

**Learning and Development Team**

**Title of Course: LCC Care Provider Portal**

Version 001 – 30 June 2014

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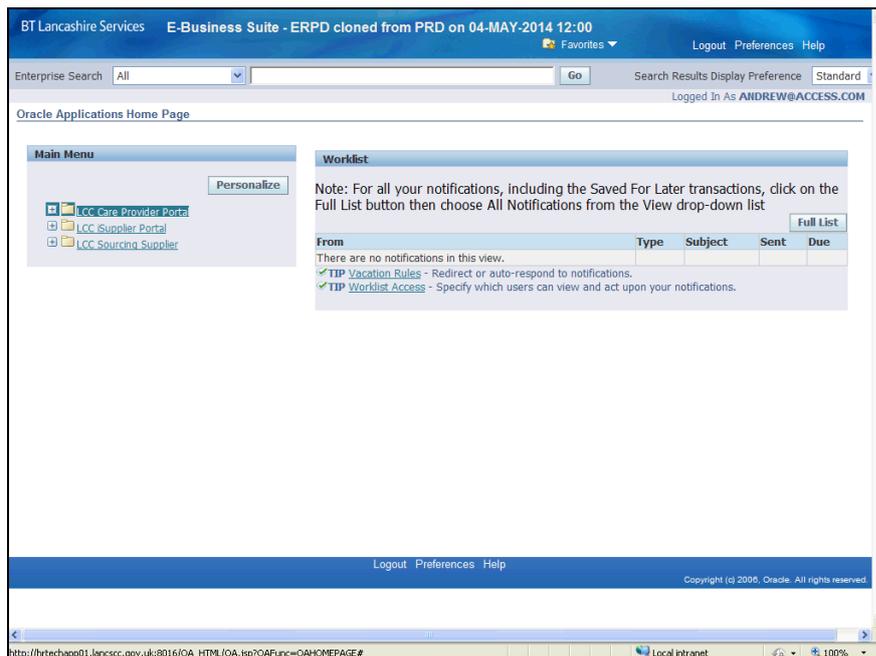
## LCC Care Provider Portal

### Supplier Authentication

The iSupplier Care Provider Portal is only available to care providers. Because the care portal contains sensitive information about service users, it is necessary for us to safeguard this information by introducing additional security in the form of a security application, or soft token, unique to each provider user.

Before you log into the iSupplier Care Portal, you must register and download additional authentication software. Information about downloading, registering and using the 'soft token' is available on the Lancashire County Council website via the [iSupplier Support](#) page

Step	Action
1.	Login to the Supplier Portal.



Step	Action
2.	Only Care Providers will have a link to the Care Portal. Click the <b>LCC Care Provider Portal</b> link.

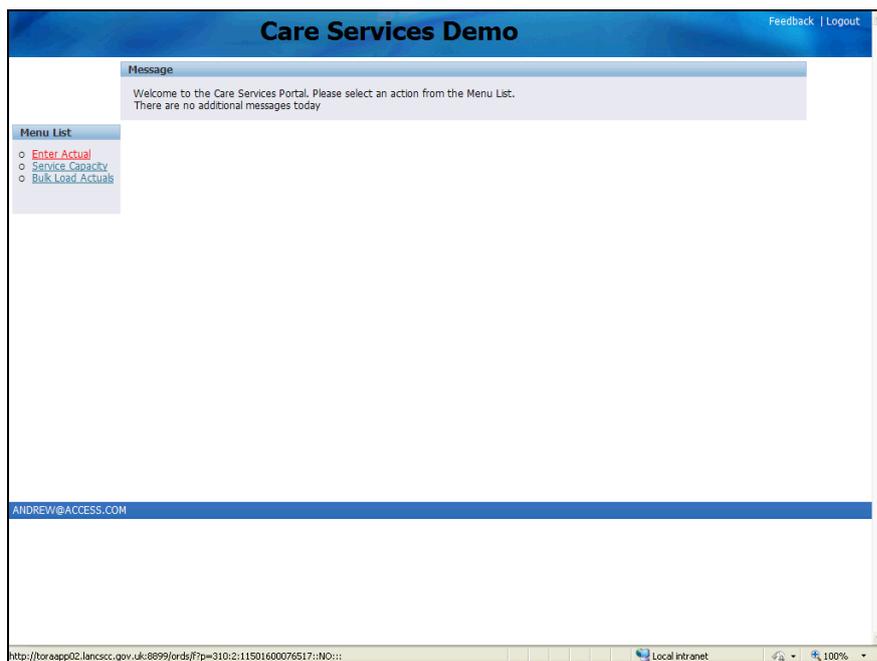
Step	Action
3.	Each time you log into the iSupplier Care Portal you must provide your PIN number and the token code.  Enter the PIN number you previously selected into the <b>PIN</b> field.
4.	Enter the token number from the Symantec VIP Authentication into the <b>Token Code</b> field.
5.	Click the <b>Login</b> link. 
6.	You are now taken to the Care Provider Portal home page.

## Care Provider Portal Home Page and Navigation

The Care Provider Home page is the starting place for all your related tasks. Using the home page you can:

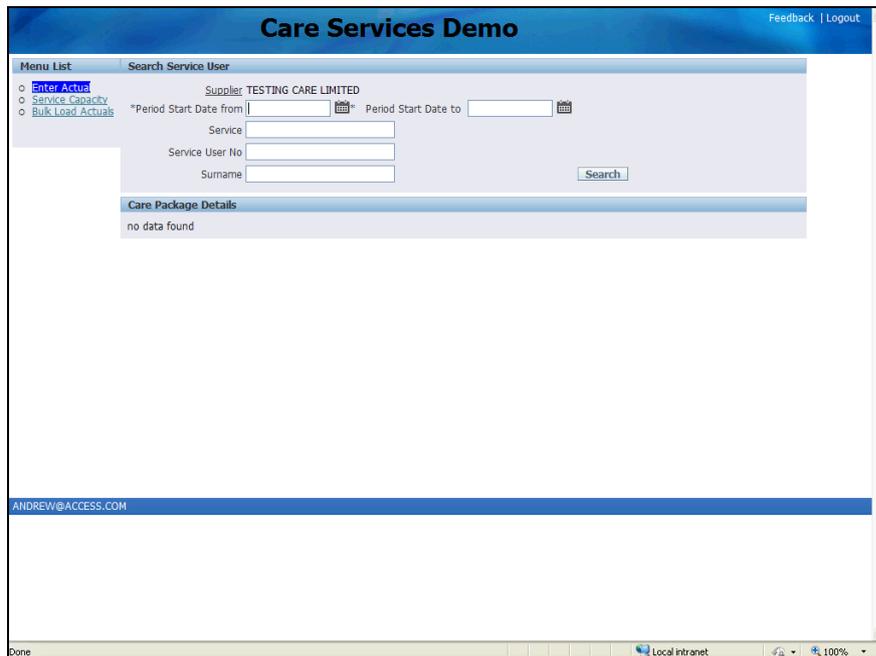
- Search for service users.
- View the needs and outcomes for service users.
- View the emergency contact information for a service user.
- Send a message relating to a service user.
- View / input details of care scheduled or provided.

Step	Action
1.	<p>When you access the Care Services Portal you are taken to the home page.</p> <p>The message section will be used by the authority where necessary e.g. this will be used to notify you of hospitals on red alert.</p>



Step	Action
2.	<p>Click the <b>Enter Actual</b> link to search for or enter information relating to service users</p> <p><b>Enter Actual</b></p>

### Search for a Service User's Care Plan



The screenshot shows a web application titled "Care Services Demo". At the top right, there are links for "Feedback" and "Logout". Below the title is a "Menu List" with three options: "Enter Actuals", "Service Capacity", and "Bulk Load Actuals". The main area is titled "Search Service User" and contains the following fields and controls:

- Supplier: TESTING CARE LIMITED
- \*Period Start Date from: [calendar icon]
- Period Start Date to: [calendar icon]
- Service: [text input]
- Service User No: [text input]
- Surname: [text input]
- [Search] button

Below the search form, there is a section titled "Care Package Details" which currently displays "no data found". At the bottom of the page, there is a blue bar with the email address "ANDREW@ACCESS.COM". The browser's taskbar at the bottom shows "Local intranet" and a zoom level of "100%".

