



Suffolk
County Council

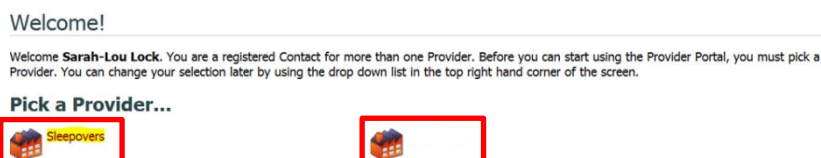
**GUIDE TO CHILDREN'S
PROVIDER PORTAL**

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1. Authorising Contracts

- 1.1) Log into portal
- 1.2) if you have access to more than one provider, you will need to select the provider you want to view



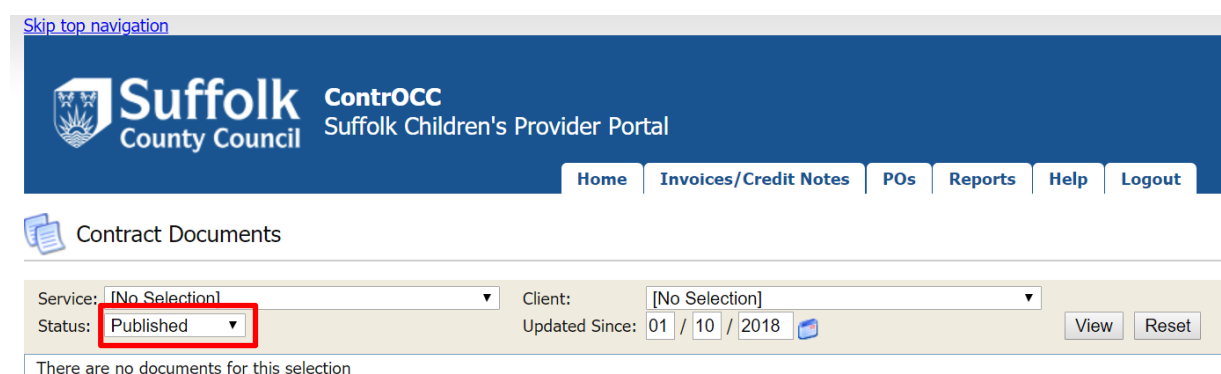
- 1.3) Click name of required Provider
- 1.4) Click **Contract Documents** to display published contracts

Sleepovers

Pick a task...




- 1.5) Change status field to **published**. The status field will allow you to view approved, rejected and published contractual documentation.



- 1.6) Enter an updated since date if you wish to filter contracts updated after a specific date
- 1.7) Click view to display
- 1.8) To view a contract, click on the name of the contract under the heading **document type**
- 1.9) To agree the contact, click accept contract
- 1.10) When prompted, enter your password and click **agree**

Download Document

By entering your password below and clicking 'Accept' you agree to this document. This is contractually binding.



A dialog box with a yellow padlock icon on the left. On the right, there is a text input field labeled "Password" and two buttons below it: "Agree" and "Cancel". The "Password" label and the "Agree" button are highlighted with red boxes.

- 1.11) If there is a discrepancy with the Contract, click **Reject**


Service: [No Selection]	Client: [No Selection]					
Status: Published	Updated Since: 01 / 04 / 2016	<input type="button" value="View"/> <input type="button" value="Reset"/>				
Document Type	Client	SSRef	Care Pkg Ref	Service	Notes	
IPA Contract	Ella, Cinder	C1170421		Sleepovers	Published by LockS02 on 11/04/2016	<input type="button" value="Agree"/> <input type="button" value="Reject"/>

- 1.12) Enter rejection reason in the field provided

Download Document

By entering your password below and clicking 'Reject' you reject this document. You must specify a reason.

Rejection Reason:



Password

Reject

1.13) Enter your password

1.14) Click **reject** to send the rejection to Suffolk County Council

SCC will now be able to view the rejected contract and the reason. If amendments are required, a new contract will be published.

2. Adding a New Action

Actions enable to you communicate securely with SCC to request advice, provide us with information or notify us of a change. They are available against specific tasks, e.g. care package line items and invoices, or can be accessed directly from the home screen.

