Telford & Wrekin
COUNCIL

ContrOCC Provider Portal FAQs

Frequently Asked Questions

This guide will answer some of your questions about the Provider Portal.

Getting Help

Who do I contact for support using the Portal?

If you have any immediate questions on accessing the Portal, please email ECM@telford.gov.uk

You will also find information on the Telford and Wrekin Council Provider Portal Internet page:-

T&W Provider Portal Information

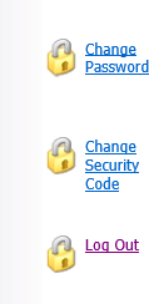
Accessing the Portal

What is the link for the Provider Portal?

The Portal is accessed here:
https://providerportal.telford.gov.uk/ProviderPortal_IAS_Live/

How do I change my Password or Security Code?

Once you have logged in to the Portal, use the links on the right-hand side to update your details:



What if I forget my Password or Security Code?

These must be reset by Telford & Wrekin Council, please use the password rest link and we will be in touch with you.

Accessing the Portal

I'm trying to change my Password or Security Code and the Portal won't accept them?

Due to Information Security requirements, the settings for passwords and security codes must be strict. Passwords must be:

- At least 12 character long
- Have at least 1 alphabetic character
- Have at least 1 non-alphabetic character

Passwords will need to be changed every 90 days. When you change your password, it must:

- Have at least 1 character different from your last password
- Not be the same as your last 12 passwords

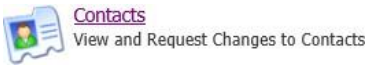
If you get your password wrong 3 times, your account will be locked—please contact us to reset. Also, users who don't log in to the Portal for 30 days will automatically be locked.

Security codes must be:

- Exactly 6 digits, only numbers 0-9
- Different from the previous code
- No digit can appear more than 4 times
- No sequences of more than three consecutive digits can be used—so '123456' will not work, but '123567' would be OK.

How do I request access for new users?

You can request access for other users in your organisation. Click the 'Contacts' link:



Now select 'New Contact' on the left. This will allow you to request a new user. Fill in the following fields:

- Forename
- Surname
- Address
- Mobile / Telephone
- Provider Portal Email Address

At the bottom, you can choose the level of access to request. In the 'For' drop-down menu, you can choose the following (not all options will be relevant to all providers):

- Organisation—will give access to everything linked to your organisation
- Contract—will allow access to the relevant Contract (e.g. if you provider Home Care and Day Care, you can grant access individually
- Service—If you have separate sites, homes etc. delivering the same type of care, you can grant access to these individually.

In the Role drop-down menu, you can choose from the following options—for each there are both Edit and Read- Only options:

- Full Access—grants full access to all functions.
- Finance Functions—grants access to Reports, Invoices / Scheduled Payments, Purchase Orders etc.
- Care Management Functions—grants access to CPLIs, Actions, Actuals (where used) etc.
- Admin Functions—grants access to request changes to Organisation Details, request new users etc.

Select the appropriate option for the member of staff and click 'Submit Contact Creation Request' - we will then create the user and contact them with login details.

Note - there is a 'Main' contact Role available. This shouldn't be selected as it will be set up by Telford & Wrekin Council.

Actuals

When do I have to start recording Actuals?

As all providers are on a different payment schedule, you will all be contacted separately to confirm the date from which you will need to record actuals via the Portal (or CM2000).

Providers will be expected to submit actuals for all packages in order for us to calculate payments.

What do the columns mean in the Actuals screen?

When completing Non-Timetabled Actuals, the following options are available:

The following fields are displayed—the number of visits is for information only, and are not required to be com- pleted for every actual:

- **Actual** - Shows the Actual quantity delivered, the units and the unit cost
- **Service Level** - The specific level of service. e.g. Home Care Long Term, Home Care ADAT
- **Pl.** (Planned) - Number of planned service units (according to the contract)
- **Frustd.** (Frustrated) - Number of service units originally planned, but missed by the Service User
- **Msd.** (Missed) - Number of service units originally planned, but missed by the provider
- **Xtr.** (Extra) - Number of extra service units delivered in addition to those planned
- ***Vst.*** *(Visits) - Total number of visits to the Service User (informational)*
- **Total Cost** - This shows the total cost; either based on the Actual + Frustrated quantity or the Planned Quantity, depending on payment terms. If a price change occurs during the week this will be indicated by the information "(avg price)" next to the price.
- **Comments** - Free text field for comments (required if there has been an over- / under-delivery of planned care)

For Timetabled Actuals, the correct dates and times should be selected / de-selected to record the actual visits. Add new rows for Frustrated Visits or where the planned timetable has changed.

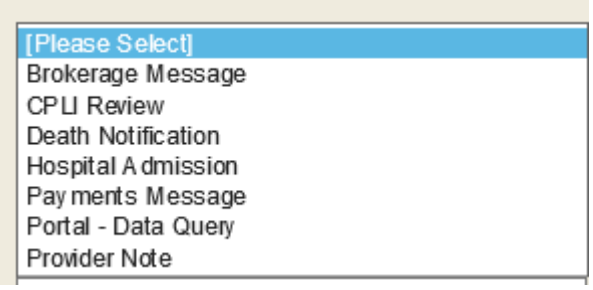
For further information, refer to the Provider Portal User Guide

Questions & Actions

I have a question about a package of care, a client or a payment how do I raise this?

Where possible, queries should be raised via the Portal Actions functionality. Click on the 'Actions and Change Requests' link and 'New Action' to start a message.

Choose an appropriate Type of message to allow us to respond to your query e.g. 'Brokerage Message' or 'Portal Data Query'.



For the 'Related To' option, choose whether the message is related to you as a Provider, or a specific service or Client. Note that you can start Client messages from the Care Package Line Items screen, which will pre- populate details in your message.

Next choose who to assign the message to—choose from the following options:

- Brokerage—for queries about commissioned care, clients etc.
- Payments—for queries relating to payments
- Provider Portal Admin—for queries about data (e.g. a service user is missing from your records, you can't see a Service etc.)

Payments

When will I be paid?

Residential / Nursing Providers—you will continue to be paid on the existing four-weekly schedule.

Home Care / Day Care / Extra Care Providers—initially, you will be paid on your current four-weekly schedule, however this will be aligned in future so that all providers operate on the same four weeks. This will streamline the capturing of Actuals, and the processing of payments. You will be advised in advance when and how this will be managed.

How will I be paid?

Residential / Nursing Providers - you will continue to be paid on a scheduled basis.

Home Care / Day Care / Extra Care Providers - you are currently paid upon the receipt of an invoice. These invoices are used to determine actual service delivery. With the Provider Portal, the Actuals process removes the need to generate an invoice to determine actual service delivery.

As a result, you will now be paid on a scheduled basis this means that a payment will be made four-weekly after Actuals are processed, for all service users. There is no need to issue an invoice for us to make a payment, although you can continue to do so.

Note that for scheduled payments, your Telford and Wrekin Council remittance advice will not quote an invoice number. If you want to see this on your payment, you will need to submit invoices via the Portal. Contact the Brokerage Team to set this up if required.

How can I view Payments?

You can view Scheduled Payments in the Portal—in addition the 'Pending Scheduled Payments' report will allow you to view the upcoming payment and export the data if required.

I have a query regarding a payment how do I raise this with you?

Please raise any issues with any CPLIs or payments as a 'Dispute' via the Portal. Please see the Provider Portal User Guide for details on how to do this.