CAREDIRECTOR YEARLY UPRATES FOR SERVICES PROVIDED





Yearly Uprates for Services Provided V1.1

DocumentYearly Uprates for Services ProvidedPurposeStep by step for ending current services provided for uprates correctionVersionV1.1OwnerICT Business Transformation Team / Adults System SupportLast Updated01/09/2023



Information

1. It is usually best to do financial uplifts during out of usual business hours/Friday. To avoid stoppages and errors being made.

Services Provided

- 1. Each year, some service provided for providers require uprating. This involves ending the current services provided which is uprated for the next financial year.
- 2. To find the current **Services Provided** for a **Provider** select: Workplace > My Work > Provider



3. Select the relevant provider from the list either by searching or by a system view.

	Caredirector	ကြဲ Home 🗂 Workplace 🗸 တို့ Sett	ings \vee	0. B & D	CD V6 Team
	+ 💵	🌮 🎝 : Providers			?
Se	arch Results	~	test		Q (3
	ld	<u>Name</u> ≟↓	Provider Type Top Up	Email	Main Phone
	191255	Test Care Home	Supplier		

4. Select the tab **Services Provided** to see the current and uplifted rates of the service.

	Caredirecto	r 🎧 Home 🗖)Workplace 🗸 🖇	ට් Settings 🗸		9 🛃 🛇	🕑 🌅 сру	6 Team
←	: P	rovider: Test Car	e Home					?
Test	<u>Care Home (Id</u>	: <u>191255)</u> Provider	Record					\sim
Туре	: Supplier							
Me	enu 🗸	Timeline Sum	mary Details	Service Provisio	Services Provided	Suspensions	Service Deliver	y Var
4								•
+	X II X	/ 🦻 🗑	Services Provid	led				
Re	lated Records	~			Search for records		Q	S
	Id [Provid	<u>Provider</u> <u>≜</u> ↓	ld	Approval Status	<u>Service Elem</u> ≧↓ <u>S</u>	Service Element 2	Service Element 3	<u>Clier</u>
	191255	Test Care Home	919	Approved	Adult Residentia L	ong-Term Care		Olde
	191255	Test Care Home	920	Approved	Adult Residentia L	ong-Term Care		Olde



Schedule Jobs

- 1. With performing any uplifts, if any of those rates are going start before the end of the financial year will create triggers for recalculating financial transactions. These will be created in the background as soon as the update is made.
- There are three scheduled jobs that run in the background which is usually best to be turned off before uplifts are made. You can find these jobs by: Settings > Configuration > System Management > Scheduled Jobs



3. The first is called "**Expand and Process Finance Transaction Triggers**". This job will go through your transactions and will start recalculating these triggers. To find this type:

Expand and Process Finance Transaction Triggers into the search bar.

	Caredin	rector	ا (lome 💾 Workplace 🗸	段 Settings 🗸	€	Ę, ć	$\mathbf{\hat{x}}$	9	CD V6	Team
\leftarrow	+	×≣	W	Scheduled Jobs	-						?
Se	arch Resu	llts	~			Expand and Process Finance Tr	ansactior	n Trig	gers	۹	G
	Name 🗄	Ļ		2	Created By	Created On	Modified	Bv		Modifi	ed On
	Expand	and Pro	ocess Fi	nance Transaction Triggers	Service Accoun	t 28/02/2020 13:00	Estelle B	axter		12/04/2	2023 08

4. To "turn **Expand and Process Finance Transaction Triggers** off" you will want to change the start date to sometime in the future. Maybe a day or two days, just so it is not running whilst these changes are being made. To do this:

Next Run Date > Couple of days in the future (this could be set to Friday at 17:00) > Save.

Caredirector 🛱 Home 🗂 Workplace 🗸 🕲 Settings	\checkmark	€	Ę	\Diamond	9		CD V6 Team
🔶 🖻 👧 🕈 🗑 E Scheduled Job: Expa	nd and Process Finance Trai	nsact	tion T	rigge	rs		?
Menu V Details Settings Results							
General Name* Expand and Process Finance Transaction Triggers	Business Module					>	< Q
Plugin Type*	Inactive						
Process Finance Transaction Triggers X Q	O Yes						
Next Run Date*	No						
13/04/2023	Valid For Export						
	Yes						

 The next process to turn off is called "Calculate Pending Financial Assessment Charges". This job will go through your financial assessment charges and will start recalculating these triggers. To find this type: Calculate Pending Financial Assessment Charges into the search bar.