2.1) From invoices or CPLIs Click **New Action / Submit Action**, or from the home page click **actions and change requests**

New Invoice

New Credit Note

Reference:	111		Total: £	29,714.29	£	0.00
Date on Invoice:	28/09/2018		Items Total: £	29,714.29	£	0.00
Created:	28/09/2018		Short by: £	0.00	£	0.00
Submitted:	28/09/2018					
			Total Payable:	£		29,714.29

Commitment	Value	VAT	Contribution	Contract	Period

New Action

SSRef	Client	Service	Service Level	Start Date	End Date	Cost	Pricing	CarePackageRef	Authorised	
C2000021				02/07/2018	-	£4,000.00 Weekly	1 x Payment at £4,000.00 (Spot)	C110	<input type="checkbox"/>	Submit Action
C2000009				01/07/2018	-	£4,000.00 Weekly	1 x Payment at £4,000.00 (Spot)	C104	<input checked="" type="checkbox"/>	Submit Action
C2000018				04/07/2018	-	£3,000.00 Weekly	1 x Payment at £3,000.00 (Spot)	C106	<input checked="" type="checkbox"/>	Submit Action
C2000023				09/07/2018	-	£3,000.00 Weekly	1 x Payment at £3,000.00 (Spot)	C111	<input type="checkbox"/>	Submit Action



Organisation Details

View and Request Changes to Organisation Details



Service Details

View and Request Changes to Service Details



Contacts

View and Request Changes to Contacts



Actions and Change Requests

No open Actions



Care Package Line Items

View Care Package Line Items

- 2.2) Select the appropriate options from the drop down menus that relate to the message you want to send. Some of these options may be pre-populated, depending on where you have selected the action from. A list of the options and their descriptions can be found below:

Heading	Description	Where from
Invoice query	Submit a query around invoice details to SCC back office team	Actions and change requests / relevant CPLI record
Placement query	Submit question about a placement to SCC	Actions and change requests
Additional cost query	Submit question about additional cost	Actions and change requests

- 2.3) Enter your message details, then select 'Create Action' to submit to the contracts and placement team.

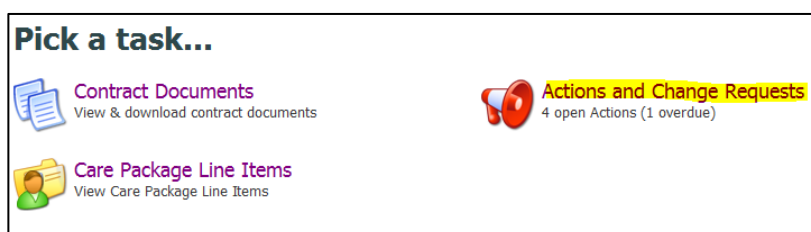
- 2.4) A Message to advise that the Action has been completed by the Provider will display



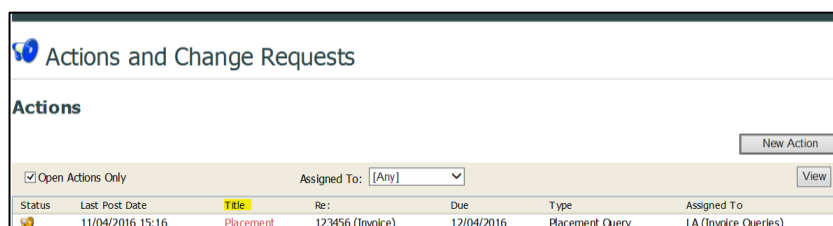
3. Viewing existing actions


You can view a list of all communications via the Home Screen and see where actions have been assigned to.

- 3.1) Click Actions and Change Requests



- 3.2) Click the Title of the Action to view the response. The "assigned to" field shows if the action is assigned to the local authority, or the provider.



Status	Last Post Date	Title	Re:	Due	Type	Assigned To
	11/04/2016 15:16	Placement	123456 (Invoice)	12/04/2016	Placement Query	LA (Invoice Queries)

- 3.3) Click the appropriate button to comment or close the action at any point.
- 3.4) NB. The Actions list defaults to display open Actions only. Once an Action has been closed, it will no longer display in the list.

