

Adults Provider Portal

System Guidance

How To:

- Submit a Manual Actual
- Submit Actuals via Bulk Import
- Add Unplanned Actuals
- Add Rolling Respite Actuals
- View Invoices and Credit Memos
- Create Invoice
- View Invoices and Credit Memos
- Submit an Action to Request a Change
- Submit a Manual Action
- View Open/Closed Actions
- Respond to an Action
- Respond to a Dispute
- View a Scheduled Payment
- View/Download Previous Payment Report
- View Pending Scheduled Payments

November 2023

Ownership details

Document Author	Title/Organisation	Signature	Date
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Version Control

Version number	Author	Date	Amendment
1.4	Stephen Ingham	November 2023	<ul style="list-style-type: none"> • <i>Updated to accommodate process change for Living Well at Home Homecare contracts.</i> • <i>Added details on how to add Unplanned Actuals</i> • <i>Added instructions on how to create an invoice.</i>

Review schedule

Initial creation date	Reviewed	Reviewer name	Responsible officer check	Review due
June 2022				June 2025

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Security

As a provider of care for LCC you must and you are required to maintain the confidentiality of confidential information obtained and adhere to The Confidentiality Policy documented here <http://intranet.ad.lancscc.net/how-do-i/information-governance/> which sets out your statutory obligations under The Data Protection Act 2018 .

Information of a confidential nature must **never** be given over the telephone unless the staff member has identified that the information needs to be shared and verifies the identity of the person calling. If a staff member doubts the identity of the caller, they must ask for the caller's telephone number to check and call back. Where there is any doubt regarding information disclosure, the person receiving the call should ask the caller to submit a written request for the information and/ or seek guidance.

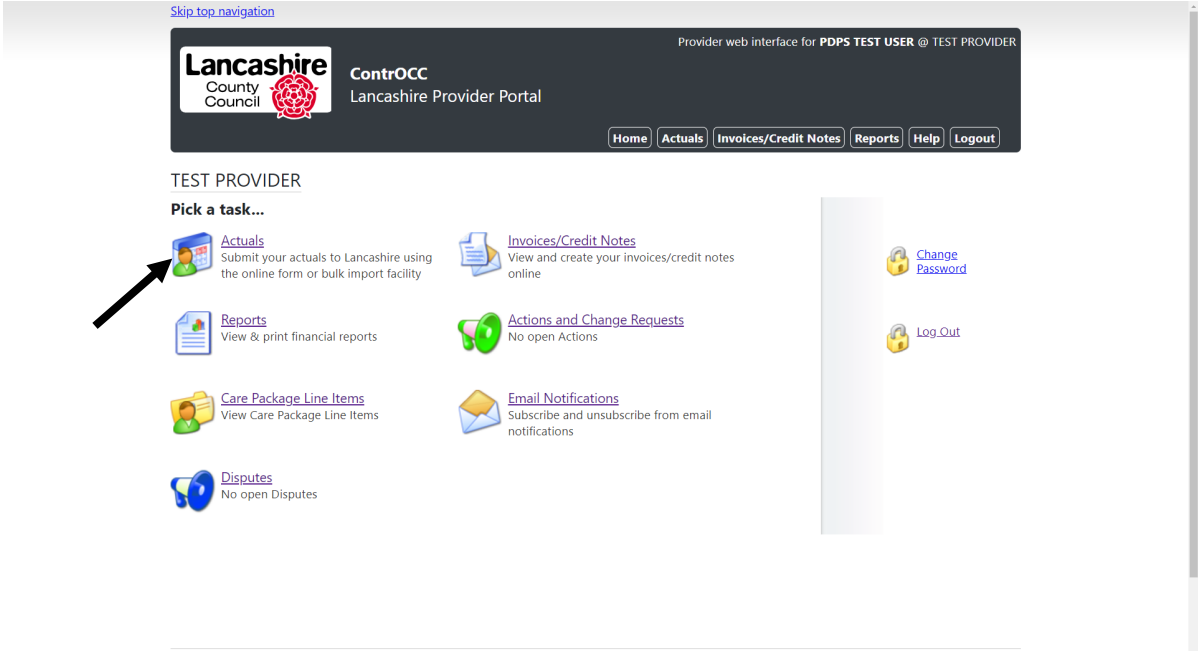
At the beginning of any period of contact including assessment or service, where possible and practicable staff should obtain the service user's consent to share information. Staff must explain the nature and likelihood of the information sharing to the service user and any other person giving information.

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Submit a Manual Actual

Step	Action
1.	Login to the Adults Provider Portal
2.	Click the Actuals link. 

3. Select the week and service to be submitted against using the options on the left of the screen.

The screenshot displays the Lancashire ContrOCC Lancashire Provider Portal. The left-hand navigation menu includes sections for 'Actual Weeks' (with a calendar for July 2023) and 'Services' (listing 'LWHH - TEST HOMECARE CONTRACT (PR1.0LD)'). The main area shows 'Actuals for LWHH - TEST HOMECARE CONTRACT (PR1.0LD)' for the week beginning 17 July. It features filter options for Service Level, Client, and Actuals, and a table of actuals with columns for Actual, Service Level, PI, Frstd, Msd, Xtr, Yst, Total Cost, and Comments.

NB: This list can be filtered further by: Service Level, Client and Type of Actual

4. Once the client to be updated has been located, click the **[Add/Edit]** button on the right of the Actual line.

Actuals for LWHH - TEST HOMECARE CONTRACT (PR1 0LD)

Week Beginning 17 July

Service Level: [All Service Levels] Client: [All Clients]

Show Clients with Actuals: [No Selection] Actuals: Unplanned Planned Intermittent Locked

Actual	Service Level	PI	Frstd	Msd	Xtr	Vst	Total Cost	Comments
Mrs	9						£389.50 of £389.50	Add/Edit Confirm
7 x Hours	Homecare (LWH) - Single Carer	7	0	0	0	7	£143.50 = 7 (Actual + Frstd) Hours x £20.50	02/10/2023
12 x Hours	Homecare (LWH) - Two Carer	14	0	2	0	14	£246.00 = 12 (Actual + Frstd) Hours x £20.50	Cancelled by client
Mrs C.							£574.00 of £574.00	Add/Edit Confirm
21 x Hours	Homecare (LWH) - Single Carer	21	0	0	0	21	£430.50 = 21 (Actual + Frstd) Hours x £20.50	
7 x Hours	Homecare (LWH) - Travel	7	0	0	0	7	£143.50 = 7 (Actual + Frstd) Hours x £20.50	

5. On the 'Edit Actuals for...' screen, input the service delivered, confirming the reason for any Frustrated, Missed/Cancelled and Extra services (Visits do not need to be amended)

Edit Actuals for DEMO SERVICE, Mrs J...

Week Beginning 20 Jun 2022

Actual	Service Level	PI	Frstd	Msd	Xtr	Vst	Total Cost	Comments
35	Non-Framework Homecare - Two Carer	35	0	0	0	35	£624.40 = 35 (Actual + Frstd) Hours x £17.84	

Week Total: £624.40

[Save](#) [Undo](#) [Back](#)

Skip_top_navigation

Lancashire County Council **ContrOCC** Lancashire Provider Portal
 Provider web interface for Mr Demo User DEMO PROVIDER

Home Actuals Invoices/Credit Notes POs Help Logout

Edit Actuals for DEMO SERVICE, Mrs J

Week Beginning 20 Jun 2022

Actual	Service Level	PI	Frstd	Msd	Xtr	Vst	Total Cost	Comments
32 x Hours	Non-Framework Homecare - Two Carer	35	0	3	0	35	£624.40 = 35 (Actual + Frstd) Hours x £17.84	Service cancelled by client

Week Total: £624.40

Save Undo
Back

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6. To commit the changes made, click the **[Save]** button.

Skip_top_navigation

Lancashire County Council **ContrOCC** Lancashire Provider Portal
 Provider web interface for Mr Demo User DEMO PROVIDER

Home Actuals Invoices/Credit Notes POs Help Logout

Edit Actuals for DEMO SERVICE, Mrs J

Week Beginning 20 Jun 2022

Actual	Service Level	PI	Frstd	Msd	Xtr	Vst	Total Cost	Comments
32 x Hours	Non-Framework Homecare - Two Carer	35	0	3	0	35	£624.40 = 35 (Actual + Frstd) Hours x £17.84	Service cancelled by client

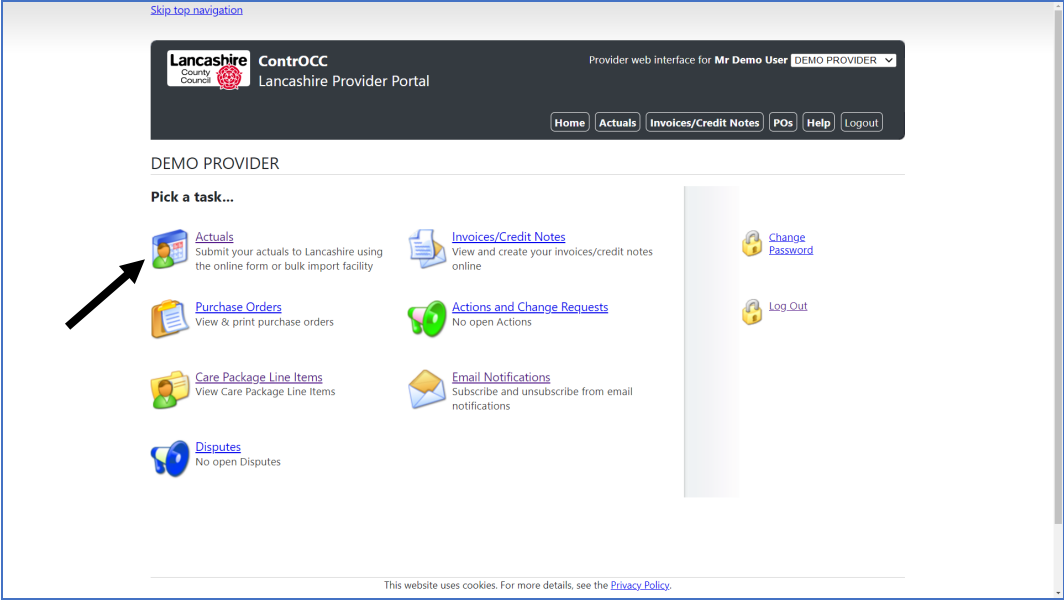
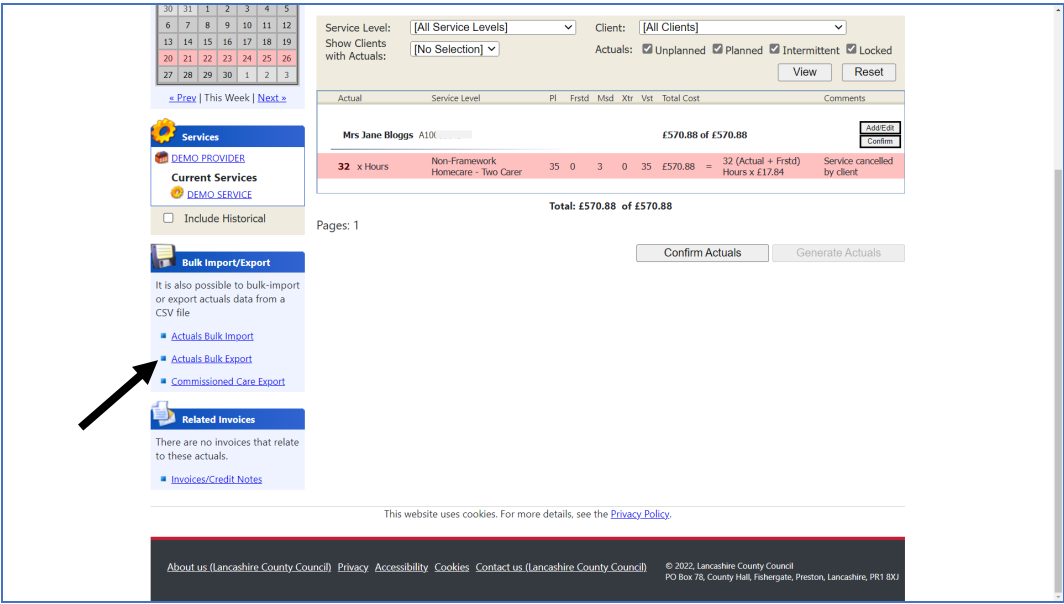
Week Total: £624.40

Save Undo
Back

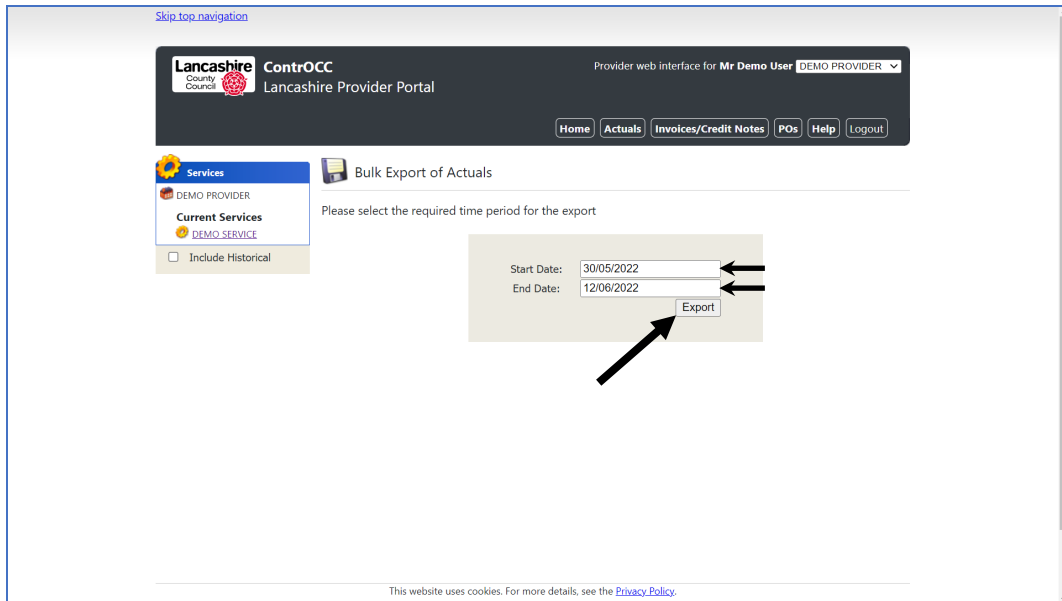
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7. Click **[Back]** to return to the list of Actuals.