	Caredir	ector	Ŵ	Home 💾 Workplace 🗸	හි Settings 🗸	Ð	R	\Diamond	9	CD V6 Team
	+	×	8	Scheduled Jobs	•					?
Se	arch Resu	lts	~			Calculate Pending Financial A	ssessme	ent Ch	arges	Q 3
	Name	L		2	Created By	Created On	Modif	ied By	,	Modified On
	Calculat	e Pend	ing Fin	ancial Assessment Charges	Service Account	16/07/2019 13:45:53	Estelle	e Baxte	er	12/04/2023 0

6. To "turn **Calculate Pending Financial Assessment Charges** off" you will want to change the start date to sometime in the future. Maybe a day or two days, just so it is not running whilst these changes are being made. To do this:

Next Run Date > Couple of days in the future (this could be set to Friday at 17:00) > Save.

Caredirector 🞧	Home 🗂	Workplace 🗸	ැරි Settings	\checkmark	Ð	R	\mathcal{D}	€	CD V6 Team
← 🖬 💀 🕈	W :	Schedu	Iled Job: Cal	culate Pending Financial	Assessm	nent C	harge	es	?
Menu V Details	Settings	Results							
General Name* Calculate Pending Fina	incial Assessn	nent Charges		Business Module					×Q
Plugin Type*				Inactive					
Calculate Financial Ass	essment Cha	ge Job	XQ	○ Yes					
Next Run Date*	1			No					
13/04/2023	#	08:39	0	Valid For Export					
L				Noc					

 The next process to turn off is called "Expand FA Calculation Triggers". This job will go through your financial assessment calculations and will start recalculating these triggers. To find this type:
 Expand FA Calculation Triggers into the search bar.

Expand FA Calculation Triggers into the search bar.

	Caredirector	r Со н	ome Workplace 🗸	😥 Settings 🗸	Q B 4	🕒 🏮 CD V6 Team
	+ 🖾	W	Scheduled Jobs	1		0
Se	arch Results	~		Ī	Expand FA Calculation Triggers	Q 🕄
	Name≟↓		2	Created By	Created On Modified B	y Modified On
	Expand FA C	alculation	Triggers	Service Accoun	t 28/02/2020 22:31: Estelle Bax	ter 12/04/2023 03

 To "turn Expand FA Calculation Triggers off" you will want to change the start date to sometime in the future. Maybe a day or two days, just so it is not running whilst these changes are being made. To do this: Next Run Date > Couple of days in the future (this could be set to Friday at 17:00) > Save.

working for you

Caredirector 🔓 Home 🗂 Workplace 🗸 🔞 Settings 🗸		€	Ę	\Diamond	ூ	CD V6 T	eam
🔶 🖻 🙀 🦸 🗑 : Scheduled Job: Expan	d FA Calculation Triggers						?
Menu Details Settings Results							
General Name* Excaped EA Colculation Triggers	Business Module					×	*
Plugin Type*	Inactive					 ~ ~	
Expand FA Calculation Triggers X Q	O Yes						
Next Run Date* 13/04/2023 08:36	 No Valid For Export Vac 						

9. If, when coming back to switch back on, you can either select the **Execute this job now** or leave it until the **next run date** on all three.

🔨 Caredirector 🔄 Home 📥 Workplace 🗸 🕸 Settings 🔪	~ 0	ર	ł	\Diamond	3	CD V6 Team
🔶 🖬 📾 🐓 🗑 : Scheduled Job: Expa	and and Process Finance Trans	actio	on Tr	igge	rs	?
Menu V Details Settings Results						
General Name*	Business Module					
Expand and Process Finance Transaction Triggers	Finance Processing					XQ
Plugin Type*	Inactive					
Process Finance Transaction Triggers X Q	O Yes					
Next Run Date *	No					
13/04/2023	Valid For Export					
	• Yes					