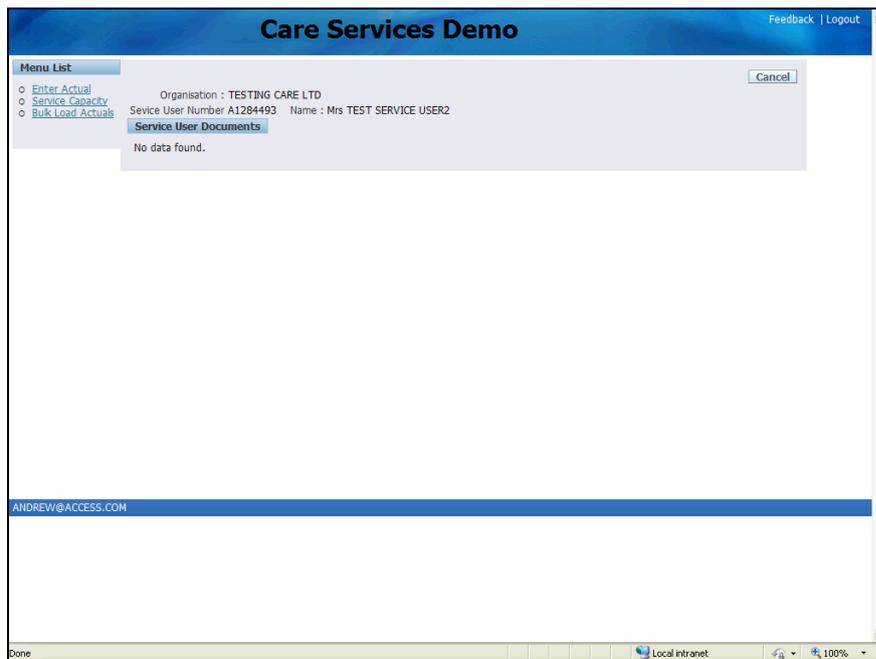
Step	Action
3.	Search for or enter information relating to service users.  Fields with an asterisk are mandatory.
4.	You must always enter the date range; this may be in the past or the future.  <b>Dates are sorted by weekly cycles starting on a Monday, so if you are looking for a Service User who started services on Wednesday 11th June 2014, the date range searched for would need to contain 09-Jun-2014.</b>  Enter the date in the format DD-Mon-YYYY, or click the <b>Calendar</b> buttons to select the dates. 
5.	Further search information is not mandatory, but may be used to reduce the number of results received in your search: <ul style="list-style-type: none"> <li>• <b>Service</b>; e.g. Domiciliary or Residential Care.</li> <li>• <b>Service User No</b>; this is the same as the Issis / LAS number and is unique to each service user.</li> <li>• <b>Surname</b>.</li> </ul>
6.	Click the <b>Search</b> link. 

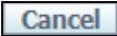
Step	Action
7.	<p>A summary of the Care Package details is now displayed. This displays the services and service users on a weekly basis.</p> <ul style="list-style-type: none"> <li>• <b>CPLI Ref</b>; Care Package Line Item - an internal reference that identifies a particular service type provided to a specific service user.</li> <li>• <b>SSREF</b>; this is the same as the Service User No (the Issis reference).</li> </ul>
8.	<p>Click the <b>Update</b> button to the left of the line summary.</p> 

Step	Action
9.	<p>The Care Plan section displays basic details about the supplier, service and service user.</p> <ul style="list-style-type: none"> <li>• The Date From and To show the original date the care package started and the date ended (if applicable).</li> <li>• Where a care package is ongoing no end date will be displayed.</li> </ul>
10.	<p>The Actuals section displays the individual week you are querying.</p> <ul style="list-style-type: none"> <li>• This may identify the hours of care due in the week, or a fixed cash amount for the care. For residential care, the quantity will normally be displayed as 1.0.</li> </ul>

View the Support Plan

Step	Action
11.	Go to the service user's care plan.
12.	Click the <b>View Documents</b> link. 



Step	Action
13.	The full support plan, including the needs and outcomes for the service user will be displayed.  Click the <b>Cancel</b> link to return to the previous screen. 

## Send a Message

**Note:** This 'Send a Message' functionality may not be available when the system is initially launched.

The screenshot shows the 'Care Services Demo' application interface. At the top, there is a 'Menu List' with options: Enter Actual, Service Capacity, and Bulk Load Actuals. The main area is titled 'Care Plan' and contains the following information:

- Buttons: View Documents, Send Message, Emergency Contact, Cancel
- Organisation: TESTING CARE LTD
- Service: Domiciliary Care Single carer
- Client Id: A1284493 Name: Mrs TEST SERVICE USER2
- Date From: 04-NOV-2013 To

Below this is the 'Actuals' section with a 'Create' button. It includes fields for:

- CPLI Ref
- Period Start: 13-JAN-2014 To
- Quantity: 87.0
- Status
- Unit Price: 0.0000
- Actual (input field)
- Frustrated (input field)
- Missed (input field)
- Extra (input field)
- Visits (input field)
- Total 0
- Tot. Value 0
- Comments (text area)

The bottom of the screen shows the user email 'ANDREW@ACCESS.COM' and a browser status bar with 'Local intranet' and '100%' zoom.

Step	Action
14.	Go to the service user's support plan.
15.	Click the <b>Send Message</b> link. 

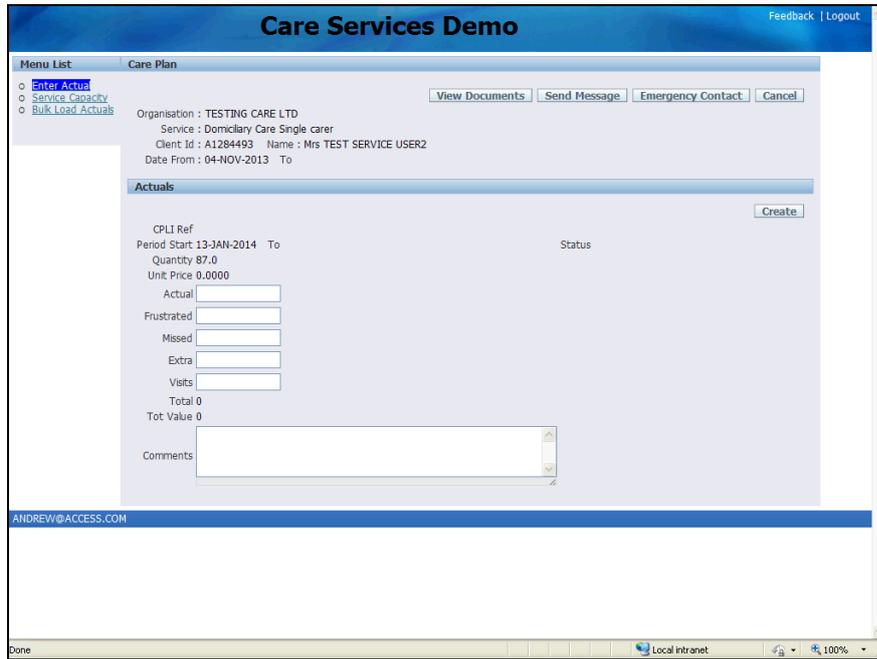
The screenshot shows the 'Send Message' dialog box within the 'Care Services Demo' application. The dialog box contains the following fields:

- Recipient (dropdown menu)
- Subject (text field)
- Message Text (text area)
- Buttons: Cancel, Send Message

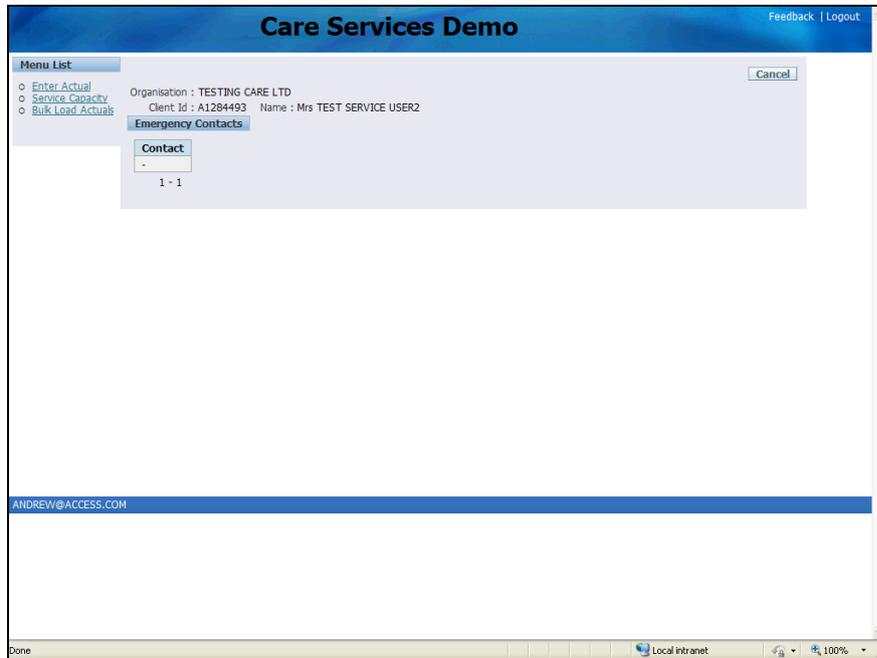
The background shows the same 'Care Plan' information as the previous screenshot. The bottom of the screen shows the user email 'ANDREW@ACCESS.COM' and a browser status bar with 'Local intranet' and '100%' zoom.

Step	Action
16.	Select the <b>Recipient</b> . You can only send a message to the Active Caseworker (the Social Worker), the Payments team (Finance) or the Sourcing team (Care Navigation).
17.	Enter the subject, the message text and click on the Send button.
18.	Click the <b>Cancel</b> button to return to the previous screen. 

View the Service User's Emergency Contact Information



Step	Action
19.	Go to the service user's support plan.
20.	Click the <b>Emergency Contact</b> link. 



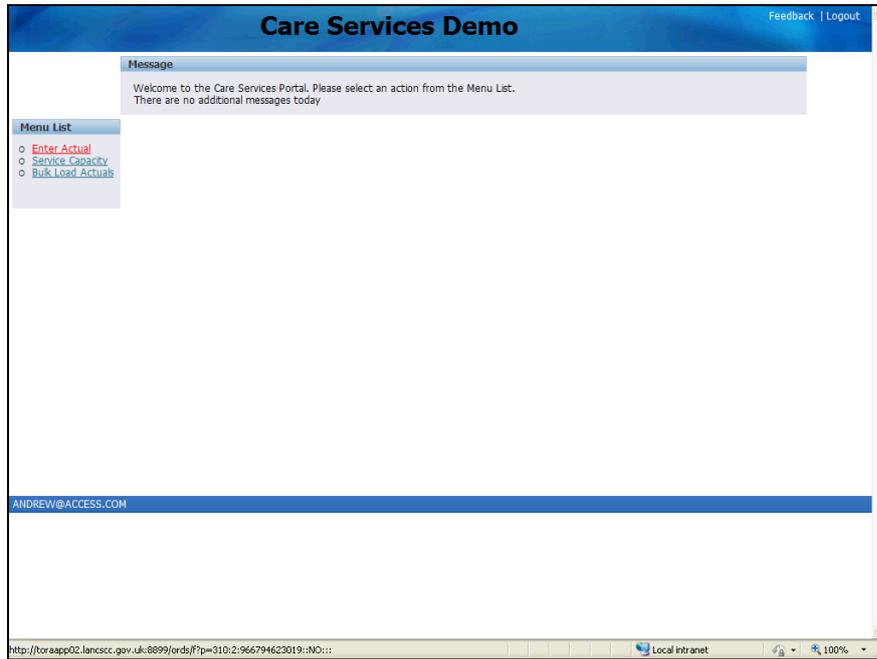
Step	Action
21.	<p>The emergency contact details for the service user will be displayed.</p> <p>Click the <b>Cancel</b> link to return to the previous screen.</p> 

## Input Details of Care Provided

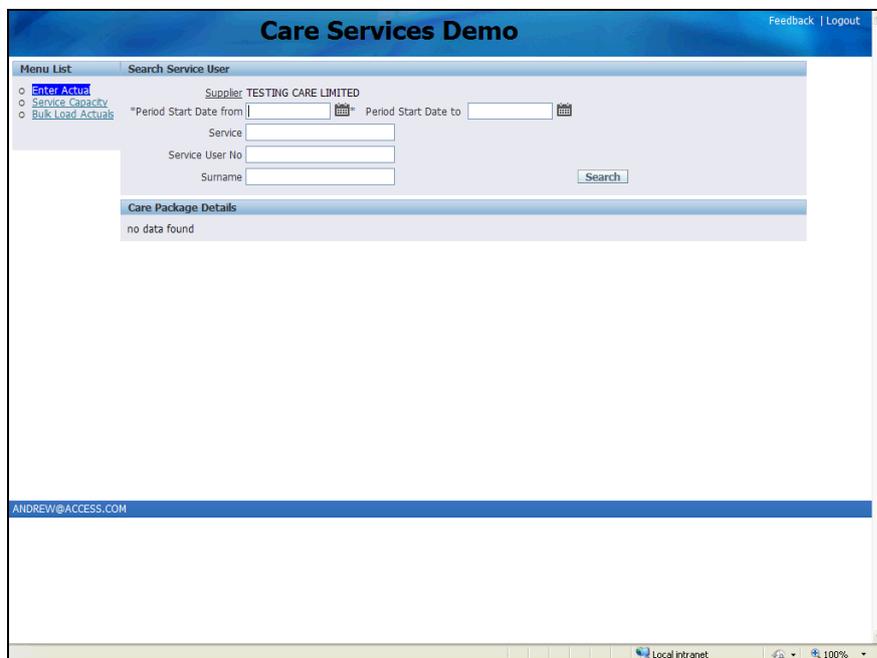
Enter the details of the care provided to instigate the payment process. Suppliers will not receive payment until the care package details have been entered and successfully submitted.

Suppliers may enter the details of the care provided online, or may download a template, enter the information on the spreadsheet and then upload it.

**Enter Domiciliary Care Single or Dual Carer**



Step	Action
1.	From the Care Services home page, click the <b>Enter Actual</b> link. <span style="border: 1px solid red; padding: 2px;">Enter Actual</span>



Step	Action
2.	Enter the date range for the search.
3.	Enter the services user's number or name.