Submit Actuals via Bulk Import

Step	Action
1.	Login to the Adults Provider Portal
2.	<p>Click the Actuals link.</p>  <p>The screenshot shows the Lancashire ContrOCC Lancashire Provider Portal. At the top, there is a navigation bar with links for Home, Actuals, Invoices/Credit Notes, POs, Help, and Logout. Below this, there is a section titled 'Pick a task...' with several icons and links: Actuals (Submit your actuals to Lancashire using the online form or bulk import facility), Invoices/Credit Notes (View and create your invoices/credit notes online), Purchase Orders (View & print purchase orders), Actions and Change Requests (No open Actions), Care Package Line Items (View Care Package Line Items), Email Notifications (Subscribe and unsubscribe from email notifications), and Disputes (No open Disputes). A black arrow points to the 'Actuals' link.</p>
3.	<p>Select Actuals Bulk Export from the left side of the screen.</p>  <p>The screenshot shows the 'Actuals Bulk Export' page. On the left side, there is a sidebar with a 'Bulk Import/Export' section. Under this section, there are three links: 'Actuals Bulk Import', 'Actuals Bulk Export', and 'Commissioned Care Export'. A black arrow points to the 'Actuals Bulk Export' link. The main content area shows a table of actuals for 'Mrs Jane Bloggs'. The table has columns for Actual, Service Level, PI, Frstd, Mid, Xtr, Vst, Total Cost, and Comments. The table shows 32 hours of actuals for a Non-Framework Homecare - Two Carer service, with a total cost of £570.88. There are buttons for 'Confirm Actuals' and 'Generate Actuals' at the bottom of the table.</p>

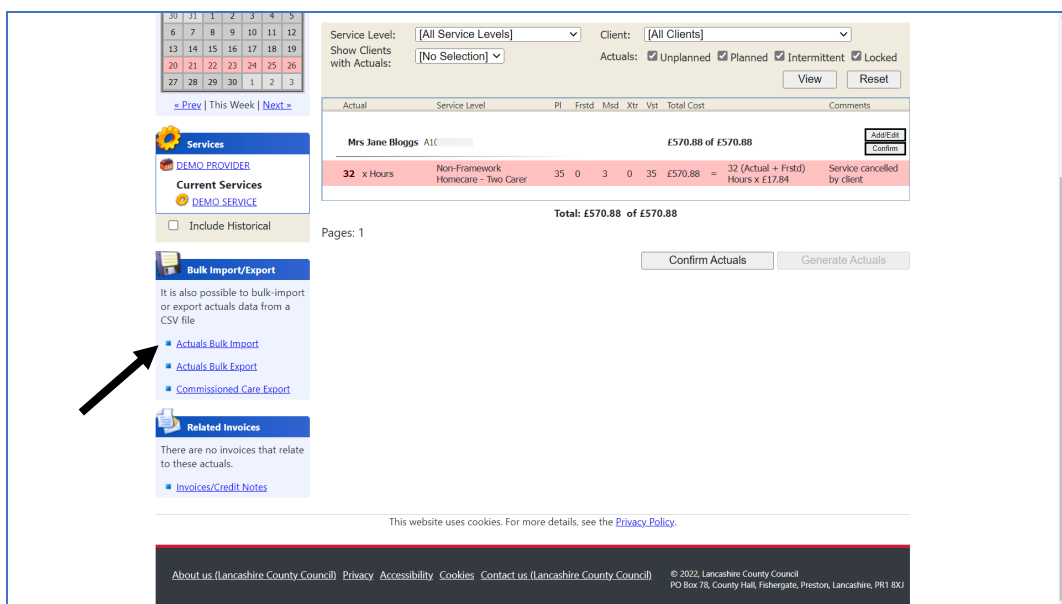
4. Input the date range to be exported and click **[Export]**



5. Open the exported file, and remove any lines not to be submitted i.e. those already confirmed or not ready for submission.

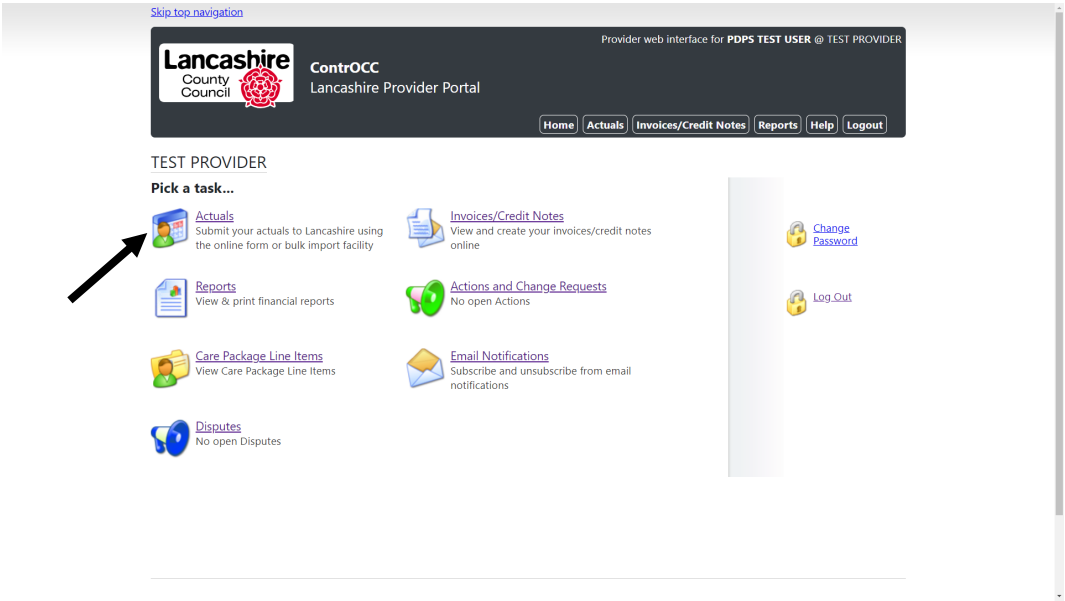
6. Update each line to be submitted to show any Actual, Frustrated, Missed and Extra values in the same way as applied to a [Manual Submission](#)

7. On the Actuals home screen, click **Actuals Bulk Import**



8.	Click [Choose File] and select the file to be imported.
9.	Click [Import]
10.	On the Confirm Import screen, check for any errors. If any are highlighted click [Cancel] and correct the import file.
11.	When file is ready to be imported, click [Update System]

Add Unplanned Actuals

Step	Action
1.	Login to the Adults Provider Portal
2.	<p>Click the Actuals link.</p> 

3. Select the week and service to be submitted against using the options on the left of the screen.

The screenshot shows the Lancashire County Council ContrOCC Lancashire Provider Portal. The main content area displays 'Actuals for LWHH - TEST HOMECARE CONTRACT (PR1 OLD)' for the week beginning 17 July. The interface includes a calendar on the left for July 2023, a 'Services' sidebar with 'TEST PROVIDER' and 'Current Services' sections, and a main table of actuals. The table lists services for Mrs Ro and Mrs Ca, including Homecare (LWH) - Single Carer and Homecare (LWH) - Two Carer. The table columns are: Actual, Service Level, PI, Frsttd, Msd, Xtr, Vst, Total, Cost, and Comments. The 'Add/Edit' button is visible on the right side of the table rows.

NB: This list can be filtered further by: Service Level, Client and Type of Actual

4. Once the required Actual/Week has been located click the [\[Add/Edit\]](#) button on the right side of the line.

The screenshot is identical to the previous one, showing the Lancashire County Council ContrOCC Lancashire Provider Portal. The main content area displays 'Actuals for LWHH - TEST HOMECARE CONTRACT (PR1 OLD)' for the week beginning 17 July. A black arrow points to the 'Add/Edit' button on the right side of the table row for '12 x Hours Homecare (LWH) - Two Carer'.

5. On the 'Edit Actuals for...' screen, at the bottom of the entries will be an 'Add Actual: Unplanned' option with a drop-down box which will default to [No Selection]

Click the drop-down box and select the type of Unplanned Actual being claimed

Provider web interface for PDPS TEST USER @ TEST PROVIDER

Lancashire County Council ContrOCC Lancashire Provider Portal

Home Actuals Invoices/Credit Notes Reports Help Logout

Edit Actuals for LWHH - TEST HOME CARE CONTRACT (PR1 0LD), Mrs R

Week Beginning 17 Jul 2023

Actual	Service Level	PI	Frstd	Msd	Xtr	Vst	Total Cost	Comments
7	x Hours Homecare (LWH) - Single Carer	7	0	0	0	7	£143.50 = 7 (Actual + Frstd) Hours x £20.50	02/10/2023
12	x Hours Homecare (LWH) - Two Carer	14	0	2	0	14	£246.00 = 12 (Actual + Frstd) Hours x £20.50	Cancelled by client

Add Actual: Planned [No selection] Unplanned

[No selection]

Homecare - Emergency Hours XX (Hour) at £20.50

Homecare - Notice XX (Hour) at £20.50

Homecare - Risk Assessment XX (Hour) at £20.50

Homecare (LWH) - Emergency Hours (Hour) at £20.50

Save Undo

Back

NB: The Planned and Unplanned options may currently appear misaligned on screen. For clarification, the Unplanned Actual options will show Risk Assessment, Emergency Hours and/or Notice.

Once the CPLI is selected click the **[Add]** button on the right side of the line

Skip top navigation

Lancashire County Council
 ContrOCC Lancashire Provider Portal
 Provider web interface for PDPS TEST USER @ TEST PROVIDER

Home Actuals Invoices/Credit Notes Reports Help Logout

Edit Actuals for LWHH - TEST HOMECARE CONTRACT (PR1 0LD), Mrs R

Week Beginning 17 Jul 2023

Actual	Service Level	PI	Frstd	Msd	Xtr	Vst	Total Cost	Comments
7	x Hours Homecare (LWH) - Single Carer	7	0	0	0	7	£143.50 = 7 (Actual + Frstd) Hours x £20.50	02/10/2023
12	x Hours Homecare (LWH) - Two Carer	14	0	2	0	14	£246.00 = 12 (Actual + Frstd) Hours x £20.50	Cancelled by client

Add Actual: Planned [No selection] Unplanned
 Homecare (LWH) - Emergency Hours (Ho

Week Total: £389.50

Save Undo
 Back

6. With the line added, input the quantity of hours/nights being claimed and add any appropriate comments as required.

7. To commit the changes made, click the **[Save]** button.

Skip top navigation

Lancashire County Council
 ContrOCC Lancashire Provider Portal
 Provider web interface for PDPS TEST USER @ TEST PROVIDER

Home Actuals Invoices/Credit Notes Reports Help Logout

Edit Actuals for LWHH - TEST HOMECARE CONTRACT (PR1 0LD), Mrs R

Week Beginning 17 Jul 2023

Actual	Service Level	PI	Frstd	Msd	Xtr	Vst	Total Cost	Comments
2	x Hours Homecare (LWH) - Emergency Hours	--	--	--	2	1	£41.00 = 2 (Actual + Frstd) Hours x £20.50	Waiting for ambulance
7	x Hours Homecare (LWH) - Single Carer	7	0	0	0	7	£143.50 = 7 (Actual + Frstd) Hours x £20.50	02/10/2023
12	x Hours Homecare (LWH) - Two Carer	14	0	2	0	14	£246.00 = 12 (Actual + Frstd) Hours x £20.50	Cancelled by client

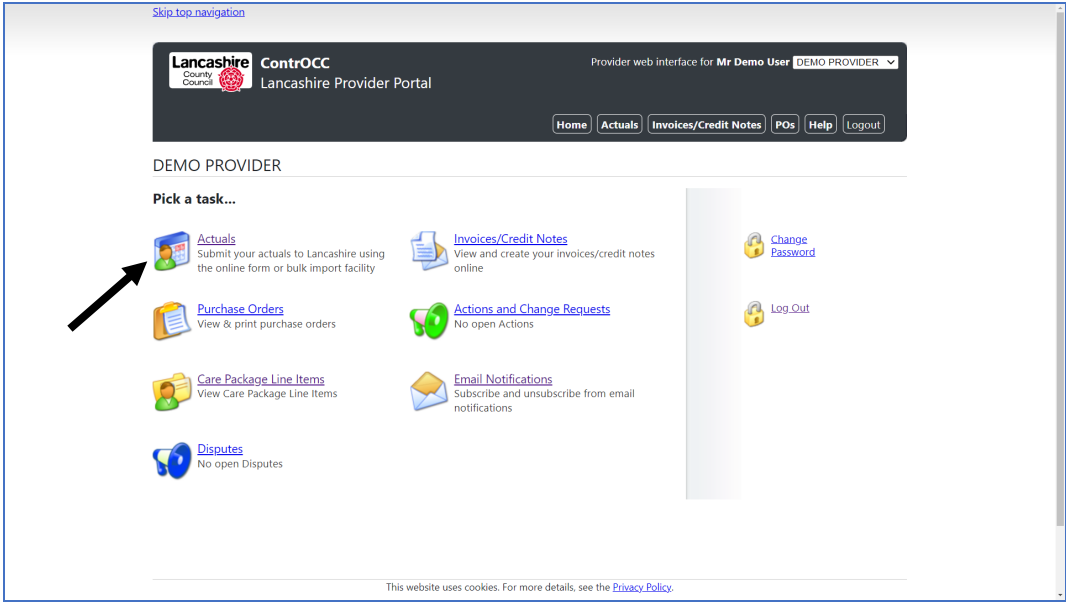
Add Actual: Planned [No selection] Unplanned
 [No selection]

Week Total: £430.50

Save Undo
 Back

8. Click **[Back]** to return to the list of Actuals.

Add Rolling Respite Actuals

Step	Action
1.	Login to the Adults Provider Portal
2.	Click the Actuals link.  <p>The screenshot shows the Lancashire ContrOCC Lancashire Provider Portal. At the top, there is a navigation bar with links for Home, Actuals, Invoices/Credit Notes, POs, Help, and Logout. Below the navigation bar, the user is identified as Mr Demo User DEMO PROVIDER. The main content area is titled 'Pick a task...' and contains several task cards: Actuals (Submit your actuals to Lancashire using the online form or bulk import facility), Invoices/Credit Notes (View and create your invoices/credit notes online), Purchase Orders (View & print purchase orders), Actions and Change Requests (No open Actions), Care Package Line Items (View Care Package Line Items), Email Notifications (Subscribe and unsubscribe from email notifications), and Disputes (No open Disputes). A black arrow points to the 'Actuals' link.</p>

3. Select the week and service to be submitted against using the options on the left of the screen.

The screenshot shows the Lancashire ContrOCC Lancashire Provider Portal. The top navigation bar includes 'Home', 'Actuals', 'Invoices/Credit Notes', 'Help', and 'Logout'. The main content area is titled 'Actuals for DEMO SERVICE' and shows a 'Week Beginning 01 May'. On the left, there is a calendar for May 2023 and a 'Services' list. Two arrows point to the calendar and the 'Services' list. The 'Services' list includes 'DEMO PROVIDER' and 'Current Services' with 'DEMO SERVICE' selected. The 'Actuals' table shows a total of £624.40 of £624.40 for Mrs Jane Bloggs. The table has columns for Actual, Service Level, PI, Frstd, Msd, Xtr, Vst, Total Cost, and Comments. The row for Mrs Jane Bloggs shows 35 x Hours, Non-Framework Homecare - Two Carer, and a total cost of £624.40. The 'Add/Edit' button is visible on the right side of the row.

NB: This list can be filtered further by: Service Level, Client and Type of Actual

4. Once the required Actual/Week has been located click the **[Add/Edit]** button on the right side of the line.

The screenshot shows the Lancashire ContrOCC Lancashire Provider Portal. The top navigation bar includes 'Home', 'Actuals', 'Invoices/Credit Notes', 'Help', and 'Logout'. The main content area is titled 'Actuals for DEMO SERVICE' and shows a 'Week Beginning 01 May'. On the left, there is a calendar for May 2023 and a 'Services' list. The 'Services' list includes 'DEMO PROVIDER' and 'Current Services' with 'DEMO SERVICE' selected. The 'Actuals' table shows a total of £624.40 of £624.40 for Mrs Jane Bloggs. The table has columns for Actual, Service Level, PI, Frstd, Msd, Xtr, Vst, Total Cost, and Comments. The row for Mrs Jane Bloggs shows 35 x Hours, Non-Framework Homecare - Two Carer, and a total cost of £624.40. The 'Add/Edit' button is visible on the right side of the row, and an arrow points to it.

5. On the 'Edit Actuals for...' screen, at the bottom of the entries will be an 'Add Actual: Planned' option with a drop-down box which will default to [No Selection]

Click the drop-down box and select the Rolling Respite CPLI that matches the date(s) being claimed

Week Beginning 01 May 2023

Actual	Service Level	PI	Frstd	Msd	Xtr	Vst	Total Cost	Comments
35 x Hours	Non-Framework Homecare - Two Carer	35	0	0	0	35	£624.40 = 35 (Actual + Frstd) Hours x £17.84	

Add Actual: Planned [No selection] Add

Week Total: £624.40
CPLI 01/04/2023 - 31/03/2024, Non-Framework Homecare - Rolling Respite (Hour) at £20.50

Save Undo
Back

Once the CPLI is selected click the [Add] button on the right side of the line

Week Beginning 01 May 2023

Actual	Service Level	PI	Frstd	Msd	Xtr	Vst	Total Cost	Comments
35 x Hours	Non-Framework Homecare - Two Carer	35	0	0	0	35	£624.40 = 35 (Actual + Frstd) Hours x £17.84	

Add Actual: Planned CPLI 01/04/2023 - 31/03/2024, Non-Fram Add

Week Total: £624.40

Save Undo
Back

6. With the line added, input the quantity of hours/nights being claimed and add any appropriate comments as required.

Skip top navigation

Lancashire County Council **ContrOCC** Lancashire Provider Portal Provider web interface for Mr Demo User DEMO PROVIDER

Home Actuals Invoices/Credit Notes Help Logout

Edit Actuals for DEMO SERVICE, Mrs Jane Bloggs ()

Week Beginning 01 May 2023

Actual	Service Level	PI	Frstd	Msd	Xtr	Vst	Total Cost	Comments
35 x Hours	Non-Framework Homecare - Two Carer	35	0	0	0	35	£624.40 = 35 (Actual + Frstd) Hours x £17.84	
4 x Hours	Non-Framework Homecare - Rolling Respite	--	0	--	--	1	--	IINV100011

Week Total: £624.40

Save Undo Back

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7. To commit the changes made, click the **[Save]** button.

