



Suffolk
County Council

**GUIDE TO CHILDREN'S
PROVIDER PORTAL**

Contents

1. Authorising Contracts	2
2. Adding a New Action	5
3. Viewing existing actions	6
4. Purchase Orders	7
5. Invoices.....	8
6. Care Package Line Items (CPLI)	10
Hints and Tips.....	11

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

Welcome!

Welcome Sarah-Lou Lock. You are a registered Contact for more than one Provider. Before you can start using the Provider Portal, you must pick a Provider. You can change your selection later by using the drop down list in the top right hand corner of the screen.

Pick a Provider...



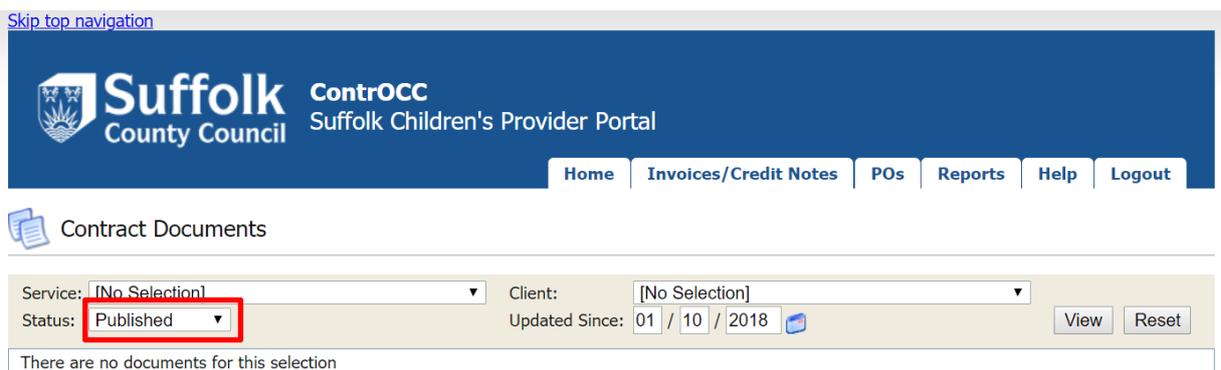
- 1.3) Click name of required Provider
- 1.4) Click **Contract Documents** to display published contracts

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.



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

Service:	[No Selection]	Client:	[No Selection]	<input type="button" value="View"/>	<input type="button" value="Reset"/>
Status:	Published	Updated Since:	01 / 04 / 2016		
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 Cancel

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 CPLs Click **New Action / Submit Action**, or from the home page click **actions and change requests**

[New Invoice](#)

[New Credit Note](#)

		Excl VAT	VAT
Reference:	111	Total: £	29,714.29
Date on Invoice:	28/09/2018	Items Total: £	29,714.29
Created:	28/09/2018	Short by: £	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.

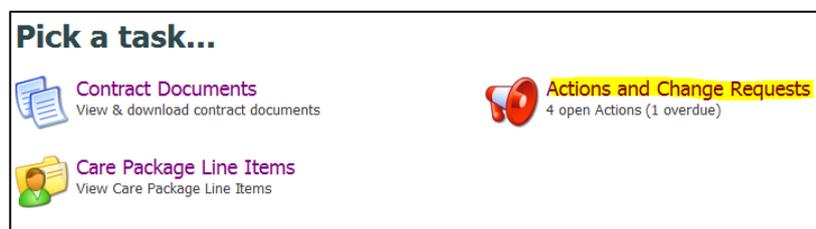
- 2.4) A Message to advise that the Action has been completed by the Provider will display



