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Purchasing a new ongoing Direct Payment

This guide is for setting up a <u>new</u> Direct Payment on Mosaic. For increasing, decreasing or ending an existing Direct Payment, please see the *Amending a Direct Payment Guide*.

Please note, prior to adding a Direct Payment on Mosaic, the practice side of setting up this Direct Payment must be completed, where the relevant payroll company have confirmed a start date for this DP, and all information has been confirmed for this service to be added to the system.

The Mosaic process of purchasing a DP, in summary:

- Open a Purchase Service (Personal Budget) workflow step
- Provide the missing information required under the Budget tab
- Add the Direct Payment provision under the Provision and Contributions tab
- Add an element to that Direct Payment provision
- Send for authorisation to your manager
- Once authorised, select a next action of 'Purchasing Outcome'
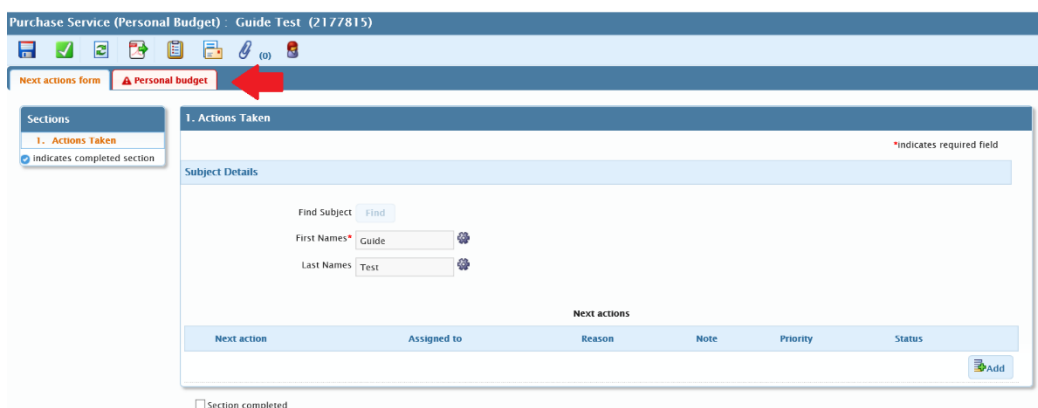- Then FINISH with the green tick, and a Purchase Order will be generated.

Opening a Purchase Service (Personal Budget) workflow step

You will generate a **Purchase Service (Personal Budget)** step, from your existing workflow (Conversation 3 or Support Plan Updates/ Review workflow), and the step is otherwise known as Purchase Service (Community Services).
You are assigning this to yourself, as you the practitioner are completing the purchasing for Direct Payment.

Navigating the Purchase Service (Personal Budget) workflow step:

- 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:

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- When you open the 'Personal budget' tab you will see the following. Take some time to familiarise yourself with this page:

- There are two tabs: The **Budget** tab (circled in green) is the tab showing at the moment, and the **Provisions and Contributions** tab (circled in purple).
The Budget tab is where you will amend/add anything to do with the budget. The Provisions and Contributions tab is where all services are added.

Provide the missing information required under the Budget tab

Please note, **you only need to complete the following actions in relation to the budget, if the person does not already have an active/current budget.** If they currently have other services in place, and you're adding a new Direct Payment to their existing services/ or replacing an existing service with this Direct Payment, then their budget should already be set, and you can skip this part.

- There are two issues you need to resolve here: one is to set the *Period Start Date* and the other is *Properties Incomplete*.

- Set the **Proposed Period Start Date** (currently stating 'Not set') by clicking 'Set Budget Period'. Enter the date you want this budget to start from (leaving the period duration as '12'), before selecting 'Save'.
  IMPORTANT: Once you've set the budget date, and finished this step, you cannot amend the budget date to an earlier date. Ensure that if you are putting on a Direct Payment retrospectively, that you set the budget date as the date the service started, or before that date.