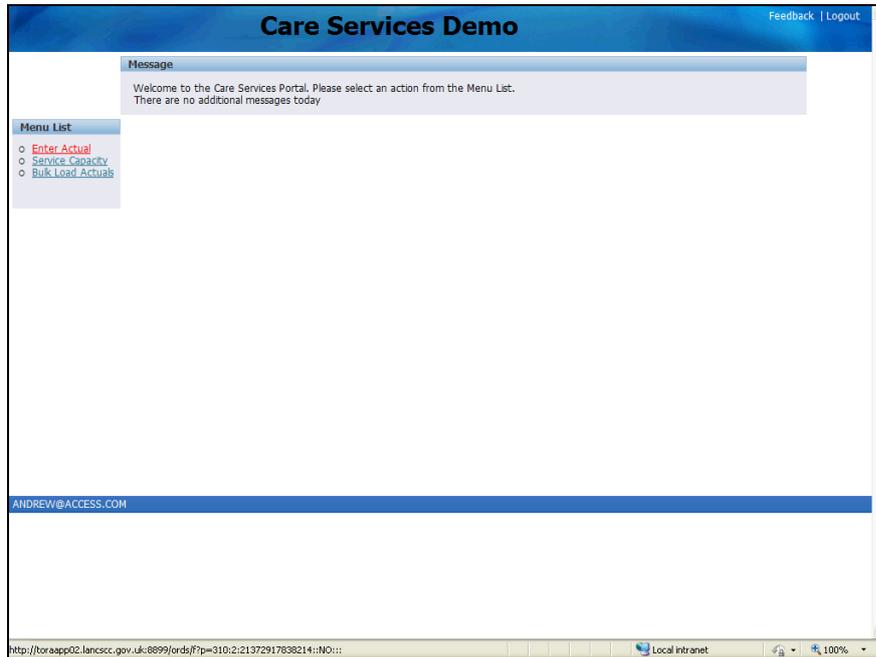
Step	Action
4.	Click the <b>Search</b> link. 
5.	A summary of the care package details for the service user and the dates requested will now be displayed.  Check the service user name and the dates; the details cannot be amended once submitted.
6.	Click on the button to the left of the line summary to enter details of the care provided. 
7.	Basic details about the supplier, service and service user are displayed.  This includes the hours of care due in the week.  The hours of care actually provided can now be entered.

Step	Action
8.	Enter the number of hours of care provided or not provided into the relevant field.  Please note; all hours entered should be to a maximum of 4 decimal places.
9.	<b>Actual</b> ; enter the actual hours of care provided to the service user into the <b>Actual</b> field.

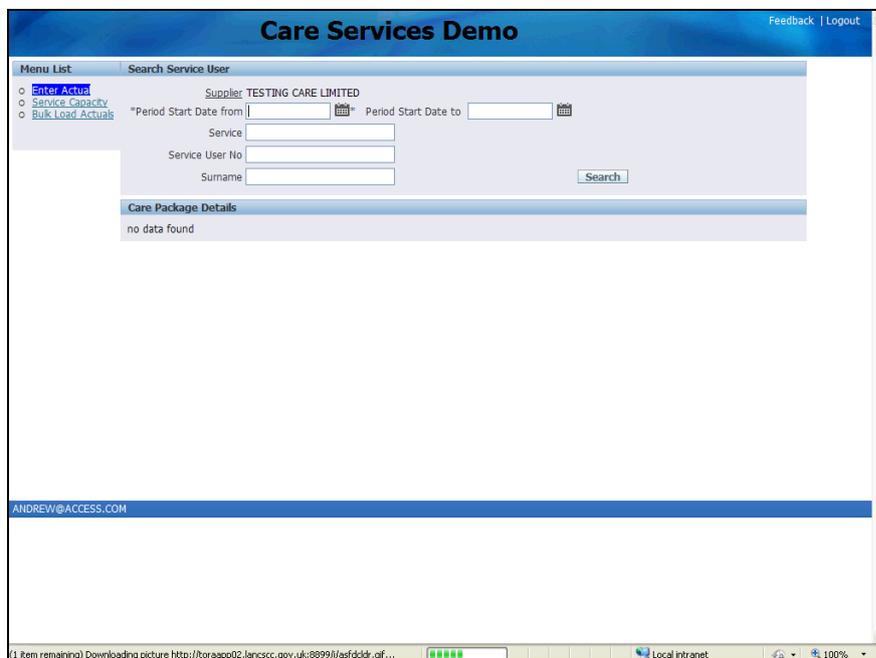
Step	Action
10.	<b>Frustrated</b> ; if applicable, enter the number of hours where the care provider attended but was unable to gain access or where the service user cancelled the appointment without sufficient notice.
11.	<b>Missed</b> ; if applicable, enter the number of hours where the care provider did not attend a scheduled appointment or where the appointment was cancelled with sufficient notice.
12.	<p><b>Please note</b>; the total of the Actual, Frustrated and Missed fields is displayed in 'Total' and must equal the Quantity (i.e. the total amount of care commissioned for the service user in the relevant period).</p> <p>You will not be able to submit the claim unless the total matches the quantity.</p>
13.	<p><b>Extra</b>; if applicable, enter the total number of hours provided over and above the commissioned total (the Quantity). This refers to unexpected extra hours such as remaining on site while an ambulance is called for the service user, or to reflect an agreed initial visit charge.</p> <p>'Extra' should not be used where the package of care has been increased by agreement with the Social Worker in advance. This type of increase should already be reflected in the Quantity by an amendment to the Service User's care package that will be shown on the portal through a revised CPLI. If the current agreed care package is not reflected in the quantity you must contact the Social Worker accordingly to request that the care package is updated.</p>
14.	Do not enter the number of visits; this will be calculated by the system.
15.	<p>If you have entered any hours into the Frustrated, Missed and / or Extra fields, you must provide full details for each in the <b>Comments</b> field.</p> <p>You may not be able to submit your claim if you do not include a comment and the Authority may reject the claim if a clear reason is not given.</p>
16.	<p>Check the details and amend if necessary.</p> <p>Once the details are correct, click the <b>Create</b> link.</p> <p></p>
17.	<p>If the status is 'Valid' or 'Valid - Requires Authorisation', go to the next step.</p> <p>If the status is 'Invalid', the details are incorrect and must be amended. This may be if the Total and Quantity fields do not match, or if a comment has not been entered where appropriate.</p>

Step	Action
18.	<p>The details should now be saved or submitted.</p> <p>Please note; you cannot make changes once the details have been submitted, unless your submission is rejected by the Authority.</p> <p>If you are not ready to submit the details yet, click the Save button.</p>
19.	<p>To submit, click the <b>Submit Actuals</b> link.</p> <p></p>
20.	<p>The status should now be 'Submitted' or 'Submitted - Requires Authorisation'.</p> <p>The Authority will now check and either authorise or reject the details.</p>
21.	<p>Click the <b>Cancel</b> link to return to the summary screen.</p> <p></p>
22.	<p>The status is also displayed on the Care Package Details summary.</p> <p>Please contact the Procurement Service if you need to update details which have been submitted.</p>

Enter Domiciliary Care (ISF) Weekly

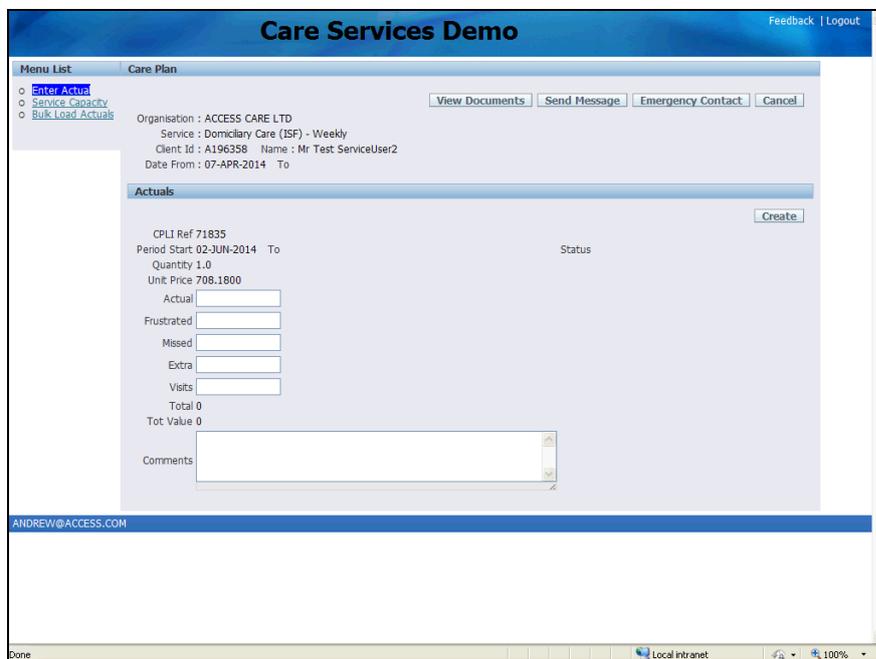


Step	Action
1.	From the Care Services home page, click the <b>Enter Actual</b> link. <b>Enter Actual</b>



Step	Action
2.	Enter the date range for the search.
3.	Enter the services user's number or name.