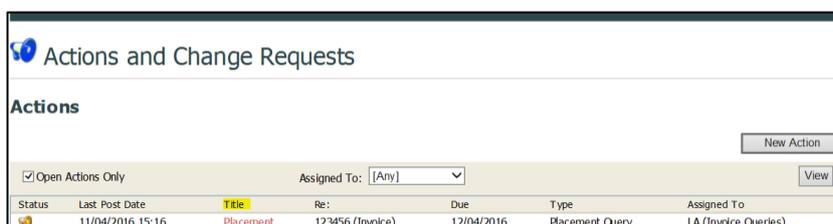
3. Viewing existing actions

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

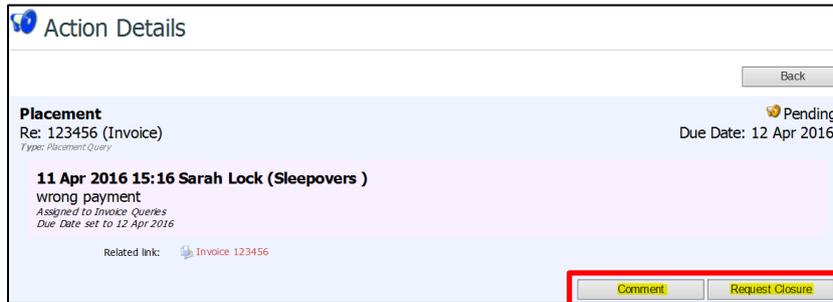


- 3.2) Click the Title of the Action to view the response. The "assigned to" field shows if the action is assigned to the local authority, or the provider.



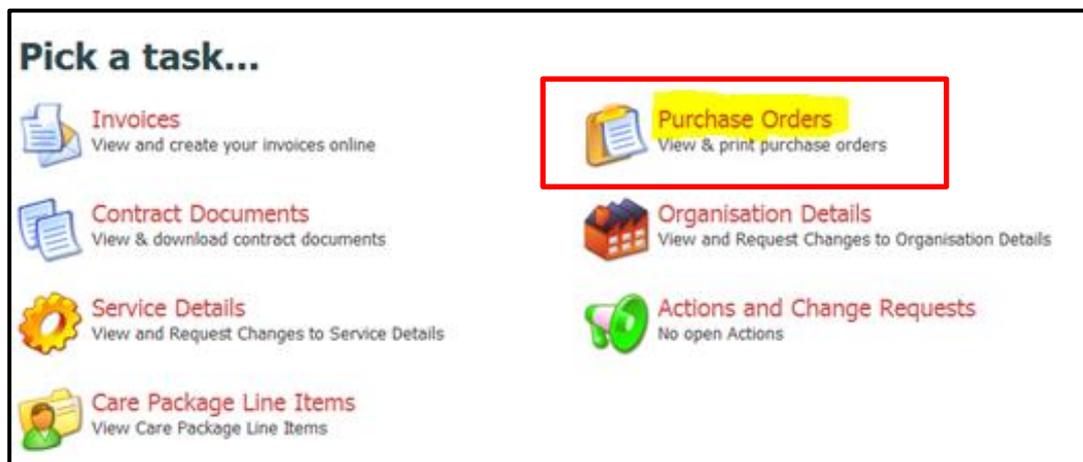
Status	Last Post Date	Title	Re:	Due	Type	Assigned To
	11/04/2016 15:16	Placement	123456 (Invoice)	12/04/2016	Placement Query	LA (Invoice Queries)

- 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.



4. Purchase Orders

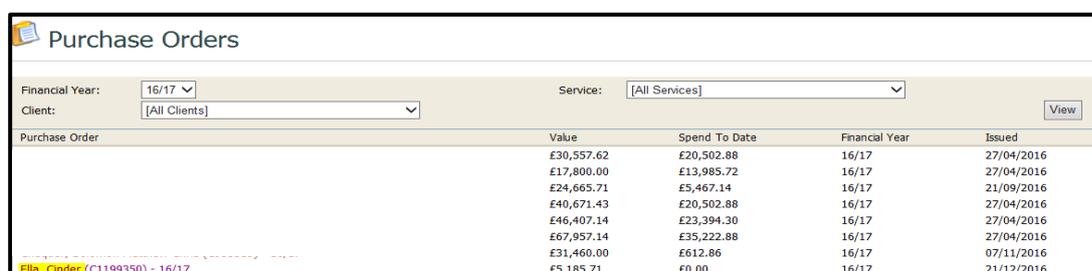
- 4.1) From the Home Screen, click Purchase Orders Icon



- 4.2) Click View to see all children in placement

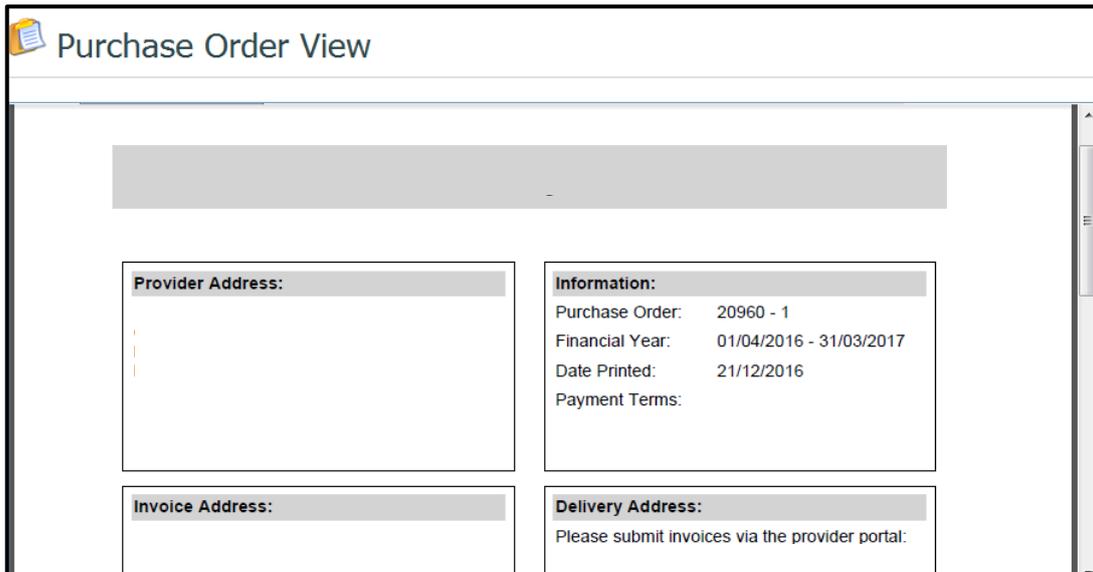


- 4.3) Select relevant child's name from the list displayed



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

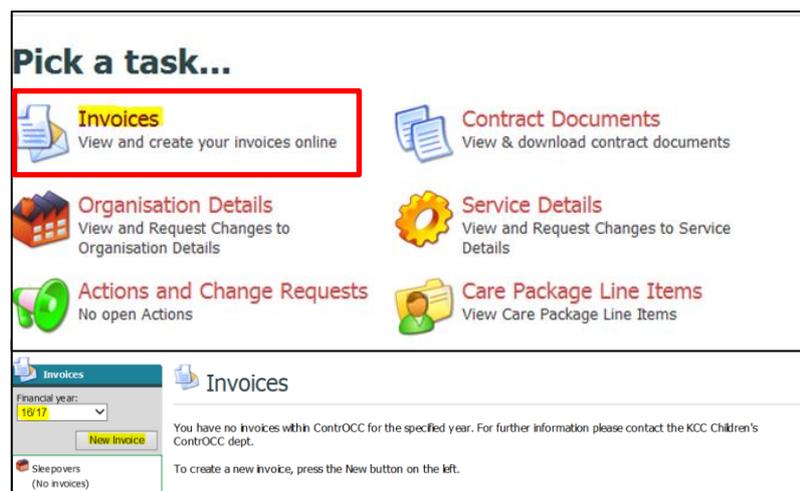


5. Invoices

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



5.2) Select relevant financial year

from dropdown list

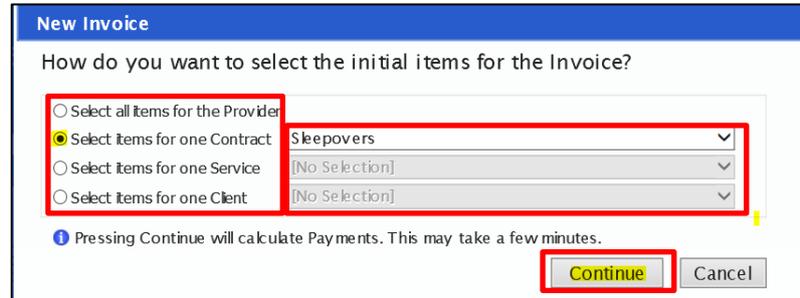
5.3) Click 'New Invoice'

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



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

5.8) Enter the Invoice Number in the Reference field



Invoices | Financial year: 16/17 | **New Invoice**

New Invoice for Sleepovers | UNSUBMITTED

Reference:

Date on Invoice: 11/04/2016

Created:

Create Cancel

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

Total Payable: 4142.86

Excl VAT: £4142.86 | **VAT: £0.00**

Items Total: 4142.86 | Short by: 0.00

Total Payable: 4142.86

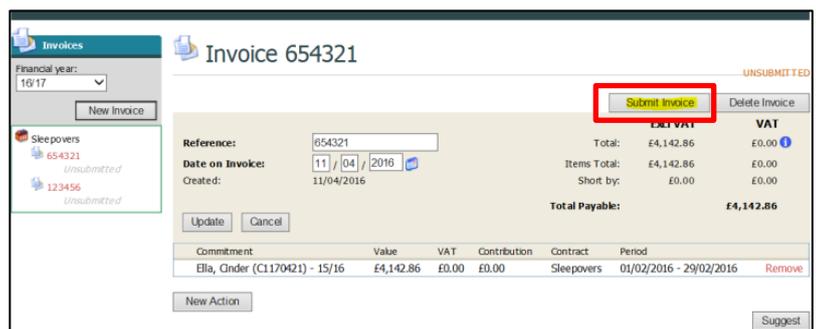
New Action

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**

Invoice 654321 | UNSUBMITTED

Reference: 654321

Date on Invoice: 11/04/2016

Created: 11/04/2016

Submit Invoice Delete Invoice

Excl VAT: £4,142.86 | **VAT: £0.00**

Items Total: £4,142.86 | Short by: £0.00

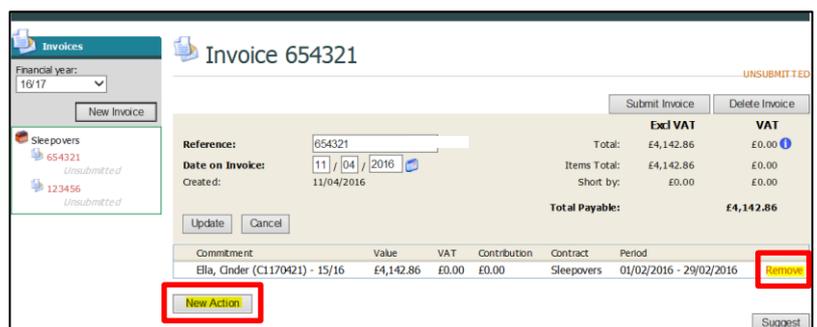
Total Payable: £4,142.86

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

New Action | **Suggest**

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**

Invoice 654321 | UNSUBMITTED

Reference: 654321

Date on Invoice: 11/04/2016

Created: 11/04/2016

Submit Invoice Delete Invoice

Excl VAT: £4,142.86 | **VAT: £0.00**

Items Total: £4,142.86 | Short by: £0.00

Total Payable: £4,142.86

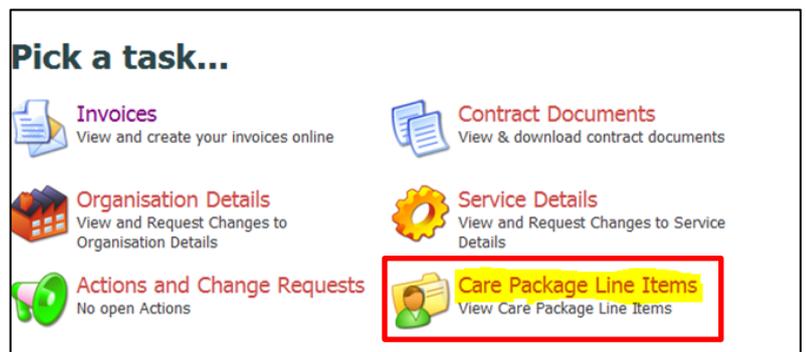
Commitment	Value	VAT	Contribution	Contract	Period
Ella, Cnder (C1170421) - 15/16	£4,142.86	£0.00	£0.00	Sleepovers	01/02/2016 - 29/02/2016

New Action | **Remove** | **Suggest**

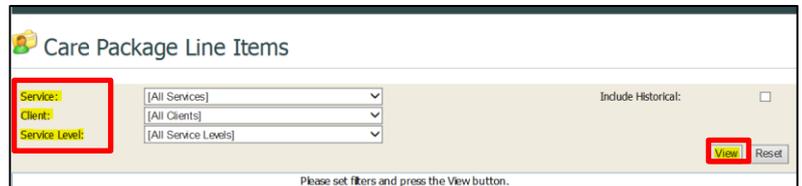
6. Care Package Line Items (CPLI)

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



The screenshot shows the 'Care Package Line Items' filter form. The 'Service:', 'Client:', and 'Service Level:' dropdown menus are highlighted with red boxes. The 'View' button is also highlighted in red.

- 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)



The screenshot shows the 'Care Package Line Items' table. The 'Submit Action' button is highlighted in red. The table contains the following data:

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