

Adults Services Provider Portal Recording Actual Service Delivery

October 2019

Updated May 2022

Introduction

The Adult Services Provider Portal (ASPP) allows the recording of Actual Service Delivery (Actuals) by Providers – this is required to enable Worcestershire County Council (WCC) to correctly calculate both payments and charges to service users where appropriate. This was previously known as Electronic Provider Return (EPR).

The actuals area of the ASPP is a way of viewing the hours commissioned for a specific service user. Currently not all providers are required to provide actual delivery data, although you may wish to view hours.

Viewing Actuals

Once logged in to the ASPP click on the Actuals Link either in the main Tasks list or via the short cut at the top of the screen:

The screenshot shows the 'ContrOCC' Provider web interface for Mr Samuel Purple @ Purple Care. The navigation bar includes Home, Actuals, POs, Reports, Help, and Logout. The 'Actuals' link is highlighted. Below the navigation bar, the user is identified as 'Purple Care'. A 'Pick a task...' section lists several tasks: 'Actuals' (Submit your actuals to Worcestershire County Council using the online form or bulk import facility), 'Purchase Orders' (View & print purchase orders), and 'Reports' (View & print financial reports). The 'Actuals' task card is highlighted with a red box. On the right side, there are links for 'Change Password' and 'Log Out'.

This will open the Actuals input page. If you have more than one service where Actuals can be recorded (e.g. one for Home Care and Transport/Day Care etc) then these will be listed on the left:

The screenshot shows the 'Submit Actuals Online' page. On the left, a 'Services' dropdown menu is open, displaying 'Purple Care' and 'Purple daycare' under 'Current Services'. Below the dropdown, there is an unchecked checkbox labeled 'Include Historical'. On the right, the text 'Please select a Service on the left.' is displayed.

Once you have selected a Service, the ASPP will present a view of all the Service Users with active packages, for the current week. Actuals are calculated and recorded on a weekly basis, running from Saturday to Friday.

Filter options

The screenshot displays the ContrOCC Worcester County Council Provider Portal interface. At the top, the header includes the logo and navigation links: Home, Actuals, POs, Reports, Help, and Logout. The main content area is titled 'Actuals for Purple Care' and shows a 'Week Beginning 19 October'. A calendar on the left highlights the week of 19th to 25th October 2019. Below the calendar is a 'List of services' section with 'Current Services' for Purple Care and Purple daycare. The main table displays weekly actuals for four clients: Miss Pamela Portal, Mr Pedro Portal, Mrs Penelope Portal, and Mr Peter Portal. The table columns include Actual, Service Level, PI, Frstd, Mad, Xtr, Vat, Total Cost, and Comments. A 'Generate Actuals' button is located at the bottom right of the table. Red arrows point from text labels to these specific elements: 'Calendar' to the calendar, 'List of services' to the services list, 'Weekly actuals view' to the table, and 'Populates actuals based on planned service delivery' to the 'Generate Actuals' button.

Calendar

List of services

Weekly actuals view

Populates actuals based on planned service delivery

Recording Actuals in the Adult Services Provider Portal

Generating Actuals

Generating Actuals causes the ASPP to create actual service delivery that exactly matches the plan – i.e. if 12 hours of home care were commissioned in a week, the ASPP will then show 12 delivered hours.

Once the Actuals are generated, they can be edited in the ASPP.

Select the correct week using the Date Navigator and then click “Generate Actuals”

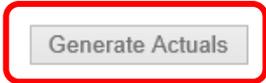
Week Beginning 19 October

Service Level: [All Service Levels] Client: [All Clients]
 Show Clients with Actuals: [No Selection] Actuals: Unplanned Planned Intermittent Locked
 [View] [Reset]

Actual	Service Level	PI	Frstd	Msd	Xtr	Vst	Total Cost	Comments
Miss Pamela Portal A201000005								[Add/Edit]
Mr Pedro Portal A201000003								[Add/Edit]
Mrs Penelope Portal A201000004								[Add/Edit]
Mr Peter Portal A201000002								[Add/Edit]

Total: £0.00 of £0.00

Pages: 1



This may take a moment to complete, and the weekly Actuals will then be presented to you. These can now be edited.

Actual	Service Level	PI	Frstd	Msd	Xtr	Vst	Total Cost	Comments				
Miss Pamela Portal A201000005							£210.00 of £210.00	[Add/Edit]				
External Domiciliary Care - Timetabled - Tier 3 (W&D)												
Sat	Sun	Mon	Tue	Wed	Thu	Fri	Entry	Exit	Spans Night?	Cost	Comments	Frustrated?
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	08:00	09:00	<input type="checkbox"/>	£70.00		<input type="checkbox"/>
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	12:30	13:00	<input type="checkbox"/>	£70.00		<input type="checkbox"/>
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	19:00	19:30	<input type="checkbox"/>	£70.00		<input type="checkbox"/>
Mr Pedro Portal A201000003							£98.00 of £98.00	[Add/Edit]				
7 x Hours		Homecare External - Spot		7	0	0	0	7	£98.00 =	7 (Actual + Frstd) Hours x £14.00		
Mrs Penelope Portal A201000004							£60.00 of £60.00	[Add/Edit]				
External Domiciliary Care - Timetabled - Tier 3 (W&D)												
Sat	Sun	Mon	Tue	Wed	Thu	Fri	Entry	Exit	Spans Night?	Cost	Comments	Frustrated?
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	10:00	10:30	<input type="checkbox"/>	£60.00		<input type="checkbox"/>
Mr Peter Portal A201000002							£98.00 of £98.00	[Add/Edit]				
7 x Hours		Homecare External - Spot		7	0	0	0	7	£98.00 =	7 (Actual + Frstd) Hours x £14.00		

Total: £466.00 of £466.00

Adding Actuals for Services

Non- timetable services are those which are commissioned by Worcestershire County Council as a quantity per week, rather than at a set timetable. An example of this service is Day care. These are the simplest Actuals to record.

Once Actuals are generated, you can edit them for a specific Service User by clicking the 'Add/Edit' button next to them:

Mr Pedro Portal A201000003						£98.00 of £98.00		<input type="button" value="Add/Edit"/>	
7	x Hours	Homecare External - Spot	7	0	0	0	7	£98.00 =	7 (Actual + Frstd) Hours x £14.00

This will open the Edit View for that Service User. The following fields are displayed – the number of visits is for information only, and are not required to be completed for every Actual:

- **Actual** - shows the Actual quantity delivered, the units and the unit cost
- **Service Level** - the specific level of service. for example. External Domiciliary Care – Tiered or Home Care External - Spot
- **Pl. (Planned)** - number of planned service units (according to the purchase order)
- **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
- **Comments** - Free text field for comments: Compulsory if there has been an over or under delivery of planned care

Scenario 1 – Visit Missed

If a visit is missed then adjust the hours in the actual box, and record the missed hours in the 'missed' box. **The hours should be read as units and are as per the purchase order. For example the units for Pedro Portal in the example below are 30 minute calls, 7 days per week, however they show as 7 hours, not 7 units. Please be mindful of this when you make any changes.**

Actual	Service Level	Pl	Frstd	Msd	Xtr	Vst	Total Cost	Comments
<input type="text" value="6"/> x Hours	Homecare External - Spot	7	<input type="text" value="0"/>	<input type="text" value="1"/>	<input type="text" value="0"/>	<input type="text" value="7"/>	£98.00 = 7 (Actual + Frstd) Hours x £14.00	<input type="text" value="Carer was late"/>
Add Actual: Unplanned [No selection] <input type="button" value="Add"/>								

Week Total: £98.00

As there are less hours it will turn red. When you have finished press save and go back to edit others as appropriate. Missed calls are not paid for by Worcestershire County Council. Please ensure there is a comment explaining the reason, to ensure that the Payments Team can process payments effectively without any delays.

Scenario 2 – Frustrated Visit

In the example below, the Service User has 7 calls/week, however one visit was Frustrated (i.e. missed by the Service User) for 1 call;

Actual	Service Level	Pl	Frstd	Msd	Xtr	Vst	Total Cost	Comments
<input type="text" value="6"/> x Hours	Homecare External - Spot	7	<input type="text" value="1"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="7"/>	£98.00 = 7 (Actual + Frstd) Hours x £14.00	<input type="text" value="hospital appt"/>
Add Actual: Unplanned <input type="text" value="[No selection]"/> <input type="button" value="Add"/>								

Week Total: £98.00

Record the frustrated quantity in the frustrated box to ensure that you are paid for the planned service. Where hours are recorded as frustrated, they should be deducted from the Actuals box. The weekly total has not changed from the planned total, as visits that are marked as “frustrated” are still paid for. As there are less hours it will turn red. Please ensure there is a comment explaining the reason, to ensure that the Payments Team can process payments effectively without any delays. When you have finished press save and go back to edit others as appropriate.

Scenario 3 – Additional Time

If a visit over runs amend the actual quantity (units) to the total number of units for the week and record the additional units in the ‘xtr’ box. **Please be aware hours should be read as units and are as per the purchase order.** Therefore, if the units are 30 minutes but an extra 15 minutes are provided this needs to be recorded as an extra 0.5 units. Please ensure supporting detail is added in the comments.

Actual	Service Level	Pl	Frstd	Msd	Xtr	Vst	Total Cost	Comments
<input type="text" value="7.5"/> x Hours	Homecare External - Spot	7	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0.5"/>	<input type="text" value="7"/>	£98.00 = 7 (Actual + Frstd) Hours x £14.00	<input type="text" value="Waited for ambulance"/>
Add Actual: Unplanned <input type="text" value="[No selection]"/> <input type="button" value="Add"/>								

Week Total: £98.00

When you have finished press save and go back to edit others as appropriate. After saving, the actual would turn green and would generate an Exception in Controcc for WCC to approve.

Adding Actuals for Timetabled Services

Some Plans will have a timetable linked to the service, and this will be displayed within the actual:

Actual	Service Level	PI	Frstd	Msd	Xtr	Vst	Total Cost	Comments				
External Domiciliary Care - Timetabled - Tier 3 (W&D)												
Sat	Sun	Mon	Tue	Wed	Thu	Fri	Entry	Exit	Spans Night?	Cost	Comments	Frustrated?
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	08:00	09:00	<input type="checkbox"/>	£70.00		<input type="checkbox"/>
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	12:30	13:00	<input type="checkbox"/>	£70.00		<input type="checkbox"/>
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	19:00	19:30	<input type="checkbox"/>	£70.00		<input type="checkbox"/>
Add Row												
Add Actual: Unplanned [No selection]												
												Add

Week Total: £210.00

These require the specific dates and times of each visit to be recorded. Changes can be made by adding rows or selecting and deselecting days from within the timetable. The example below illustrates some of the possible options.

Scenario 1 – Visit Missed

If a visit is missed simply untick the relevant day:

After saving, this Actual would turn red. Please ensure a note is added in the comments.

Actual	Service Level	PI	Frstd					
External Domiciliary Care - Timetabled - Tier 3 (W&D)								
Sat	Sun	Mon	Tue	Wed	Thu	Fri	Entry	Exit
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	08:00	09:00
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	12:30	13:00
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	19:00	19:30
Add Row								

Scenario 2 – Frustrated Visit

If a visit is frustrated, untick the relevant day as before. Then click “Add Row” to add a new row, tick only the relevant day and enter the Entry and Exit times and also the “frustrated” box. Please ensure a comment is added.

Actual	Service Level	PI	Frstd	Msd	Xtr	Vst	Total Cost	Comments				
External Domiciliary Care - Timetabled - Tier 3 (W&D)												
Sat	Sun	Mon	Tue	Wed	Thu	Fri	Entry	Exit	Spans Night?	Cost	Comments	Frustrated?
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	08:00	09:00	<input type="checkbox"/>	£60.00		<input type="checkbox"/>
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	12:30	13:00	<input type="checkbox"/>	£70.00		<input type="checkbox"/>
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	19:00	19:30	<input type="checkbox"/>	£70.00		<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	08:00	09:00	<input type="checkbox"/>	£10.00	no answer to door	<input checked="" type="checkbox"/>
Add Row												

After saving, the actual would remain grey.

Scenario 3 – Additional Time

If a visit over runs, untick the relevant day as before. Then, click “Add Row” to add a new row, tick only the relevant day and enter the Entry and Exit times. Please ensure supporting detail is added in the comments.

After saving, the actual would turn green and would generate an Exception in Controcc for WCC to approve.

Actual	Service Level	PI	Frstd	Msd	Xtr	Vst	Total Cost				
External Domiciliary Care - Timetabled - Tier 3 (W&D)											
Sat	Sun	Mon	Tue	Wed	Thu	Fri	Entry	Exit	Spans Night?	Cost	Comments
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	08:00	09:00	<input type="checkbox"/>	£60.00	
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	12:30	13:00	<input type="checkbox"/>	£70.00	
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	19:00	19:30	<input type="checkbox"/>	£70.00	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	08:00	09:30	<input type="checkbox"/>	£10.00	client had fallen

Scenario 4 – Additional Visit

If a visit is not due on a particular day, that day can be ticked to include it:

Actual	Service Level	PI	Frstd					
External Domiciliary Care - Timetabled - Tier 3 (W&D)								
Sat	Sun	Mon	Tue	Wed	Thu	Fri	Entry	Exit
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	09:00	10:00				
<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	12:00	12:30				
<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	07:30	08:00				

If the day of a visit is changed, the planned day can be unticked too. Note that where the weekly total matches the planned total, an exception won't be generated. When you have finished press save and go back to edit others as appropriate.

Confirming Actuals

The previous process of exporting and importing actuals has now been replaced with a one step process. Once you have made all the necessary changes to the data for a week you simply need to press the confirm actuals button at the bottom of the actuals screen.



Completion of Intermittent Residential Replacement Care

From the Actuals button on the main screen select the correct week you are completing the bed return for, and select Intermittent Residential Replacement Care from the Service Level drop down.

Actuals for Pershore Short Term Breaks

Week Beginning 25 January

MIXTURE OF PAYABLE AND INFORMATIONAL ACTUALS

Service Level: Intermittent Residential Repla Client: [All Clients]

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

View Reset

Actual	Service Level	PI	Frstd	Msd	Xtr	Vst	Total Cost	Comments
	A120219842							Add/Edit
One Reablement	A110024548							Add/Edit
Three Reablement	A130006387							Add/Edit
Two Reablement	A110023061							Add/Edit

Total: £0.00 of £0.00

Pages: 1

Generate Actuals

Click on the 'Add/Edit button' for the Service User you are completing and the following screen appears – choose the options in the drop down boxes as shown below for replacement care.

Worcestershire County Council Provider Portal

Home Actuals POs Reports Help Logout

Edit Actuals for Pershore Short Term Breaks, Three Reablement (A130006387)

Week Beginning 18 Jan 2020

Actual	Service Level	PI	Frstd	Msd	Xtr	Vst	Total Cost	Comments
There is no item to display								
Add Actual: Planned	CPLI 04/01/2020 - 31/03/2020, Intermittent							Add

Week Total: £0.00

Save Undo

Back

Click on the 'Add' button

Week Beginning 25 Jan 2020

Actual	Service Level	PI	Frstd	Msd	Xtr	Vst	Total Cost	Comments
0	x Nights Intermittent Residential Replacement Care - Chargeable	--	0	--	--	1	--	

Add Actual: Unplanned [No selection]

Week Total: £0.00

Complete the number of nights used in the **Actual** box – change **visits** to match this. Any cancelled stays within 24 hours should be recorded in the comments box NOT as an actual stay. Click **Save** and you will see the screen below showing the number of nights of replacement care and the cost. Press Back.

Week Beginning 25 Jan 2020

Actual	Service Level	PI	Frstd	Msd	Xtr	Vst	Total Cost	Comments
2	x Nights Intermittent Residential Replacement Care - Chargeable	--	0	--	--	2	£300.00 = 2 (Actual + Frstd) Nights x £150.00	one cancelled

Add Actual: Unplanned [No selection]

Week Total: £300.00

Back on the main screen you see that the service user has now gone green - complete for the other service users as appropriate

« Prev | This Week | Next »

Services

[Persore Short Term Breaks](#)

Current Services

[Persore Short Term Breaks](#)

Include Historical

Bulk Import/Export

It is also possible to bulk-import or export actuals data from a CSV file

Week Beginning 25 January

MIXTURE OF PAYABLE AND INFORMATIONAL ACTUALS

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
	\120219842							<input type="button" value="Add/Edit"/>
	One Reablement A110024548							<input type="button" value="Add/Edit"/>
	Three Reablement A130006387						£450.00 of £450.00	<input type="button" value="Add/Edit"/>
2	x Nights Intermittent Residential Replacement Care - Chargeable	0	1	0	0	2	£450.00 = 3 (Actual + Frstd) Nights x £150.00	one frustrated
	Two Reablement A110023061							<input type="button" value="Add/Edit"/>
							Total: £450.00 of £450.00	

Pages: 1

Once you have completed this for everyone, then press the confirm actuals button – as detailed above on page 8.