Step	Action
4.	Click the <b>Search</b> link. 
5.	A summary of the care package details for the service user and the dates requested will now be displayed.  Check the service user name and the dates; the details cannot be amended once submitted.
6.	Click on the button to the left of the line summary to enter details of the care provided. 
7.	Basic details about the supplier, service and service user are displayed. This includes a fixed cash value of the care due in the week.  The details of the care actually provided can now be entered.
8.	The value of the care actually provided or not provided is entered in the Actual and missed fields as a proportion of the total care due. The 'Missed' details are required for monitoring purposes.  Please note; this should be entered to a maximum of 4 decimal places.



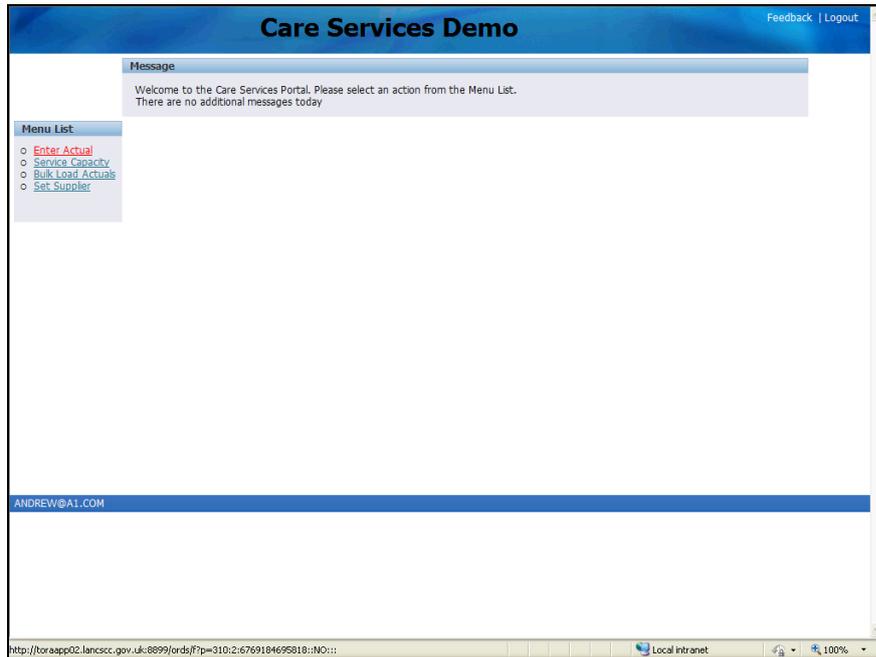
The screenshot shows the 'Care Services Demo' web application interface. The main content area is titled 'Actuals' and contains the following information and form fields:

- Menu List:** Enter Actuals (highlighted), Service Capacity, Bulk Load Actuals.
- Buttons:** View Documents, Send Message, Emergency Contact, Cancel.
- Metadata:** Organisation: ACCESS CARE LTD, Service: Domiciliary Care (ISF) - Weekly, Client Id: A196358, Name: Mr Test ServiceUser2, Date From: 07-APR-2014 To.
- Actuals Section:**
  - CPLI Ref 71835
  - Period Start 02-JUN-2014 To
  - Quantity 1.0
  - Unit Price 708.1800
  - Actual:
  - Frustrated:
  - Missed:
  - Extra:
  - Visits:
  - Total 0
  - Tot. Value 0
  - Comments:
  - Buttons: Create
- Footer:** ANDREW@ACCESS.COM
- System Bar:** Done, Local intranet, 100%

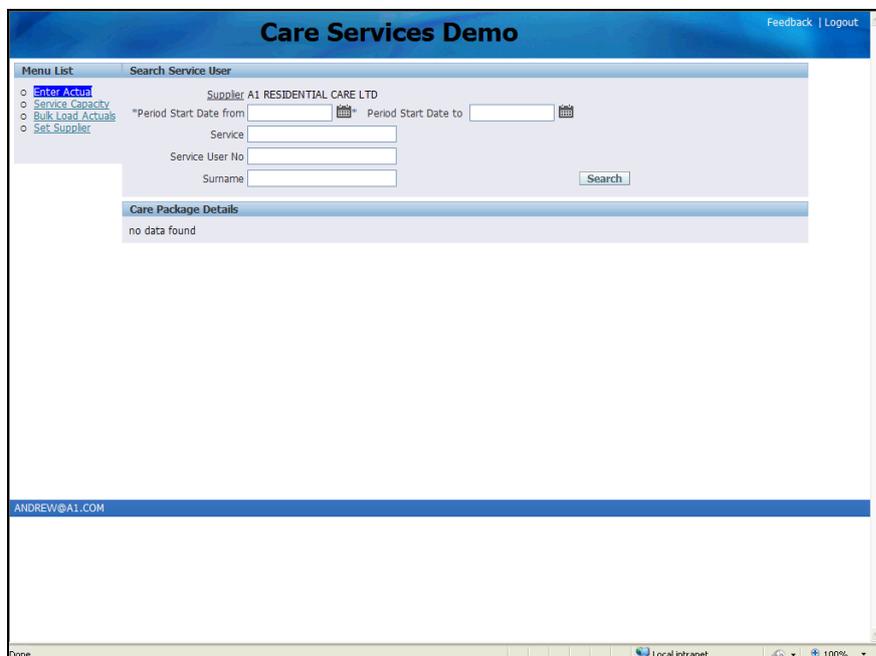
Step	Action
9.	<p><b>Actual</b>; enter the proportion of care provided to the service user. E.g. if the value of care provided totalled £400.00 and you were commissioned for £500.00.</p> $£400.00 \div £500.00 = 0.8000$
10.	<b>Frustrated</b> ; is not required for this type of service.
11.	<p><b>Missed</b>; enter the proportion of care <u>not</u> provided to the service user, irrespective of the reason. For this example, care totalling £50.00 out of a £500.00 budget was not used.</p> $£50.00 \div £500.00 = 0.1000$
12.	<p><b>Please note</b>; the total of the Actual and Missed fields is displayed in 'Total' and this must be the same as the Quantity.</p> <p>You will not be able to submit the claim unless the total matches the quantity.</p>
13.	<p>If a service user starts to receive care during the week, the Quantity will be a proportion of the week.</p> <p>If a service user's care ends during the week, use the Missed field to identify the proportion of care not provided during the week.</p>
14.	The Extra and Visits fields should not be completed.
15.	<p>If you have recorded any Missed visits, you must provide full details for each in the <b>Comments</b> field.</p> <p>You may not be able to submit your claim if you do not include a comment and the Authority may reject the claim if a clear reason is not given.</p>
16.	<p>Check the details and amend if necessary.</p> <p>Once the details are correct, click the <b>Create</b> link.</p> <p></p>
17.	<p>If the status is 'Valid' or 'Valid - Requires Authorisation', go to the next step.</p> <p>If the status is 'Invalid', the details are incorrect and must be amended. This may be if the Total and Quantity fields do not match, or if a comment has not been entered where appropriate.</p>
18.	<p>The details should now be saved or submitted.</p> <p>Please note; you cannot make changes once the details have been submitted, unless your submission is rejected by the Authority.</p> <p>If you are not ready to submit the details yet, click the Save button.</p>

Step	Action
19.	To submit, click the <b>Submit Actuals</b> link. 
20.	The status should now be 'Submitted' or 'Submitted - Requires Authorisation'.  The Authority will now check and either authorise or reject the details.
21.	Click the <b>Cancel</b> link to return to the summary screen. 
22.	The status is also displayed on the Care Package Details summary.  Please contact the Procurement Service if you need to update details which have been submitted.

Enter Residential Care

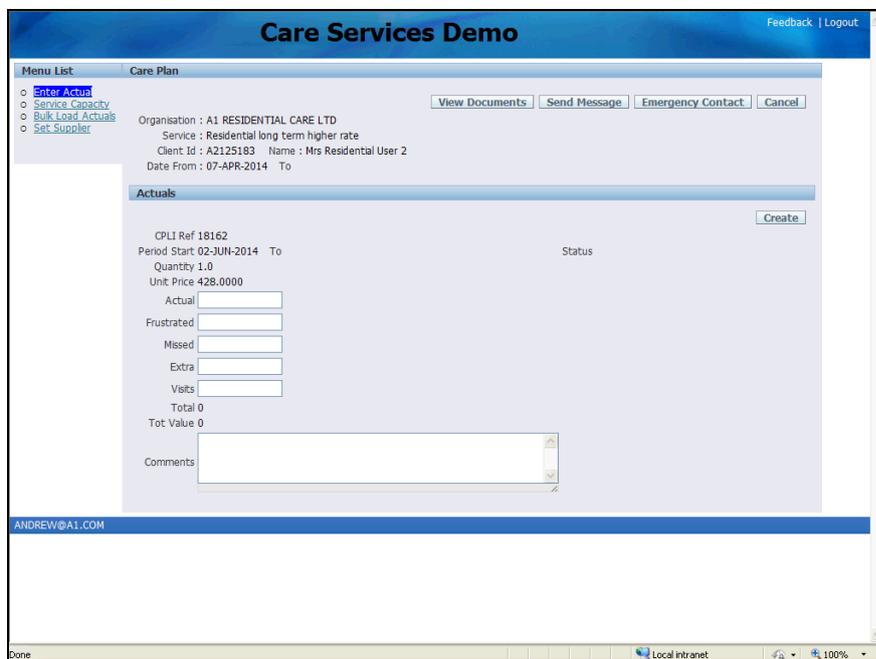


Step	Action
1.	From the Care Services home page, click the <b>Enter Actual</b> link. <b>Enter Actual</b>



Step	Action
2.	Enter the date range for the search.
3.	Enter the services user's number or name.

Step	Action
4.	Click the <b>Search</b> link. 
5.	A summary of the care package details for the service user and the dates requested will now be displayed.  Check the service user name and the dates; the details cannot be amended once submitted.
6.	Click on the button to the left of the line summary to enter details of the care provided. 
7.	Basic details about the supplier, service and service user are displayed. This includes a fixed cash value of the care due in the week.  The details of the care actually provided can now be entered.
8.	The value of the care actually provided or not provided is entered in the Actual and missed fields as a proportion of the total care due. The 'Missed' details are required for monitoring purposes.  Please note; this should be entered to a maximum of 4 decimal places.



The screenshot shows a web application titled "Care Services Demo" with a "Feedback | Logout" link in the top right. A "Menu List" on the left includes "Enter Actuals", "Service Capacity", "Bulk Load Actuals", and "Set Supplier". The main content area displays "Care Plan" details for "A1 RESIDENTIAL CARE LTD", including "Service: Residential long term higher rate", "Client Id: A2125183", "Name: Mrs Residential User 2", and "Date From: 07-APR-2014". Below this is the "Actuals" section with a "Create" button. The form includes fields for "CPLI Ref 18162", "Period Start: 02-JUN-2014 To", "Quantity 1.0", "Unit Price 428.0000", and input boxes for "Actual", "Frustrated", "Missed", "Extra", and "Visits". Summary statistics show "Total 0" and "Tot Value 0". A "Comments" text area is at the bottom. The footer shows the email "ANDREW@A1.COM" and a Windows taskbar with "Local intranet" and "100%" zoom.

Step	Action
9.	<b>Actual</b> ; enter the proportion of care provided to the service user. E.g. if the care has been provided for 4 out of the 7 days due.  $4 \div 7 = 0.5714$

Step	Action
10.	The Frustrated field is not required for this type of service.
11.	<p><b>Missed</b>; enter the proportion of care <u>not</u> provided to the service user, irrespective of the reason. For this example, the care has not been provided for 3 out of the 7 days due.</p> $3 \div 7 = 0.4286$
12.	<p><b>Please note</b>; the total of the Actual and Missed fields is displayed in 'Total' and this must be the same as the Quantity.</p> <p>You will not be able to submit the claim unless the total matches the quantity.</p>
13.	<p>If a service user starts to receive care during the week, the Quantity will be a proportion of the week.</p> <p>If a service user's care ends during the week, use the Missed field to identify the proportion of care not provided during the week.</p>
14.	The Extra and Visits fields should not be completed.
15.	<p>If you have recorded any Missed visits, you must provide full details for each in the <b>Comments</b> field.</p> <p>You may not be able to submit your claim if you do not include a comment and the Authority may reject the claim if a clear reason is not given.</p>
16.	<p>Check the details and amend if necessary.</p> <p>Once the details are correct, click the <b>Create</b> link.</p> <p></p>
17.	<p>If the status is 'Valid' or 'Valid - Requires Authorisation', go to the next step.</p> <p>If the status is 'Invalid', the details are incorrect and must be amended. This may be if the Total and Quantity fields do not match, or if a comment has not been entered where appropriate.</p>
18.	<p>The details should now be saved or submitted.</p> <p>Please note; you cannot make changes once the details have been submitted, unless your submission is rejected by the Authority.</p> <p>If you are not ready to submit the details yet, click the Save button.</p>
19.	<p>Click the <b>Submit Actuals</b> link.</p> <p></p>

Step	Action
20.	<p>The status should now be 'Submitted' or 'Submitted - Requires Authorisation'.</p> <p>The Authority will now check and either authorise or reject the details.</p>
21.	<p>Click the <b>Cancel</b> link to return to the summary screen.</p> 
22.	<p>The status is also displayed on the Care Package Details summary.</p> <p>Please contact the Procurement Service if you need to update details which have been submitted.</p>

## Input Details of the Care Provided via Spreadsheet

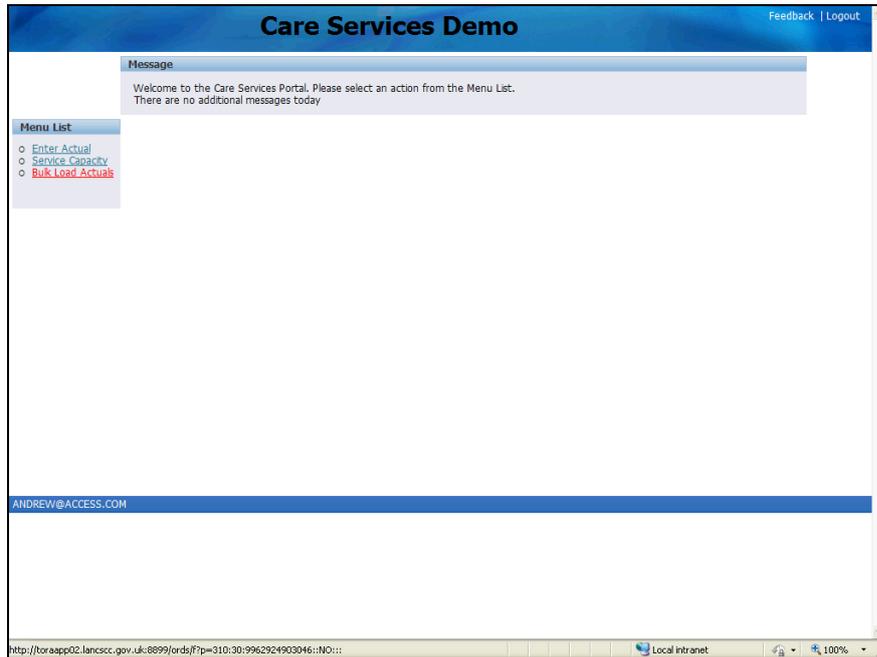
If you wish to input the care package details for several service users at the same time, you may find it easier to download the care package details into a spreadsheet and then enter and import back into the system.

The information you are required to provide about care provided is exactly the same whether you use the Enter Actuals page to submit details manually for each service user or if you use the Bulk Upload functionality to provide the information in spreadsheet format.

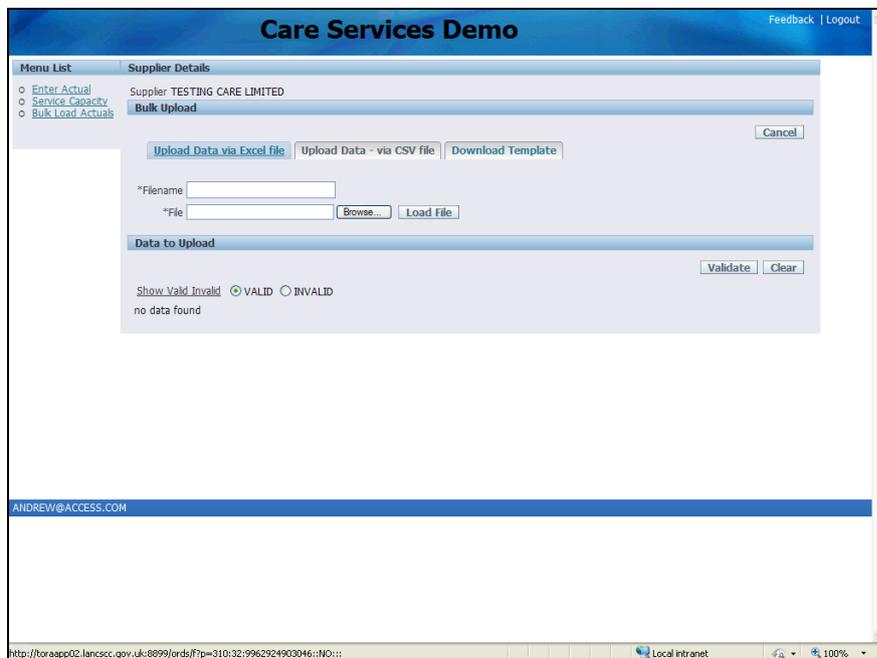
The process is divided into 3 parts:

- Download the spreadsheet template,
- Enter details of the care provided using the spreadsheet
- Import the spreadsheet into the Care Services Portal and submit the claim.

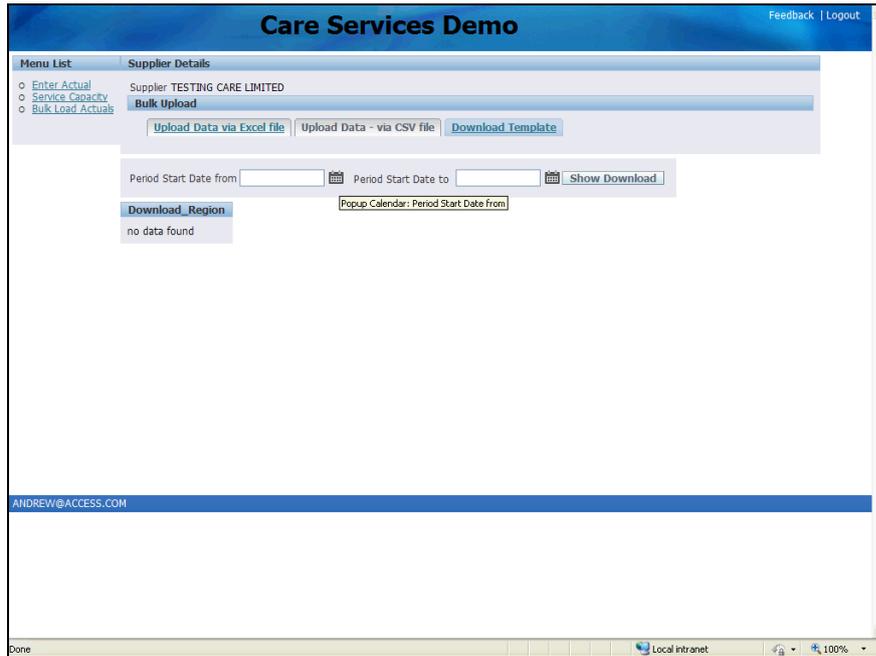
## Download the Spreadsheet Template



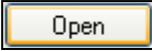
Step	Action
1.	From the Care Services portal home page, click the <b>Bulk Load Actuals</b> link.



Step	Action
2.	Click the <b>Download Template</b> link.



Step	Action
3.	Enter the date range for the search.
4.	Enter further search criteria if required.
5.	Click the <b>Search</b> link. 
6.	Click the <b>Show Download</b> link. 
7.	A summary of the care package details for the service users and the dates requested will now be displayed.  This information can now be exported into a spreadsheet.  Click the scrollbar until you see the Save to CSV link.
8.	Click the <b>Save to CSV</b> link. 

Step	Action
9.	Rename and save the spreadsheet as a CSV file to a convenient location.
10.	When the spreadsheet has been saved, click the <b>Open</b> button. 
11.	The information shown on the portal is now displayed in the spreadsheet.

## Update Spreadsheet with Details of Care Provided

Once you have downloaded and saved the spreadsheet template from the Bulk Load Actuals tab, you may enter the details of the care provided.

LCC Ref	Period Start	Org Name	Service Level	CPLI Ref	Ssref	Client Fullname	Unit Cost	Quantity	Start Date	End Date
122732	26/05/2014	ACCESS CARE LTD	Domiciliary Care (ISF) - Weekly	71835	A196358	Mr Test ServiceUser2	708.18	1	07/04/2014	
122731	02/06/2014	ACCESS CARE LTD	Domiciliary Care (ISF) - Weekly	71835	A196358	Mr Test ServiceUser2	708.18	1	07/04/2014	
68270	26/05/2014	ACCESS CARE LTD	Domiciliary Care Single carer	33718	A335460	Miss Test ServiceUser3	4.94	1	02/12/2013	
68268	26/05/2014	ACCESS CARE LTD	Domiciliary Care Single carer	33717	A335460	Miss Test ServiceUser3	4.77	167	02/12/2013	
68269	02/06/2014	ACCESS CARE LTD	Domiciliary Care Single carer	33717	A335460	Miss Test ServiceUser3	4.77	167	02/12/2013	
68272	02/06/2014	ACCESS CARE LTD	Domiciliary Care Single carer	33718	A335460	Miss Test ServiceUser3	4.94	1	02/12/2013	
90251	26/05/2014	ACCESS CARE LTD	Domiciliary Care Single carer	47107	A1284493	Mrs Service User1	0	87	02/12/2013	
90253	26/05/2014	ACCESS CARE LTD	Domiciliary Care Single carer	47108	A1284493	Mrs Service User1	3.99	81	02/12/2013	
90256	02/06/2014	ACCESS CARE LTD	Domiciliary Care Single carer	47108	A1284493	Mrs Service User1	3.99	81	02/12/2013	
90250	02/06/2014	ACCESS CARE LTD	Domiciliary Care Single carer	47107	A1284493	Mrs Service User1	0	87	02/12/2013	

Step	Action
1.	Delete any rows for which you are not ready to enter the details.
2.	Enter the details of the care provided against the relevant service user and date.  <b>Please note;</b> hours and proportion of weeks should always be entered to a maximum of 4 decimal places.
3.	<b>Actual;</b> enter the actual hours or proportion of care provided to each service user.
4.	<b>Frustrated:</b> Only required for Domiciliary Care, Single or Dual Carer (where hours are input).  Enter the number of hours where the care provider attended but was not able to gain access to the premises or when the service user cancelled the appointment without sufficient notice.

Step	Action
5.	<p><b>Missed:</b></p> <p><u>Domiciliary Care, Single or Dual Carer</u>; enter the hours where the care provider failed to attend the appointment or the appointment was cancelled with sufficient notice.</p> <p><u>Domiciliary Care (ISF) Weekly / Residential Care</u>; enter the proportion of care not provided to the service user, irrespective of the reason.</p>
6.	<p><b>Please note</b>; the total of the Actual, Frustrated and Missed fields must equal the Quantity.</p> <p>The spreadsheet can be uploaded but will be invalid (and cannot be submitted) if the quantity and the total do not match.</p>
7.	<p><b>Extra:</b> Only required for Domiciliary Care, Single or Dual Carer, where hours are input.</p> <p>Enter the total number of 'Extra' hours provided over and above the commissioned total (the Quantity). Note: the term 'Extra' refers to unexpected extra hours such as remaining on site while an ambulance is called for the service user, or to reflect an agreed initial visit charge.</p> <p>'Extra' should not be used where the package of care has been increased by agreement with the Social Worker in advance. This type of increase should already be reflected in the Quantity by an amendment to the Service User's care package that will be shown on the portal through a revised CPLI. If the current agreed care package is not reflected in the quantity you must contact the Social Worker accordingly to request that the care package is updated.</p>
8.	<p>Do not enter the number of visits; this will be calculated by the system.</p>
9.	<p>If you have entered any hours into the Frustrated, Missed and / or Extra fields, you must provide full details for each in the <b>Comments</b> field.</p> <p>You may not be able to submit your claim if you do not include a comment and the Authority may reject the claim if a clear reason is not given.</p>
10.	<p>Once the details have been entered, <b>Save</b> the amended spreadsheet.</p> <p>Please note; the details can still be amended once uploaded into the portal. Amendments can continue to be made to the details of care provided until the claim is actually submitted.</p>

### Upload the Spreadsheet into the Care Portal

Once you have completed and saved your spreadsheet, you should then upload the data into the Care Provider portal. Once you have uploaded and checked the details, this must then be submitted. The Authority will not be able to access the details of the care that you have recorded (or authorise any additional payments that might be due to you as a result) until the details are submitted by you.

Step	Action
1.	Once you have completed and saved your spreadsheet, you can upload into the Care Services portal and then submit the data.



Step	Action
2.	The spreadsheet has been saved as a CSV file; click the <b>Upload Data - via CSV file</b> link. <a href="#">Upload Data - via CSV file</a>

**Care Services Demo** Feedback | Logout

**Menu List**

- Enter Actual
- Service Capacity
- Bulk Load Actuals

**Supplier Details**

Supplier TESTING CARE LIMITED

**Bulk Upload**

Upload Data via Excel file | Upload Data - via CSV file | Download Template

**Data Load Source** Cancel | Next >

Import From

Upload file, comma separated (\*.csv) or tab delimited

Copy and Paste

\*Separator: ,

Optionally Enclosed By: "

First Row has Column Names  Yes

\*Copy and Paste Delimited Data

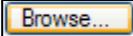
**Data to Upload** Validate | Clear

Show Valid Invalid  VALID  INVALID

no data found

ANDREW@ACCESS.COM

Done Local intranet 100%

Step	Action
3.	Click the <b>Upload file, comma separated (*.csv) or tab delimited</b> option.
4.	Use the <b>Browse</b> button to search for and select your completed spreadsheet file. 

**Care Services Demo** Feedback | Logout

**Menu List**

- Enter Actual
- Service Capacity
- Bulk Load Actuals

**Supplier Details**

Supplier TESTING CARE LIMITED

**Bulk Upload**

Upload Data via Excel file | Upload Data - via CSV file | Download Template

**Data Load Source** Cancel | Next >

Import From

Upload file, comma separated (\*.csv) or tab delimited

Copy and Paste

\*File Name: \\compdata01\ccusers3\$\asimp | **Browse...**

\*Separator: ,

Optionally Enclosed By: "

First Row has Column Names  Yes

**Data to Upload** Validate | Clear

Show Valid Invalid  VALID  INVALID

no data found

ANDREW@ACCESS.COM

Done Local intranet 100%

Step	Action
5.	<p>The location of the spreadsheet is now displayed in the File Name field and is ready to be uploaded.</p> <p>Click the <b>Next &gt;</b> link.</p> <p><input type="button" value="Next &gt;"/></p>
6.	<p>Click the <b>Validate</b> link.</p> <p><input type="button" value="Validate"/></p>
7.	<p>The data is now displayed and is displayed as Valid.</p> <p>The Status should be Valid or Valid Requires Authorisation.</p> <p><b>You must now submit the data - do not navigate away from this page without submitting.</b></p> <p>If you navigate away from this screen, the data will not be uploaded and you will not be able to upload by spreadsheet later. However, you will be able to upload manually.</p>
8.	<p><b>Invalid Rows</b></p> <p>If the Status of a row is invalid, the details have been transferred into the portal but you will not be able to submit.</p> <p>After submitting the remaining lines, you must access, amend and submit the details via the Enter Actual link.</p>
9.	<p>Click the <b>Submit</b> link.</p> <p><input type="button" value="Submit"/></p>
10.	<p>The data will disappear from the screen.</p> <p>You will receive confirmation of the number of rows uploaded at the top of the screen.</p>
11.	<p>To view the data which has been uploaded, click the <b>Enter Actual</b> link.</p> <p>You will also be able to amend and submit data which has an invalid status.</p> <p><input type="button" value="Enter Actual"/></p>

**Care Services Demo** Feedback | Logout

Menu List Search Service User

- Enter Actuals
- Service Capacity
- Bulk Load Actuals

Supplier: TESTING CARE LIMITED

\*Period Start Date from:  Period Start Date to:

Service:  Popup Calendar: Period Start Date from

Service User No:

Surname:

**Care Package Details**

no data found

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Done Local intranet 100%

Step	Action
12.	Search for the relevant period and service users.
13.	Click the <b>Search</b> link. 
14.	The status of each line is displayed in the summary.
15.	View the uploaded details. 

**Care Services Demo** Feedback | Logout

Menu List Care Plan

- Enter Actuals
- Service Capacity
- Bulk Load Actuals

View Documents Send Message Emergency Contact Cancel

Organisation : ACCESS CARE LTD  
Service : Domiciliary Care Single carer  
Client Id : A335460 Name : Miss Test ServiceUser3  
Date From : 02-DEC-2013 To :

**Actuals**

CPL Ref 33717  
Period Start: 26-MAY-2014 To Status Submitted - Requires Authorisation  
Quantity 167.0  
Unit Price 4.7700  
Actual 140.0000  
Frustrated 7.0000  
Missed 20.0000  
Extra 3.0000  
Visits  
Total 167  
Tot Value 796.59  
Comments enter comments relating to frustrated, missed or extra hours

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Done Local intranet 100%

<b>Step</b>	<b>Action</b>
16.	<p>If the status is 'Submitted' or 'Submitted - Requires Authorisation', the data can only be amended if rejected by the Authority.</p> <p>If a line has an Invalid status, amend and submit the details.</p> <p>Please contact the Procurement Service if you need to update details which have been submitted.</p>