Skip top navigation

Lancashire County Council **ContrOCC** Lancashire Provider Portal Provider web interface for Mr Demo User DEMO PROVIDER

Home Actuals Invoices/Credit Notes Help Logout

Edit Actuals for DEMO SERVICE, Mrs Jane Bloggs ()

Week Beginning 01 May 2023

Actual	Service Level	PI	Frstd	Msd	Xtr	Vst	Total Cost	Comments
35 x Hours	Non-Framework Homecare - Two Carer	35	0	0	0	35	£624.40 = 35 (Actual + Frstd) Hours x £17.84	
4 x Hours	Non-Framework Homecare - Rolling Respite	--	0	--	--	1	--	IINV100011

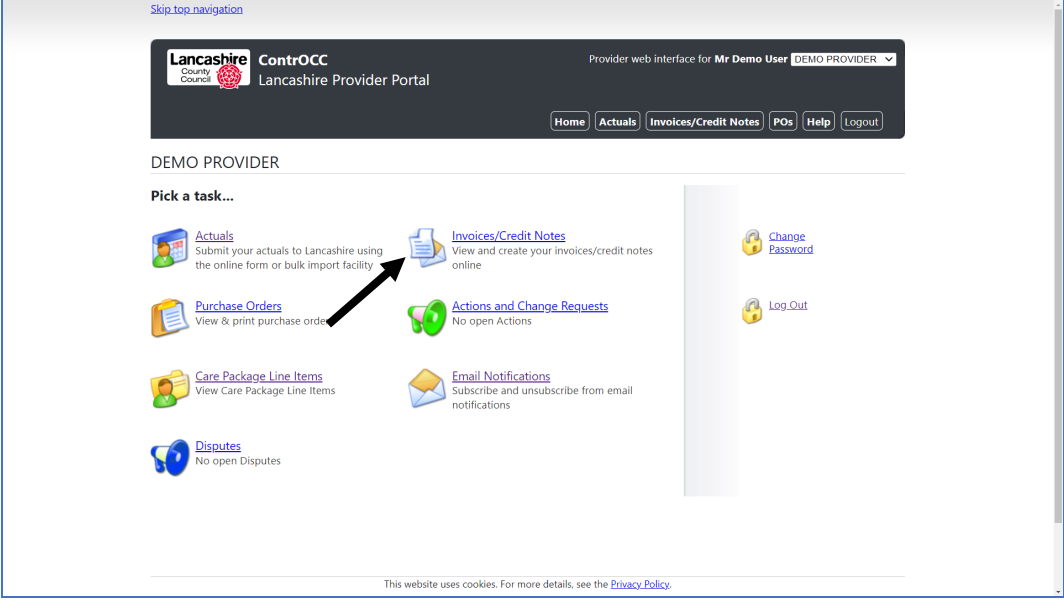
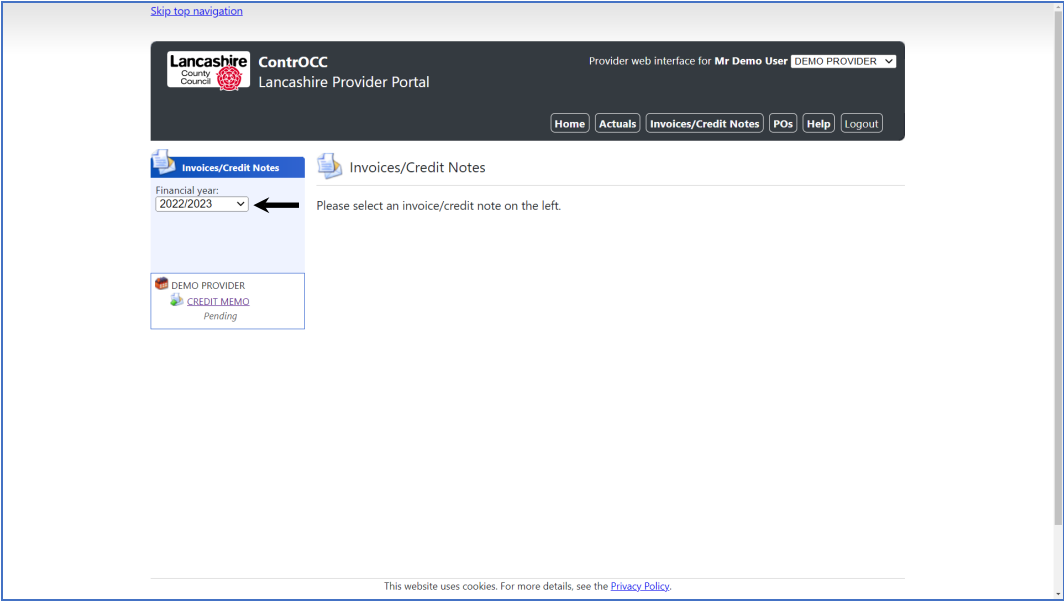
Week Total: £624.40

Save Undo Back

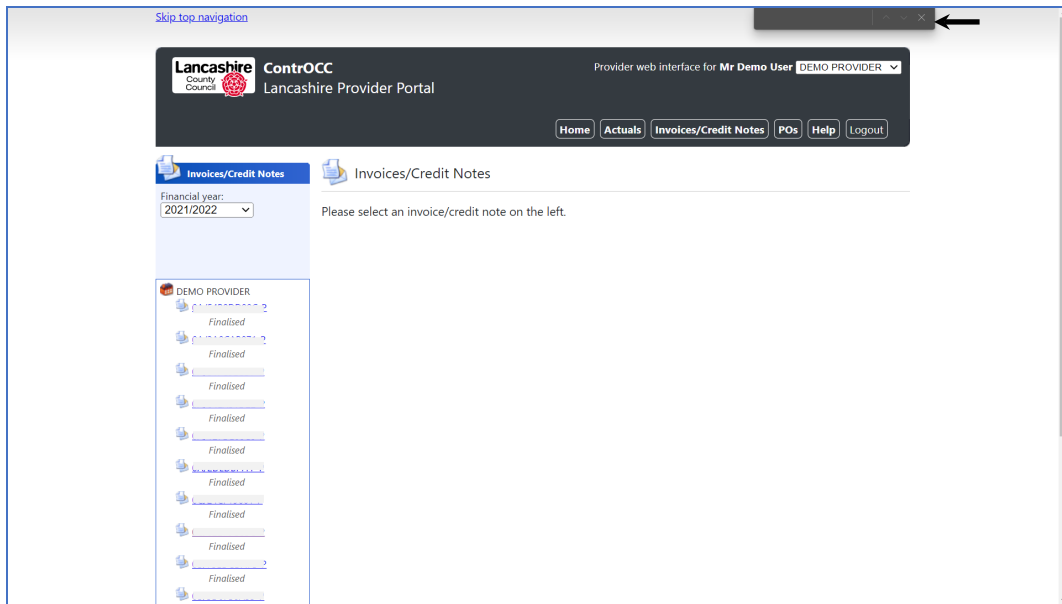
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8. Click **[Back]** to return to the list of Actuals.

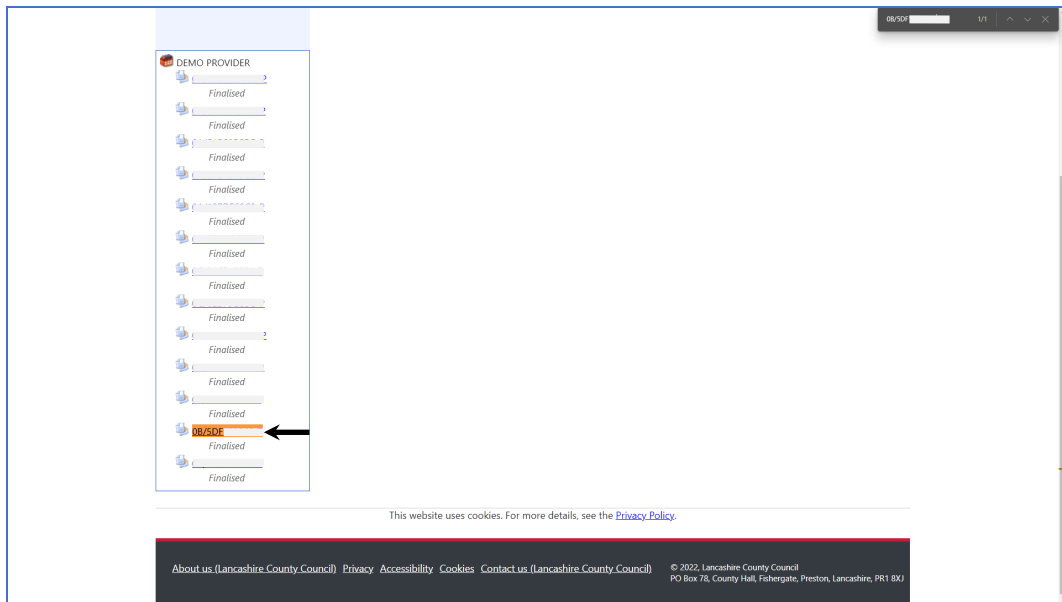
View Invoices and Credit Memos

Step	Action
1.	Login to the Adults Provider Portal
2.	<p>Click the Invoices/Credit Notes link.</p>  <p>The screenshot shows the Lancashire ContrOCC Lancashire Provider Portal. At the top, there is a navigation bar with links for Home, Actuals, Invoices/Credit Notes, POs, Help, and Logout. Below the navigation bar, there is a section titled 'Pick a task...' with several task cards: Actuals, Purchase Orders, Care Package Line Items, Disputes, Invoices/Credit Notes, Actions and Change Requests, and Email Notifications. A black arrow points to the 'Invoices/Credit Notes' link.</p>
3.	<p>Select the Financial Year to be queried.</p>  <p>The screenshot shows the 'Invoices/Credit Notes' page. A dropdown menu for 'Financial year:' is open, showing '2022/2023' selected. Below the dropdown, there is a list of pending credit memos for the DEMO PROVIDER.</p>

4. To search for a specific invoice/credit memo, press CTRL + f to bring up the web-browser 'Find' option.



5. Type the Invoice Number in the 'Find' box to highlight the invoice in the list.



6.

Click on the Invoice Number to view the Top-Level detail of the invoice.

The screenshot displays the Lancashire ContrOCC Lancashire Provider Portal. At the top, there is a navigation bar with the Lancashire County Council logo, the text 'ContrOCC Lancashire Provider Portal', and a user profile for 'Mr Demo User' with a dropdown menu showing 'DEMO PROVIDER'. Navigation buttons for 'Home', 'Actuals', 'Invoices/Credit Notes', 'POs', 'Help', and 'Logout' are present.

The main content area is titled 'Invoices/Credit Notes' and shows 'Invoice 0B/5DF123348-P' with a 'FINALISED' status. A 'Financial year' dropdown is set to '2021/2022'. On the left, a sidebar for 'DEMO PROVIDER' lists several 'Finalised' invoices.

The invoice details section includes:

- Reference: [redacted]
- VAT Number: [redacted]
- Date on Invoice: 12/07/2021
- Created: 15/07/2021
- Submitted: 12/07/2021

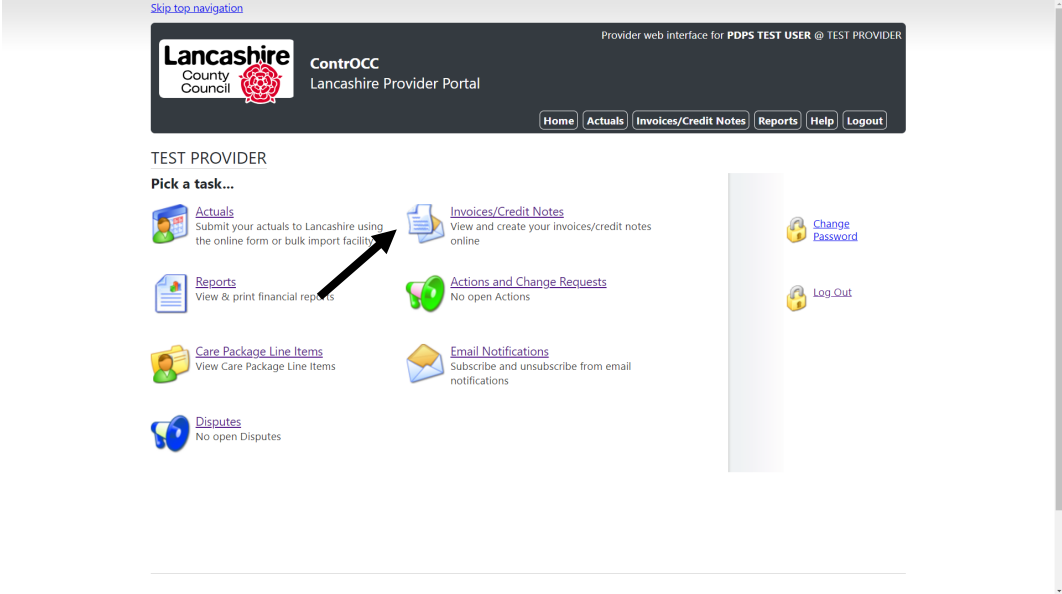
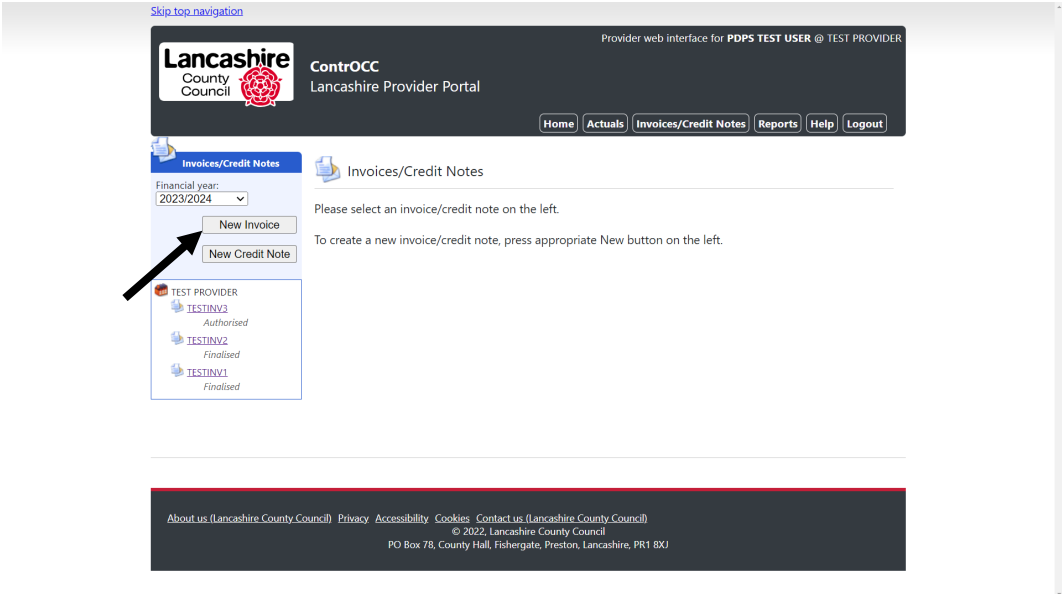
	Excl VAT	VAT
Total: £	2399.60	£ 0.00
Items Total: £	2399.60	£ 0.00
Short by: £	0.00	£ 0.00
Total Payable:	£	2399.60