- Next, provide the missing information required under **Properties Incomplete**, using the pencil icon:

- Click '**review and amend'**, which will bring you to a page with three tabs.
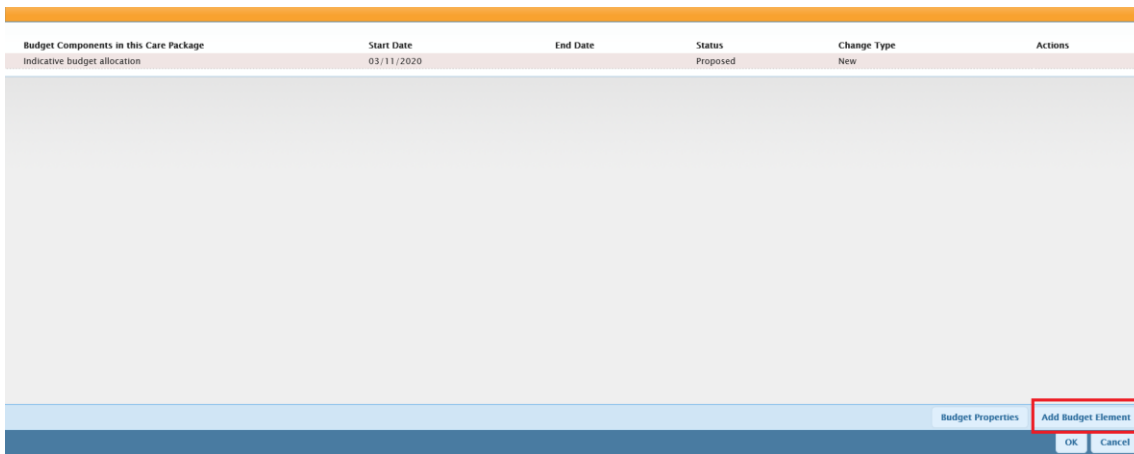

- Under the *Purchaser* tab: Your team may have pulled through under Purchasing team, but please ensure it's the correct one. If not, select 'Find' and enter your team.
- For instance, if you are in a neighbourhood team, and ASC Neighbourhood Team North has pulled through under 'Purchasing team' for example, this will need to be changed to **ASC Neighbourhoods**. This applies to any neighbourhood team.
- If you are in the CYPDS team, you will need to change your Childrens team (CSSW Young People with Disability Transitions Team 14-25 for example), to **CLDS Integrated Team – CYPDS** instead.

- Under the *Budget Code*s tab: Choose the correct budget code from the drop-down (if presented with ACM Personal Budget or ACM Generic option, choose ACM Personal Budget).
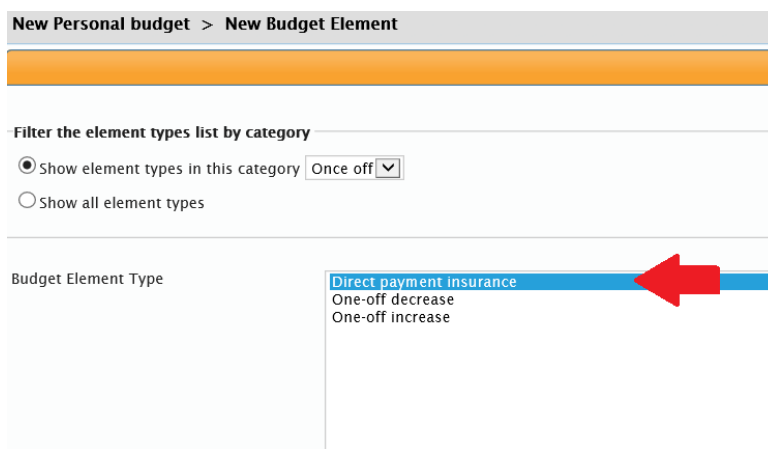
- **Select 'OK'**, and you'll note on this page that the red warning with 'review and amend' has now gone as this has been completed.

