS - Managed Account \ Supporte	ed Living - Waking Nights \	\ Spot \ 229980	\28 Apr	?
TEST,Tom (ld: 448365) Y Person Record		Born: 03/05/1995 (2	27 Years) Gender	r: Male NHS No:	$\sim$
Pronouns: Preferred Name:	•			🚸 💁 🔧	
Menu V Timeline Details Service Deliveries	Service Delivery Variations Co	osts Per Week Finance Tr	ansactions		
+ 💷 🎣 🗑 Service Deliveries					
Ren. Records v	Search for rec	ords		Q	G
Person Id Planned Start Ti	Units Total Units	Total Visits Mo	nday	Tuesday	v



- 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 =  $1 \text{ or } \frac{1}{2} \text{ hour} = 30$ . Please see annexed table of Rate Unit Amounts, below.
  - I. Change the **Units.** (Duration of session e.g. 1 is an hour).

m. Save and Return to Previo	us Page	200
← ■ ■ Service Delivery: New		?
Details		
General		
Service Provision *	Responsible Team*	
Tom Test \ In House \ SDS - Managed Account \ Supported Living - Wakin Q	CD V6 Team X Q	
Id	Rate Unit*	
	Per 1 Hour \ Hours (Whole) \ Hours (Part) Q	
Planned Start Time*	Units*	
11:00 🛇	2	
Total Visits*	Total Units*	
Number of Carers*		
1		
Schedule applies to days		
Select All*	Thursday*	
<ul> <li>No</li> </ul>	<ul> <li>No</li> </ul>	
Monday*	Friday*	
O Yes	• Yes	
No	○ No	
Tuesday*	Saturday*	
○ Yes	O Yes	
No	No	
Wednesday*	Sunday*	
Yes	○ Yes	
⊖ No	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.

Caredirector 🎧 Home 🛱 W	vorkplace 🗸 🔞 Settings 🗸	⊕ <	ኢ 🖸 킻 CD V6 Team
- 🖬 🗟 🎝 🕹	Service Provision: Tom Test \ In House \ SD	9S - Managed Account \ Supported Living	g - Waking Night 🧿
ST,Tom (Id: 65) V Person Reco	ord	Born: 03/05/1995 (27 Years)	Gender: Male NHS No: 🗸
onouns: eferred Name:			🚸 👱 🔧 🙎
Menu 🗸 Timeline Details	Service Deliveries Service Delivery Variations	Costs Per Week Finance Transaction	IS
Person*	Responsible	Team*	
Person*	Responsible	Team*	
Tom Test	Q CD V6 Te	eam	Q
Id	Responsible	User*	
229980	Scott Sir	mpson	XQ
Status*			
Ready for Authorisation	× Q 2		

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



## In House Supported Living – Sleep-Ins

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



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- R Service Provision: New				
ST.Tom (Id: 448365)   Person Record			Born: 03/05/1995 (27 Years) Ger	nder: Male NHS No:
งกouns: ะferred Name:				\land 💁 🔧
Details				
General				
Person*			Responsible Team*	
Tom Test		Q	CD V6 Team	×C
ld			Responsible User*	
			Scott Simpson	×C
Status*				
Draft		Q		
L				
Service Request				
Service Liement I*	Y	0	Supported Living - Sleep Ins	× C
Saarial Schama	^	~	Einance Client Category	~ ~
special scheme		Q	Finance Client Category	c
Cl Code		~	Pate linit*	
			Par cloop in	× c
Actual Start Date			Actual End Date	
				Ê
Start Reason*	V	0		
New Placement	~	Q		
Commissioning				
Purchasing Team			Frequency in Weeks*	
CTLD East (Castleford)	×	Q	1	
Service Provided			Provider/Carer	
In House \ SDS - Managed Account \ Supported Living - Sleep I	×	Q	In House	C
Rate Required*				
Ves				
No				
Total Units				
0.0000				
Authorisation Detail				
Authorised By			Authorisation Date	
		Q		Û
Related Information				
Placement Room Type *			Related Assessment	
Not Applicable	×	Q		C
N	- 10 - 11 - 1			
Related Case				



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←	8 🖻	Service	Provision: New											?
TEST,T	<u>om (Id: 448365)</u>	Person Re	ecord				Born:	03/05/1	995	(27 Yea	ars) G	ender:	Male	NHS No: 🗸
Prono Prefer	uns: red Name:													$\langle \! \! A \! \! \rangle$
Det	ails													
Ge	eneral													
Per	son*				R	esponsible	e Team *							
	Tom Test			0	2	CD V6 T	ēam							XQ
Id					R	esponsible	e User*							
						Scott Si	mpson							XQ
Sta	tus*													
	Draft			0	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**.