The 'Upload File' section contains a table with the following data:

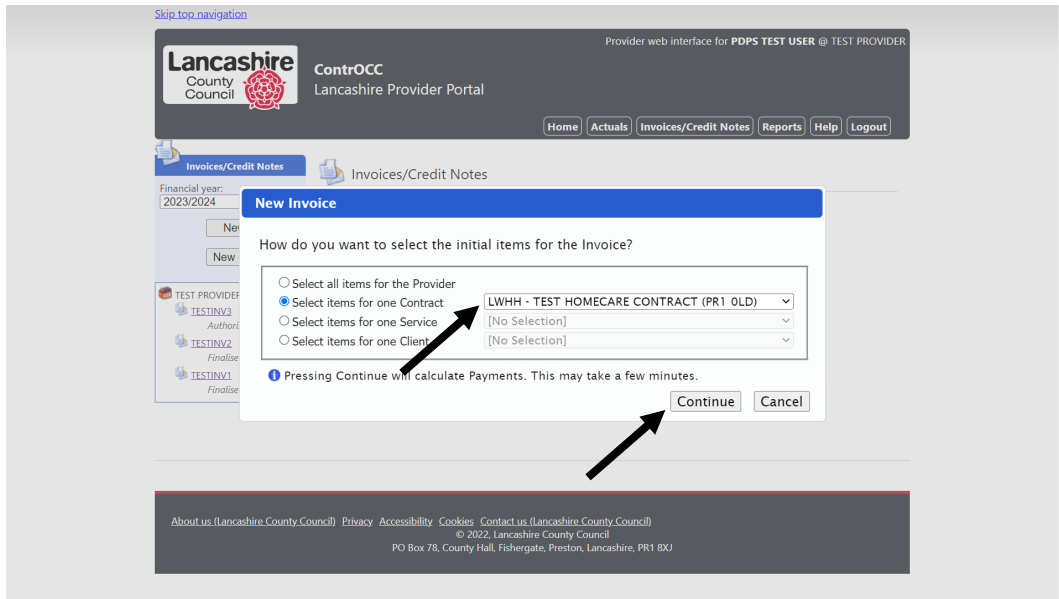
Commitment	Value	VAT	Contribution	Contract	Period
Bloggs, Jane, 2021/2022	£ 2399.60	£ 0.00	£ 0.00	DEMO CONTRACT	26/04/2021 - 23/05/2021

The 'Actions' section features dropdown menus for 'Assigned To: [Any]' and 'Type: [Any]', an 'Include Done Actions' checkbox, and a 'View Actions' button. Below is a table with columns: Status, Last Post Date, Title, Due, Type, Assigned To. The message 'There are no actions that match your filter criteria' is displayed.

Create An Invoice

Step	Action
1.	Login to the Adults Provider Portal
2.	<p>Click the Invoices/Credit Notes link.</p>  <p>The screenshot shows the Lancashire County Council ContrOCC Lancashire Provider Portal. The user is logged in as PDPS TEST USER. The dashboard includes a navigation menu with 'Home', 'Actuals', 'Invoices/Credit Notes', 'Reports', 'Help', and 'Logout'. Under 'Pick a task...', there are several options: 'Actuals', 'Invoices/Credit Notes' (highlighted with a black arrow), 'Reports', 'Actions and Change Requests', 'Care Package Line Items', 'Email Notifications', and 'Disputes'. On the right side, there are links for 'Change Password' and 'Log Out'.</p>
3.	<p>Click [New Invoice]</p>  <p>The screenshot shows the 'Invoices/Credit Notes' page. The 'Financial year' is set to 2023/2024. There are two buttons: 'New Invoice' (highlighted with a black arrow) and 'New Credit Note'. Below these buttons, there is a list of invoices for the TEST PROVIDER, including 'TESTINV3 Authorised', 'TESTINV2 Finalised', and 'TESTINV1 Finalised'. The page also includes a footer with 'About us (Lancashire County Council)', 'Privacy', 'Accessibility', 'Cookies', and 'Contact us (Lancashire County Council)'. The footer also contains the copyright information: '© 2022, Lancashire County Council, PO Box 78, County Hall, Fishergate, Preston, Lancashire, PR1 8XJ'.</p>

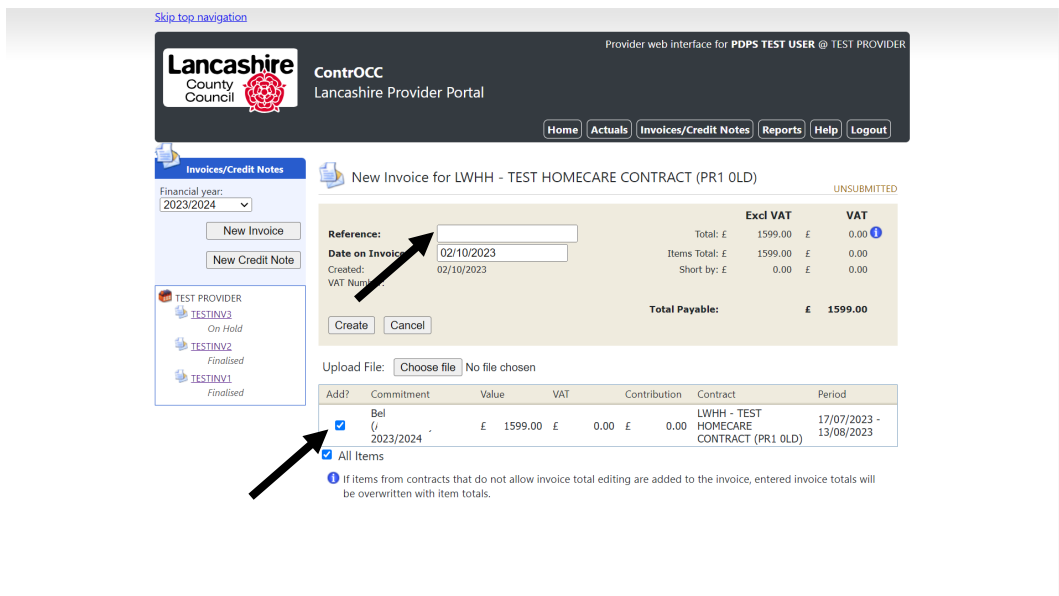
4. Select which contract the invoice is to be generated against



NB: It is advised to create invoices only at the Contract level, and to disregard the options for Provider and Service. The only exception will be for invoices generated for a specific client to clear any backdated debt.

Click [\[Continue\]](#)

5. Once the invoice has been calculated, input a Reference, and select/deselect the lines to be included on the invoice.



Once all appropriate items have been added, click [\[Create\]](#)

6. Check the balances added are correct and match the expected payment for each client/period.

7. To review Actuals for a specific line, click on the commitment Hyperlink, which will take you to the Manual Actuals screen to review/update the Actuals.

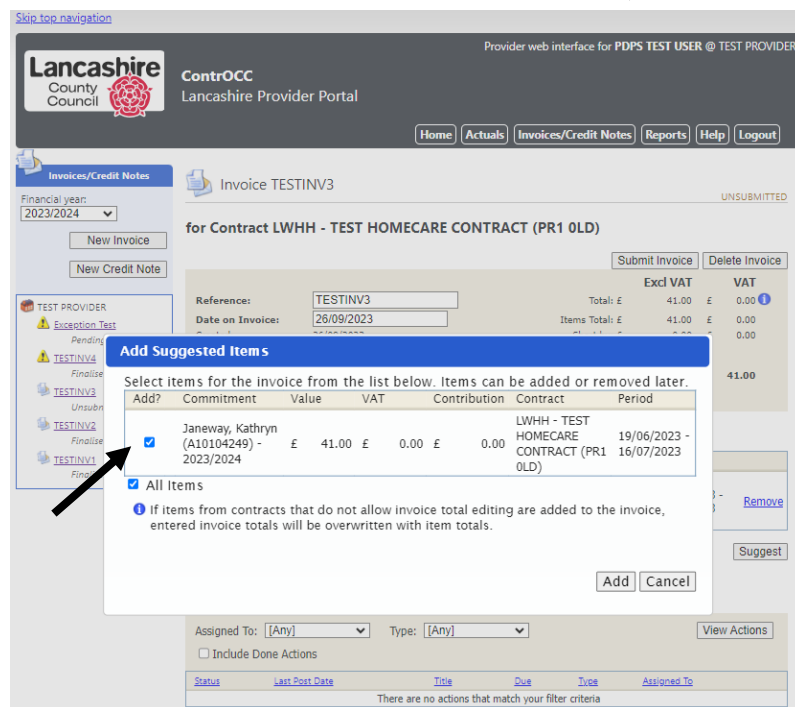
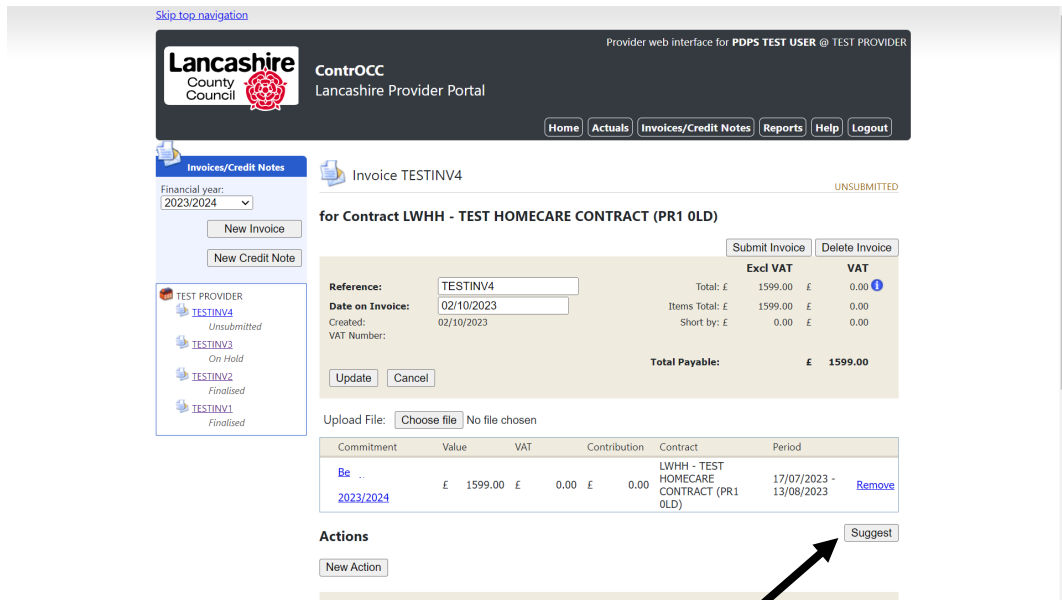
The screenshot shows the Lancashire ContrOCC Lancashire Provider Portal interface. The main content area displays invoice details for 'Invoice TESTINV4' (UNSUBMITTED) for 'Contract LWHH - TEST HOMECARE CONTRACT (PR1 OLD)'. The invoice summary shows a Total Payable of £ 1599.00. Below the summary is a table with columns: Commitment, Value, VAT, Contribution, Contract, and Period. The table contains one row with a commitment link 'Be ... 2023/2024' highlighted by a black arrow. The 'Contract' column contains 'LWHH - TEST HOMECARE CONTRACT (PR1 OLD)' and the 'Period' column contains '17/07/2023 - 13/08/2023'. There is also a 'Remove' link next to the period.

8. If any changes are made, click **[Update]** to recalculate the invoice.

This screenshot is identical to the one above, showing the same invoice details for 'Invoice TESTINV4'. However, a black arrow now points to the 'Update' button located below the invoice summary, next to a 'Cancel' button. The 'Update' button is highlighted in blue.

9. Any items which have been created/updated may need to be manually re-added, to be included on the invoice.

To do this, click **[Suggest]** and then select from the list, the items which need to be added.



NB: After adding new items, there may be some lines appear with a value of £0.00. These will need to be removed before submission.

10. The Total value of the invoice will be calculated from the sum of the items attached. This cannot be overridden.

Provider web interface for PDP5 TEST USER @ TEST PROVIDER

Lancashire County Council **ContrOCC** Lancashire Provider Portal

Home Actuals Invoices/Credit Notes Reports Help Logout

Invoices/Credit Notes

Financial year: 2023/2024

New Invoice New Credit Note

TEST PROVIDER

- TESTINV4 Unsubmitted
- TESTINV3 On Hold
- TESTINV2 Finalised
- TESTINV1 Finalised

Invoice TESTINV4 UNSUBMITTED

for Contract LWHH - TEST HOME CARE CONTRACT (PR1 OLD)

Submit Invoice Delete Invoice

Reference: TESTINV4 Total: £ 1599.00 £ 0.00

Date on Invoice: 02/10/2023 Items Total: £ 1599.00 £ 0.00

Created: 02/10/2023 Short by: £ 0.00 £ 0.00

VAT Number: Total Payable: £ 1599.00

Update Cancel

Upload File: Choose file No file chosen

Commitment	Value	VAT	Contribution	Contract	Period
Be: 2023/2024	£ 1599.00	£	0.00	£ 0.00 LWHH - TEST HOME CARE CONTRACT (PR1 OLD)	17/07/2023 - 13/08/2023

Actions: Suggest

New Action

11. When the invoice is ready to be submitted for processing, click [Submit Invoice]

Provider web interface for PDP5 TEST USER @ TEST PROVIDER

Lancashire County Council **ContrOCC** Lancashire Provider Portal

Home Actuals Invoices/Credit Notes Reports Help Logout

Invoices/Credit Notes

Financial year: 2023/2024

New Invoice New Credit Note

TEST PROVIDER

- TESTINV4 Unsubmitted
- TESTINV3 On Hold
- TESTINV2 Finalised
- TESTINV1 Finalised

Invoice TESTINV4 UNSUBMITTED

for Contract LWHH - TEST HOME CARE CONTRACT (PR1 OLD)

Submit Invoice Delete Invoice

Reference: TESTINV4 Total: £ 1599.00 £ 0.00

Date on Invoice: 02/10/2023 Items Total: £ 1599.00 £ 0.00

Created: 02/10/2023 Short by: £ 0.00 £ 0.00

VAT Number: Total Payable: £ 1599.00

Update Cancel

Upload File: Choose file No file chosen

Commitment	Value	VAT	Contribution	Contract	Period
Be: 2023/2024	£ 1599.00	£	0.00	£ 0.00 LWHH - TEST HOME CARE CONTRACT (PR1 OLD)	17/07/2023 - 13/08/2023

Actions: Suggest

New Action

12. Once the invoice has been submitted it will change to a Pending state.

The screenshot displays the Lancashire County Council ContrOCC Lancashire Provider Portal. The user is logged in as 'PDP5 TEST USER @ TEST PROVIDER'. The main navigation includes Home, Actuals, Invoices/Credit Notes, Reports, Help, and Logout. The 'Invoices/Credit Notes' section is active, showing a dropdown for the financial year '2023/2024' and buttons for 'New Invoice' and 'New Credit Note'. A sidebar lists 'TEST PROVIDER' with a list of invoices: TESTINV4 (Pending), TESTINV3 (On Hold), TESTINV2 (Finalised), and TESTINV1 (Finalised). The main content area shows 'Invoice TESTINV4' in a 'PENDING' state for 'Contract LWHH - TEST HOME CARE CONTRACT (PR1 OLD)'. A summary table shows: Reference: TESTINV4, Total: £ 1599.00, VAT: £ 0.00; VAT Number: VAT Number, Items Total: £ 1599.00, VAT: £ 0.00; Date on Invoice: 02/10/2023, Short by: £ 0.00, VAT: £ 0.00; Created: 02/10/2023; Submitted: 02/10/2023; Total Payable: £ 1599.00. Below this is an 'Upload File' section with a table of commitments. The 'Actions' section includes a 'New Action' button, dropdowns for 'Assigned To' and 'Type', a 'View Actions' button, and a checkbox for 'Include Done Actions'. A table at the bottom shows columns for Status, Last Post Date, Title, Due, Type, and Assigned To.