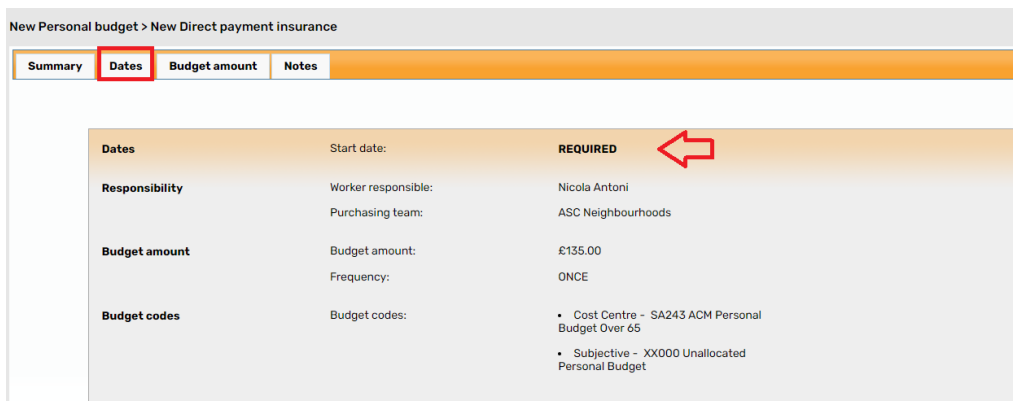## Adding Direct Payment Insurance:

- Now you can **add Direct Payment Insurance**. This is required for new Direct Payments, and is not part of the service we are purchasing, but added into the budget instead. **Select 'Add Budget Element'**:

Budget Components in this Care Package	Start Date	End Date	Status	Change Type	Actions
Indicative budget allocation	03/11/2020		Proposed	New	

Budget Properties   Add Budget Element

OK   Cancel

- Choose Direct Payment Insurance from the list, and **select 'OK'**:

New Personal budget > New Budget Element

Filter the element types list by category

◉ Show element types in this category Once off ⌄

○ Show all element types

Budget Element Type

Direct payment insurance
One-off decrease
One-off increase

- Add a 'Start date', under the **Dates** tab (the same date as the new Direct Payment is starting). You <u>do not</u> need to amend the Budget amount (it's £135 as standard):

New Personal budget > New Direct payment insurance

| Summary | Dates | Budget amount | Notes |

| **Dates**	Start date:	REQUIRED	
Responsibility	Worker responsible:	Nicola Antoni	
	Purchasing team:	ASC Neighbourhoods	
Budget amount	Budget amount:	£135.00	
	Frequency:	ONCE	
Budget codes	Budget codes:	• Cost Centre - SA243 ACM Personal Budget Over 65	
		• Subjective - XX000 Unallocated Personal Budget	

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- This has now been added, and you can **select 'OK'** again to bring you back to the main page.

- You'll notice that the 'Properties Incomplete' status has been changed to 'Proposed', and we have now sorted everything we need to under the **Budget** tab:

Add the Direct Payment provision under the Provision and Contributions tab

To purchase a Direct Payment on the system, we add a Direct Payment provision.

- To add a Direct Payment provision, we need to select the **Provisions and Contributions tab**. If any services have ever been provided to this individual, past or present, they will be listed here.

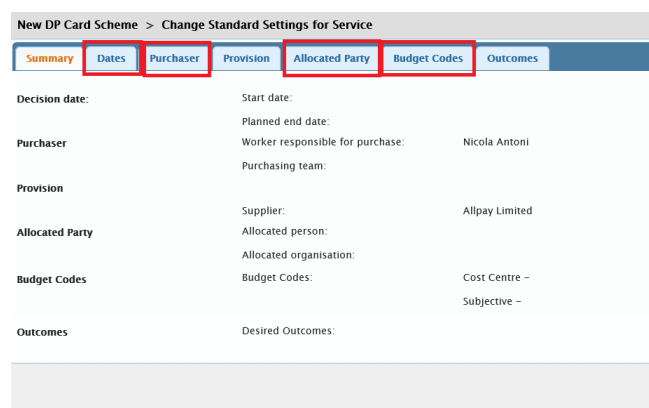- To add a provision, simply select **'Add Provision'**:
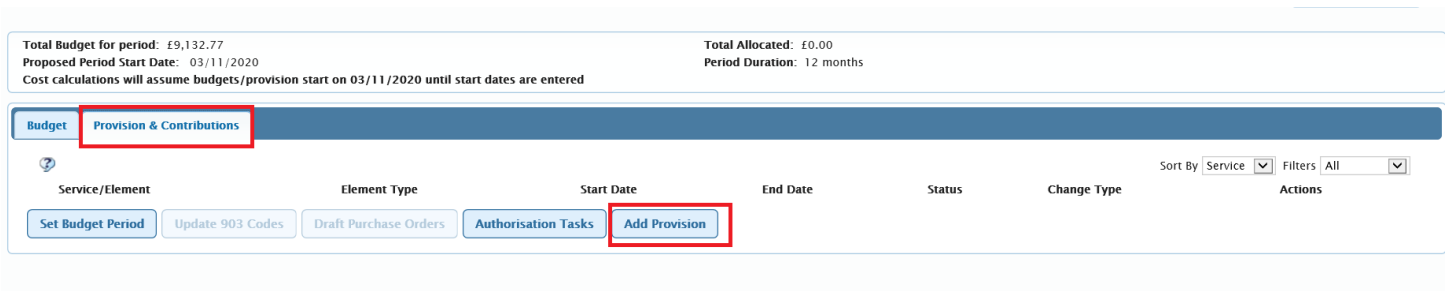
- Choose 'Direct Payment' from the Service Group list, and then choose one of the two options that open up under *Service*:

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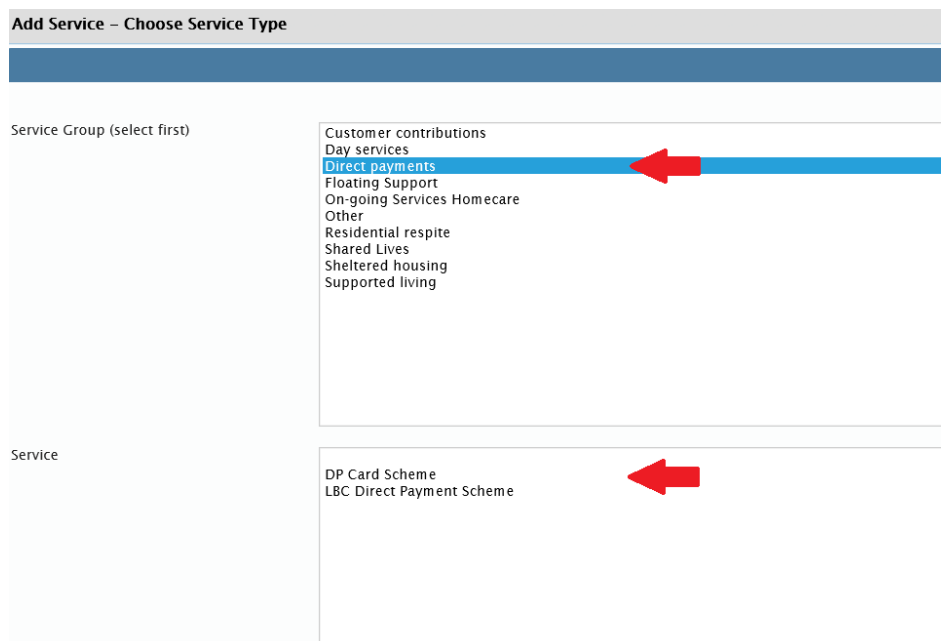
- If you have decided with the individual that the Direct Payment will be provided via a prepaid card, then select **DP Card Scheme**. If the Direct Payment is to be provided via managed payroll, choose **LBC Direct Payment Scheme**. Once you've selected an option, **click 'OK'**.

If you choose DP Card Scheme option	**If you choose the LBC Direct Payment Scheme option**
• Fill in the relevant information, in relation to the DP you're setting up under the following tabs:	• Fill in the relevant information, in relation to the DP you're setting up under the following tabs:

New DP Card Scheme > Change Standard Settings for Service

| Summary | Dates | Purchaser | Provision | Allocated Party | Budget Codes | Outcomes |