🔥 Caredirector 🎧 Home 🗂 Workplace 🗸 🐯 Settings 🗸	ତ୍ୟ 🛃 🛠 🗓 🌅 CD V6 Team
← : Service Provision: Tom Test \ In House \ SDS - Ma	naged Account \ Supported Living - Sleep Ins \ Spot \ 229981 \ 28 Apr 2023
TEST.Tom (ld: 448365) Y Person Record	Born: 03/05/1995 (27 Years) Gender: Male NHS No: 🗸
Pronouns: Preferred Name:	I I I I I I I I I I I I I I I I I I I
Menu V Timeline Details Service Deliveries Serv	e Delivery Variations Costs Per Week Finance Transactions
+ 💷 🎣 🗑 Service Deliveries	
Reh. Records V	Search for records Q 3
Person Id Planned Start Ti Units	Total Units Total Visits Monday Tuesday W



- 6. Now input the number of sleep-ins:
  - a. Tick one day of the week.
  - 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).

Service Delivery: New			
Details			
General			
Service Provision*		Responsible Team*	
Test Newperson \ Test provider 2 \ SDS - Managed Account	Supported Living - Sleep Ins Q	CareDirector	ХQ
Id*		Rate Unit*	
		Per Sleep In \ Units (Part)	9
Disposed Start Time*			
00:00	0	1.75	
Total Visite*		2	
Number of Carers		1	
1 Schedule applies to days			
Select All*		Thursday*	
Yes		Yes	
O No		O No	
Monday*		Friday*	
Yes		Yes	
O No		O No	
Tuesday*		Saturday*	
Yes		Yes	
O No		O No	
Wednesday*		Sunday*	
Yes		Yes	

d. Click Save and Return to the Previous Page.



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

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Menu 🗸 Timeline Details	Service Deliveries Service Delivery Variations Co	osts Per Week Finance Transactions
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## 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
- 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.
- Service Provisions that are set to Ready for Authorisation will be picked up via an Advanced Search and Authorised (<u>How to Authorise a Service</u> <u>Provision</u>) 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.
- 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: <u>How to find Service Provisions and Create New</u>.

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



		٩	Born: 03/05/1995 (27 Years) Responsible Team* CD V6 Team Responsible User* Scott Simpson	Gender: Male NHS No:
T.Tom (Id: 448355) <ul> <li>Person Record</li> <li>nouns:</li> <li>Ferred Name:</li> <li>retails</li> <li>Ceneral</li> <li>Person*</li> <li>Tom Test</li> <li>d</li> <li>itatus*</li> <li>Draft</li> <li>Service Request</li> <li>iervice Element 1*</li> <li>SDS- Managed Account</li> <li>tended Accoun</li></ul>		٩	Born: 03/05/1995 (27 Years) Responsible Team* CD V6 Team Responsible User* Scott Simpson	Cender: Male NHS No:
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6. You will now need to record **Service Deliveries**. Select **Service Deliveries** from the tabs and select **Create New Record** from the toolbar.

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Related Records 🗸		Search for records				Q	S
Person Id Planned Start Ti	Units	Total Units Tot	al Visits N	londay	Tues	day	v



- 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

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iervice Provision*	Responsible Team*	
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- 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.

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



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

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



	B R Service Provision: New			
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Provider/Carer   Reablement Team \Re-ablement \Frickley Mews - Outreach \S   Xate Required*   Yes   No   Authorisation Detail   Authorisation Detail   Authorisation Detail     Related Information   Provider/Carer   Provider/Carer     Related Information     Pacement Room Type*   Not Applicable   Xot Applicable     Xot Applicable     Xot Applicable     Xot Applicable     Xot Applicable     Xot Applicable     Xot Applicable     Xot Applicable     Xot Applicable     Xot Applicable     Xot Applicable     Xot Applicable     Xot Applicable     Xot Applicable     Xot Applicable     Xot Applicable     Xot Applicable     Xot Applicable     Xot Applicable     Xot Applicable     Xot Applicable     Xot Applicable     Xot Applicable     Yot Applicable     Yo		~ ~		
Reablement Team \ Re-ablement \ Frickley Mews - Outreach \ S X Q     State Required *     Yes     No     Authorisation Detail     Authorisation Detail     Authorisation Date     Q     Related Information     Placement Room Type *     Related Assessment     Not Applicable     X     Q     Service Package	service Provided		Provider/Carer	
No Authorisation Detail Authorisation Detail Authorisation Detail Authorisation Date	Reablement Team \ Re-ablement \ Frickley Mews - Outreach \ S	×q	Readement ream	
Yes   No     Authorisation Detail     Authorisation Date     Authorisation Date     Q     Related Information     Placement Room Type*     Related Assessment     Not Applicable     Not Applicable     Q     Service Package	Rate Required*			
■ No Authorisation Detail Authorisation Data Authorisation Date  Authorisation Date  Related Information Placement Room Type* Related Assessment	Yes			
Authorisation Detail       Authorisation Detail     Authorisation Date       Image: Constraint on Detail     Image: Constraint on Date       Palacement Room Type*     Related Assessment       Not Applicable     X       Related Case     Image: Constraint on Date       Stervice Package     Image: Constraint on Date	No.			
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Authorised By Authorisation Date  Related Information  Placement Room Type* Related Assessment  Not Applicable  Related Case  G Service Package	Authorisation Detail			
Related Information     Placement Room Type*   Related Assessment     Not Applicable   X   Q     Related Case     Q     Service Package	Authorised By		Authorisation Date	
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Placement Room Type*     Related Assessment       Not Applicable     X     Q       Related Case     Q       Service Package     Q	Related Information			
Not Applicable X Q Related Case Q Service Package	Placement Room Type*		Related Assessment	
Related Case Q Service Package	Not Applicable	XQ		
Q.	Related Case			
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←	8 🖻	Service	Provision: New												?
<u>TEST,T</u>	<u>om (Id: 448365)</u>	Person Re	ecord				Born:	03/05/	1995	(27 Yea	ars) G	ender:	Male	NHS No	D: \
Prono Prefer	ouns: rred Name:														$\langle \! \! A \! \! \rangle$
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Id					R	esponsibl	e User*								
						Scott Si	mpson							×Q	
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	Draft			(	2										