Uplifts Process

Supplier Payment Uplifts

- Typically, you want to begin with Supplier payment uplifts as these can influence other charges as well. If there are separations in who requires uplifting for example in a direct payment, if one person employs a PA and someone else employs a provider, this would mean there are two separate rates. Break down the criteria further with different service elements and/or remove the one's not required once the list has been generated.
- For your uplifts under: Settings > Configuration > Finance Admin



3. Service Provision > Service Uprates

人 Caredirector 🎧 Home 🗂 Workplace 🗸 🕲 Settings 🗸	🔍 🖳 🛠 边 🌅 CD V6 Team
Finance Admin which feature would you like to work with?	
V DEFERRED PAYMENT SCHEMES	
V FINANCE PROCESSING	
V FINANCIAL ASSESSMENT	
SERVICE PROVISION	
Service Delivery Variation Rules To create payment and charging rules based on a variation recorded for a Service Delivery	Service Element 2 Used to create secondary descriptions to describe services for suppliers
Service Element 3 Tertiary descriptions for services To create payment rules based on a period of Absence from a Service Provision	Service Provision End Reason Rules To create payment rules based on the End Reason of a Service Provision
Service Uprates To set criteria by which Services can be globally uprated	



4. Select **Services Uprates** and to create new select **Create New Record** on the toolbar.

Caredi	rector	۵	Home	۵v	Workplace 🗸	ැබූ Setting	s 🗸			Ð	ł	\Diamond	9		CDV	6 Tea	ım
+	6	2,,	S	:	Service	Uprates										Ċ	?
Active Reco	rds 💉	~						Search for reco	rds						C	λ ξ	3
Service	Uprate lo	d S	tatus	S	ervice Element	:1 U	prate S	Start Date	Uprate E	nd Da	ate		Upra	te Rate	Туре	Up	orate

- 5. This page will be our criteria page of what requires uplifting in which we can generate a list of services provided and change accordingly both by bulk and individually. When the list has been generated, we can go into each one and change accordingly as well as remove ones we do not need to be uprated. These are the fields and how each impacts the list:
 - a. Historic Rate Change: If you have a provider that has multiple changes of rates, if that is set to:
 - i. No, it will only change the most recent rate period.
 - ii. **Yes,** it will change the older rate period that may have been cancelled out by the newer (in date) as well.
 - b. Suspend Rate: Would mean that all the rates set under our criteria will be set to 0 for as long as the Uprate End Date states (this Uprate End Date field will auto show once, Suspend = Yes). After the end date it will automatically place it back to what it was set to before.
 - c. Uprate Start Date: When you are starting it from.
 - d. Uprate Rate Type: Percentage or Value amount.
 - e. Uprate Rate Value: What that value is whether that is a percentage or value. With percentage do the format '7' '25' for example you do not need the percent sign. With value make you put to two decimal places. £1 = '1.00' or '100.00'.
 - f. Rounding Option: Is what the percentage should round to, as the value will already have the number within. (For Percentage Only).



CAREDIRECTOR YEARLY UPRATES FOR SERVICES PROVIDED

🔨 Caredirector 🎧 Home 🗂 Workplace 🗸	ැරි Settings `	\checkmark	Ð	Ð	\Diamond	€	CD V6 Team
🗧 🖬 🕞 🏹 Service Uprate: Ne	9W						?
Details							
Uprate Values							
Historic Rate Change?*		Suspend Rate?*					
O Yes		○ Yes					
No		No					
Uprate Start Date *							
	#						
Uprate Rate Type *		Uprate Rate Value*					
Percentage	~						
Rounding Option *		Responsible Team *					
To the nearest £0.01	~	CD V6 Team					XQ

- 6. Service Rate Type will impact the uprate and provide these levels. You can undergo multiple uprates; therefore, you can split the fixed, negotiated, person service rate types into the relevant chunks for the desired list. Depending on which one has been selected, it will either update the rates held within a Service Provision itself or the Service Provided record. It changes based on where you need to change that rate.
 - a. **Fixed**: All those rates that are fixed based in the Service Provided record. Service Provided records will have a rate period that will be updated when **fixed** is selected.
 - b. **Negotiated**: The actual rate is held within the Service Provision. Therefore, you are updating the rate period within them.
 - c. **Person**: When you have a direct payment, and the payment tends to be set up as a person payment. No provider that is linked to that service, and the rate period is held within the Service Provision.