Action Details

Back

Placement
 Re: 123456 (Invoice)
 Type: Placement Query

Pending
 Due Date: 12 Apr 2016

11 Apr 2016 15:16 Sarah Lock (Sleepovers)
 wrong payment
 Assigned to Invoice Queries
 Due Date set to 12 Apr 2016


Related link: [Invoice 123456](#)


[Comment](#) [Request Closure](#)


4. Purchase Orders


- 4.1) From the Home Screen, click Purchase Orders Icon


Pick a task...


 **Invoices**
View and create your invoices online


 **Contract Documents**
View & download contract documents

 **Service Details**
View and Request Changes to Service Details

 **Care Package Line Items**
View Care Package Line Items

 **Purchase Orders**
View & print purchase orders

 **Organisation Details**
View and Request Changes to Organisation Details

 **Actions and Change Requests**
No open Actions

- 4.2) Click View to see all children in placement

Purchase Orders

Financial Year: 16/17 Service: [All Services]

Client: [All Clients] [View](#)

Please set filters and click the View button.

- 4.3) Select relevant child's name from the list displayed

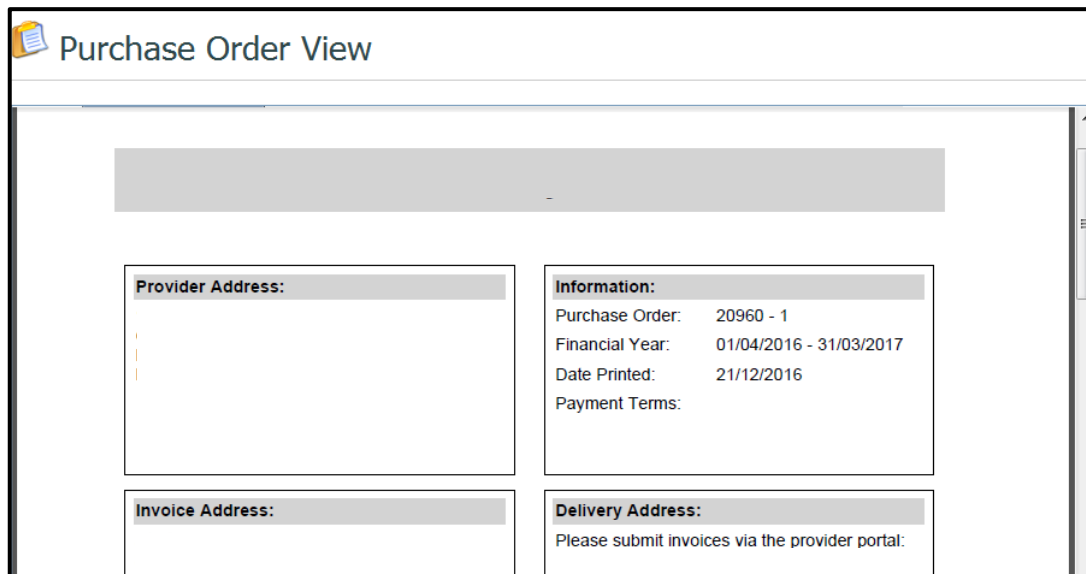
Purchase Orders

Financial Year: 16/17 Service: [All Services]

Client: [All Clients] [View](#)

Purchase Order	Value	Spend To Date	Financial Year	Issued
	£30,557.62	£20,502.88	16/17	27/04/2016
	£17,800.00	£13,985.72	16/17	27/04/2016
	£24,665.71	£5,467.14	16/17	21/09/2016
	£40,671.43	£20,502.88	16/17	27/04/2016
	£46,407.14	£23,394.30	16/17	27/04/2016
	£67,957.14	£35,222.88	16/17	27/04/2016
	£31,460.00	£612.86	16/17	07/11/2016
Ella, Cinder (C1199350) - 16/17	£5,185.71	£0.00	16/17	21/12/2016

4.4) Purchase Order will generate and can be viewed by Provider



Purchase Order View

Provider Address:

Information:

Purchase Order: 20960 - 1
 Financial Year: 01/04/2016 - 31/03/2017
 Date Printed: 21/12/2016
 Payment Terms:

Invoice Address:

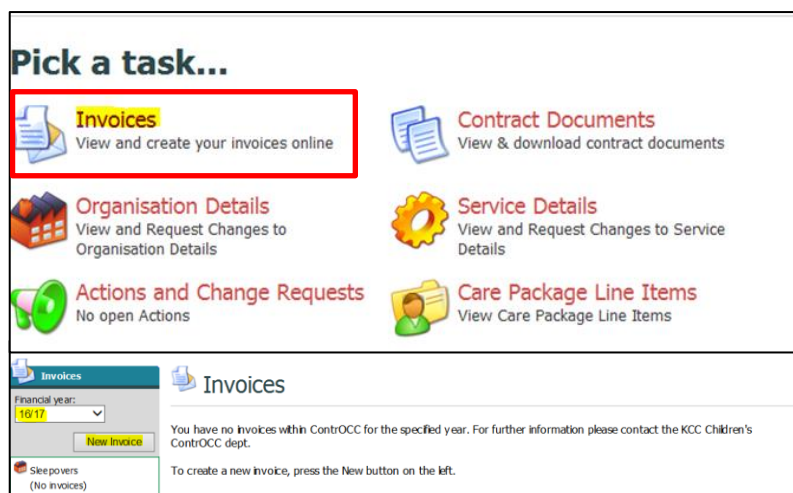
Delivery Address:
 Please submit invoices via the provider portal:

5. Invoices

All CPLI's with zero amounts must be selected and submitted for payment for each period to enable the next pay period to be released.

NB: If the final total is negative (overpayment by SCC e.g. credit note required) you will need to insert the value zero e.g. 0 and then submit

5.1) From the Home Screen icon, click Invoices Icon



Pick a task...

Invoices
 View and create your invoices online

Contract Documents
 View & download contract documents

Organisation Details
 View and Request Changes to Organisation Details

Service Details
 View and Request Changes to Service Details

Actions and Change Requests
 No open Actions

Care Package Line Items
 View Care Package Line Items

Invoices

Financial year: 16/17
 New Invoice

Sleepovers (No Invoices)

You have no invoices within ContrOCC for the specified year. For further information please contact the KCC Children's ContrOCC dept.
 To create a new invoice, press the New button on the left.

5.2) Select relevant financial year

from dropdown list

5.3) Click 'New Invoice'

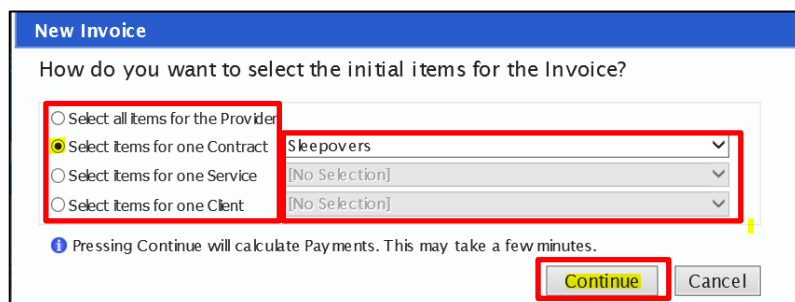
5.4) Select Item the items you wish to use to populate the invoice using the radio buttons

5.5) Choose the appropriate options from dropdown lists

5.6) Click 'Continue'

5.7) NB: Proposed Invoice will display

5.8) Enter the Invoice Number in the Reference field



New Invoice

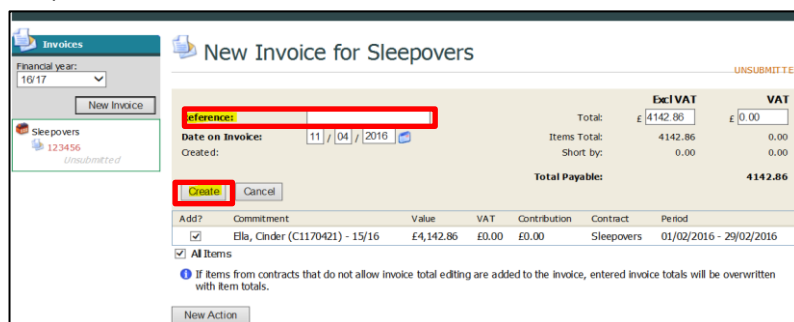
How do you want to select the initial items for the Invoice?