Decision date:	Start date:
	Planned end date:
Purchaser	Worker responsible for purchase: Nicola Antoni
	Purchasing team:
Provision	
	Supplier: Allpay Limited
Allocated Party	Allocated person:
	Allocated organisation:
Budget Codes	Budget Codes: Cost Centre –
	Subjective –
Outcomes	Desired Outcomes:
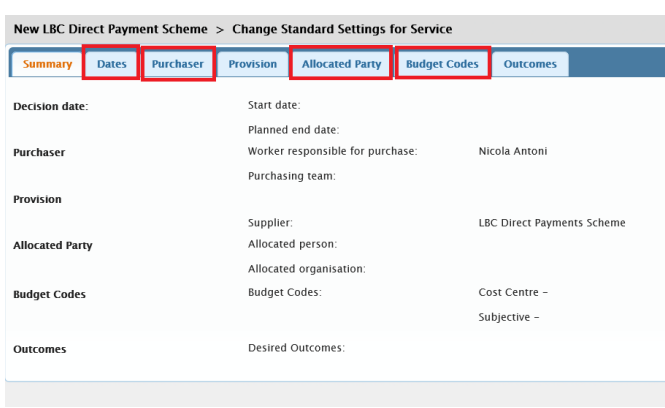
New LBC Direct Payment Scheme > Change Standard Settings for Service

| Summary | Dates | Purchaser | Provision | Allocated Party | Budget Codes | Outcomes |

Decision date:	Start date:
	Planned end date:
Purchaser	Worker responsible for purchase: Nicola Antoni
	Purchasing team:
Provision	
	Supplier: LBC Direct Payments Scheme
Allocated Party	Allocated person:
	Allocated organisation:
Budget Codes	Budget Codes: Cost Centre –
	Subjective –
Outcomes	Desired Outcomes:

Left column:

- <u>Dates:</u> Put the start date of the Direct Payment in. Do not put an end date in if this is an ongoing Direct Payment.
- <u>Purchaser:</u> This is you the practitioner, so under 'Purchasing Team', ensure the correct team is detailed.
- <u>Allocated party:</u> This is the person managing the Direct Payment card. This could be the individual or a nominated person. Under 'Person', select 'Find' and find the person to add here. Ignore 'Organisation' here.
- <u>Budget Codes:</u> Choose a budget code from the drop down (if presented with ACM Personal Budget or ACM Generic, choose ACM Personal Budget).
- The other tabs do not require your attention- the Provision tab has already selected the supplier of Allpay (this is the provider for the prepaid card). The Outcomes tab is optional.

Right column:

- <u>Dates:</u> Put the start date of the Direct Payment in. Do not put an end date in if this is an ongoing Direct Payment.
- <u>Purchaser:</u> This is you the practitioner, so under 'Purchasing Team', ensure the correct team is detailed.
- <u>Allocated party:</u> This is likely to be individual themselves who is going to receive the services. In some rare instances (mainly in the CYPDS team), the allocated party is someone where it has been agreed the funds will go directly into their account. If so, then this person's name needs to be entered here instead. Under 'Person', select 'Find' and find the person to add here. Ignore 'Organisation' here.
- <u>Budget Codes:</u> Choose a budget code from the drop down (if presented with ACM Personal Budget or ACM Generic, choose ACM Personal Budget).

- Your page should now look like the following:

- Then **select 'OK'**.

- The other tabs do not require your attention- the Provision tab has already selected the supplier of LBC Direct Payments Scheme. The Outcomes tab is optional.

- Your page should now look like the following:

- Then **select 'OK'**.

Add an element (add a cost) to this Direct Payment.

- You will have noticed we have not yet stated how much this Direct Payment will be a week. To do this, we select 'Add Element':

- Initially, one off options are visible, however if you click on the *Show element types in this category* drop down, you can see more

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- Choose the appropriate element type, and then **select 'Next'**:

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- **Carer- Card (Weekly)**: This is used for instances where a Carer receives an ongoing Carer budget.
- **DP- Agency Rate- Card**: This is used for an ongoing Direct Payment, at the £16.73 agency rate.
- **DP- Standard Rate- Card**: This is used for an ongoing Direct Payment, at the £15.04 standard rate.
- **DP- Variable Rate- Card**: This provides flexibility, without an embedded rate. This is used for an ongoing Direct Payment at a

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different agreed hourly rate. (This could be a Direct Payment above the standard or agency rates or a Direct Payment calculated as an averaged weekly amount- common in the CYPDS team).
- **Day Services- Card**: This is used for those receiving ongoing day service funds via Direct Payment (where it's not one of our commissioned services that can be purchased under a Day Service provision).
- **Other- Card**: This is used for any additional costs that need to be added to the ongoing Direct Payment. For instance, if you've already selected one of the other elements, and need to add another part of the Direct Payment under a different rate (as you cannot select the same element here, twice).
- **Residential Respite- Card**: This is to be used for Residential Respite funds, added to the Direct Payment.
- **Transport- Card**: This is to be used for when individuals are provided with funds via Direct Payment for transport, for instance weekly taxi costs.