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

ent \ Frickley Mews - Outreach \ Spot \ 2 orn: 03/05/1995 (27 Years) Gender: Male NF Finance Transactions	2 HS No:
orn: 03/05/1995 (27 Years) Gender: Male NF	HS No:
Finance Transactions	
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5. You will now need to record **Service Deliveries**. Select **Save** from the toolbar. Then select the **Service Deliveries** tab. Then **Create New Record**.

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← : Service Provision: Tom Test∖Reableme	nt Team \ Re-ab	lement \ Frickley Me	ews - Outreach	\Spot\229	9983 \	28 Ap	or 2023		?
TEST.Tom (ld: 448365) Y Person Record			Born:	03/05/1995 (	27 Yea	rs) Ge	nder: N	1ale NHS	S No: 🗸
Pronouns: Preferred Name:	1						A	> 🔮 🖣	8
Menu V Timeline Details Service Deliveries	Service Deliv	very Variations Co	osts Per Week	Finance T	ransact	tions			
+ 💷 🎣 🗑 Service Deliveries									
Related Records		Search for reco	ords						Q 3
Person Id Planned Start Ti.	Units	Total Units	Total Visits	Мс	onday		т	Jesday	١

- 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.



Service Delivery: New		(	
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General			
ervice Provision*		Responsible Team *	
Tom Test \ Reablement Team \ Re-ablement \ Frickley Mews - Outreach \ Q		CD V6 Team	ХQ
d		Rate Unit*	
		Per 1 Hour \ Hours (Whole) \ Hours (Part)	Q
Planned Start Time*		Units*	
10:00	0	Ĩ	
Transl Minister #	-	7-14-11-14-1	
otal visita -		iotal ones	
Number of Carers*			
1			
Schedule applies to days			
Select All*		Thursday*	
) Yes		○ Yes	
No No		No	
Nonday*		Friday*	
) Yes		O Yes	
No No		No	
Fuesday*		Saturday*	
⊃ Yes		Yes	
No		O No	
Wednesday*		Sunday*	
⊖ Yes		⊖ Yes	

- 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 (<u>How to Authorise a Service</u> <u>Provision</u>) 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)

- 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: <u>How to find Service Provisions and Create New</u>.
- 2. The Practitioner must have already completed the **Interim Support Plan** on **CareDirector** and left as **In Progess** not set to **Complete**. Complete the following information:

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



Service Provision: New		
		Rem: 03/05/1995 (27 Vear) Conder: Male NHS N
nouns:		Born: 03/03/1595 (27 rears) Gender: Male NHS N
ferred Name:		<a> 💁 👻 🔫</a>
vetails		
General		
Person *		Responsible Team*
Tom Test	Q	CD V6 Team X
d		Responsible User*
		Scott Simpson X
Status*		
Draft	Q	]
Service Request		
Service Element 1*		Service Element 2*
Re-ablement	XQ	Discharge Support (Hospital)
ipecial Scheme		Finance Client Category
	Q	
SL Code		Rate Unit*
		Per 1 Hour \ Hours (Whole) \ Hours (Part) X
Actual Start Date		Actual End Date
		]
Admitted from Community	XQ	]
Commissioning		
Purchasing Team	~ 0	Frequency in Weeks*
Hospital leam Wakefield (Pinderfields)	XQ	
Service Provided		Provider/Carer
Discharge Support (Hospital) Team \ Re-ablement \ Discharge S	XQ	Discharge Support (Hospital) realth
Rate Required*		
Yes		
No		
Authorisation Detail		
Authorised By		Authorisation Date
	Q	
Related Information		
Related Information		Related Assessment
Related Information Placement Room Type* Not Applicable	XQ	Related Assessment
Related Information Placement Room Type* Not Applicable Related Case	XQ	Related Assessment
Related Information Placement Room Type * Not Applicable Related Case	x Q	Related Assessment