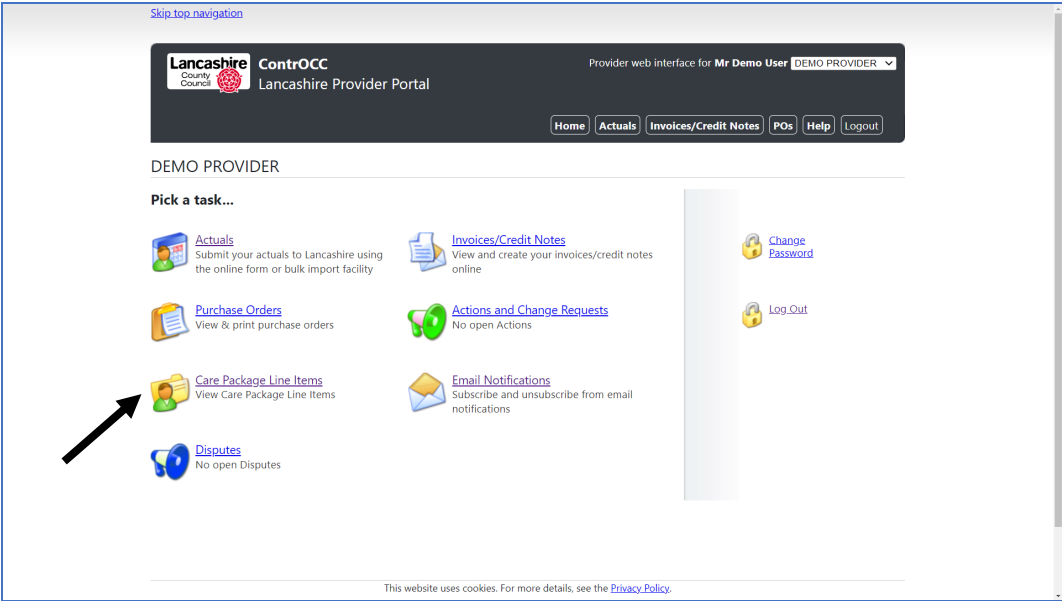
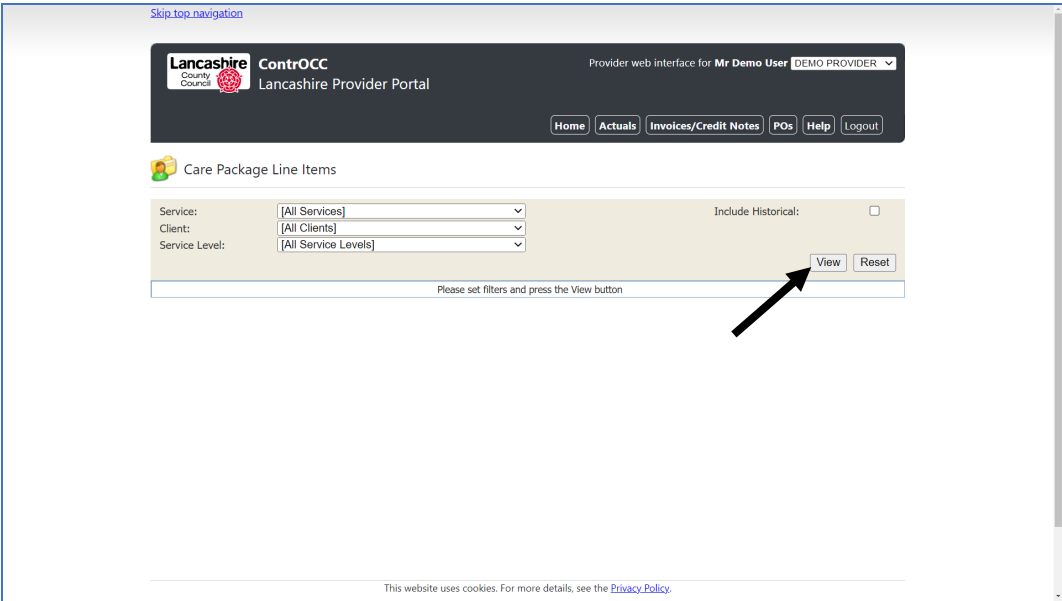
Reference:	TESTINV4	Total:	£ 1599.00	Excl VAT	£ 0.00	VAT	£ 0.00
VAT Number:		Items Total:	£ 1599.00		£ 0.00		£ 0.00
Date on Invoice:	02/10/2023	Short by:	£ 0.00		£ 0.00		£ 0.00
Created:	02/10/2023						
Submitted:	02/10/2023	Total Payable:		£	1599.00		

Commitment	Value	VAT	Contribution	Contract	Period
Be 2023/2024	£ 1599.00	£ 0.00	£ 0.00	LWHH - TEST HOME CARE CONTRACT (PR1 OLD)	17/07/2023 - 13/08/2023

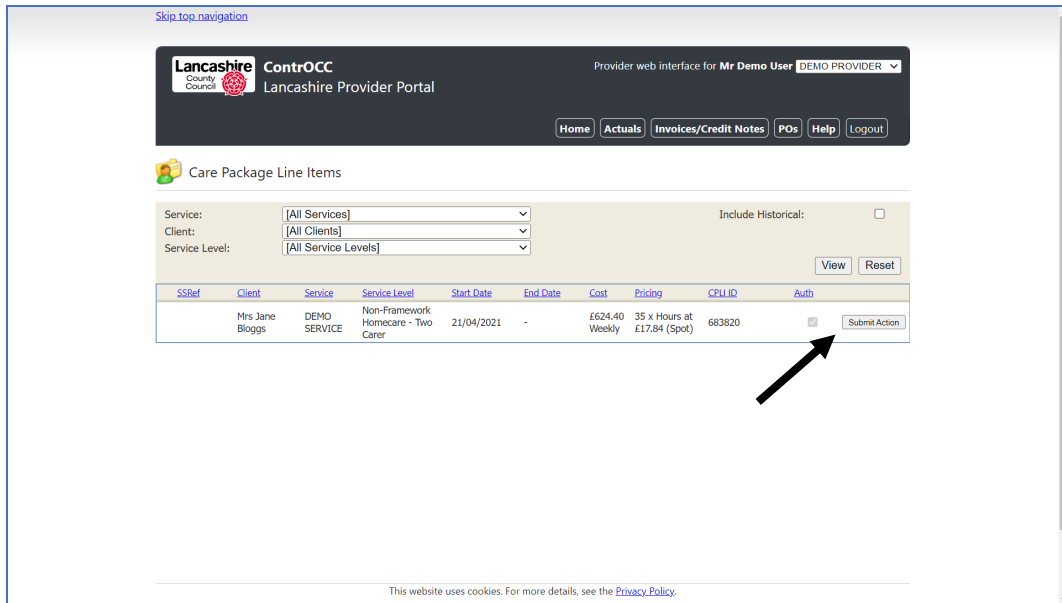
13. If the invoice is approved, it will move to Authorised and the Finalised status. Finalised status means the payment details have been passed to the Payment system.

NB: Submitted invoices will only ever be processed as the submitted cost. Lancashire County Council will not amend this cost. Should there be an error, the invoice will be returned for correction. It is also assumed at the point of submission that you have checked the balance being submitted is true and accurate.

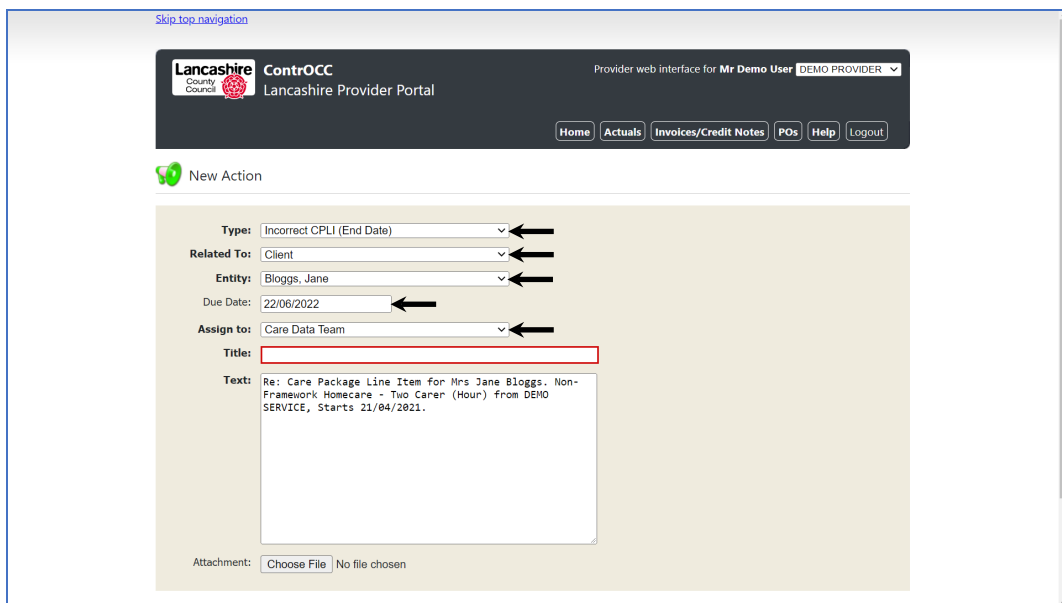
Submit an Action to Request a Change

Step	Action
1.	Login to the Adults Provider Portal
2.	<p>Click the Care Package Line Items link.</p>  <p>The screenshot shows the Lancashire ContrOCC Lancashire Provider Portal. At the top, there is a navigation bar with links for Home, Actuals, Invoices/Credit Notes, POs, Help, and Logout. Below this, the user is identified as 'DEMO PROVIDER'. A section titled 'Pick a task...' contains several task cards: Actuals, Invoices/Credit Notes, Purchase Orders, Actions and Change Requests, Care Package Line Items (highlighted with a black arrow), and Disputes. On the right side, there are links for Change Password and Log Out. At the bottom, there is a footer with a cookie notice.</p>
3.	<p>Apply the required filter(s) and click [View]</p>  <p>The screenshot shows the 'Care Package Line Items' page. It features a filter section with three dropdown menus: Service (set to [All Services]), Client (set to [All Clients]), and Service Level (set to [All Service Levels]). There is also an 'Include Historical' checkbox which is unchecked. Below the filters are 'View' and 'Reset' buttons. A black arrow points to the 'View' button. Below the buttons, there is a message: 'Please set filters and press the View button'. At the bottom, there is a footer with a cookie notice.</p>

4. Locate the CPLI to be corrected and click [Submit Action]



5. Select Type of Action, Entity, Due Date (See Appendix B for recommended due dates)



6. Enter a suitable Title and add details of the amendment required. **NB:** Where text is pre-populated, please do not remove this.

The screenshot shows the Lancashire ContrOCC Lancashire Provider Portal. The page title is 'New Action'. The form contains the following fields:

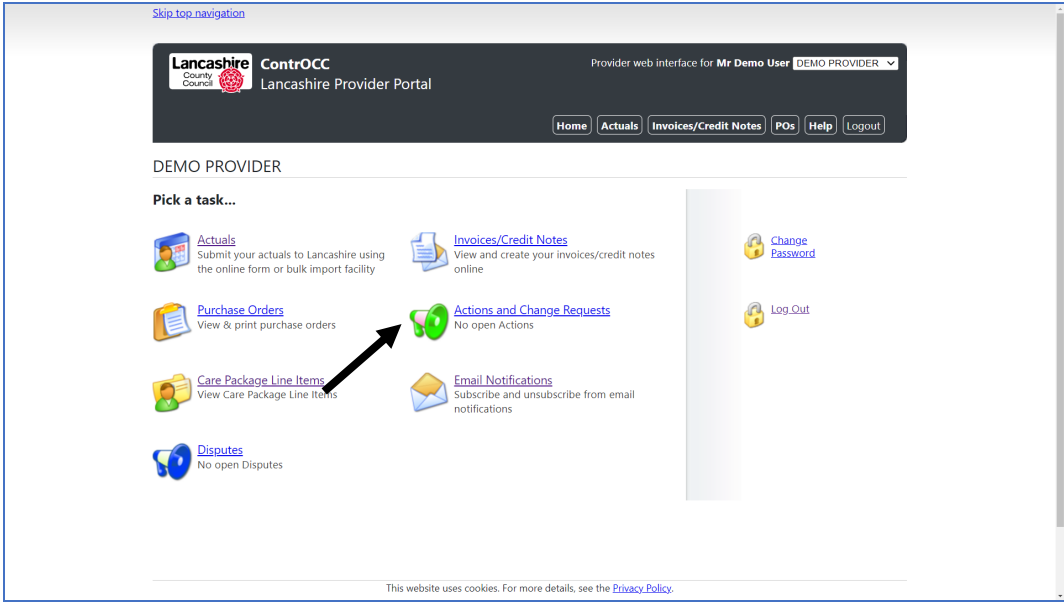
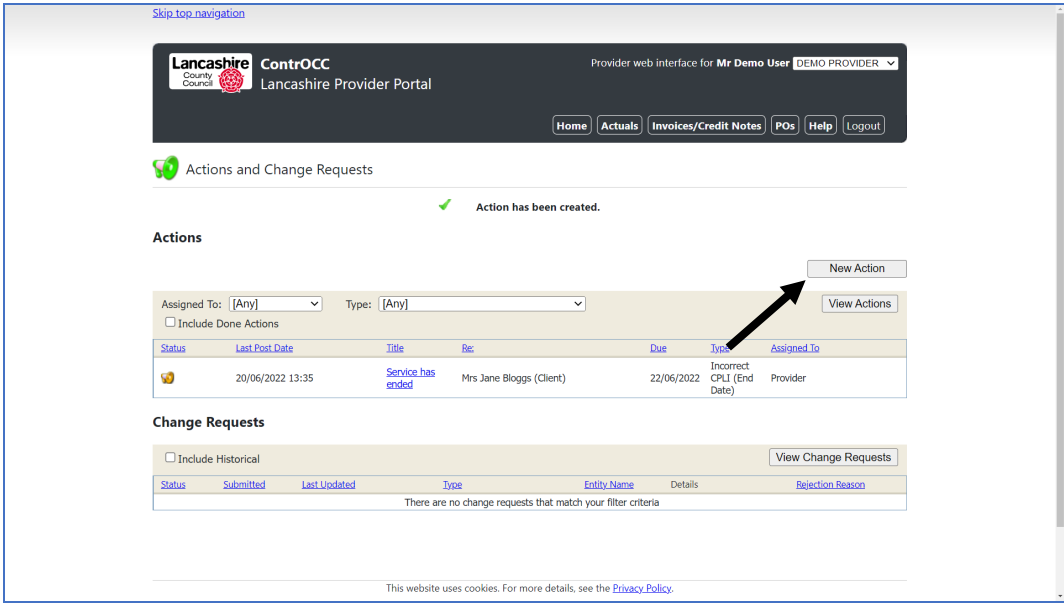
- Type: Incorrect CPLI (End Date)
- Related To: Client
- Entity: Bloggs, Jane
- Due Date: 22/06/2022
- Assign to: Care Data Team
- Title: Service Ended
- Text: Re: Care Package Line Item for Mrs Jane Bloggs. Non-Framework Homecare - Two Carer (Hour) from DEMO SERVICE, Starts 21/04/2021. This agreement ended 09/06/2022. Client admitted to hospital.
- Attachment: Choose File | No file chosen