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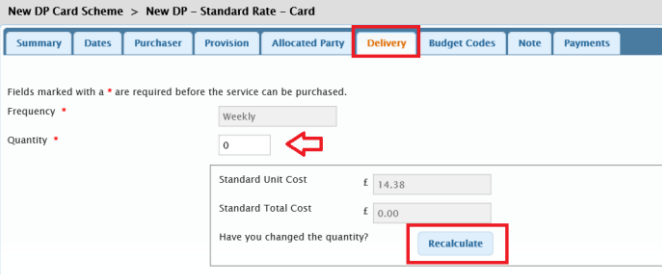- **Transport**: This is to be used for when individuals are provided with funds via Direct Payment for transport, for instance weekly taxi costs.

You are now in the element, and can see that there is missing information (the cost), under the 'Delivery' tab.

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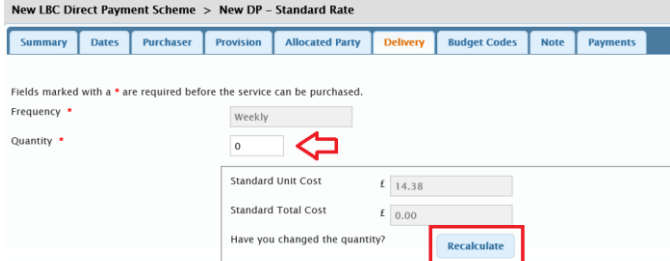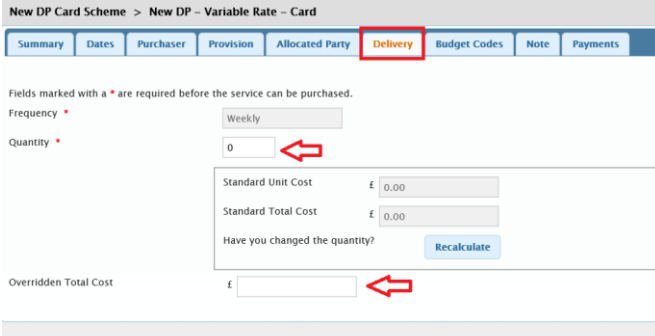

Nicola Antoni v1, Efioawan Glover, August 2022, v2

- Select the 'Delivery' tab, and under 'Quantity', add the hours of care (remember to use the correct decimal of hours to ensure an accurate calculation).
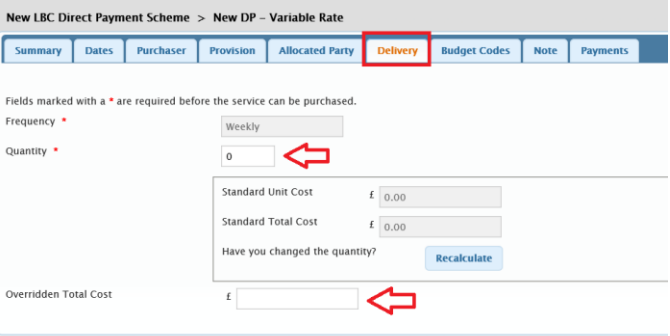
  Then click 'Recalculate' and it will provide the total weekly cost (you'll notice this example is the **standard rate element**, which is embedded. This works the same if you chose the **agency rate element**).
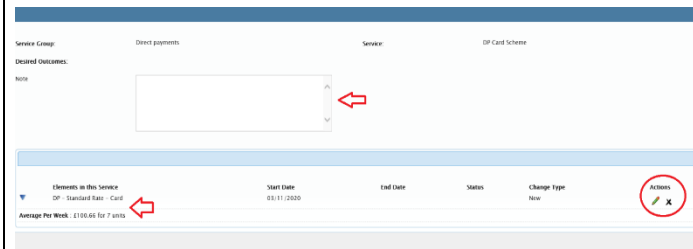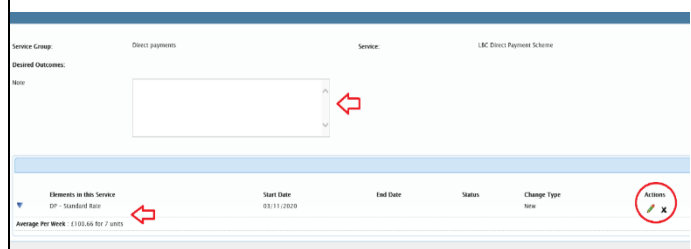