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<u>TEST,T</u>	<u>om (Id: 448365)</u>	Person Re	ecord				Born:	03/05/	1995	(27 Yea	ars) G	ender:	Male	NHS No: 🗸	
Prono Prefer	uns: red Name:													À	•
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Per	son*				R	esponsibl	e Team *								
	Tom Test			0	2	CD V6 1	Team							XQ	
Id					R	esponsibl	e User*								
						Scott Si	impson							XQ	
Sta	tus*														
[	Draft			(	2										

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

		(1983) N	J					
TTom (Ic. 365) Y Person Record				Bor	n: 03/05/1995 (27	Years) Ge	ender: Ma	le NHS No:
ferred Name:							$\langle A \rangle$	2
lenu 🗸 Timeline Details	service Deliveries	Service Delivery	Variations	Costs Per Week	Finance Trans	actions		
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terson*			Responsible	Team *				0
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erson* Tom Test		Q	Responsible CD V6 Te Responsible	Team* am User*				Q
Tom Test d 229984		Q	Responsible CD V6 Te Responsible Scott Sim	Team * am User *				् × Q
Person* Tom Test d 229984 itatus*		Q	Responsible CD V6 Te Responsible Scott Sim	Team * am User *				् × <b>२</b>



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

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TEST,Tom (ld: 448365) 👻 Person Record				Born:	03/05/1995	(27 Year	s) Geno	der: Male	NHS No:	$\sim$
Pronouns: Preferred Name:		•						<u>م</u>		
Menu 🗸 Timeline Details	Service Deliveries	Service De	elivery Variations	Costs Per Week	Finance T	ransact	ions			
🕇 💵 🎝 🗑 Service D	eliveries									
Relativecords ~			Search for re	ecords					Q	S
Person Id	Planned Start Ti	Units	Total Units	Total Visits	M	onday		Tuesd	ay	Ņ

- 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.



Service Delivery. New		(
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	Per 1 Hour \ Hours (Whole) \ Hours (Part)	Q
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otal Visits*	Total Units*	
umber of Carers*		
1		
ichedule applies to days		
elect All*	Thursday*	
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elect All* ) Yes ) No	Thursday* O Yes ® No	
elect All* ) Yes ) No onday*	Thursday* Ves No Friday*	
elect All* ) Yes (No tonday* ) Yes	Thursday* <ul> <li>Yes</li> <li>No</li> </ul> Friday* <ul> <li>Yes</li> </ul>	
elect All* ) Yes 0 No tonday* 0 No	Thursday* <ul> <li>Yes</li> <li>No</li> </ul> Friday* <ul> <li>Yes</li> <li>No</li> </ul>	
elect All* ) Ves 0 No tonday* ) Yes 0 No uesday*	Thursday* <ul> <li>Yes</li> <li>No</li> </ul> Friday* <ul> <li>Yes</li> <li>No</li> </ul> Saturday*	
elect All* ) Ves 0 No tonday* ) Ves 0 No uesday* ) Yes	Thursday* O Yes O No Friday* Yes No Saturday* O Yes	
elect All* ) Yes ) No ) No uesday* ) Yes	Thursday* O Yes @ No Friday* @ Yes O No Saturday* O Yes @ No	
elect All* ) Yes ) No No uesday* ) Yes ) No	Thursday* <ul> <li>Yes</li> <li>No</li> </ul> Friday* <ul> <li>Yes</li> <li>No</li> </ul> Saturday* <ul> <li>Yes</li> <li>No</li> </ul> Saturday*	
Select All*  Yes No No No Tuesday* Yes No No No Nednesday* Yes Yes	Thursday*  Yes No Friday* Yes No Saturday* Yes No Saturday* Yes No Sunday* Yes	

- 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 (<u>How to Authorise a Service</u> <u>Provision</u>) 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**

 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: <u>How to find Service Provisions and Create New</u>.