Buttons at the bottom: Create Action, Cancel

7. Attached any supporting documentation by clicking **[Choose File]**

8. Click **[Create Action]**

Submit a Manual Action

Step	Action														
1.	Login to the Adults Provider Portal														
2.	<p>Click the Actions and Change Requests link.</p>  <p>The screenshot shows the Lancashire ContrOCC Lancashire Provider Portal. The user is logged in as 'Mr Demo User'. The dashboard has a 'Pick a task...' section with several options: Actuals, Invoices/Credit Notes, Purchase Orders, Care Package Line Items, Disputes, and Actions and Change Requests. A black arrow points to the 'Actions and Change Requests' link, which indicates 'No open Actions'. There are also links for 'Change Password' and 'Log Out' on the right side.</p>														
3.	<p>Click [New Action]</p>  <p>The screenshot shows the 'Actions and Change Requests' page. A green checkmark and the message 'Action has been created.' are visible. Below this, there are sections for 'Actions' and 'Change Requests'. In the 'Actions' section, there is a 'New Action' button highlighted with a black arrow. The 'Actions' table has the following data:</p> <table border="1" data-bbox="459 1525 1219 1630"> <thead> <tr> <th>Status</th> <th>Last Post Date</th> <th>Title</th> <th>Re:</th> <th>Due</th> <th>Type</th> <th>Assigned To</th> </tr> </thead> <tbody> <tr> <td></td> <td>20/06/2022 13:35</td> <td>Service has ended</td> <td>Mrs Jane Bloggs (Client)</td> <td>22/06/2022</td> <td>Incorrect CPLI (End Date)</td> <td>Provider</td> </tr> </tbody> </table> <p>The 'Change Requests' section shows a message: 'There are no change requests that match your filter criteria'.</p>	Status	Last Post Date	Title	Re:	Due	Type	Assigned To		20/06/2022 13:35	Service has ended	Mrs Jane Bloggs (Client)	22/06/2022	Incorrect CPLI (End Date)	Provider
Status	Last Post Date	Title	Re:	Due	Type	Assigned To									
	20/06/2022 13:35	Service has ended	Mrs Jane Bloggs (Client)	22/06/2022	Incorrect CPLI (End Date)	Provider									

4. Select Type of Action, Entity, Due Date (See Appendix B for recommended due dates)

Skip top navigation

Lancashire County Council ContrOCC Lancashire Provider Portal Provider web interface for Mr Demo User DEMO PROVIDER

Home Actuals Invoices/Credit Notes POs Help Logout

New Action

Type: Payment Query
Related To: Contract
Entity: DEMO CONTRACT
Due Date: 27/06/2022
Assign to: Accounts Management

Title:
Text:

Attachment: Choose File | No file chosen

5. Enter a suitable Title, add details of the enquiry, and attach any supporting documentation.

Lancashire County Council ContrOCC Lancashire Provider Portal Provider web interface for Mr Demo User DEMO PROVIDER

Home Actuals Invoices/Credit Notes POs Help Logout

New Action

Type: Payment Query
Related To: Contract
Entity: DEMO CONTRACT
Due Date: 27/06/2022
Assign to: Accounts Management

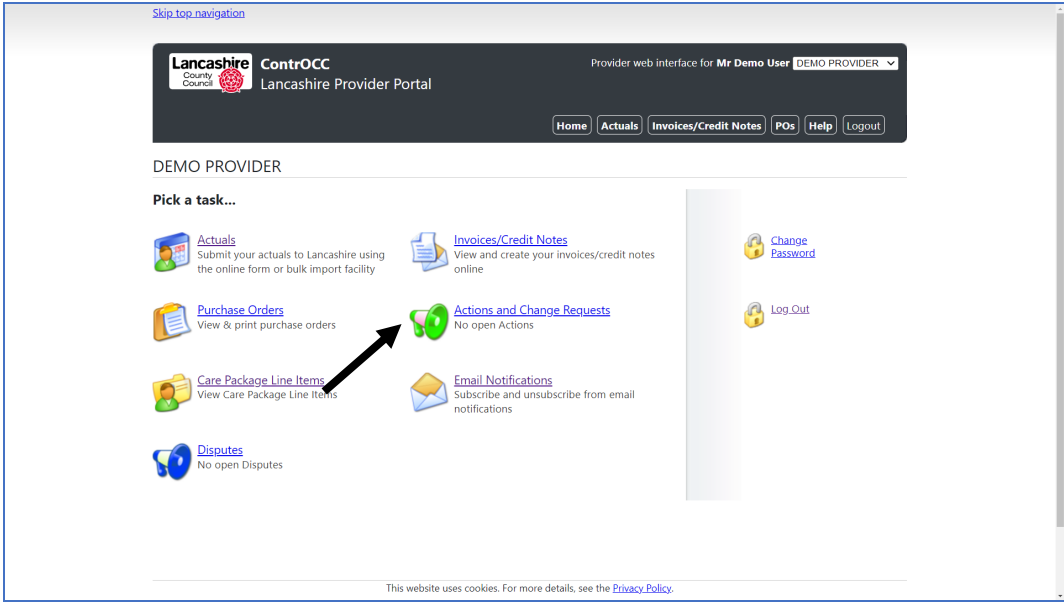
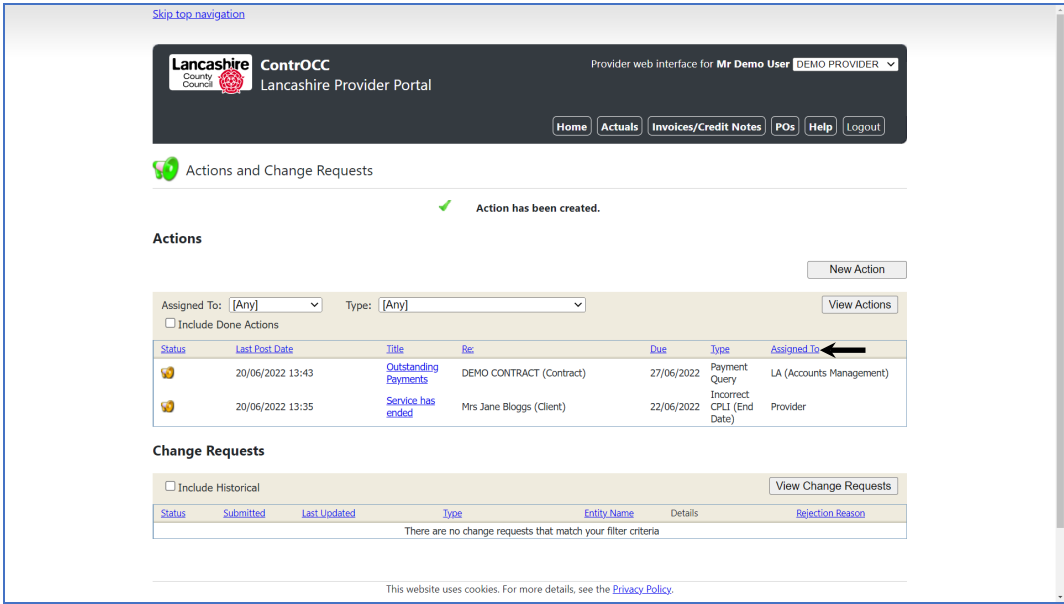
Title: Outstanding Payments
Text: A number of payments are outstanding for this contract. Please see attached for details.

Attachment: Choose File | DEMO FILE.xlsx

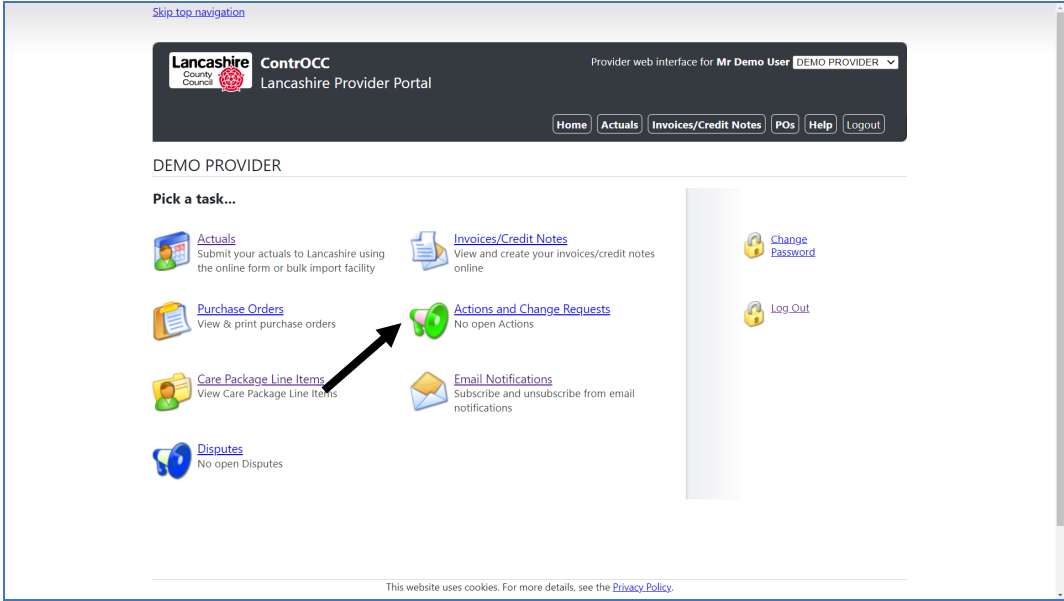
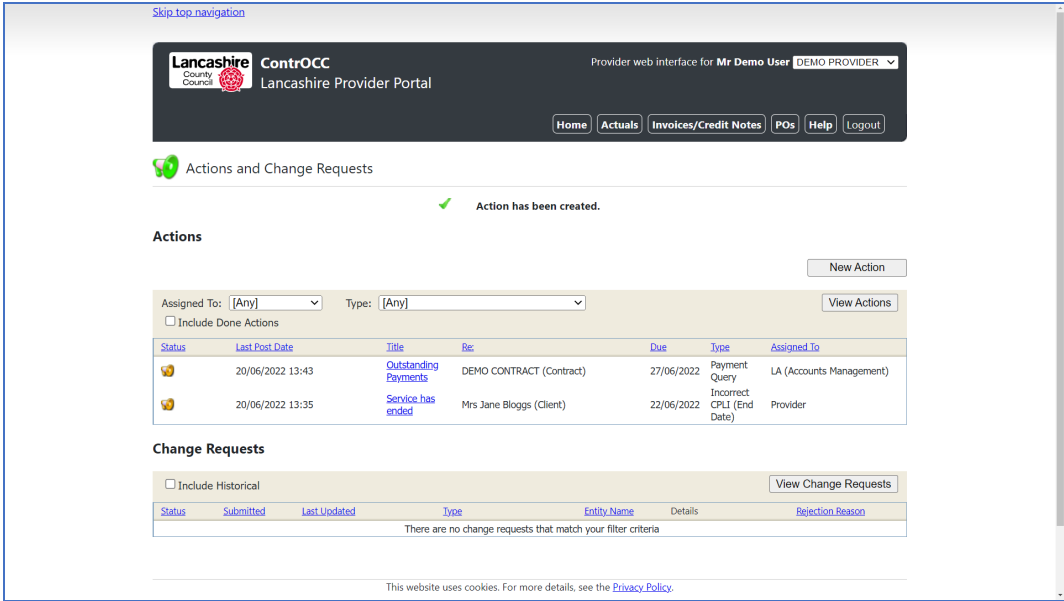
Create Action Cancel

6. Click **Create Action**

View Open Actions

Step	Action
1.	Login to the Adults Provider Portal
2.	<p>Click the Actions and Change Requests link.</p>  <p>The screenshot shows the Lancashire ContrOCC Lancashire Provider Portal. The user is logged in as 'Mr Demo User'. The dashboard has a 'Pick a task...' section with several options: 'Actuals', 'Purchase Orders', 'Care Package Line Items', 'Disputes', 'Invoices/Credit Notes', 'Actions and Change Requests', and 'Email Notifications'. The 'Actions and Change Requests' link is highlighted with a black arrow. On the right side, there are links for 'Change Password' and 'Log Out'.</p>
3.	<p>The screen will default to currently open Actions; providing details of where each Action is currently assigned (Provider or LA)</p>  <p>The screenshot shows the 'Actions and Change Requests' page. A green checkmark indicates 'Action has been created.' Below this is the 'Actions' section, which includes a table of open actions. The table has columns for Status, Last Post Date, Title, Re:, Due, Type, and Assigned To. The 'Assigned To' column is highlighted with a black arrow. Below the table is the 'Change Requests' section, which includes a table of change requests. The table has columns for Status, Submitted, Last Updated, Type, Entity Name, Details, and Rejection Reason. The table is currently empty, with the message 'There are no change requests that match your filter criteria'.</p>

Respond to an Action

Step	Action																																			
1.	Login to the Adults Provider Portal																																			
2.	<p>Click the Actions and Change Requests link.</p>  <p>The screenshot shows the Lancashire ContrOCC Lancashire Provider Portal. The user is logged in as 'Mr Demo User'. The dashboard includes a navigation menu with 'Home', 'Actuals', 'Invoices/Credit Notes', 'POs', 'Help', and 'Logout'. Under 'Pick a task...', there are several options: 'Actuals', 'Purchase Orders', 'Care Package Line Items', 'Disputes', 'Invoices/Credit Notes', 'Actions and Change Requests' (highlighted with a black arrow), and 'Email Notifications'. There are also 'Change Password' and 'Log Out' links on the right.</p>																																			
3.	<p>The screen will default to currently open Actions.</p>  <p>The screenshot shows the 'Actions and Change Requests' page. A green checkmark indicates 'Action has been created.' Below this, there is a table of 'Actions' and a section for 'Change Requests'.</p> <p>Actions</p> <p>Assigned To: [Any] Type: [Any] [New Action] [View Actions]</p> <p><input type="checkbox"/> Include Done Actions</p> <table border="1"> <thead> <tr> <th>Status</th> <th>Last Post Date</th> <th>Title</th> <th>Re:</th> <th>Due</th> <th>Type</th> <th>Assigned To</th> </tr> </thead> <tbody> <tr> <td>🔔</td> <td>20/06/2022 13:43</td> <td>Outstanding Payments</td> <td>DEMO CONTRACT (Contract)</td> <td>27/06/2022</td> <td>Payment Query</td> <td>LA (Accounts Management)</td> </tr> <tr> <td>🔔</td> <td>20/06/2022 13:35</td> <td>Service has ended</td> <td>Mrs Jane Bloggs (Client)</td> <td>22/06/2022</td> <td>Incorrect CPLI (End Date)</td> <td>Provider</td> </tr> </tbody> </table> <p>Change Requests</p> <p><input type="checkbox"/> Include Historical [View Change Requests]</p> <table border="1"> <thead> <tr> <th>Status</th> <th>Submitted</th> <th>Last Updated</th> <th>Type</th> <th>Entity Name</th> <th>Details</th> <th>Rejection Reason</th> </tr> </thead> <tbody> <tr> <td colspan="7">There are no change requests that match your filter criteria</td> </tr> </tbody> </table>	Status	Last Post Date	Title	Re:	Due	Type	Assigned To	🔔	20/06/2022 13:43	Outstanding Payments	DEMO CONTRACT (Contract)	27/06/2022	Payment Query	LA (Accounts Management)	🔔	20/06/2022 13:35	Service has ended	Mrs Jane Bloggs (Client)	22/06/2022	Incorrect CPLI (End Date)	Provider	Status	Submitted	Last Updated	Type	Entity Name	Details	Rejection Reason	There are no change requests that match your filter criteria						
Status	Last Post Date	Title	Re:	Due	Type	Assigned To																														
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Status	Submitted	Last Updated	Type	Entity Name	Details	Rejection Reason																														
There are no change requests that match your filter criteria																																				

4.

Select 'Provider' from the 'Assigned To:' drop-down list and click [View Actions] to view all open Actions assigned to you.

The screenshot shows the Lancashire ContrOCC Lancashire Provider Portal. The user is logged in as Mr Demo User. The page displays a notification that an action has been created. Below this, the 'Actions' section is visible, featuring a filter for 'Assigned To:' set to 'Provider' and a 'View Actions' button. A table of actions is shown below the filter:

Status	Local Authority	Title	Re:	Due	Type	Assigned To
🔔	20/06/2022 13:43	Outstanding Payments	DEMO CONTRACT (Contract)	27/06/2022	Payment Query	LA (Accounts Management)
🔔	20/06/2022 13:35	Service has ended	Mrs Jane Bloggs (Client)	22/06/2022	Incorrect CPLI (End Date)	Provider

Below the actions table, the 'Change Requests' section is visible, showing a 'View Change Requests' button and a message: 'There are no change requests that match your filter criteria'.

5.