☐ Select all Items for the Provider
☒ Select Items for one Contract
☐ Select Items for one Service
☐ Select Items for one Client

Sleepovers
 [No Selection]
 [No Selection]

Pressing Continue will calculate Payments. This may take a few minutes.

Continue Cancel



Invoices

Financial year: 16/17

New Invoice

Sleepovers 123456 Unsubmitted

New Invoice for Sleepovers UNSUBMITTED

Reference:

Date on Invoice: 11/04/2016

Created: 11/04/2016

Create Cancel

Add?	Commitment	Value	VAT	Contribution	Contract	Period
<input checked="" type="checkbox"/>	Ella, Cinder (C1170421) - 15/16	£4,142.86	£0.00	£0.00	Sleepovers	01/02/2016 - 29/02/2016

☒ All Items

If items from contracts that do not allow invoice total editing are added to the invoice, entered invoice totals will be overwritten with item totals.

New Action

Total: £4142.86 Excl VAT £0.00 VAT

Items Total: 4142.86

Short by: 0.00

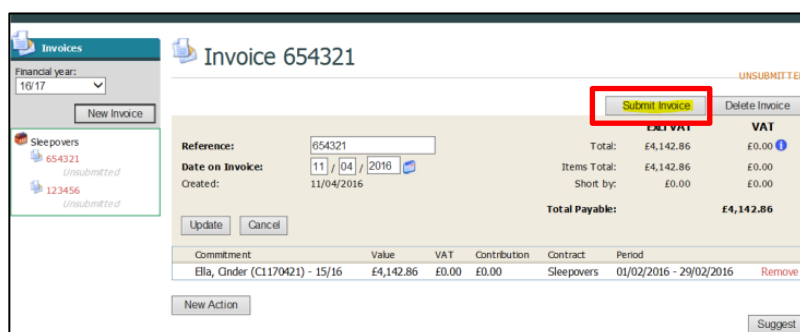
Total Payable: 4142.86

5.9) Click 'Create'

5.10) Check all placement and child details are correct

5.11) If correct, click Submit Invoice

5.12) NB: The Invoice has now been submitted and is awaiting finalisation by SCC



Invoices

Financial year: 16/17

New Invoice

Sleepovers 654321 Unsubmitted

Sleepovers 123456 Unsubmitted

Invoice 654321 UNSUBMITTED

Reference: 654321

Date on Invoice: 11/04/2016

Created: 11/04/2016

Submit Invoice Delete Invoice

Update Cancel

Commitment	Value	VAT	Contribution	Contract	Period
Ella, Cinder (C1170421) - 15/16	£4,142.86	£0.00	£0.00	Sleepovers	01/02/2016 - 29/02/2016

New Action

Total: £4,142.86 Excl VAT £0.00 VAT

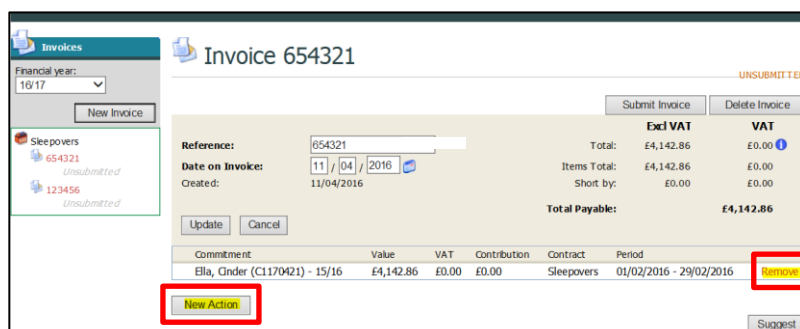
Items Total: £4,142.86

Short by: £0.00

Total Payable: £4,142.86

5.13) If there is a discrepancy: Click 'Remove' against the individual commitment line

5.14) Click 'New Action' to note and submit a query



Invoices

Financial year: 16/17

New Invoice

Sleepovers 654321 Unsubmitted

Sleepovers 123456 Unsubmitted

Invoice 654321 UNSUBMITTED

Reference: 654321

Date on Invoice: 11/04/2016

Created: 11/04/2016

Submit Invoice Delete Invoice

Update Cancel

Commitment	Value	VAT	Contribution	Contract	Period
Ella, Cinder (C1170421) - 15/16	£4,142.86	£0.00	£0.00	Sleepovers	01/02/2016 - 29/02/2016

