

Adding a one-off to an existing ongoing Direct Payment

This guide is for purchasing a one-off payment, for an ongoing Direct Payment in place.

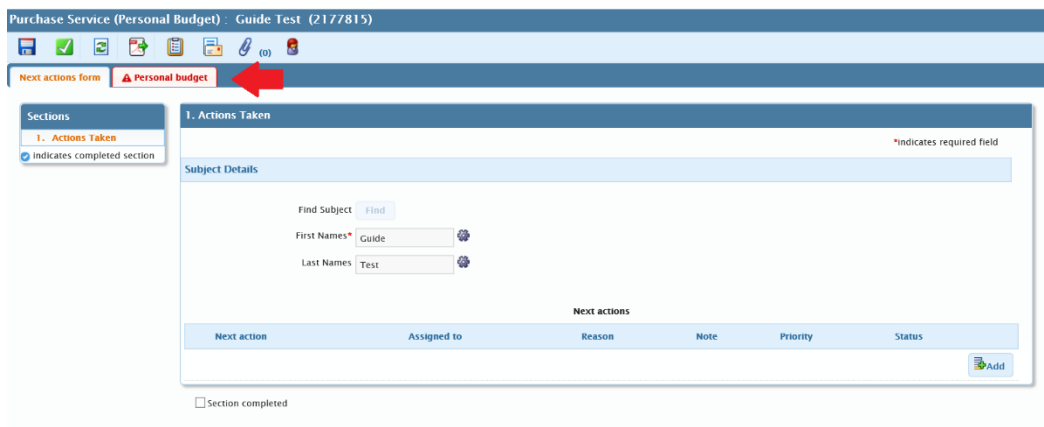
The Mosaic process of purchasing a one-off, in summary:

- Open a Purchase Service (Personal Budget) workflow step
- Amend the Direct Payment provision under the Provision and Contributions tab
- Add a one-off element to the Direct Payment provision
- Select a next action of 'Purchasing Outcome'
- Then FINISH with the green tick, and a Purchase Order will be generated.

Opening a Purchase Service (Personal Budget) workflow step

You will generate a **Purchase Service (Personal Budget)** step, from the *What Matters-Conversation Update* workflow, where you have provided details of the one-off payment required. You are assigning this to yourself, as you the practitioner are completing the one-off purchasing for this Direct Payment.

- When you first open this step, you will see two tabs. The 'Next actions' tab can be completed at the end. To start the purchasing of a Direct Payment, you need to click on the '**Personal budget**' tab:



Purchase Service (Personal Budget) - Guide Test (2177815)

Next actions form Personal budget

Sections

- 1. Actions Taken
- Indicates completed section

1. Actions Taken

Subject Details

Find Subject Find

First Names* Guide

Last Names Test

Next actions

Next action	Assigned to	Reason	Note	Priority	Status

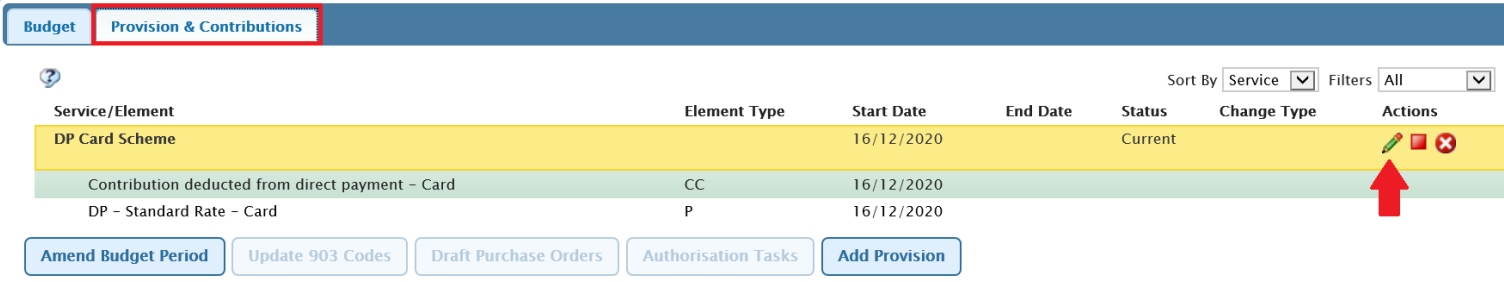
Add




Section completed

Adding a one-off to the Direct Payment provision

- Select the **Provision & Contributions tab** and find the current Direct Payment provision in place.

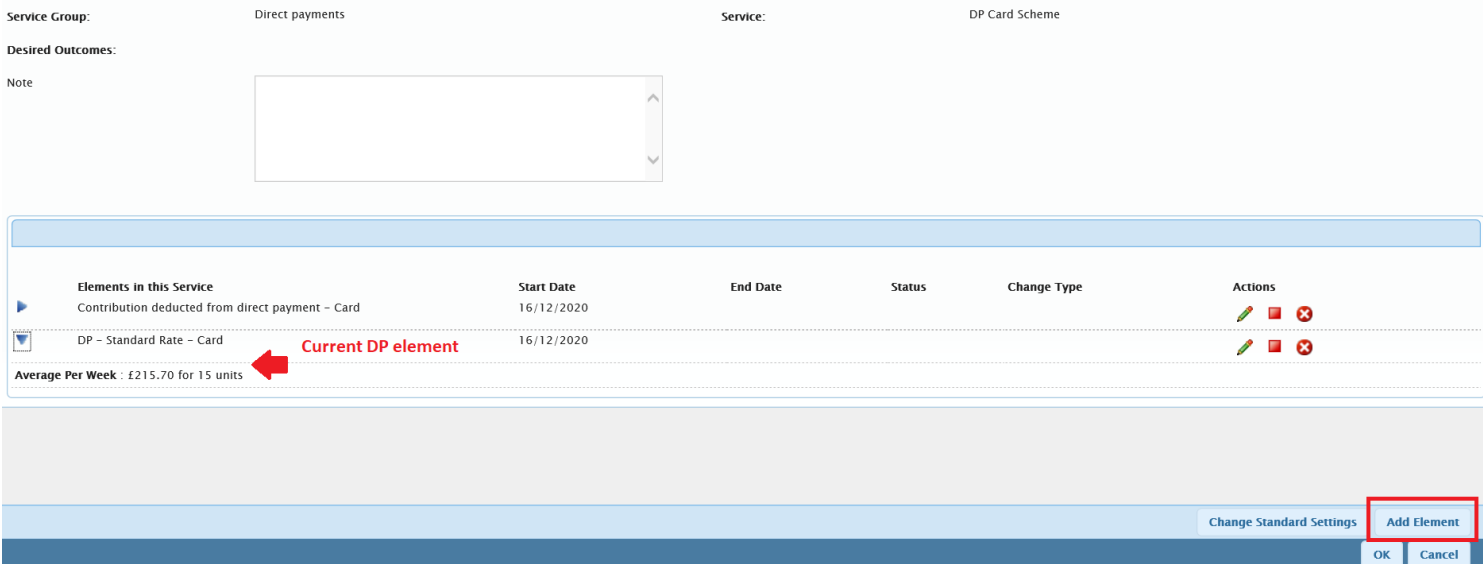
The Direct Payment provision will either be titled *DP Care Scheme* or *LBC Direct Payment Scheme*, as shown below and will have a status of 'Current':



Service/Element	Element Type	Start Date	End Date	Status	Change Type	Actions
DP Card Scheme		16/12/2020		Current		  
Contribution deducted from direct payment - Card	CC	16/12/2020				
DP - Standard Rate - Card	P	16/12/2020				

Buttons: Amend Budget Period, Update 903 Codes, Draft Purchase Orders, Authorisation Tasks, Add Provision







- Select the **pencil icon** to amend.
- You have now opened up the Direct Payment provision and can see the current Direct Payment element within.
- To add a one-off element, **select Add Element**:



Service Group: Direct payments Service: DP Card Scheme

Desired Outcomes:

Note

Elements in this Service	Start Date	End Date	Status	Change Type	Actions
Contribution deducted from direct payment - Card	16/12/2020				  
DP - Standard Rate - Card	16/12/2020				  

Average Per Week : £215.70 for 15 units

Buttons: Change Standard Settings, Add Element, OK, Cancel

- Choose the one-off option from the drop-down list.
This will either be **DP Card- One off** (if the current Direct Payment is via DP Card Scheme) or will be **DP- One off** (if the current Direct Payment is via LBC Direct Payments Scheme):

Amend DP Card Scheme > New Element

Filter the element types list by category

Show element types in this category

 Show all element types

DP Card - One off

 DP Card - Ongoing Information

 Other contributions

Element Type

DP - Standard Rate - Card (one off)

 DP - Agency Rate - Card (one off)

 DP - Variable Rate - Card (one off)

 Day Services - Card (one off)

 Residential Respite - Card (one off)

 Transport - Card (one off)

 Other - Card (one off)

New LBC Direct Payments Scheme > New Element

Filter the element types list by category

Show element types in this category

 Show all element types

DP - One off

 DP - Ongoing Information

 Other contributions

Element Type

DP - Standard Rate (one off)

 DP - Agency Rate (one off)

 DP - Variable Rate (one off)

 Day Services (one off)

 Residential respite (one off)

 Transport (one off)

 Carer (one off)

 Other (one off)

- Choose the appropriate Element Type:
 - DP- Standard Rate- Card (one off) or DP- Standard Rate (one off):** To be used for a one-off at the £15.04 standard rate.
 - DP- Agency Rate- Card (one off) or DP- Agency Rate (one off):** To be used for one-off at the £16.73 agency rate.
 - DP- Variable Rate- Card (one off) or DP- Variable Rate (one off):** To be used for a one-off at a different agreed hourly rate (could be above the standard or agency rates or calculated as an averaged weekly amount for instance).
 - Day Services- Card (one off) or Day Services (one off):** To be used for a one-off in relation to day services provided via Direct Payment.
 - Residential Respite- Card (one off) or Residential Respite (one off):** To be used for a one-off for Residential Respite.
 - Transport- Card (one off) or Transport (one off):** To be used for one-offs in relation to transport costs.
 - Other- Card (one off) or Other (one off):** To be used for any other one-off payments required.
- Then select 'Next'.

- It will open up the one-off element, and you will notice all the relevant information about this Direct Payment is there (please check all information is correct).
- There are two tabs that require information; the **Dates** tab and the **Delivery** tab:

Amend DP Card Scheme > New DP - Standard Rate - Card (one off)

Summary	Dates	Purchaser	Provision	Allocated Party	Delivery	Budget Codes	Note	Payments
Dates	Start date:				REQUIRED ←			
Purchaser	Worker responsible for purchase:	Nicola Antoni						
	Purchasing team:	Access and Response						
Provision	Supplier:	Allpay Limited						
Allocated Party	Allocated person:	Andy Test						
	Allocated organisation:							
Delivery	Frequency:	Once						
	Hour:	REQUIRED ←						
	Standard total cost:	£0.00						
	Overridden total cost:							
Budget Codes	Budget Codes:	Cost Centre SA243 ACM Personal Budget Over 65 Subjective JH030 Direct Payments						
Payments	Method of payment:	Via Corporate System						
	Payee:	Supplier						

- Under the Dates tab, enter the Start Date of the one-off payment (most likely today's date):

Amend DP Card Scheme > New DP - Standard Rate - Card (one off)

Summary	Dates	Purchaser	Provision	Allocated Party	Delivery	Budget Codes	Note	Payments
Fields marked with a * are required before the service can be purchased.								
	Start Date *	<input type="text"/>						

- Under the Delivery tab:
 - If it's a standard rate element or agency rate element, **amend the Quantity** and **select 'Recalculate'** for the one-off total:

Amend DP Card Scheme > New DP - Standard Rate - Card (one off)

Summary	Dates	Purchaser	Provision	Allocated Party	Delivery	Budget Codes	Note	Payments
Fields marked with a * are required before the service can be purchased.								
	Frequency *	Once						
	Hour *	<input type="text" value="0"/>						
	Standard Unit Cost	£ 14.67						
	Standard Total Cost	£ 0.00						
	Have you changed the quantity?	<input type="checkbox"/>			Recalculate			

- If it's a variable rate element, **amend the Quantity** and manually type in the one-off under **Overridden Total Cost**.
- If it is one of the other element types, then it just requires you to manually enter the one-off total in the box provided.
- You may also want to change the details under the 'Purchaser' tab, if the previous worker's name and team are showing- to indicate that you are purchasing this one-off payment:

Amend DP Card Scheme > New DP - Variable Rate - Card (one off)

Summary Dates **Purchaser** Provision Allocated Party Delivery Budget Codes Note Payments

Fields marked with a * are required before the service can be purchased.

Worker Responsible for Purchase *

Purchasing Team *

- Then **select 'OK'**.
- You can now see this one-off element has been added to the Direct Payment provision. You can amend this one-off using the pencil icon if needed, or cancel it entirely by using the 'x' icon:

Elements in this Service	Start Date	End Date	Status	Change Type	Actions
DP - Standard Rate - Card (one off)	23/12/2020	23/12/2020		New	
Cost (One-off) : £28.76 for 2 units					
▶ Contribution deducted from direct payment - Card	16/12/2020				
▶ DP - Standard Rate - Card	16/12/2020				

- **Select 'OK'** to return to the main page. You can see the one-off element has been added, and under Change Type it states 'Changing':

Total Budget for period: £14,000.36 Total Allocated: £11,275.97
 Current Period Start Date: 16/12/2020 Period Duration: 12 months
 Cost calculations will assume budgets/provision start on 16/12/2020 until start dates are entered

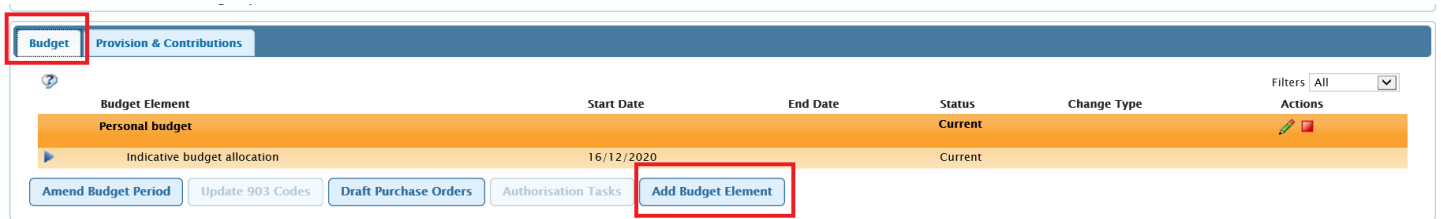
Budget Provision & Contributions

Service/Element	Element Type	Start Date	End Date	Status	Change Type	Actions
DP Card Scheme				Proposed	Changing	
DP - Standard Rate - Card (one off)	P	23/12/2020	23/12/2020		New	
▶ Contribution deducted from direct payment - Card	CC	16/12/2020				
▶ DP - Standard Rate - Card	P	16/12/2020				

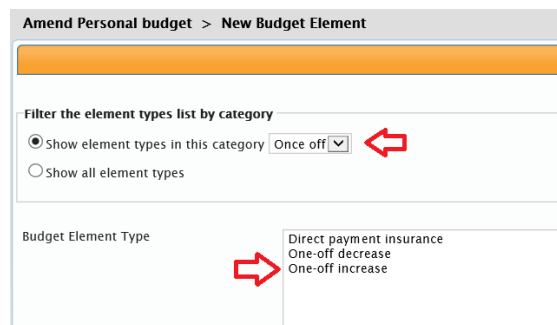
Amend Budget Period Update 903 Codes Draft Purchase Orders Authorisation Tasks Add Provision

- If you have not exceeded the budget with your addition of this one-off payment to the Direct Payment, then this step does not require authorisation. In these cases, you will notice the Authorisation Tasks icon is greyed out, as above. You do not need to task this to your manager and can proceed to the Next actions tab to finish this step (Page 7 of this guide).
- **If you have exceeded the Budget available**, then you will receive a warning message informing you. You will need to resolve the Budget issue if you wish to proceed with this step.

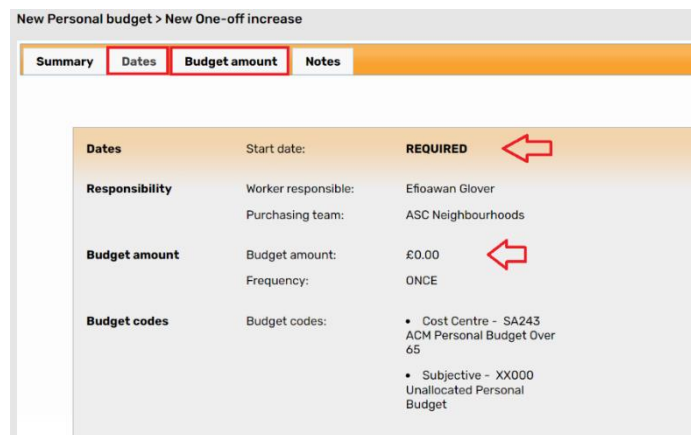
- Select the Budget tab, and click **'Add Budget Element'**:



- Ensure the drop-down option is 'Once off' and select **One-off increase** then click 'OK':



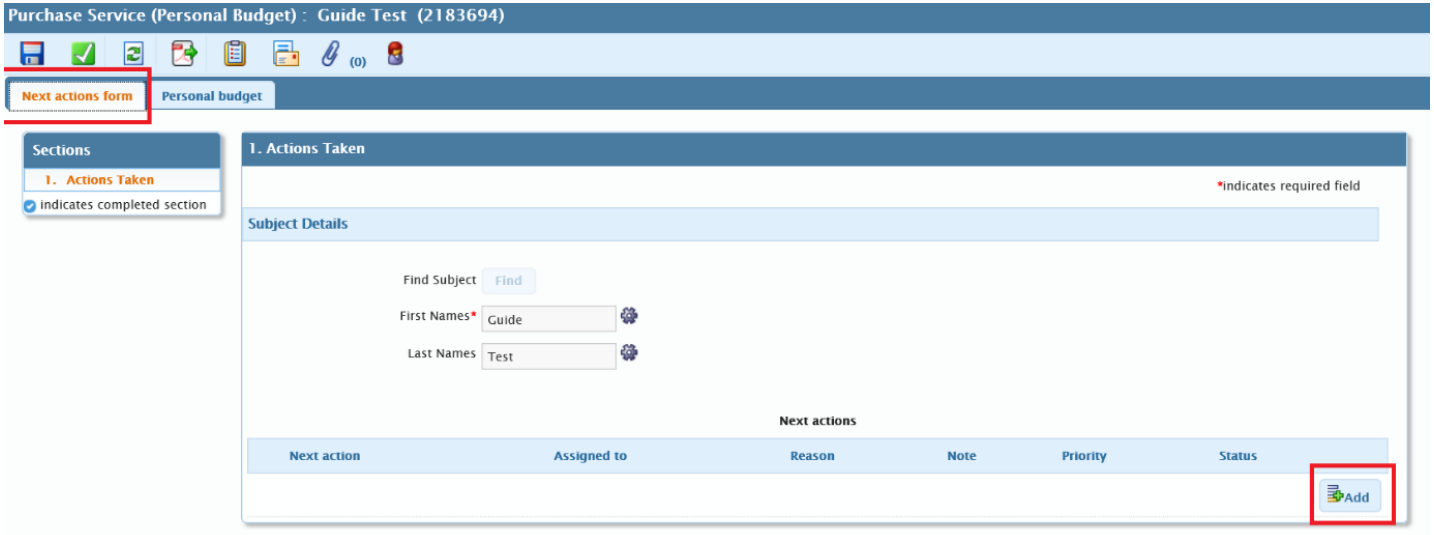
- Under the Dates tab, add the date the one-off was added.
- Under the Budget Amount tab, add the one-off amount the Budget needs to be increased by (the same amount as the one-off payment):



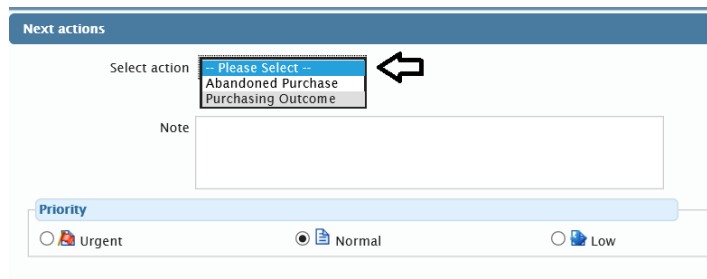
- Then **select 'OK'**, and **'OK' again** to return to the main page. The Budget exceeded warning message should now have disappeared. You will need to send this for authorisation to your manager, by using the Authorisation Task icon.

Selecting a next action, and finishing this step

- Finally, on the 'Next action form' tab, select 'Add':



- You will see two drop-down options available. To complete this step and ensure the one-off payment is processed, select **Purchasing Outcome**. To abandon this step, as if you never created it (if opened in error for instance), choose **Abandoned Purchase**:



- Then 'Add and Close'
- You must **FINISH** this workflow step, using the green tick icon in the toolbar. Without finishing this step, the one-off payment will not be processed.
- Once the finish icon has been selected, the step will generate a Purchase Order (PO). It's not necessary for you to keep this or send it to anyone.