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



Service Provision: New			
TTom (Id: 448365)		Born: 03/05/1995 (27 Years)	Gender: Male NHS No:
nouns:			A 💽 🖳
ferred Name:			
vetails			
General			
Person *		Responsible Team *	
Tom Test	Q	CD V6 Team	×
ld		Responsible User*	
		Scott Simpson	×
Status*			
Draft	Q		
Convice Derwest			
Service Request			
Service Element 1*		Service Element 2*	
Re-ablement - Chargeable	XQ	Discharge Support (Hospital)	X
Special Scheme		Finance Client Category	
	Q		C
GL Code		Rate Unit*	
		Per 1 Hour \ Hours (Whole) \ Hours (Part)	× C
Actual Start Date	m	Actual End Date	19
			10
			E
Start Reason*			E
Start Reason* Change in type of care	XQ		E
start Reason* Change in type of care	XQ		H
Start Reason* Change in type of care Commissioning	XQ		E E
Start Reason* Change in type of care Commissioning Purchasing Team	XQ	Frequency in Weeks*	E
Start Reason* Change in type of care Commissioning Purchasing Team Adults Connecting Care Team East	× Q × Q	Frequency in Weeks*	u 
Start Reason* Change in type of care Commissioning Purchasing Team Adults Connecting Care Team East Service Provided	х Q х Q	Frequency in Weeks*	E
Start Reason* Change in type of care Commissioning Purchasing Team Adults Connecting Care Team East Service Provided Discharge Support (Hospital) Team \ Re-ablement - Chargeable	х Q х Q	Frequency in Weeks*          1         Provider/Carer         Discharge Support (Hospital) Team	u
Start Reason* Change in type of care Commissioning Purchasing Team Adults Connecting Care Team East Service Provided Discharge Support (Hospital) Team \ Re-ablement - Chargeable	× Q × Q	Frequency in Weeks*          1         Provider/Carer         Discharge Support (Hospital) Team	
Start Reason* Change in type of care Commissioning Purchasing Team Adults Connecting Care Team East Service Provided Discharge Support (Hospital) Team \ Re-ablement - Chargeable Rate Required*	× Q × Q	Frequency in Weeks* 1 Provider/Carer Discharge Support (Hospital) Team	
Start Reason* Change in type of care Commissioning Purchasing Team Adults Connecting Care Team East Service Provided Discharge Support (Hospital) Team \ Re-ablement - Chargeable Rate Required* Yes	X Q   X Q   X Q	Frequency in Weeks*           1           Provider/Carer           Discharge Support (Hospital) Team	
Start Reason* Change in type of care Commissioning Purchasing Team Adults Connecting Care Team East Service Provided Discharge Support (Hospital) Team \ Re-ablement - Chargeable Rate Required* Yes No	x Q x Q	Frequency in Weeks*          1         Provider/Carer         Discharge Support (Hospital) Team	
Start Reason* Change in type of care Commissioning Purchasing Team Adults Connecting Care Team East Service Provided Discharge Support (Hospital) Team \ Re-ablement - Chargeable Rate Required* Yes No	× Q × Q	Frequency in Weeks*          1         Provider/Carer         Discharge Support (Hospital) Team	
Start Reason* Change in type of care Commissioning Purchasing Team Adults Connecting Care Team East Service Provided Discharge Support (Hospital) Team \ Re-ablement - Chargeable Rate Required* Yes No Authorisation Detail	× Q × Q	Frequency in Weeks*          1         Provider/Carer         Discharge Support (Hospital) Team	
Start Reason* Change in type of care Commissioning Purchasing Team Adults Connecting Care Team East Service Provided Discharge Support (Hospital) Team \ Re-ablement - Chargeable Rate Required* Yes No Authorisation Detail Authorisat By	× Q × Q	Frequency in Weeks*          1         Provider/Carer         Discharge Support (Hospital) Team	
Start Reason* Change in type of care Commissioning Purchasing Team Adults Connecting Care Team East Service Provided Discharge Support (Hospital) Team \ Re-ablement - Chargeable Rate Required* Yes No Authorisation Detail Authorisat By		Frequency in Weeks*          1         Provider/Carer         Discharge Support (Hospital) Team	
Start Reason* Change in type of care Commissioning Purchasing Team Adults Connecting Care Team East Service Provided Discharge Support (Hospital) Team \ Re-ablement - Chargeable Rate Required* Yes No Authorisation Detail Authorised By	х Q х Q х Q	Frequency in Weeks*          1         Provider/Carer         Discharge Support (Hospital) Team         Authorisation Date	
Start Reason* Change in type of care Commissioning Purchasing Team Adults Connecting Care Team East Service Provided Discharge Support (Hospital) Team \ Re-ablement - Chargeable Rate Required* Yes No Authorisation Detail Authorised By Delated Information	x Q x Q x Q	Frequency in Weeks*          1         Provider/Carer         Discharge Support (Hospital) Team         Authorisation Date	
Start Reason* Change in type of care Commissioning Purchasing Team Adults Connecting Care Team East Service Provided Discharge Support (Hospital) Team \ Re-ablement - Chargeable Rate Required* Yes No Authorisation Detail Authorised By Related Information		Frequency in Weeks*          1         Provider/Carer         Discharge Support (Hospital) Team         Authorisation Date	
Start Reason* Change in type of care Commissioning Purchasing Team Adults Connecting Care Team East Service Provided Discharge Support (Hospital) Team \ Re-ablement - Chargeable Rate Required* Yes No Authorisation Detail Authorised By Related Information Placement Room Type*		Frequency in Weeks*          1         Provider/Carer         Discharge Support (Hospital) Team         Authorisation Date         Related Assessment	
Start Reason* Change in type of care Commissioning Purchasing Team Adults Connecting Care Team East Service Provided Discharge Support (Hospital) Team \ Re-ablement - Chargeable Rate Required* Yes No Authorisation Detail Authorised By Related Information Placement Room Type* Not Applicable		Frequency in Weeks*          1         Provider/Carer         Discharge Support (Hospital) Team         Authorisation Date         Related Assessment	
Start Reason* Change in type of care Commissioning Purchasing Team Adults Connecting Care Team East Service Provided Discharge Support (Hospital) Team \ Re-ablement - Chargeable Rate Required* Yes No Authorisation Detail Authorised By Related Information Placement Room Type* Not Applicable Related Case		Frequency in Weeks*          1         Provider/Carer         Discharge Support (Hospital) Team         Authorisation Date         Related Assessment	
Start Reason* Change in type of care Commissioning Purchasing Team Adults Connecting Care Team East Service Provided Discharge Support (Hospital) Team \ Re-ablement - Chargeable Rate Required* Yes No Authorisation Detail Authorisation Detail Authorised By Related Information Placement Room Type* Not Applicable Related Case		Frequency in Weeks*          1         Provider/Carer         Discharge Support (Hospital) Team         Authorisation Date         Related Assessment	