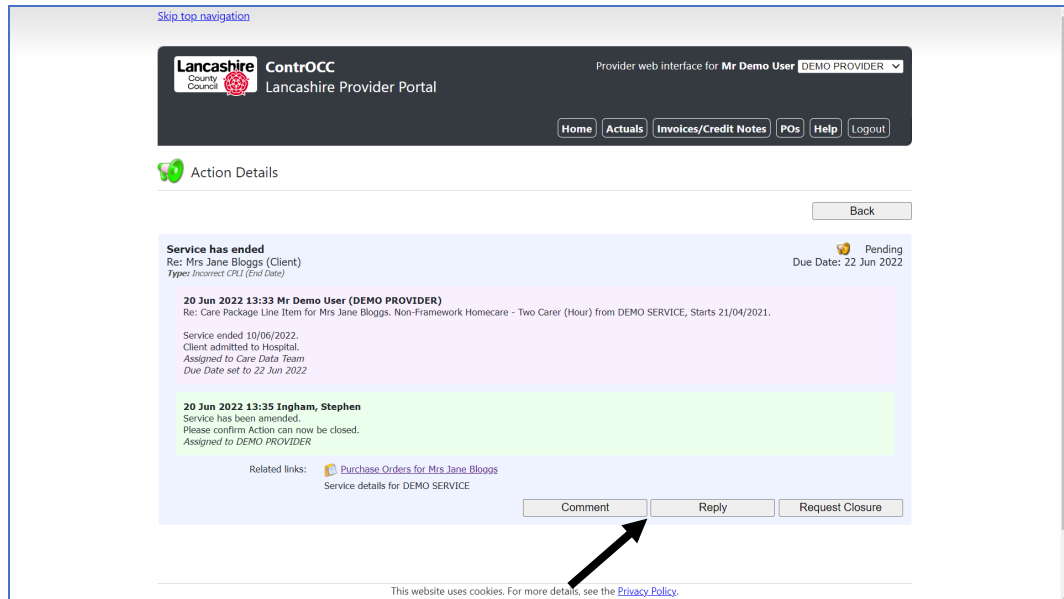
Click the Title of an Action to open it.

The screenshot shows the Lancashire ContrOCC Lancashire Provider Portal. The user is logged in as Mr Demo User. The page displays a notification that an action has been created. Below this, the 'Actions' section is visible, featuring a filter for 'Assigned To:' set to 'Provider' and a 'View Actions' button. A table of actions is shown below the filter:

Status	Last Post Date	Title	Re:	Due	Type	Assigned To
🔔	20/06/2022 13:35	Service has ended	Mrs Jane Bloggs (Client)	22/06/2022	Incorrect CPLI (End Date)	Provider

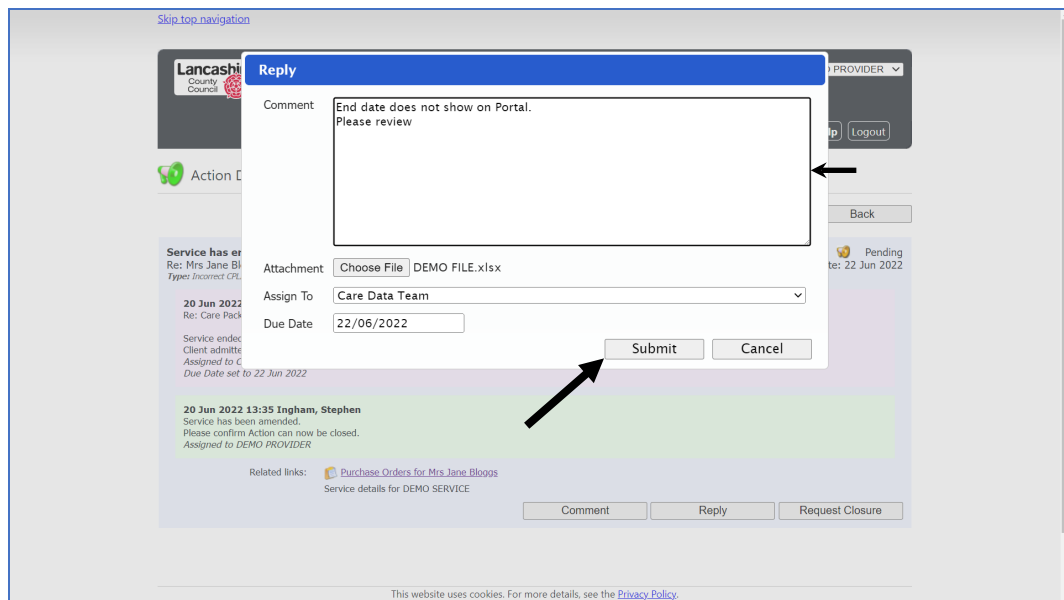
An arrow points to the title 'Service has ended' in the table. Below the actions table, the 'Change Requests' section is visible, showing a 'View Change Requests' button and a message: 'There are no change requests that match your filter criteria'.

6. Click [Reply] to respond.



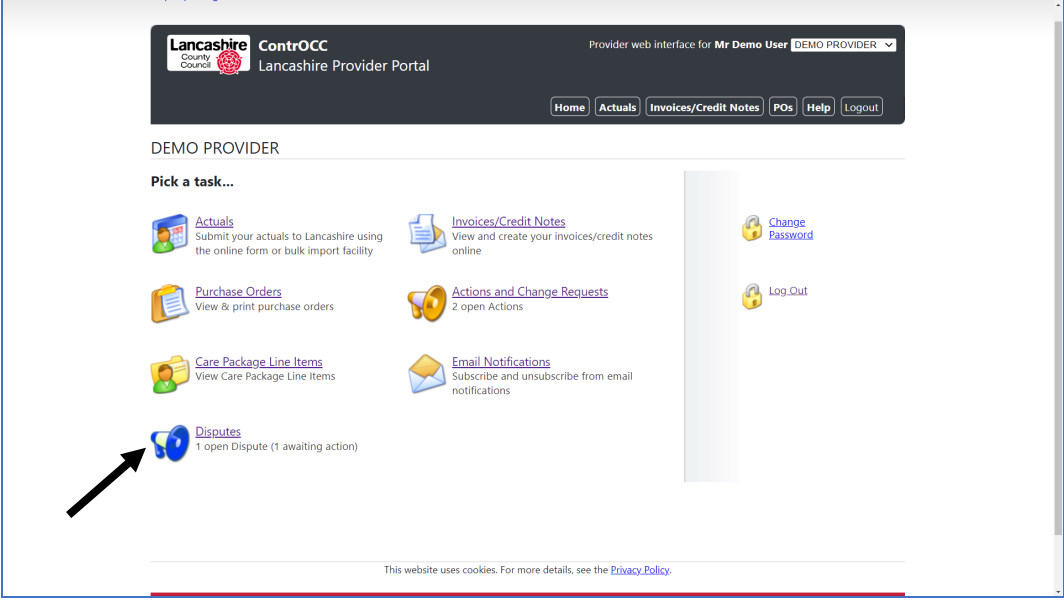
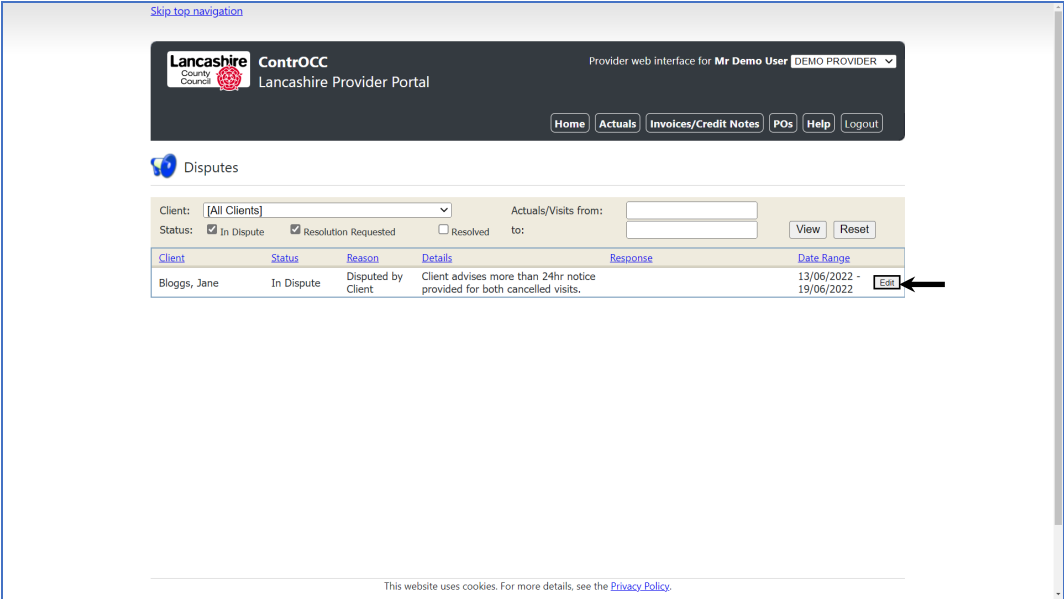
NB: If responding to confirm the Action can be closed, click **[Request Closure]** instead of **[Reply]**

7. Complete your response (attaching any supporting documents) and click **[Submit]**



NB: Interactions can continue via Portal Actions until the Action is closed.

Respond to a Dispute

Step	Action
1.	Login to the Adults Provider Portal
2.	<p>Click the Disputes link.</p> 
3.	<p>To open a Dispute, click [Edit]</p> 

4. Review the [Details](#) provided by Lancashire. Should the Actuals require correction to match the detail provided, click [\[Add/Edit\]](#) and update the Actuals as per the [Submit a Manual Actual](#) guidance.

5. To request a Dispute to be closed, add a [Response](#), and then click [\[Request Resolution\]](#)

Skip top navigation

Lancashire County Council **ContrOCC** Lancashire Provider Portal Provider web interface for Mr Demo User DEMO PROVIDER

Home Actuals Invoices/Credit Notes POs Help Logout

Dispute

Client: Bloggs, Jane
Status: In Dispute
Reason: Disputed by Client
Details: Client advises more than 24hr notice provided for both cancelled visits.
Response: Actuals updated.

Actual	Service Level	PI	Frstd	Msd	Xtr	Vst	Total Cost	Comments
Week Beginning 13 Jun 2022 (DEMO SERVICE)							£588.72 of £588.72	Add/Edit
33 x Hours	Non-Framework Homecare - Two Care	35	0	2	0	35	£588.72 = 33 (Actual + Frstd) Hours x £17.84	Client cancelled care; one visit short notice

Pages: 1

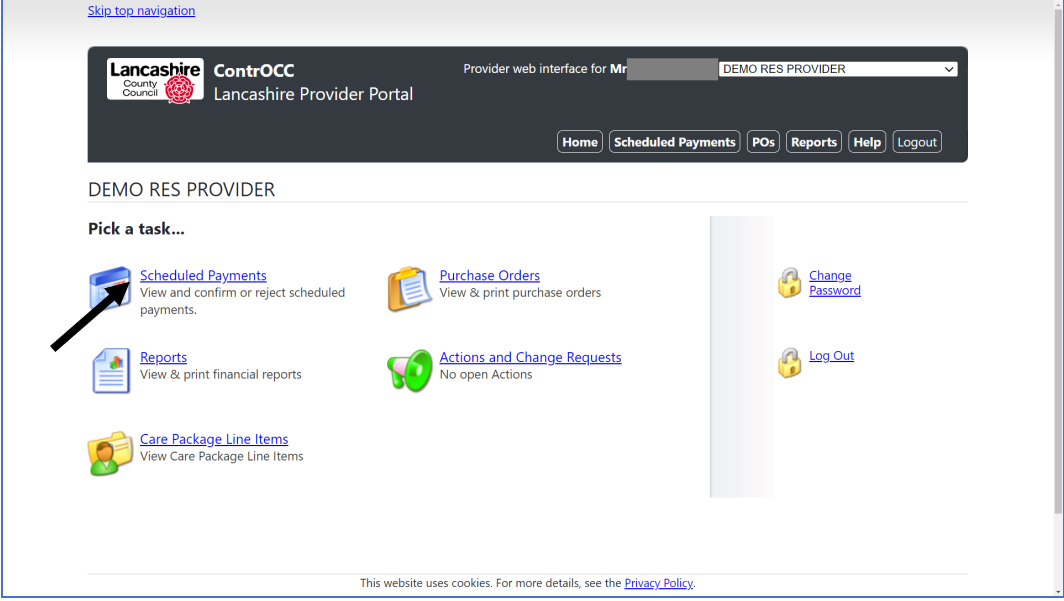
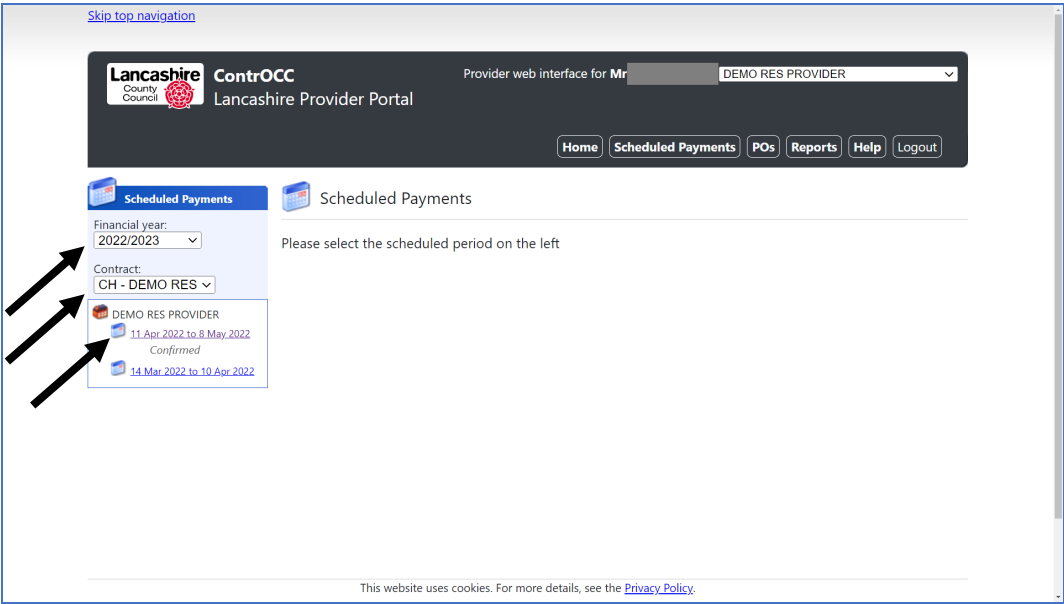
[Request Resolution](#) [Back](#)

This website uses cookies. For more details, see the [Privacy Policy](#).

Should you disagree with the [Details](#) provided, you will detail this in the [Response](#) and again click [\[Request Resolution\]](#)

Where a [Dispute](#) is not resolved, further contact may be made via [Actions](#).

View a Scheduled Payment

Step	Action
1.	Login to the Adults Provider Portal
2.	<p>Click the Scheduled Payment link.</p>  <p>The screenshot shows the Lancashire ContrOCC Lancashire Provider Portal interface. At the top, there is a navigation bar with the Lancashire County Council logo, the text 'ContrOCC Lancashire Provider Portal', and a dropdown menu for 'Provider web interface for Mr DEMO RES PROVIDER'. Below the navigation bar are buttons for 'Home', 'Scheduled Payments', 'POs', 'Reports', 'Help', and 'Logout'. The main content area is titled 'DEMO RES PROVIDER' and contains a 'Pick a task...' section with several task cards: 'Scheduled Payments' (with a blue arrow pointing to it), 'Purchase Orders', 'Reports', 'Actions and Change Requests', and 'Care Package Line Items'. On the right side, there are links for 'Change Password' and 'Log Out'. At the bottom, there is a footer that says 'This website uses cookies. For more details, see the Privacy Policy.'</p>
3.	<p>Select Financial Year and Contract, then click the Payment Period Schedule to be view.</p>  <p>The screenshot shows the 'Scheduled Payments' page in the Lancashire ContrOCC Lancashire Provider Portal. The 'Financial year' dropdown is set to '2022/2023' and the 'Contract' dropdown is set to 'CH - DEMO RES'. Below these, there is a section titled 'Payment Period Schedule' with a list of scheduled payments. The first entry is 'DEMO RES PROVIDER' with a date range of '11 Apr 2022 to 8 May 2022' and a status of 'Confirmed'. The second entry is '14 Mar 2022 to 10 Apr 2022'. Three black arrows point to the 'Financial year' dropdown, the 'Contract' dropdown, and the 'Payment Period Schedule' section. At the bottom, there is a footer that says 'This website uses cookies. For more details, see the Privacy Policy.'</p>

4.