Uprate Criteria	
Service Uprate Id*	Status*
	New ~
Service Rate Type*	Rate Unit*
~	Q
Fixed	Service Element 2
Negotiated Person	٩



- 7. Rate Unit is what the type of rate unit you are updating for them as well.
- 8. Contract Type of whether it is spot or block.
- 9. Service Element 1 is required so you put down the relevant service element linked to the service provided. Service element 2/3, Client Category fill these out if required. Ensure you press on Add Records to add it to your field.
- 10. **Provider** will allow you to search for a specific provider, however leaving this field blank will bring back all providers linked to the service elements.

Service Uprate Id *		Status*	
		New	~
Service Rate Type *		Rate Unit *	
	~		Q
Contract Type *		Service Element 2	
	~		Q
Service Element 1*		Client Category	
	Q		Q
Please fill out this field.			
Service Element 3			
	Q		
Provider			
	Q		

Uprate Criteria



- 11. These fields are essentially the criteria that you are selecting and once you save this record it will generate a list of rates that require uprating. You can still preview and change them before you change them.
- 12. When you have completed your fields and criteria to search for select **Save.** In this example, I am going to do a specific provider and an uprate of £10.

Image: Service Uprate: Service Uprate: Menu v Details Uprate Values Historic Rate Change?* Vira Vira No Vara Startice Rate Type* Frei	Caredirector 🖌 Home 🗋 Workplace 🗸 🐯 Settings	\sim	G	\Diamond	ூ	٢	CD V6 Tean
Ment Details Service Uprate Details Uprate Values Suspend Rate?* 'vis 'vis 'vis 'vis 'vis 'vis 'vis 'vis 'Uprate State Date* 'vis 'Z04/2025 'wis 'Uprate State Date* 'vis 'Uprate State Date* 'vis 'Uprate State Date* 'vis 'Uprate State Date* 'vis 'Uprate State Type* Uprate State Value* 'Uprate State State* 'size 'To the nearest 60:01 'vis 'Dyrate Criteria 'size* Service Uprate Is* Status* 'Size* 'size*	- 🖬 🗟 🎝 🕄 🗄 Service Uprate: 3\N	lew∖SDS - Man	aged Account\Spot\Fixed				?
Uprate Values Historic flats Change?* Vis Vis No Uprate Stat Date* 12/04/2023 Uprate Stat Date* 12/04/2023 Uprate Stat Date* 12/04/2023 Uprate State Type* Value Nonding Option* Responsible Team * To the nearest 60:01 Voit Team Service Uprate State Service Uprate State Type* Fleed Vertice Uverset Type * Service Uprate State Service Uprate State Service Element 3 Service Element 3 Service Element 3 Provider State Uvers Teame Throw/der X	Menu V Details Service Uprate Details						
Uprate Values Historic Rate Changet* Ves							
Historic Rate Phaney** Suspend Rate P* ○ Yes ● Yes ● No ● No Uppeter Star Date* Image: Control Contro Control Control Control Control Control Control Contro	Uprate Values						
○ Yes ● No ● No ● No Uprate Star Date* IDO/2023 120/6/2023 Immediate Value Immediate Value Inoo Rounding Option* Responsible Team* To the nearest £0.01 C D V6 Team Varate Criteria Status* Service Uprate Id* Status* Service Bare Name Immediate Service Barest 2 Service Element 2 Spot Service Element 2 Spot Client Category Spot Client Category Spot Q Service Element 3 Q Spot Q Spot Q Spot Q Spot Q Spot Q	Historic Rate Change?*		Suspend Rate?*				
 No Ho Uprate Start Date* 12/04/2023 Imiliar Type* Uprate Rate Value* Value NoO Responsible Team* CD V6 Team Q Uprate Criteria Service Uprate Id* Status* Service Uprate Id* Service Rate Type* New New Service Rate Type* Service Rate Type Type* Service Rate Rate Type Service Rate Rate Rate Type Service Rate Rate Type<td>○ Yes</td><td></td><td>⊖ Yes</td><td></td><td></td><td></td><td></td>	○ Yes		⊖ Yes				
Uprate Start Date* 12/04/2023 Uprate Rate Yape* Uprate Rate Value* 1000 Rounding Option* Responsible Team* To the nearest £0.01 Uprate Criteria Service Uprate Id* Status* Service Rate Type* Fixed Per Week Pro Rate Service Element 1* Cient Category Sof Ananged Account Sof Ananged Account Cient X Q Service Brement 3 Service Barement	No		No				