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TEST,T	<u>om (Id: 448365)</u>	Person Re	ecord			Born:	03/05/19	95 (27 Y	ears) G	ender:	Male	NHS No: 🗸
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Det	ails											
Ge	eneral											
Per	rson*				Responsib	le Team*						
1	Tom Test			Q	CD V6	Team						XQ
Id					Responsib	le User*						
					Scott S	impson						XQ
Sta	tus*										I	
	Draft			Q								

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.

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← : Service Provision: Tom Test \ Discharge St	upport (Hospital) Team \ Re-ableme	ent - Chargeable \ Discha	rge Suppor	t (Hospital)	\ ⑦
TEST,Tom (ld: 448365) Y Person Record		Born: 03/05/1995 (2	7 Years) Ger	nder: Male N	IHS No: 🗸
Pronouns: Preferred Name:	1			<u>ې</u>	
Mg     Timeline     Details     Service Deliveries       +     II     II     Service Deliveries	Service Delivery Variations Cos	ts Per Week Finance Tra	ansactions		
Related Records V	Search for record	ds			Q 3
Person Id Planned Start Ti	Units Total Units	Total Visits Mo	nday	Tuesday	y v



- 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.

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Tom Test \ Discharge Support (Hospital) Team \ Re-ablement - Chargeabl	CD V6 Team XQ
ld	Rate Unit*
	Per 1 Hour \ Hours (Whole) \ Hours (Part)
Planned Start Time*	Units*
10:00	
Total Visits*	Total Units*
Number of Carers*	
1	
Schedule applies to days	
Select All*	Thursday*
○ Yes	⊖ Yes
No	No
Monday*	Friday*
O Yes	Yes
No	O No
Tuesday*	Saturday*
Yes	O Yes
O No	No
Wednesday*	Sunday*
○ Yes	○ Yes
No	No

d. Save and Return to Previous Page.



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

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Pronouns: Preferred Name:				$\langle A \rangle$	9 🔧 🙎
Menu 🗸 Timeline Details Serv	vice Deliveries Service Delivery Variations Costs Per Week	Finance Tra	nsactions		
General					
Person*	Responsible Team*				
Tom Test	Q CD V6 Team				Q
Id	Responsible User •				
229985	Scott Simpson				XQ
Status*					
Ready for Authorisation	× < 1				

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



## **Re-ablement – Chargeable Bridging Service (Booking Request)**

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



T.Tom (Id: 448365) V Person Record		Born: 03/05/1995 (27 Yea	rs) Gender: Male NHS N
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Service Provided  Reablement Team \Re-ablement - Chargeable \ Bridging Servi  Rate Required*  Yes No  Authorisation Detail Authorised By  Related Information	<b>X Q</b>	Reablement Team Authorisation Date	
Service Provided  Reablement Team \ Re-ablement - Chargeable \ Bridging Servi  Rate Required*  Yes No  Authorisation Detail  Authorised By  Related Information  Placement Room Type*	Q	Reablement Team         Authorisation Date         Related Assessment	
Service Provided Reablement Team \Re-ablement - Chargeable \ Bridging Servi Rate Required* Yes No Authorisation Detail Authorised By Related Information Placement Room Type* Not Applicable	X     Q       X     Q	Reablement Team         Authorisation Date         Related Assessment	
Service Provided  Reablement Team \Re-ablement - Chargeable \ Bridging Servi  Rate Required*  Yes No  Authorisation Detail  Authorisation Detail  Related Information  Placement Room Type*  Not Applicable Related Case		Reablement Team         Authorisation Date         Related Assessment	
Service Provided  Reablement Team \Re-ablement - Chargeable \ Bridging Servi  Rate Required*  Yes No  Authorisation Detail  Authorised By  Related Information  Placement Room Type*  Not Applicable  Related Case	X     Q       Q     X       X     Q	Reablement Team         Authorisation Date         Related Assessment	



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←	8 🖻	Service	Provision: New												?
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4. When saved, go back into details as it will default you to the **Timeline** tab and select **Booking Request** then **Save**.

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🖬 🗟 🕹 🎜 🗄	Service Provision: Tom Test	\ Reablement Tea	m \ Re-ablement	- Chargeabl	e \ Bridgii	ng Service	\\\
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d Status*	Q	Responsible Team CD V6 Team Responsible Use Scott Simps	m* n or*				Q X Q



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



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


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Schedule applies to days Select All* ) Yes No Aonday* ) Yes No Vednesday* ) Yes No Vednesday* ) Yes	Thursday*  Ves  Ves No Saturday* Ves No Saturday* Ves No Sunday* Ves

- 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 (<u>How to Authorise a Service</u> <u>Provision</u>) by Team Managers/ Support Services Co-ordinator.
- 9. Add a **Note** (<u>How to add a Note</u>) 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.
- 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>	Information
Service Element 1:	SDS – Managed Account
Service Element 2:	Telecare Monitoring Service
Rate Unit:	Per Week Pro Rata
Planned Start Date:	Leave blank
Actual Start Date:	Enter date of installation of Telecare
Planned End Date:	Leave blank
Actual End Date:	Leave blank (Can only be input on the day of the
	Planned End Date or after it)
Start Reason:	New Placement.
Purchasing Team:	Choose appropriate Team.
Service Provided:	Choose Telecare
Status:	Draft.
Placement Room Type:	Auto populates to 'Not Applicable'
Responsible Team:	Auto populated with the user's default team.
Responsible User:	Auto populated with the user's name
Related Case:	Select relevant case



Service Provision: New			
Tam ((d: 448365)  Person Record		Born: 03/05/1995 (27 Years)	Gender: Male NHS No:
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Service Request			
ervice Element 1*		Service Element 2*	
SDS - Managed Account	XQ	Telecare Monitoring Service	×C
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itart Reason*			
New Placement	xq		
Commissioning			
Purchasing Team		Frequency in Weeks*	
Adults Connecting Care Team West	XQ	1	
ervice Provided		Provider/Carer	
Telecare \ SDS - Managed Account \ Telecare Monitoring Servic	хQ	Telecare	C
ate Required *			
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uthorised By		Authorisation Date	
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← 🖬 🖻	Service	Provision: New								?
TEST,Tom (Id: 448365)	Person Re	ecord		Bori	n: 03/05/1995	(27 Ye	ars) G	ender:	Male I	NHS No: 🗸
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				Scott Simpso	n					XQ
Status*										
Draft			Q							

 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 (<u>How to Authorise a Service Provision</u>) by your manager.





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

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TEST.Tom (Id: 41-0-565) Y Person Record Born:	03/05/1995	(27 Ye	ars) G	ender: Mal	e NHS No:	$\sim$
Pronouns: Preferred Name:				$\langle A \rangle$	• 🔧	
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General						4
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Tom Test Q CD V6 Team					Q	
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229987 Scott Simpson					XQ	
Status*						
Ready for Authorisation XQ						

 Service Provisions that are set to Ready for Authorisation will be found via an Advanced Find and Authorised (<u>How to Authorise a Service Provision</u>) 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**.
- 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: <u>How to find Service Provisions and Create New</u>.

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



Service Provision: New			
Trom (Id: 448365) Y Person Record		Born: 03/05/1995 (27 Y	ears) Gender: Male NHS N
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General			
Person*		Responsible Team *	
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ervice Element 1*		Service Element 2*	i
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New Placement	ΧQ		
Commissioning			
Purchasing Team		Frequency in Weeks*	
Adults Connecting Care Team West	XQ	1	
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Telecare \ SDS - Managed Account \ Telecare Rapid Response S	×Q	Telecare	
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 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 (<u>How to Authorise a Service Provision</u>) by your manager.





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

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Pronouns: Preferred Name:	I 😔 🛂 🥵 🖉
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 Service Provisions that are set to Ready for Authorisation will be found via an Advanced Find and Authorised (<u>How to Authorise a Service Provision</u>) by a Team Manager/ Support Services Co-Ordinator.



# **Recording Advocacy**

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



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Status*										
Draft			Q							

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 (<u>How to Authorise a Service Provision</u>) by your manager.

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← : Service Provision: Tom Test \ Advocacy \ Advocacy \ Advocacy \ \ Spot \ 229989 \ 28 Apr 2023						?
TEST.Tom (ld: 448365) Y Person Record Born: 03/0	5/1995 (	27 Yea	rs) Ge	nder: I	Male NHS	5 No: 🗸
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Menu V Timeline Details Costs Per Week Finance Transactions						
Filter By APR 2023					Today a	at 17:28



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

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🔶 🖪 💀 🎝 🎝 Service Provision: Tom Test \ Ac	vocacy\Advocacy\Advocacy\\\Spot\229989\28 Apr 2023
TESTIom (c 2 5) V Person Record	Born: 03/05/1995 (27 Years) Gender: Male NHS No: 💛
Pronouns: Preferred Name:	I I I I I I I I I I I I I I I I I I I
Menu V Timeline Details Costs Per Week Finance Transaction	ons
Ceneral Person* Tom Test	Responsible Team* CD V6 Team Q
ld 229989	Responsible User*
Status* Ready for Authorisation	

- Service Provisions that are set to Ready for Authorisation will be found via an Advanced Find and Authorised (<u>How to Authorise a Service Provision</u>) by a Team Manager/ Support Services Co-Ordinator.
- In addition to recording the Service Provision Information add a Note (See <u>How to add a Note</u>) 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: <u>How to find Service Provisions and Create New</u>.

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

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

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



## **Orientation and Mobility – Visual Impairment Rehabilitation**

- 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.
- 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: <u>How to find Service Provisions and Create New</u>.

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



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

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229994 Scott Simpson					×	Q
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- In addition to recording the Service Provision Information add a Note (<u>How</u> 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).
- Service Provisions that are set to Ready for Authorisation will be found via an Advanced Find and Authorised (<u>How to Authorise a Service Provision</u>) 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**.
- 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>
Service Element 1:	Equipment
Service Element 2:	Occupational Therapy
Rate Unit:	Per Session
Planned Start Date:	Leave blank
Actual Start Date:	The date of service starting.
Planned End Date:	Leave blank
Actual End Date:	Leave blank (Can only be input on the day of the Planned End Date or after it).
Start Reason:	Choose New Placement.
Purchasing Team:	Community Occupational Therapy
Service Provided:	Choose Own Local Authority.
Status:	Draft.
Placement Room Type:	Auto populates to 'Not Applicable'
Responsible Team:	Auto populated with the user's default team.
Responsible User:	Auto populated with the user's name
Related Case:	Select relevant case



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- 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**.

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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**.

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

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229995	Scott Simpson					XQ
Status*						
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8. Service Provisions that are set to **Ready for Authorisation** will be found via an **Advanced Find** and **Authorised** (<u>How to Authorise a Service Provision</u>) 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 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 (E	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	Home Care	short bursts of domiciliary care (i.e. 30 mins for washing and dressing)				
commissioned by the Co-	Home Care Travel Time					
ordination Team). These are internal booking requests	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 Res	dential 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	Extra Care (Meridian & Creative	e Support)			
Practitioner commissions direct with the provider):	Day Centres (including In-House Day Opportunities, Transport and Meals)				
Re-ablement - Outreach		Short-term home care up to a maximum of 21 days			
Re-ablement – Discharge Support Hospital		Short-term home care up to a maximum of 10 days or as a			
		bridging service until other permanent care can be sourced following hospital stay			



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



# **Version Control**

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



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



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



Placement Room Type: Auto populates to '	Not
Applicable'	
Responsible User: Auto populated with the	user's
name.	
Addition of Related Case: Select relevant c	ase and
removal of paragraph relating to same.	
Service Delivery Instructions amended to in	
more detailed explanation of input of units a	
Bete Unit Amounte	
Rale Unit Amounts Boonite for Client / Boonite for Corer on	
Respite for Glient / Respite for Garer and	
Addition of information around (Diannad En	d Data'
	d Date ,
Additional contance regarding ton up fees	
Clarification around extending respite SPs	whore
actual and dates have been recorded	where
Addition of sentence regarding retrospectiv	e SPs
for subsequently suspended providers	e of s
SDS – Cash Direct Payments	
Complete removal of section detailing old	
procedure and replacement with guidance	on
revised procedure	
SDS - Cash Direct Payments Change in	Care or
change to Third Party Representative/ T	hird
Party Support Account	
Complete removal of section detailing old	
procedure and replacement with guidance	on
revised procedure.	
Cash Direct Payment for Carer	
Complete removal of section detailing old	
procedure and replacement with guidance	on
revised procedure	
SDS – Carers Cash Direct Payment Chang	le in
Care	
Removal of section detailing old procedure	and
replacement with guidance on revised proc	edure.
Day Care, 1-1 Care and Expenses provid	led by
Millennium Care	
Amendment of page numbers for ISF and	
ACP/Non-Commissioned Payments guidan	ice
Reablement SPs	
Change of wording from 'Reablement refer	ral' to
'Interim Support Plan'	
Reablement Service Deliveries	
Amendment to say planned start time must	be 9am



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