New Action

Total: £4,142.86 Excl VAT £0.00 VAT

Items Total: £4,142.86

Short by: £0.00

Total Payable: £4,142.86

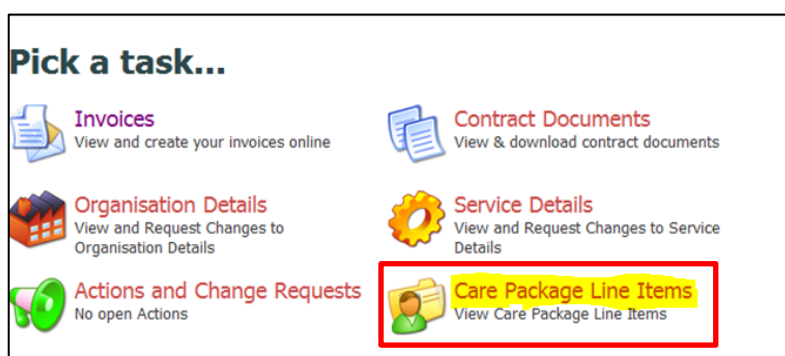
Remove

Suggest

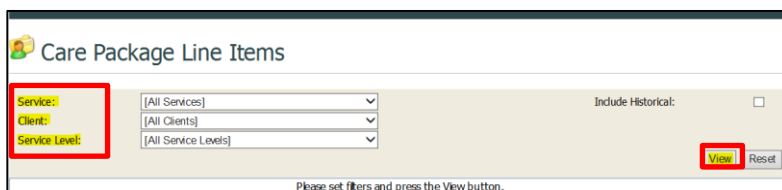
6. Care Package Line Items (CPLI)

The care package lines are determined by the child/young person's placement e.g. provider and foster carer or unit or property and is therefore not based solely on the child/young person's placement with the provider.

- 6.1) From the Home Screen icon, click Care Package Line Items Icon



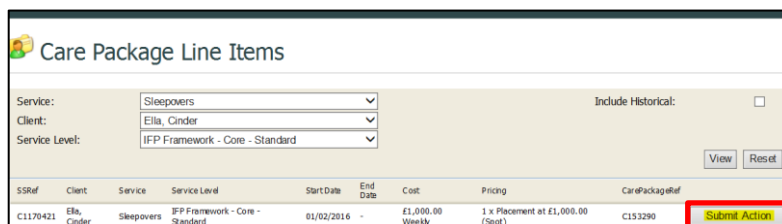
- 6.2) Select the Service, Client and Service Level as appropriate, from the drop-down lists provided



- 6.3) Click View

- 6.4) All current placements with Provider will display

- 6.5) If there is a query, click Submit Action against the relevant placement (See section: How to create a new Action)



SSRef	Client	Service	Service Level	Start Date	End Date	Cost	Pricing	CarePackageRef
C1170421	Ella, Cinder	Sleepovers	IFP Framework - Core - Standard	01/02/2016	-	£1,000.00 Weekly	1 x Placement at £1,000.00 (Spot)	C153290

Hints and Tips

Invoices:

- Invoices & credit notes must be raised via the Portal. An electronic copy of the invoice/credit note is not required
- Invoices numbers must be unique and cannot be duplicated
- Invoice Terminology - If an Invoice displays in Portal as:
 - Unsubmitted:** *This means the Invoice remains with the Provider and has not yet been submitted for Authorisation*
 - Pending:** *This means the Invoice has been submitted and is awaiting Authorisation by SCC*
 - Authorised:** *This means the Invoice has been authorised by SCC and is waiting finalisation*
 - Finalised:** *This means the Invoice has been finalised and is waiting for the payment to be made in line with contractual terms and conditions.*

Portal:

- Portal Resets and changes to Portal roles must be requested via the Portal
- If an Organisation has multiple Contracts or Units, Invoices for all Care Package Lines must be submitted, authorised & finalised before the next payment period becomes available on the Portal
- Actions and Change Requests should be checked for notes / responses on a regular basis as SCC use this as a preferred method to communicate with Providers.

Contact details

If you need further help, our contact details can be found below:

E: CYPplacements@suffolk.gov.uk

T: 01473 260695