Details of the payment will be displayed.

Scheduled Payments CH - DEMO RES - 11 Apr 2022 to 8 May 2022 FINALISED

Financial year: 2022/2023
 Contract: CH - DEMO RES
 DEMO RES PROVIDER
 11 Apr 2022 to 8 May 2022 Confirmed
 14 Mar 2022 to 10 Apr 2022

Start Date:	11 Apr 2022			
End Date:	08 May 2022			
		Payable		Total
				£45197.49
		Non-Payable		£0.00
Status:	Confirmed			

Cost / Income	Reason for Payment	Applicable Dates	Amount	Status
DEMO RES - CH 2020/2021				
Mr D			(Total: £1087.48)	
Cost	Discharge Support - Residential (Bed), Spot.	17/03/2021 - 31/03/2021	£1087.48	Paid
DEMO RES - CH 2021/2022				
M			(Total: -£1304.87)	
Cost	Discharge Support - Residential (Bed), Spot. (Adj)	14/03/2022 - 10/04/2022	-£1304.87	Paid
Mrs C			(Total: -£2982.39)	
Cost	Discharge Support - Residential (Bed), Spot. (Adj)	14/02/2022 - 13/03/2022	-£1605.90	Paid
Cost	Discharge Support - Residential (Bed), Spot. (Adj)	14/03/2022 - 10/04/2022	-£1376.49	Paid
Mr D			(Total: -£16964.66)	

View/Download Previous Payment Report

Step	Action
1.	Login to the Adults Provider Portal
2.	Click the Reports link.

[Skip top navigation](#)

Lancashire ContrOCC Provider web interface for Mr DEMO RES PROVIDER
County Council Lancashire Provider Portal

[Home](#) [Scheduled Payments](#) [POs](#) [Reports](#) [Help](#) [Logout](#)

DEMO RES PROVIDER

Pick a task...

[Scheduled Payments](#)
View and confirm or reject scheduled payments.

[Reports](#)
View & print financial reports

[Care Package Line Items](#)
View Care Package Line Items

[Purchase Orders](#)
View & print purchase orders

[Actions and Change Requests](#)
No open Actions

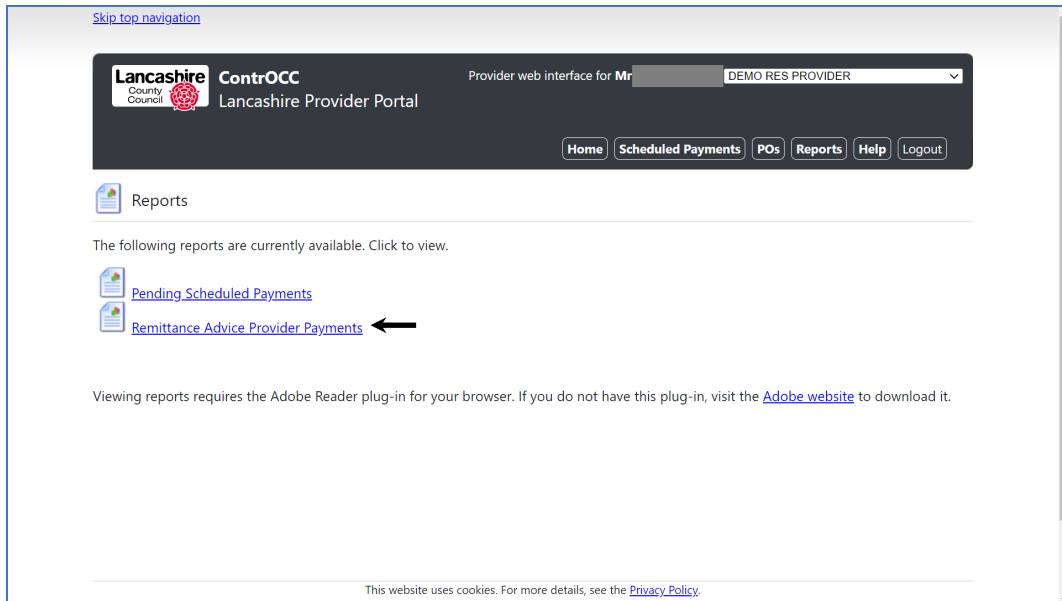
[Change Password](#)

[Log Out](#)

This website uses cookies. For more details, see the [Privacy Policy](#).

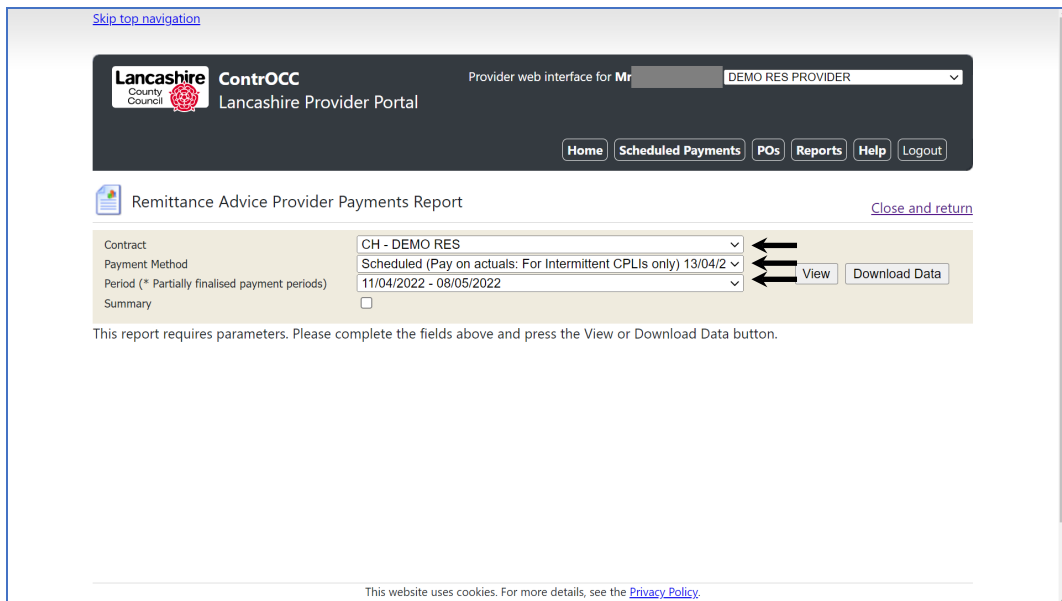
3.

Select **Remittance Advice Provider Payments**



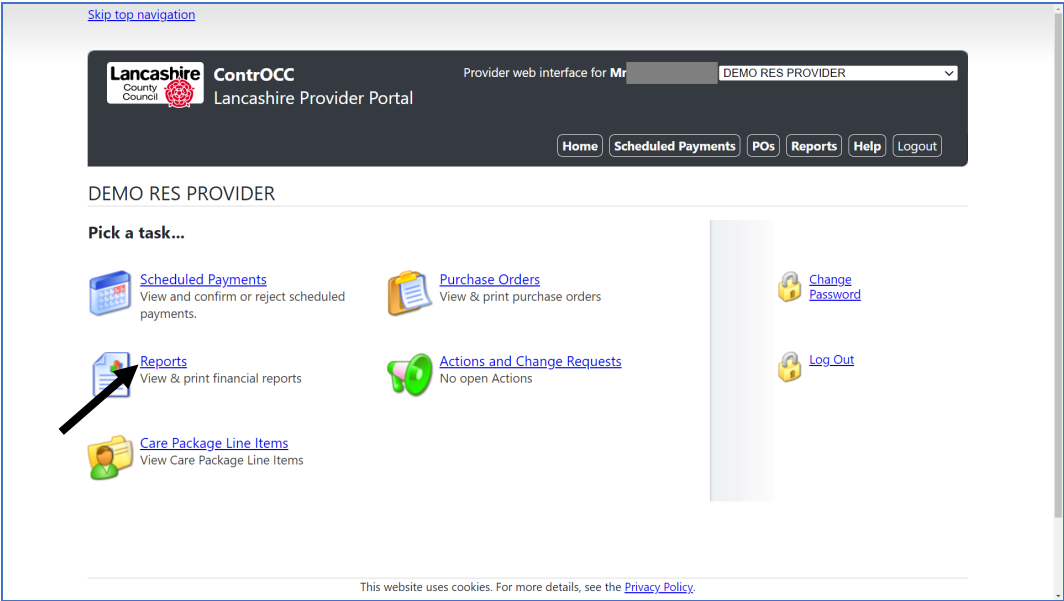
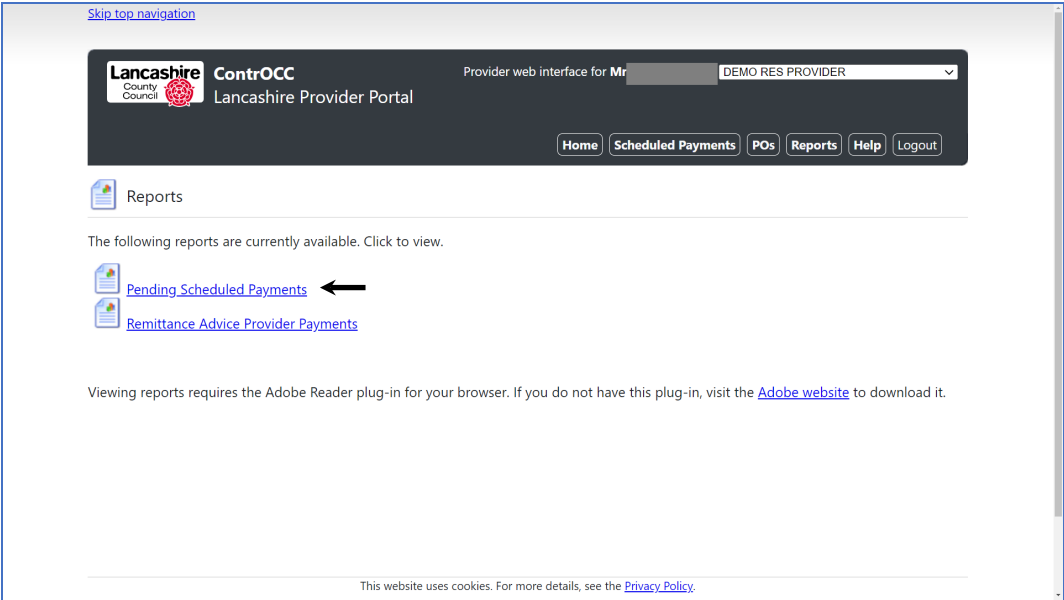
4.

Select **Contract, Payment Method** (Choose method applicable to period being queried), and **Period**.



Click **[View]** or **[Download Data]**

View Pending Scheduled Payments

Step	Action
1.	Login to the Adults Provider Portal
2.	<p>Click the Reports link.</p>  <p>The screenshot shows the Lancashire ContrOCC Lancashire Provider Portal interface. At the top, there is a navigation bar with the Lancashire County Council logo, the text 'ContrOCC Lancashire Provider Portal', and a dropdown menu for 'Provider web interface for Mr DEMO RES PROVIDER'. Below the navigation bar are buttons for 'Home', 'Scheduled Payments', 'POs', 'Reports', 'Help', and 'Logout'. The main content area is titled 'DEMO RES PROVIDER' and 'Pick a task...'. There are several task cards: 'Scheduled Payments' (View and confirm or reject scheduled payments), 'Purchase Orders' (View & print purchase orders), 'Change Password', 'Reports' (View & print financial reports), 'Actions and Change Requests' (No open Actions), and 'Log Out'. A black arrow points to the 'Reports' link. At the bottom, there is a footer: 'This website uses cookies. For more details, see the Privacy Policy.'</p>
3.	<p>Select Remittance Advice Provider Payments</p>  <p>The screenshot shows the 'Reports' section of the Lancashire ContrOCC Lancashire Provider Portal. The navigation bar is the same as in the previous screenshot. Below the navigation bar, there is a 'Reports' heading. The text says 'The following reports are currently available. Click to view.' There are two report links: 'Pending Scheduled Payments' and 'Remittance Advice Provider Payments'. A black arrow points to the 'Remittance Advice Provider Payments' link. Below the links, there is a note: 'Viewing reports requires the Adobe Reader plug-in for your browser. If you do not have this plug-in, visit the Adobe website to download it.' At the bottom, there is a footer: 'This website uses cookies. For more details, see the Privacy Policy.'</p>

4.


Leave all options as default and click [\[View\]](#) or [\[Download Data\]](#)

[Skip top navigation](#)

Lancashire County Council **ContrOCC** Lancashire Provider Portal

Provider web interface for Mr

[Home](#) [Scheduled Payments](#) [POs](#) [Reports](#) [Help](#) [Logout](#)

 Pending Scheduled Payments Report [Close and return](#)

Organisation	<input type="text" value="DEMO RES PROVIDER"/>	<input type="button" value="View"/>	<input type="button" value="Download Data"/>
Status	<input type="text" value="[All]"/>		
Date From	<input type="text"/>		
Date To	<input type="text"/>		

This report requires parameters. Please complete the fields above and press the View or Download Data button.

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Appendix A - Glossary of Terms

- Actual:** Can refer to both the hours delivered, and the overall submission. As a rule, "Actuals" refers to the line, whereas "Actual" refers to the service delivered.
- Frustrated:** A Frustrated visit relates to a service which could not be delivered (i.e. due to a no-entry), or has been cancelled with insufficient notice (usually less than 24hrs)
- Missed:** A Missed visit relates to a service which was not delivered either due to the service being cancelled with notice, or where the provider was unable to provide the service
- Emergency Hours:** Defined as *"The provision of unscheduled and unanticipated care that would otherwise result in the service user experiencing significant emotional or physical harm."*
Limited to 4hrs per instance, or must be commissioned by Adult Social Care
- Action:** An interaction between Lancashire and Provider linked to either a client, contract, invoice, or service.
- Dispute:** A request for amendment/response from provider following either receipt information contradicting information from another source, or where the submission needs to be queried.

Appendix B - Actions & Recommended Due Dates

The below gives advice on the recommended Minimum Due Dates to be applied to specific Action Types

Action Type	Minimum Due Date
<i>CPLI Amendment (All variants)</i>	<i>2 Working Days</i>
<i>CPLI Outstanding</i>	<i>2 Working Days</i>
<i>Actuals Query</i>	<i>5 Working Days</i>
<i>Aged Actuals Submission</i>	<i>5 Working Days</i>
<i>APL Supported Living - Void Claim</i>	<i>15 Working Days</i>
<i>Disputes Pending</i>	<i>5 Working Days</i>
<i>Payment Query</i>	<i>5 Working Days</i>
<i>Rolling Respite Claim</i>	<i>5 Working Days</i>
<i>Third Party Amendment Request</i>	<i>10 Working Days</i>

Please also be aware that Actions can only be raised on appropriately linked *Entities*. The list below confirms which *Entities* each Action Type can be issued against.

Action Type	Valid Entities
<i>CPLI Amendment (All variants)</i>	<i>Client</i>
<i>CPLI Outstanding</i>	<i>Client</i>
<i>Actuals Query</i>	<i>Client</i>
<i>Aged Actuals Submission</i>	<i>Contract</i>
<i>APL Supported Living - Void Claim</i>	<i>Service</i>
<i>Disputes Pending</i>	<i>Organisation</i>
<i>Payment Query</i>	<i>Contract, Invoice, Credit Note</i>
<i>Rolling Respite Claim</i>	<i>Contract</i>
<i>Third Party Amendment Request</i>	<i>Contract</i>

More details on when each Action Type should be used/not used are given in the Process Support Document

The following Action Types should be initiated by Lancashire County Council only and will all be issued with a 5 working day due date.

Action Type
<i>Debit Balance [LCC Use Only]</i>
<i>Notification [LCC Use Only]</i>
<i>O/S Actuals [LCC Use Only]</i>
<i>Returned Invoice/Credit Note [LCC Use Only]</i>