- If you choose a **variable element**, then again enter the number of hours under 'Quantity', however the 'Recalculate' button has been disabled as this is for a variable rate. Therefore, you need to have calculated the weekly cost yourself, based on the variable hourly cost you have confirmed, and enter it under 'Overridden Total Cost':

- If you choose one of the other elements, then it just requires you to enter the weekly amount in the box provided under the 'Delivery' tab (again, calculated by yourself).

- Note, you can add multiple elements if the Direct Payment is broken down into

- Select the 'Delivery' tab, and under 'Quantity', add the hours of care (remember to use the correct decimal of hours to ensure an accurate calculation).

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- Note, you can add multiple elements if the Direct Payment is broken down into different support at different rates etc, but you cannot choose the same element twice.

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different support at different rates etc, but you cannot choose the same element twice. • Once you have added in the relevant information under the 'Delivery' tab, then **select 'OK'** which will bring you back to the main element page.	• Once you have added in the relevant information under the 'Delivery' tab, then **select 'OK'** which will bring you back to the main element page.
You can see your element has now been added and displays the hours/ costs that you've entered. To amend this use the pencil icon, or to delete it use the 'x' icon. You can also use the 'Note' text box available to detail the breakdown of the Direct Payment if there are multiple elements, for information purposes. • **Select 'OK'** to return to the main page.	You can see your element has now been added and displays the hours/ costs that you've entered. To amend this use the pencil icon, or to delete it use the 'x' icon. You can also use the 'Note' text box available to detail the breakdown of the Direct Payment if there are multiple elements, for information purposes. • **Select 'OK'** to return to the main page.

• You can see the Direct Payment provision you added (the orange line) and the element you added to that (the white line underneath). If you do not see both of these lines of information, then you know this has not been added correctly:
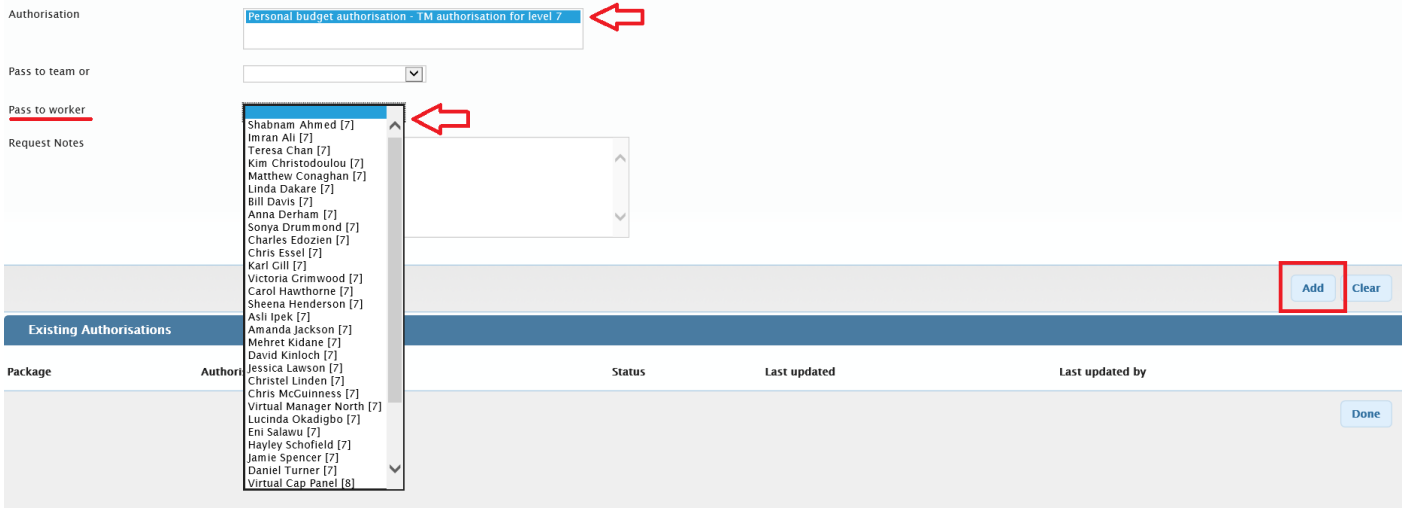
Sending an Authorisation Task to your manager

