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1. **Contract Documents – Individual Service Contracts**

1. Click on **Contract Documents**

   ![Contract Documents](image)

2. Select the parameters you wish to view
3. Click on **view**

   ![View](image)

4. Click on **agree** or **reject** the Individual Service Contract (ISC)
5. Agree or reject
6. A **clear reason** for rejection is required so that a revised ISC can be sent out quickly
7. Enter your **password**

   ![Download Document](image)

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

8. Click **agree** (you will be directed back to the Contract Documents home screen)

   **Top tip:** When accessing contract documents, this defaults to show only those you have yet to respond to. You need to change the 'Status' drop down box to show those that have been accepted, rejected or terminated.
2. Processing Actuals (including Bulk Export and Import)

Actuals (no Exporting required)

Providers are expected to update their actuals on a **weekly basis** and submit an action to the relevant team to notify them that this has been done. This is so that the Business & Finance teams can audit and check on a weekly basis.

1. Log into the Provider Portal
   1 Oak Home Care

   **Pick a task...**

   - **Actuals**
     - Submit your actuals to Suffolk using the online form or bulk import facility
   - **Scheduled Payments**
     - View and confirm or reject scheduled payments.
   - **Purchase Orders**
     - View & print purchase orders
   - **Contract Documents**
     - View & download contract documents
   - **Service Details**
     - View and Request Changes to Service Portal
   - **Invoices/Credit Notes**
     - View and create your invoices/credit notes online
   - **One-Off Claims**
     - View and create One-Off Claims
   - **Reports**
     - View & print financial reports
   - **Organisation Details**
     - View and Request Changes to Organisation Details
   - **Contacts**
     - View and Request Changes to Contacts

2. Click on **Actuals**
3. Select any **service** on the left (yellow cog)
4. Select the **week** you wish to create actuals for by selecting on the calendar (a weekly summary will appear) – the **payment schedule provided should indicate which payment period we are currently on**.
5. If the provider offers more than one service level for instance STLH and spot then they will see all their service levels on the left hand side.

6. A grid will appear where you can select your parameters.

7. Click on **generate** (this will produce the actuals commissioned).

8. From the weekly summary you can edit the lines by clicking on **edit**.
9. You can now edit the data and add any comments.

10. Click **save** when you have finished editing.
11. Click **back** to go back to the actuals menu.

**Rules when editing the actuals:**

- Comments are **mandatory** for all changes. Absence of a comment may **delay** the processing of your actuals submitted to us and therefore your payment.
- Any increases in care **must** have been authorised through the usual means of going through the **social work teams** or **Customer First** (0800 800 4005), otherwise these will **not** be authorised via payment if submitted through the provider portal.
- Do **not** use the Frustrated box.
- Do **not** use the **Add Actual: Unplanned** box. Highlighted below; these will NOT be processed by SCC.
• When updating an actual, a decrease in care will change the box to **red** and an increase in care will change the box to **green**.

• If no care was delivered in the whole week do not delete the row, just update the quantity to 0 and add a comment.

• For an increase in care, add another row and indicate the quantity on the new row. If the increase is over several days and the quantity differs for each day, you will need a new row for each, however if the quantity is the same – only one row is needed. See examples below.

**Extra half hour on both Monday and Wednesday.**

**Extra half hour on Monday. Extra 1 hour on Tuesday.**

• When decreasing care, either untick the relevant box or update the hours in the quantity box, whichever is applicable.
Week Beginning 16 Jul 2018

Customer normally has 45 minutes every day but did not have a call on Sunday.

Key Tips for Users Inputting Actuals:

- You do not need to click the 'Add' button when you are editing actuals, unless you are adding a different service type (e.g. half day, when the customer usually attends for full days)
- For home care providers, you will either untick visits that were not delivered, or ‘add row’ for additional visits or time. Remember to add, or untick, two rows where this is a double assist service.
- Day Services only need to input to the ‘Actual’ box to input the number of sessions attended or provided, other boxes should not be used
- Make sure you click save once the variation is entered, and then back to return to all customers for that week
- Users with Support to Live at Home contracts will need to select the lot they are editing actuals for on the left-hand pane of the Actuals/Visits screen, under ‘Services’

Actuals Bulk Export

This feature will be unavailable from day one, however may be developed to be used in the future.

1. From the actuals home page click on Actuals Bulk Export

2. Enter **start date** for the period you wish to export
3. Enter **end date** for the period you wish to export
4. Click export

5. Click open or save the report
6. Save the report in your chosen file location
7. Open report using excel (you will need to search for all file types as the file saved is a CSV file.
8. Amend line items where there are variations

9. Save file when you have finished making the amendments to the line items
10. You are now ready to carry out the actuals bulk import process

**Actuals Bulk Import**

1. Click on **Actuals Bulk Import**

2. Click on **browse** for the csv file
3. Select file
4. Click on **open**
5. Click on **import** (*this will take a little while to import so please wait*)

6. A confirm import window will appear. Click **update system**
7. If any records have failed this will be highlighted.
8. An import complete window will appear. Click return to take you back to the bulk import menu. *(The amendments you have made in the actuals will automatically appear in the ContrOCC for the business support team to check and authorise)*

**Import Complete**

Review updated records and click Return once complete.

9. Click on home to take you back to the home page.
3. Scheduled Payments – Provider viewing in Portal

This shows a list of the scheduled payments. If the status shown is **current** it means the payments have **not yet been finalised** and are subject to change. If the payment says **finalised**, then it has been **authorised and finalised** in ContrOCC. No further changes can be made to these payments.

1. Click on the **scheduled payments** link from the home screen

2. Please select the **scheduled period** on the left (*Please note that the system will default to the current financial year. If you select a period where there are no scheduled payments the message, no scheduled payments appear*)

3. Click on the link for the **contract** (*if there are more than one week’s payments scheduled a list will appear and you will need to select the correct week*)

4. The scheduled payments will now appear

5. If the status of the scheduled payments say **current** it means that these payment periods have **not yet been finalised** and are subject to change
6. If the period says **finalised** then the payments have been calculated, authorised and the payment batch finalised.

7. To return click on the **home screen** link.

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### 4. Actions and change requests

**Actions**

1. Click on the actions and change requests link

   **Actions and Change Requests**
   
   2 open Actions (1 overdue)

2. Click on new action
3. Select the **type** of action you wish to take from the drop-down menu

4. Select the **Related to** type from the drop-down menu

5. Select **Entity** from the drop-down menu

6. Enter a **due date** for when the action is due by

7. Select **Assign** from the drop-down menu to assign to the appropriate SCC team
8. Enter the **title** of your action (This is a free text box)

![Title: Test title](image)

9. Enter the **description** of the action in the text box

![Description](image)

10. If you wish to attach documents to your action click on browse

![Choose file](image)

11. Chose file from, your file location

12. Your file should be shown in the attachment

![Attachment](image)

13. Click **Create Action** (If you want to cancel the action click cancel button which will take you back to the actions landing screen)

[Create Action] [Cancel]

**Viewing Existing Actions**

1. All actions are displayed on the view existing actions screen
2. If you wish to view open actions only tick the **open actions** box

![Open Actions Only]

3. Use the **assigned to** dropdown box to filter actions by who they are assigned to

![Actions and Change Requests]

4. Once you have chosen the filters you wish to use, click on the **view** button to run the search. (The results will then be displayed)

![Action Details]
5. To view an **existing** action, click on the hyperlinked title of the action

<table>
<thead>
<tr>
<th>Title</th>
</tr>
</thead>
<tbody>
<tr>
<td>Test</td>
</tr>
</tbody>
</table>

6. The details of that action will then be displayed

7. To add a comment to the action, click on the **comment** button

![Comment Button]

8. Click **submit**
9. To request that the action is closed, click on the **request closure** button

![Request Closure Button]

10. Click **submit**
11. Click the **back** button to return to the landing page

![Back Button]

**Change requests**

Any submitted change requests can be viewed from the landing page.

![Change Requests](image)

Archived requests can be included by ticking the include archived box, and then clicking **view** (you will only be able to see requests if there are archived requests)

![Include Archived]

You can reject change requests in ContrOCC. You can create a list of rejection reasons.
5. Reports

Commissioned V Actuals

1. Go to reports from the main menu

2. Click on commissioned v actuals link

3. Select Service Group Class
4. Select Organisation
5. Select Client or all clients
6. Enter date from
7. Enter date to
8. Tick if you only want to see differences only
9. Tick if you wish to include weeks without actuals
10. Click on view and your details will appear

11. You can click view or download based on your preferred option
12. To return to your reports home page click on close and return

Pending Payments Exception

1. Click on pending payments exception from the reports home page
2. **Click on organisation**

3. **Click on** view (if there are no records to display you will see a message there is nothing to display)
4. **Click close and return** to take you back to the main reports page

**Pending Scheduled Payments**

1. Click on **pending scheduled payments** from the home page
2. Select status from the drop-down menu

3. Enter date from
4. Enter date to
5. Click view - it may take a little while for your report to generate. The report will show the **pending payments** due to the provider.
6. These payments are **not finalised** until SCC carries out the finalisation process.
7. You can choose to download the report.
8. When you have finished click close and return to main reports menu.

Remittance Advice Provider Payments Report

1. Click on remittance advice provider payments report

2. Select the contract from the drop-down menu
3. Select the payment method from the drop-down menu
4. Select the payment period you wish to view in your report
5. Click view to generate your report
6. Click **download** if you want to download your report

7. Click **open** and your report will open

8. Or save your report in your specified location

9. **Close and return** when you have finished with your report or close report if you have downloaded the report.

### 6. Care Package Line Items

1. Click on **Care Package Line Items** on the home page
2. Select the **service** from the drop-down menu
3. Select the **client** you wish to view
4. Select the **service level**
5. Click **view** and your report will display
6. To return to the main menu click on the home page
7. You can add actions from here that are specific to the care details of a client

7. Log Out

To log out of the system click on the log out icon

8. Contact details

If you have any questions about the information you are submitting for billing purposes, actuals, you can contact business and finance colleagues as you have always done.

If you have any problems using or accessing the portal itself, please contact the ACS Contracts Helpdesk, using the contact details below.

E: ACSContractsHelpdesk@Suffolk.gov.uk
T: 01473 264025