12/04/2023 Uprate Rate Type* Value Value Value 10:00 Responsible Team* To the nearest £0:01 CD V6 Team Q Uprate Criteria Service Uprate Id* Service Element 1* Contract Type* Spot Spot Service Element 1* Client Category SDS - Managed Account Service Element 3 Charter LLives Team Provider	Uprate Start Date*						
Uptate Rate Type* Uptate Rate Value* Value \ooddots Responsible Team* Q To the nearest £0.01 CD V6 Team Uprate Criteria Status* 3 New Service Uprate Id* Responsible Team* 3 New Service Rate Type* Rate Unit* Fixed VerWeek Pro Rata X Q Contract Type* Service Element 2 Spot Shared Lives LT - Band 1 X Q Service Element 1* Client Category Struce Element 3 Q Provider Q	12/04/2023	雦					
Value Value Rounding Option* Responsible Team* To the nearest £0.01 CD V6 Team Uprate Criteria Service Uprate Id* 3 Service Date Type* Fixed Spot Spot Spot Service Element 1* SDS - Managed Account Service Element 3 Q Provider Ehared Lives Team Provider X	Uprate Rate Type*		Uprate Rate Value*				
Rounding Option* Responsible Team* To the nearest £0.01 CD V6 Team Uprate Criteria Service Uprate id* 3 Service Variate Status* 3 New Service Rate Type* Rate Unit* Fixed V Spot Service Element 2 Spot Shared Lives Tam Provider X Client Category	Value	~	10.00				
To the nearest £0.01 To the nearest £0.01 Uprate Criteria Service Uprate id* 3 Service Uprate id* 3 New Service Rate Type* Fixed Yet Sort Spot Sort/ce Element 1* SDS - Managed Account Service Element 3 Q Provider Shared Lives Team Provider	Rounding Option*		Responsible Team*				
Uprate Criteria Service Uprate Id* 3 3 New 3 Service Rate Type* Fixed V Per Week Pro Rata X Spot Spot Spot Service Element 1* SDS - Managed Account Service Element 3 Provider	To the nearest £0.01	~	CD V6 Team				Q
3 New ✓ Service Rate Type* Rate Unit* Fixed ✓ Per Week Pro Rata X Q Contract Type* Service Element 2 Spot ✓ Spot ✓ Service Element 1* Client Category Sorvice Element 3 Q Service Element 3 Q Forwider Q	Service Uprate Id*		Status*				
Service Rate Type* Rate Unit* Fixed Per Week Pro Rata Contract Type* Service Element 2 Spot Shared Lives LT - Band 1 X Service Element 1* Client Category SDS - Managed Account X Q Service Element 3 Provider Shared Lives Team Provider X	3		New				\sim
Fixed Per Week Pro Rata X Q Contract Type* Service Element 2 Spot Service Element 1X Q SDS - Managed Account X Q Service Element 3 Q Provider Q	Service Rate Type*		Rate Unit*				
Contract Type* Service Element 2 Spot Service Element 1 SDS - Managed Account X Q SDS - Managed Account X Q Service Element 3 Provider Shared Lives Team Provider X	Fixed	~	Per Week Pro Rata				
Spot Service Element 1* Client Category SDS - Managed Account X Q Service Element 3 Q Provider Shared Lives Team Provider X Q							XQ
Service Element 1* Client Category Client Category Client Category Q Service Element 3 Provider Shared Lives Team Provider X Q	Contract Type *		Service Element 2				XQ
SDS - Managed Account X Q Service Element 3 Q Provider Shared Lives Team Provider X Q	Contract Type* Spot	~	Service Element 2				X Q
Service Element 3 Q Provider Shared Lives Team Provider X	Contract Type* Spot Service Element 1*	~	Service Element 2 Shared Lives LT - Band 1 X Client Category				x Q
Provider Q Shared Lives Team Provider ×	Contract Type* Spot Service Element 1* SDS - Managed Account	~ X	Service Element 2 Shared Lives LT - Band 1 X Client Category				x Q Q
Provider Shared Lives Team Provider × Q	Contract Type* Spot Service Element 1* SDS - Managed Account Service Element 3	~ X Q	Service Element 2 Shared Lives LT - Band 1 X Client Category				x Q Q
Shared Lives Team Provider X	Contract Type* Spot Service Element 1* SDS - Managed Account Service Element 3	~ 	Service Element 2 Shared Lives LT - Band 1 X Client Category				x Q Q
	Contract Type* Spot Service Element 1* SDS - Managed Account Service Element 3 Provider	~ Q	Service Element 2 Shared Lives LT - Band 1 X Client Category				x Q Q

13. When saved, a new tab called **Service Uprate Details** will appear. You will need to press the **Generate Details Record** for it to populate the information in **Service Uprate Details**. Please give 5 – 10 minutes for it to populate with information.

working for you

Caredirector <table-cell> Ho</table-cell>	me 🖞 Workplace 🗸 🔞 Settings 🗸	€	ŝ	\Diamond	3	CD V6 Team
← 🖬 🗟 🎝	Service Uprate: 3\New\SDS - Managed Account\Spot\Fixed					?
Menu 🗸 Details	Service Uprate Details					
Uprate Values						
Historic Rate Change?*	Suspend Rate?*					
⊖ Yes	⊖ Yes					
No	No					

14. It should be complete once you see the **Details** fields all greyed out.

Caredirector 🎧 Home 🗂 Workplace 🗸 🐯 Settings	✓ ④ 晨 久 ⑤ 🥊 CD V6 Tear
- 🖬 🔀 🎣 : Service Uprate: 3\Generat	ed\SDS - Managed Account\Spot\Fixed
Menu V Details Service Uprate Details Service Pro	vision records
Uprate Values	
Historic Rate Change?*	Suspend Rate?*
○ Yes	○ Yes
No	No
Uprate Start Date *	
12/04/2023	
Uprate Rate Type*	Uprate Rate Value*
Value ~	10.00
Rounding Option*	Responsible Team •
To the nearest £0.01	CD V6 Team Q



15. The **Service Uprate Details** has been populated with my example provider and from here you may have 1 or more depending on your criteria.

	Caredirector	Home 🖰)Workplace 🕚	✓ ĝ Settings ヽ	~	€	Ę	\Diamond	Э 🏮	CD V6 Team
Service Uprate: 3\Generated\SDS - Managed Account\Spot\Fixed										
Menu Details Service Uprate Details Service Provision records										
×	2, 🗑 🤅	Service Up	rate Details							
Re	elated Records 🗸 🗸]			Search for reco	ords				Q S
	Service Uprate ID	<u>Status [S</u>	Person Id	Service Provide	Service Element 1	Service Element	t <u>2</u>	Service	Element 3	<u>Client Category</u>
	3	Generated		Shared Lives Tea	SDS - Managed	Shared Lives LT				

16. If you had more than one, you can go into each one individually you can change the amount as well as delete from this screen which ones you do not want to **process.** To remove one from being processed, select the checkbox and go to **delete**.

Caredirector	Home 🗖)Workplace 🔨	Ko Settings	\checkmark	€	Ę	\Diamond	ۍ	CD V6 Team		
Service Uprate: 3\Generated\SDS - Managed Account\Spot\Fixed											
Menu V Details Service Uprate Details Service Provision records											
💵 🎝 👿 ²	2 ervice Uprate Details										
Related Records 🗸]			Search for reco	ords				Q B		
Service Uprate ID	<u>Status [S</u>	Person Id	Service Provide	Service Element 1	Service Element	2	<u>Service</u>	Element 3	Client Category		
1	Generated		Shared Lives Tea	SDS - Managed	Shared Lives LT	·					

17. To change the amount of this one, select it from the row and it will open into the details screen. Here you can see that the Current rate = 50.00 (£50) and the new Proposed Rate = 60.00 (£60) which follows our £10 uprate that we want to execute for these criteria of SDS – Managed Account, Shared Lives LT – Band 1 etc. If I am happy with this, leave it or you can change it using the Proposed Rate. Saving any changes made.

Caredirector 🎧 Home 🗂 Workplace 🗸 🥳	3 Settings 🔨	/ E E & D 🥄	CD V6 T
🛛 🖬 🕼 🎝 🗑 🗄 Service Up	orate Detai	: 3\Shared Lives Team Provider\SDS - Managed Account\	S
1enu 🗸 Details			
General			
Service Uprate *		Service Uprate ID*	
3\Generated\SDS - Managed Account\Spot\Fixed	Q	3	
Service Element 1*		Service Element 2	
SDS - Managed Account	Q	Shared Lives LT - Band 1	Q
Service Element 3		Client Category	
	Q		Q
Jprate Start Date*			
12/04/2023	m		
Amendment Options			
Current Rate*		Proposed Rate *	
50.00		60.00	
Current Rate Bank Holiday*		Proposed Rate Bank Holiday*	
		0.00	

18. If you are happy with the changes, go back to the **Service Uprate > Service Uprate Details** and select the **three dots** and select **Process**.

	Caredirector	Home 🖰) Workplace 、	🗸 🔞 Settings ヽ	~	Ð	ł	\$ D		CD V6 Team
÷	← : 1 ervice Uprate: 3\Generated\SDS - Managed Account\Spot\Fixed ②									
Mer	Men Process 2 ervice Uprate Details Service Provision records									
×	Delete	rvice Up	rate Details							
Rela	at Copy Record Lini	K			Search for reco	ords				Q 3
	Service Uprate ID	<u>Status [S</u>	Person Id	Service Provide	Service Element 1	Service Element	<u>2</u> <u>Se</u>	ervice Eleme	ent 3	Client Category
	3	Generated		Shared Lives Tea	SDS - Managed	Shared Lives LT				

19. You will receive this pop-up that will confirm that the Service Uprate is being processed in the background.

CareDirector
Service Uprate is being processed in the background.
Close

20. You can check the stage of every **Service Uprates** via the **Service Uprates** screen and they will have the **Status = New / Generated / Processed**. New being brand new and not generated a list. Generated being a list of suppliers ready to be looked over. Processed when you have selected processed, and it is now uplifted into the system.

	Caredirector	ධ Home උ) Workplace 🗸 හි Sett	tings 🗸			Ð	Ę	\Diamond	€		CD V6	Team
+ I Service Uprates									?				
Ac	tive Records 🗸 🗸				Search for rea	cords						Q	53
	Service Uprat 🖡	<u>Status</u>	Service Element 1	<u>Uprate St</u>	tart Date	Uprate End	Date		!	<u>Uprate</u>	Rate Ty	<u>/pe </u>	<u>Iprate R</u>
	3	Processed	SDS - Managed Account	12/04/202	23				,	Value		10	0.00

21. Once you have **Process** and turned on the **Schedule Jobs** again once you go to that **Service Provided** and **Rate Periods** you will see a new **Rate Period** will appear from the date set on the **Uprate**.

	Caredirector	Home 💾 Worl	kplace 🗸	ழි Settings 🗸		Ð		🕒 🌅 CD V6 Tear	n
←	: Service	e Provided: Shar	ed Lives Tea	am Provider \ SDS	5 - Managed Account \ Sha	ared l	lives LT - Band	d1\\\Spot 🕐	Î
Share	ed Lives Team Provide	er (Id: 193251) Prov	vider Record					\sim	
Type:	Supplier								
Ме	enu 🗸 Deta	ils Service Finar	nce Settings	Rate Periods	Service Delivery Variation	S			
+	A 🕄 🎙	🖌 🗑 Serv	ice Provid	led Rate Period	ls				
Ар	proved Rate Periods	~			Search for records			Q S	
	<u>Rate Unit</u>	Approval Status	Start Date	End Date	<u>Capacity</u>	Ca	<u>apacity Can Be</u>	<u>Service Provided</u>	
	Per Week Pro Ra	Approved	12/04/2023			No	þ	Shared Lives Team	Р
	Per Week Pro Ra	Approved	24/02/2023	3 11/04/202	3	No	þ	Shared Lives Team	Р



CAREDIRECTOR YEARLY UPRATES FOR SERVICES PROVIDED

Version Control

Version	Change	Author	Date
V1	Creation of document	SS	12/04/2023
	 FA's will been added in later. 		
V1.1	Name Change	SS	01/09/2023