- Now that you have added a Direct Payment provision, you can see that funds have been spent:

- Select the 'Authorisation Tasks' button (circled above) to send a request to your manager for authorisation (if this button is greyed out/ unavailable, then it means there was an existing current budget that has already been agreed, and an authorisation in this step is not required).

- Ensure you click on *'Personal budget authorisation- TM authorisation for level 7'*, to enable the managers drop-down list to appear. Choose your manager, and select 'Add'. Note, we always use 'Pass to worker' NOT 'Pass to team'.
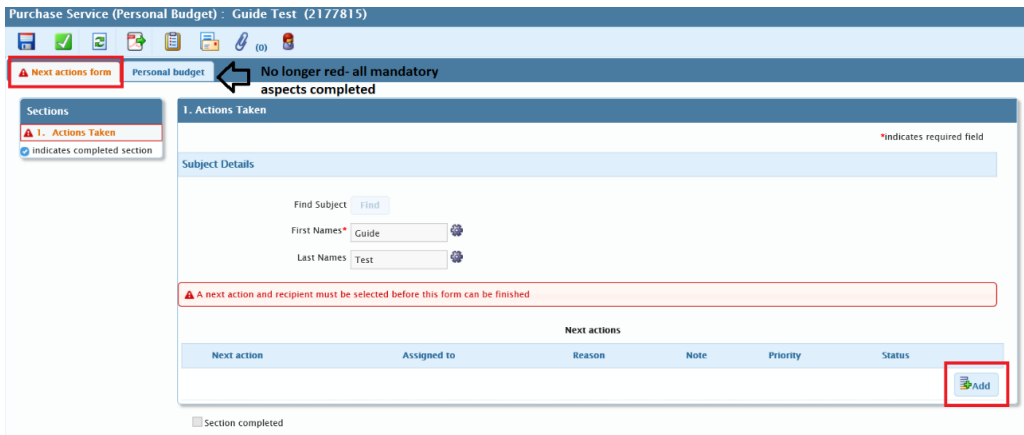

- Once added, select 'Done'.

- You now must 'Save and close' this workflow step, until your manager has authorised.

Selecting a next action, and finishing this step

- Once your manager has authorised the task, you need to 'Resume' the Purchase Service (Personal Budget) workflow step.

- On the 'Next action form' tab, select 'Add':

- You will see two drop-down options available. To complete this step and ensure the Direct Payment is set up, select **Purchasing Outcome**. To abandon this step, as if you never created it (if opened in error for instance), choose **Abandoned Purchase**:
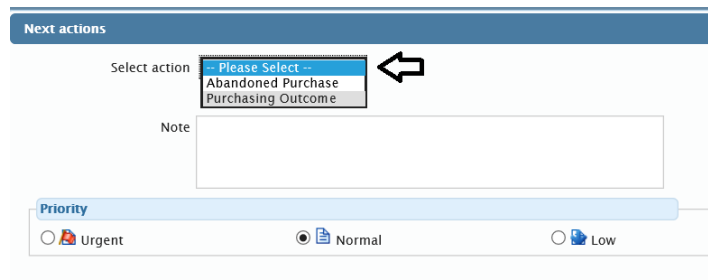
- Then 'Add and Close'

- Finally, you must **FINISH** this workflow step, using the green tick icon in the toolbar. Without finishing this step, the Direct Payment will not be in place.

- 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.

- On the individual's front screen, you can now see the Direct Payment in place: