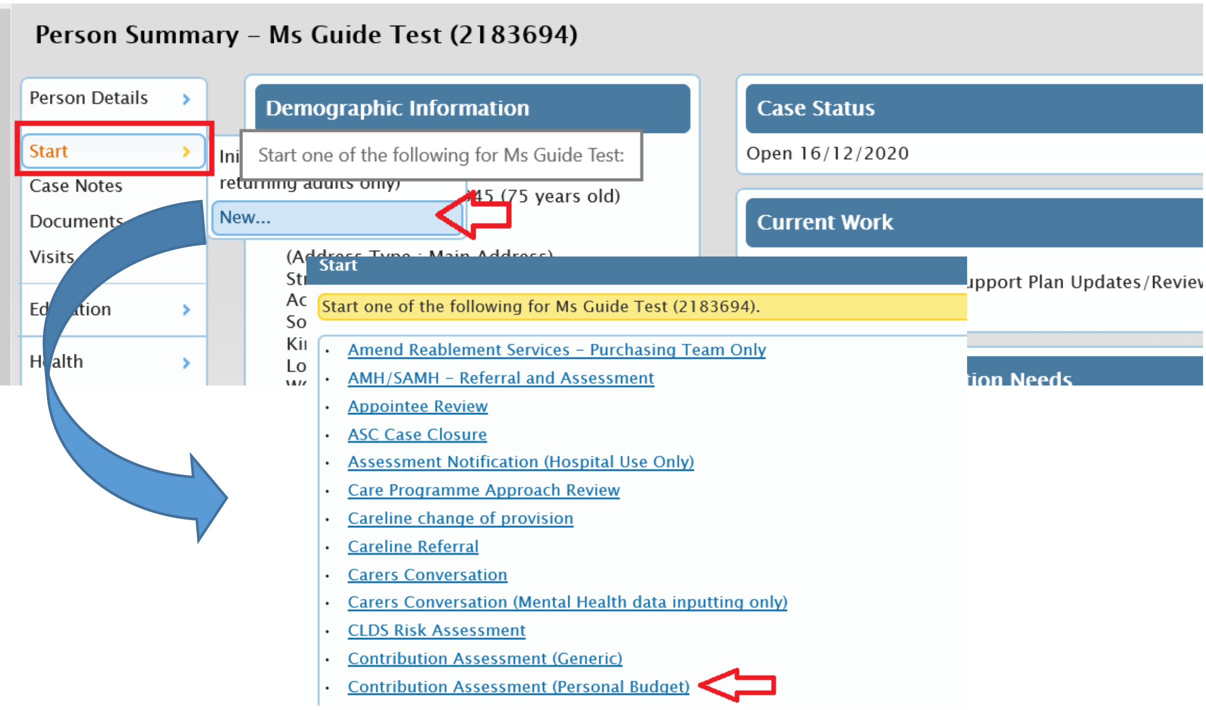
Adding/ Amending a Contribution for a Direct Payment: Awards and Contributions team

This guide details how to add and amend a client contribution for a Direct Payment. Only staff within the Awards and Contributions team should be completing this task.

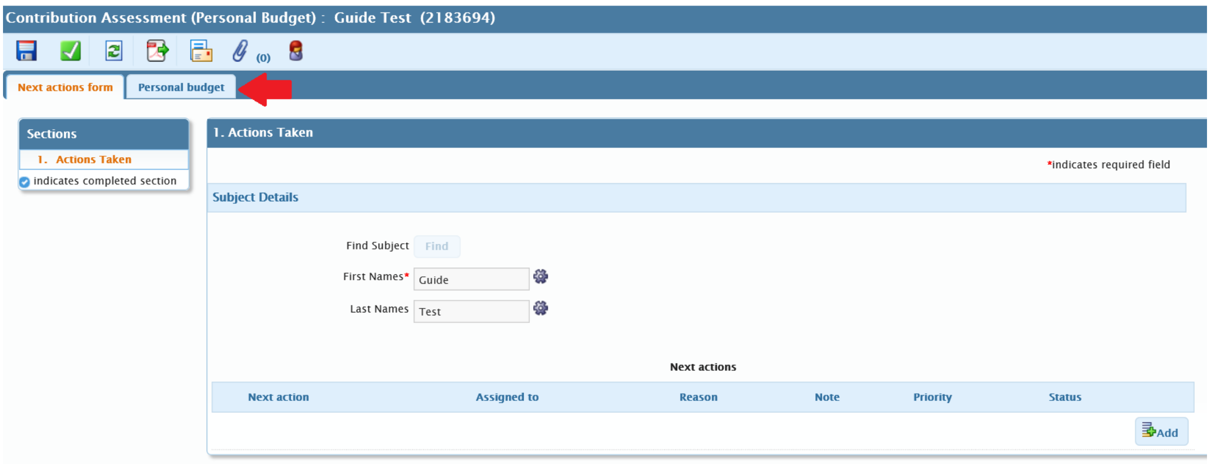
1. Start a Contribution Assessment (Personal Budget) step

- From the individual's main page, select 'Start', then 'New', and choose the **Contribution Assessment (Personal Budget)** workflow step:

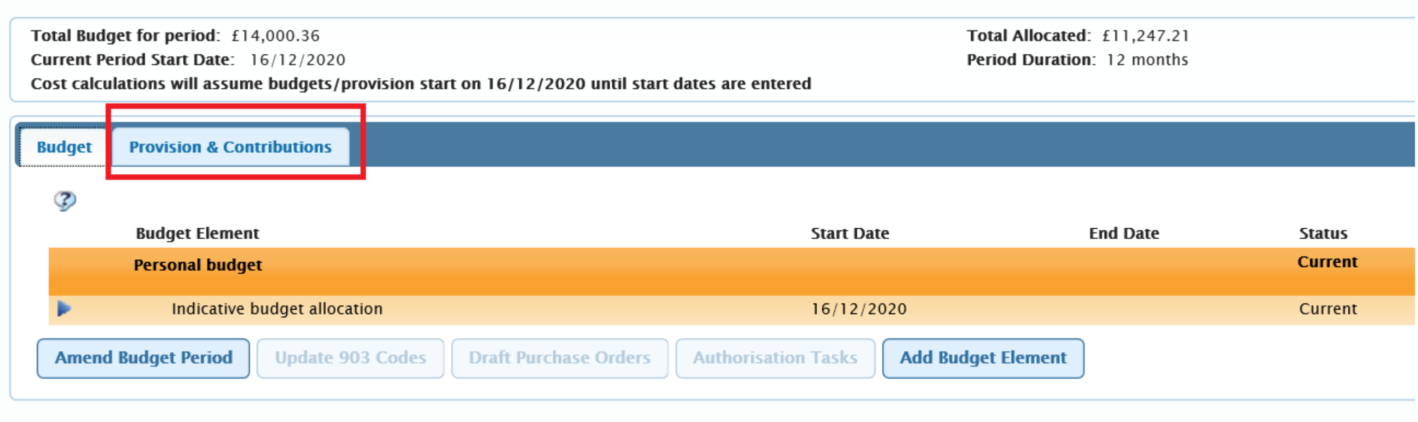


2. Add the client contribution to the existing Direct Payment

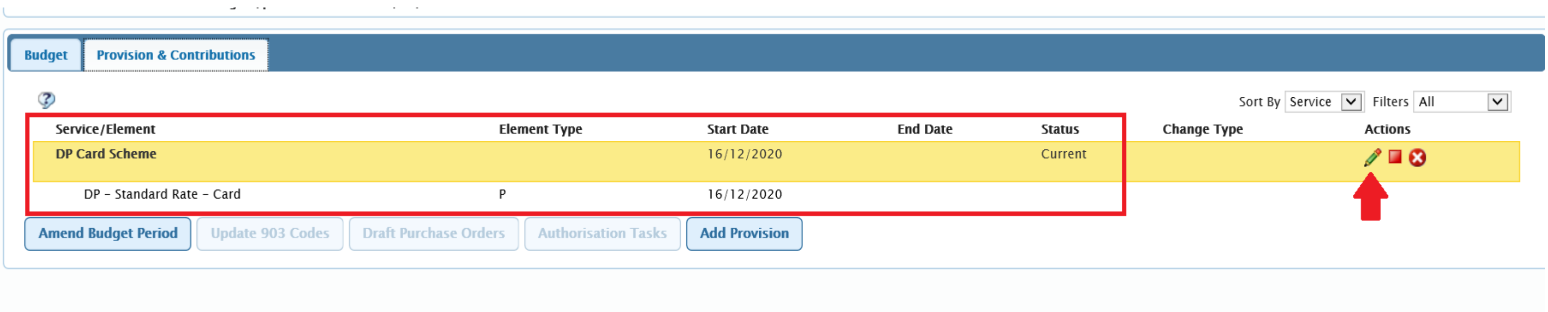
- You have now opened the Contribution Assessment (Personal Budget) workflow step. Select the 'Personal budget' tab:



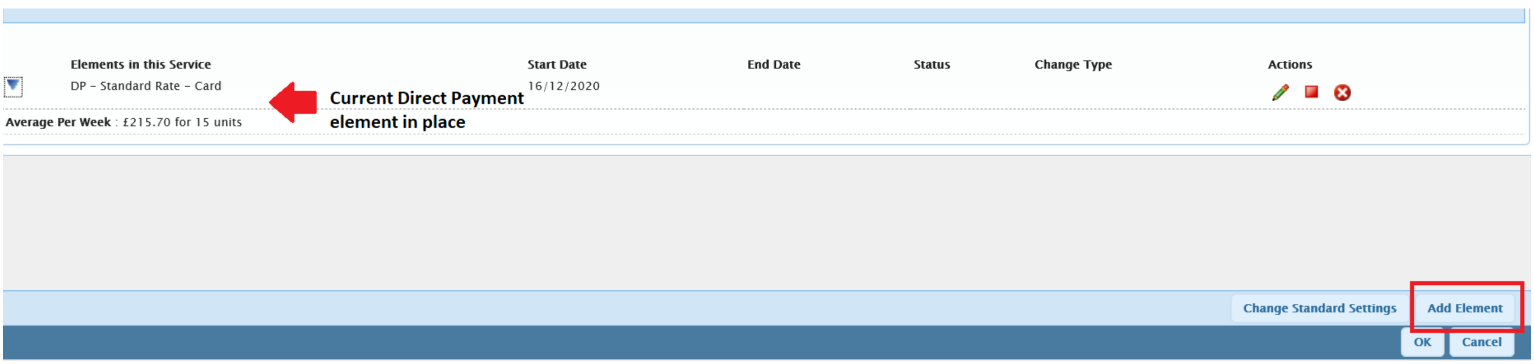
- Select the **Provision & Contributions** tab:



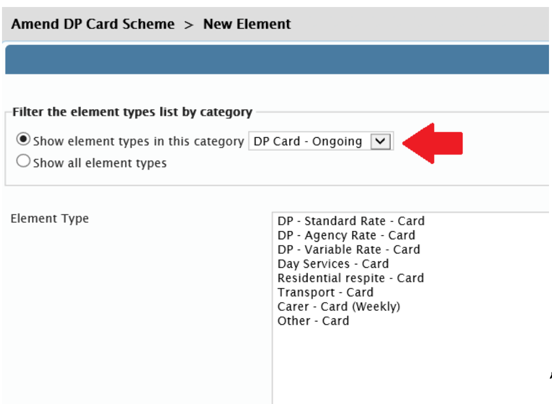
- Find the current Direct Payment in place, and select the pencil icon to amend:



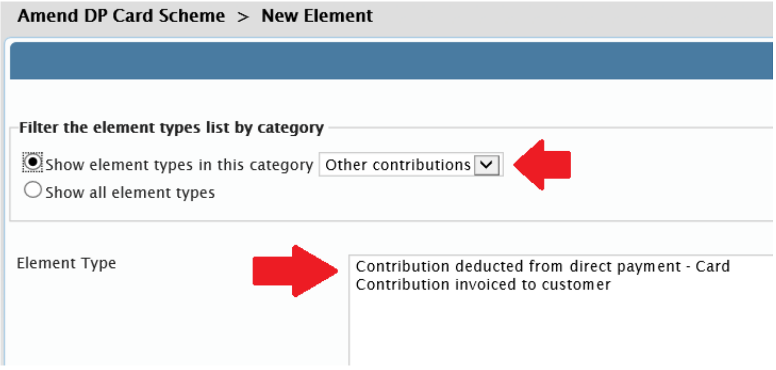
- You are now within the Direct Payment service, where you can add the contribution. We do this by adding another element to the existing Direct Payment.
  Select 'Add Element':



- Click on the 'Show element types in this category' drop down list:

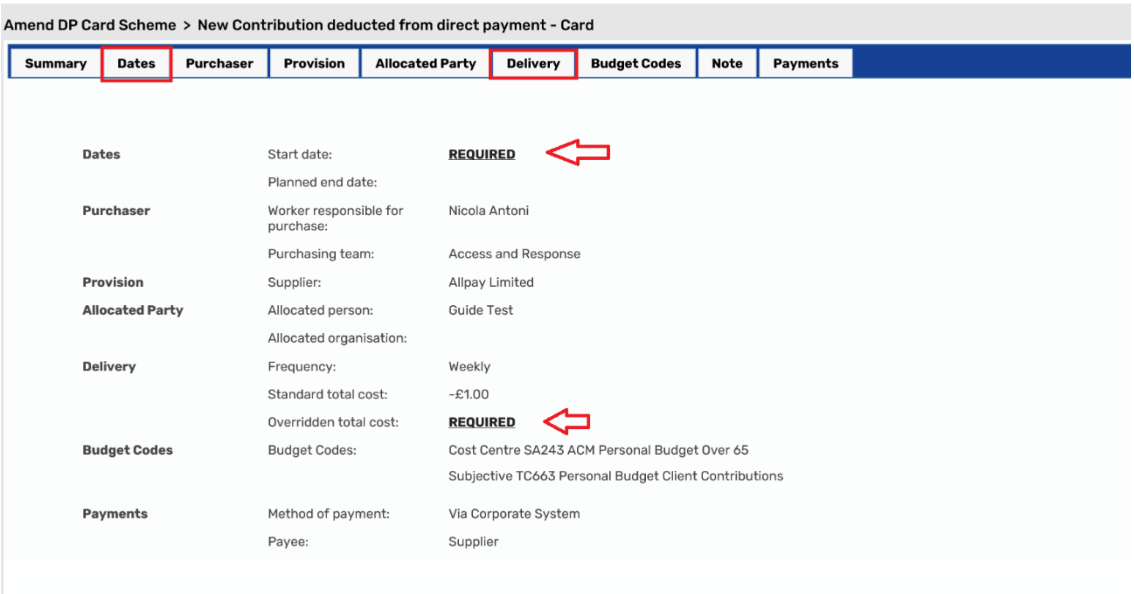


- To add a client contribution, select **Other contributions**, and choose one of the element types that applies to the contribution you are adding:

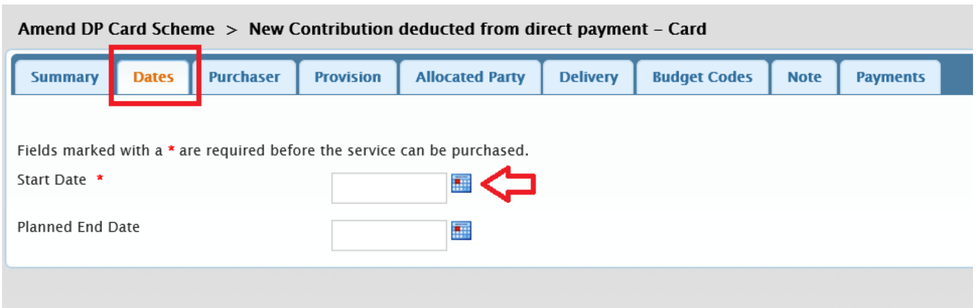


- Then **select 'Next'**.

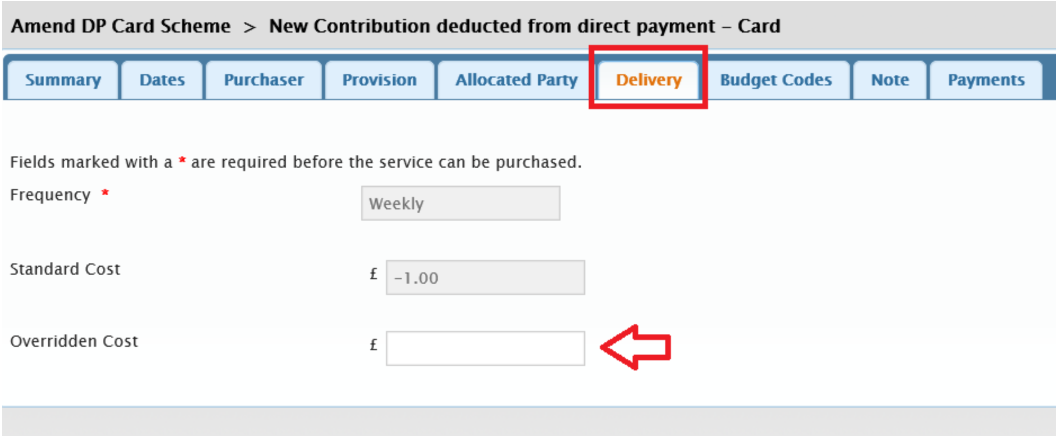
- It will open up the element, and you will notice all the relevant information about this Direct Payment has already been completed.
  However, there are two tabs that require information; the **Dates** tab and the **Delivery** tab:



- Under the Dates tab, enter the date the contribution is starting from, under 'Start Date'. You would not put a 'Planned End Date' if this was ongoing:



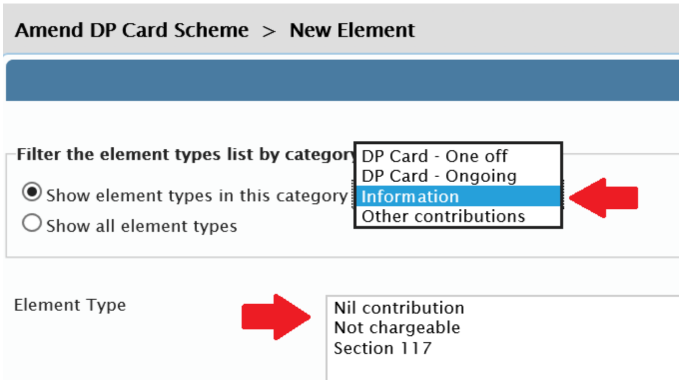
- Under the Delivery tab, add the weekly contribution under **Overridden Cost** (as a minus figure):



- Then **select 'OK'**.

Or

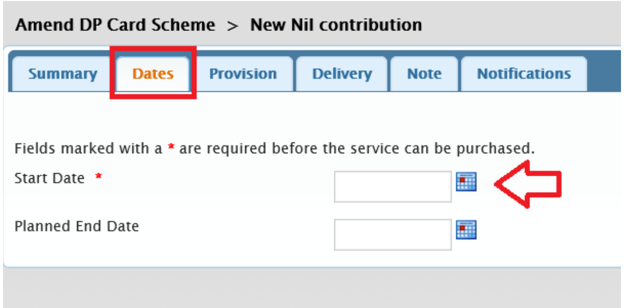
- To add nil contribution, select **Information**, and choose one the element types that applies:



- Then **select 'Next'**.

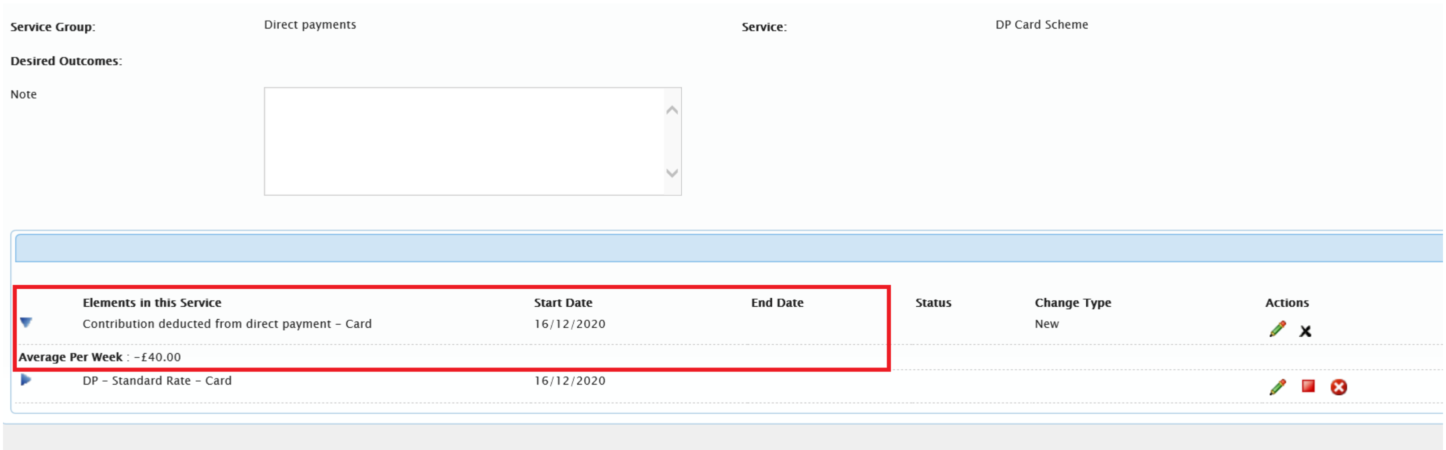
- It will open up the element, and you will notice there is only one tab that requires information, the **Dates** tab:

- Under the Dates tab, enter the date the contribution is starting from, under 'Start Date'. You would not put a 'Planned End Date' if this was ongoing

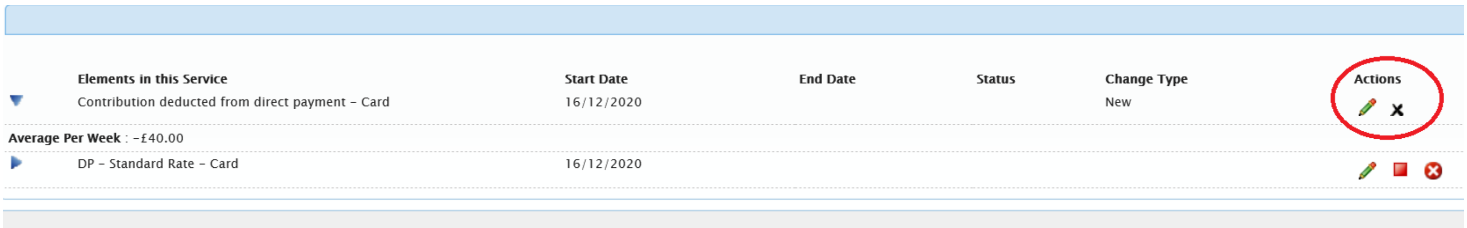


- Then **select 'OK'.**

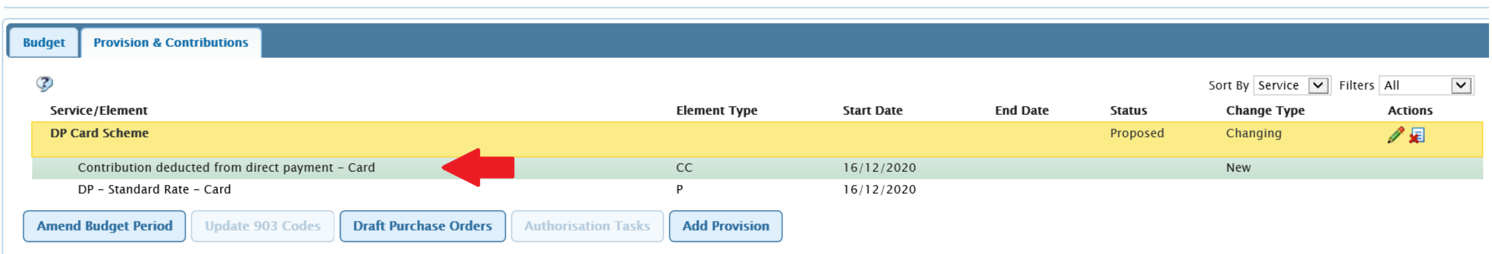
- Your contribution has now been added, and you can **select 'OK'** again to return to the Provisions & Contributions page:



- If you need to amend this contribution, use the pencil icon. To delete it, use the 'x' icon:

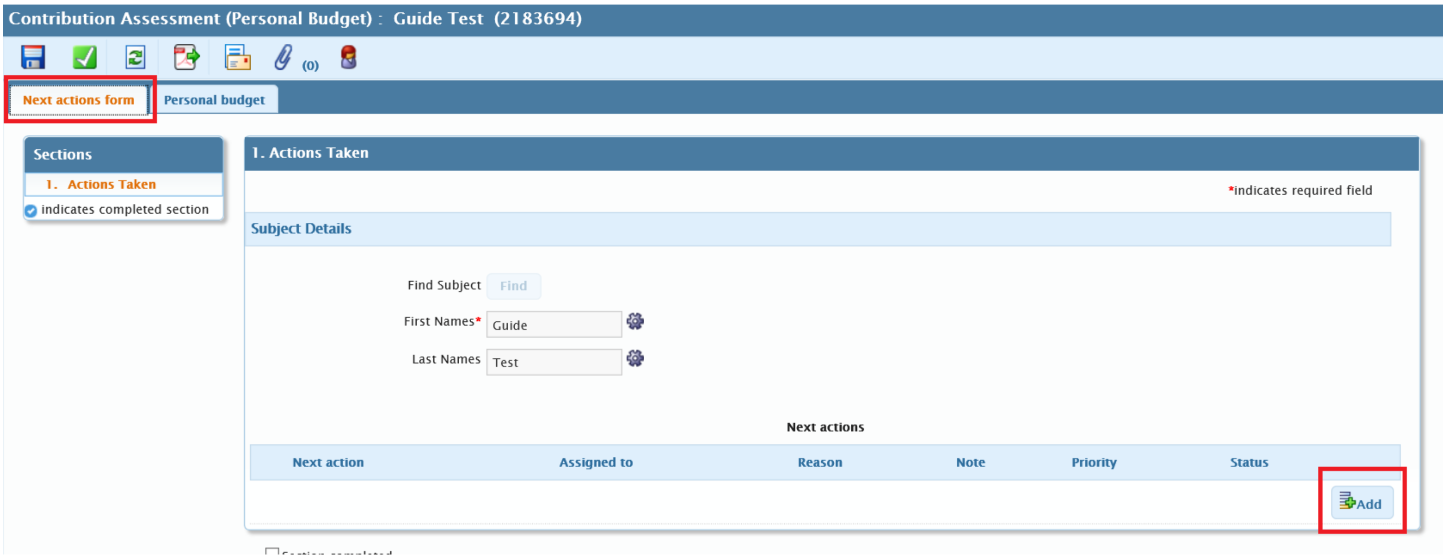


- Please be careful not to amend the actual Direct Payment element that is here also.
- You can now see that the contribution has been added to this Direct Payment provision:

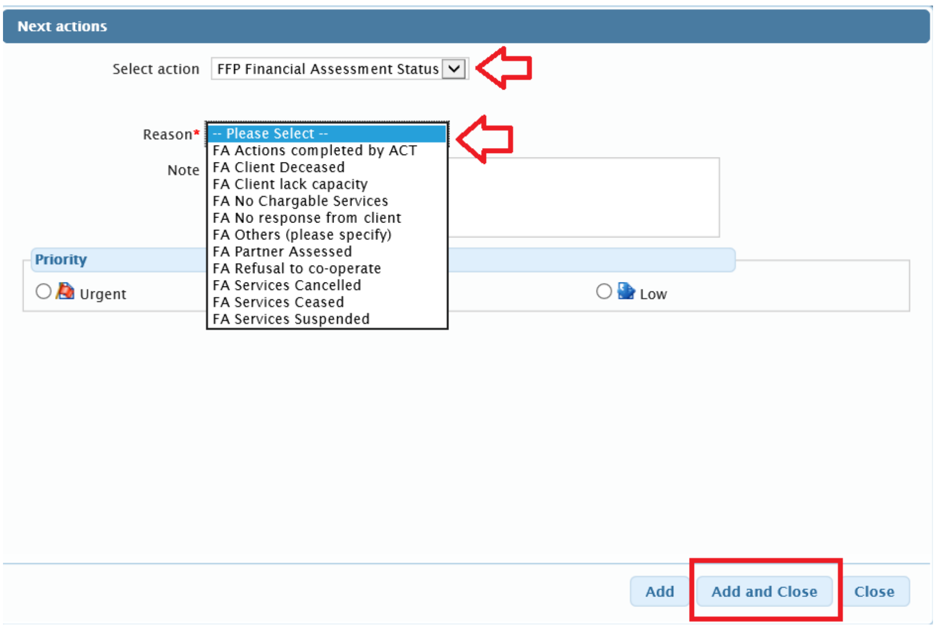


3. Finishing the Contribution Assessment (Personal Budget) step

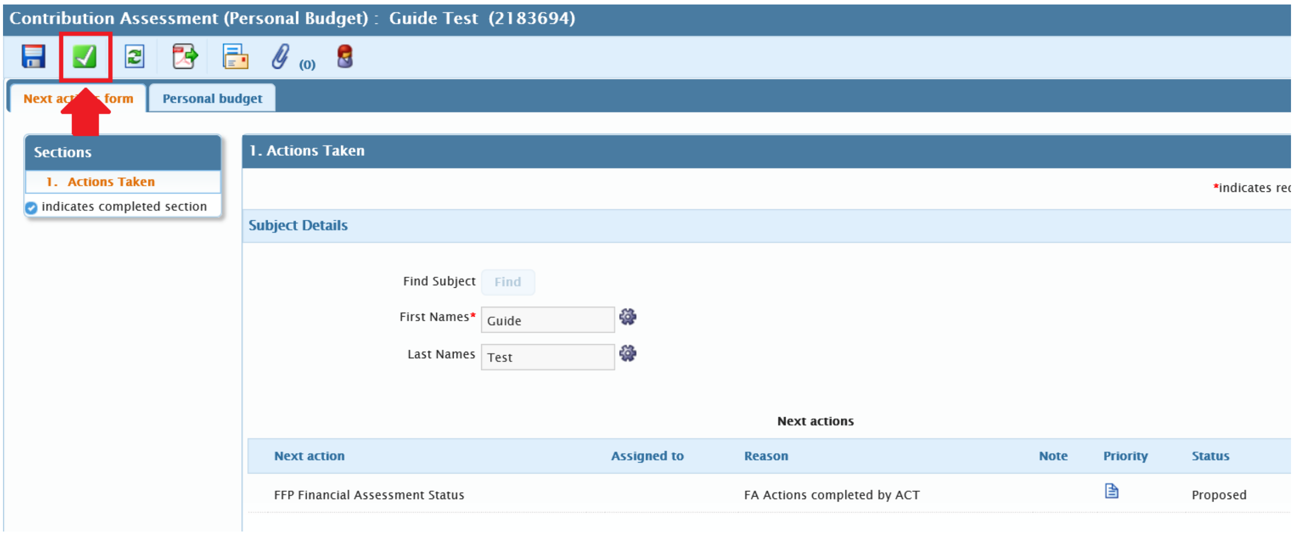
- To finish this step, select the **Next actions form** tab, and click on 'Add':



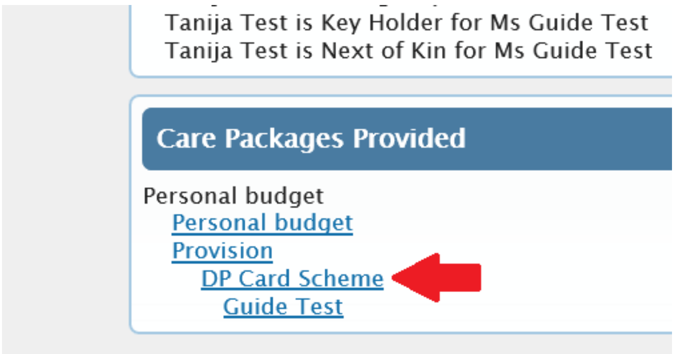
- Select the only action available from the drop-down: **FFP Financial Assessment Status**. Then select an appropriate 'Reason' from the second drop-down, before clicking 'Add and Close':



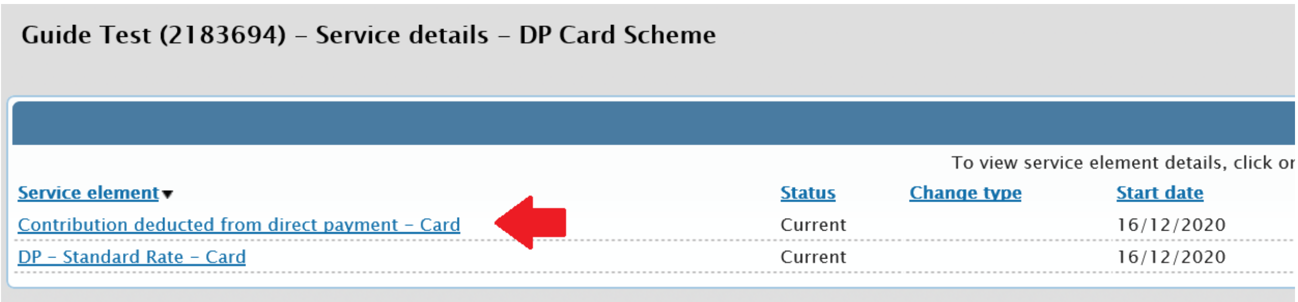
- Finally, you must ensure you click the green tick icon, the FINISH button, in the toolbar to ensure this contribution is processed:



- You will note that your contribution isn't visible from the individual's main page, under **Care Packages Provided**:



- However, if you click on the Direct Payment provision type (in this case DP Card Scheme, however it could also be LBC Direct Payment Scheme), then it will show you the elements within:

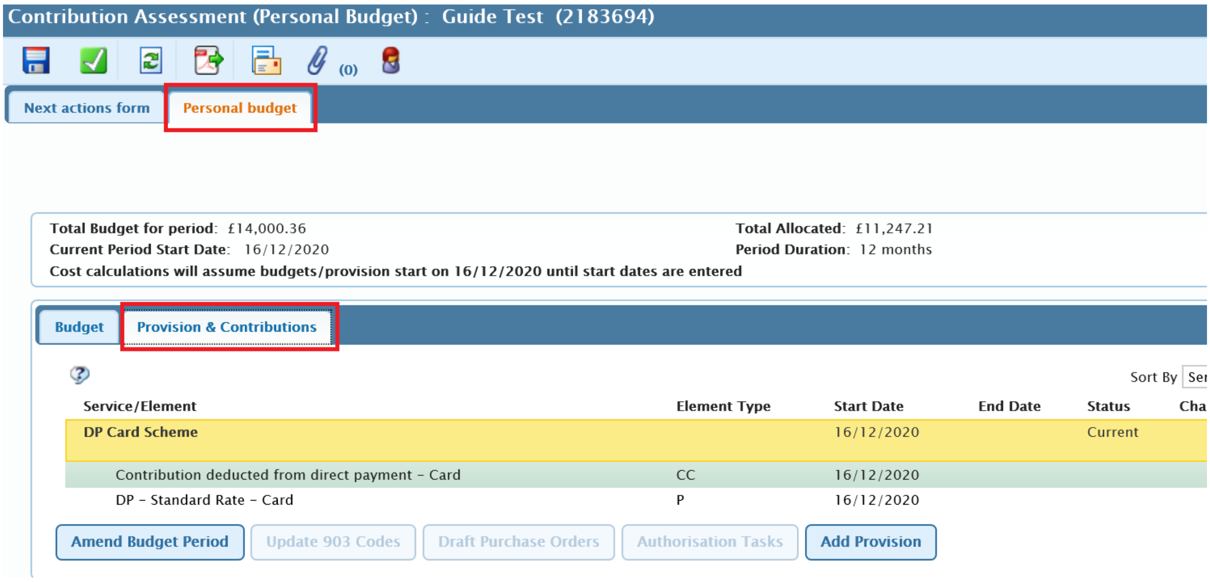


- Clicking on the contribution element, it will show all the information we added.

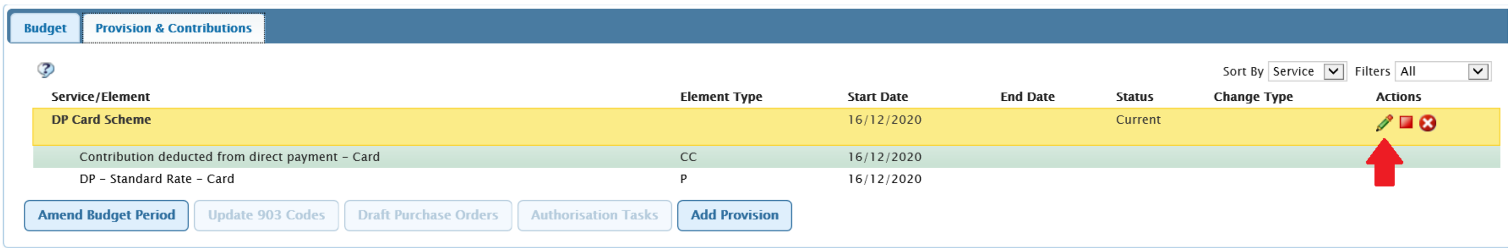
4. Amending a client contribution

- Create a Contribution Assessment (Personal Budget) workflow step (from ‘Start’ and then ‘New’ on the individual’s main page).

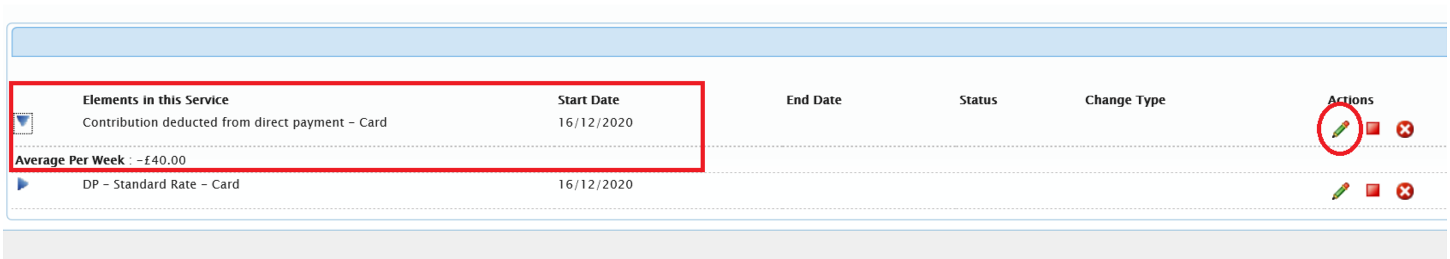
- Once the workflow step has opened, select the ‘Personal budget tab’ and then the **Provision & Contributions** tab:



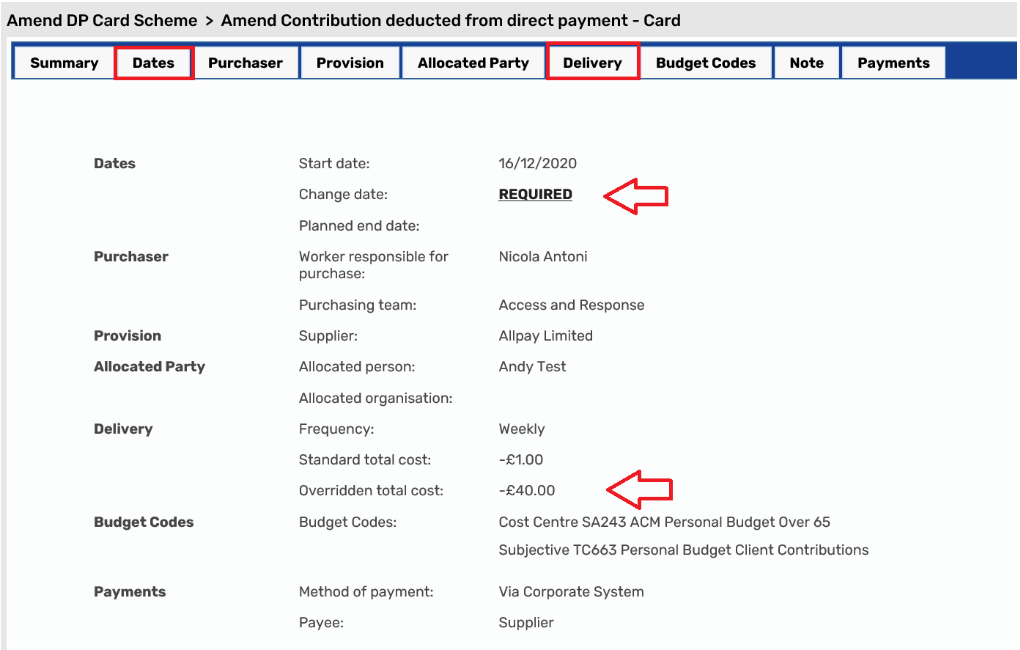
- **<u>To amend an existing client contribution</u>**, find the current Direct Payment provision, which includes the contribution, and select the pencil icon to amend:



- Find the contribution element, and select the pencil icon to amend:

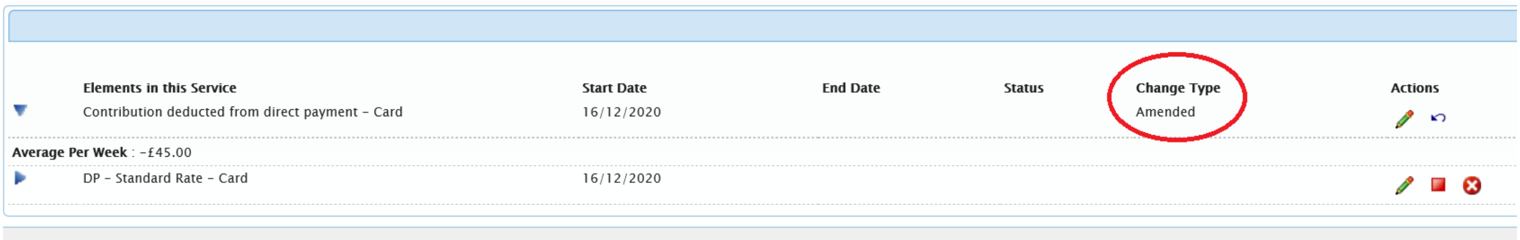


- There are two tabs that require information: The **Dates** tab and the **Delivery** tab:



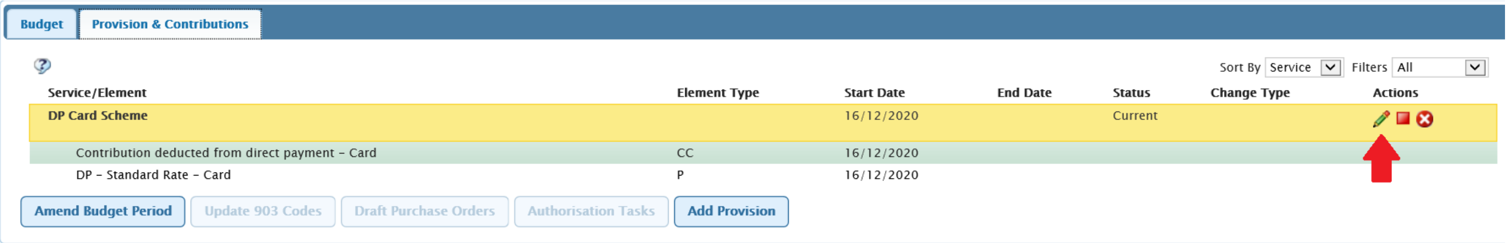
- Under the Dates tab, enter the *Change date*- when this contribution will be changing from.
- Under the Delivery tab, change the figure under *Overridden total cost*, to the new contribution amount.
- Then **select 'OK'.**

- You can see this has now been amended:

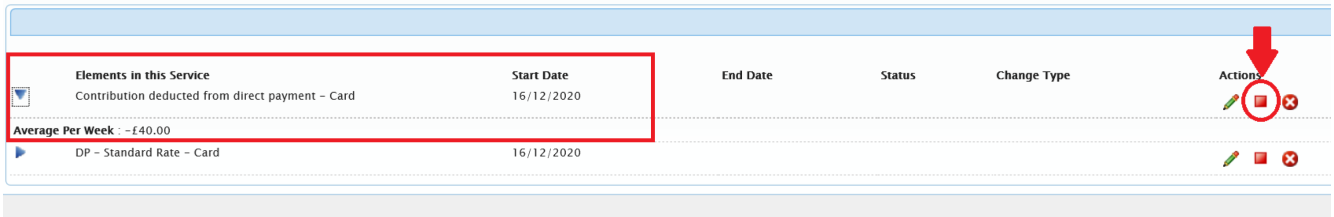


- **Select 'OK'**, and move onto the Next actions tab to finish this workflow step (see Section 3 of this guide).

- **<u>To end an existing client contribution</u>**, again ensure you have found the current Direct Payment provision, which includes the contribution, and click the pencil icon to amend:

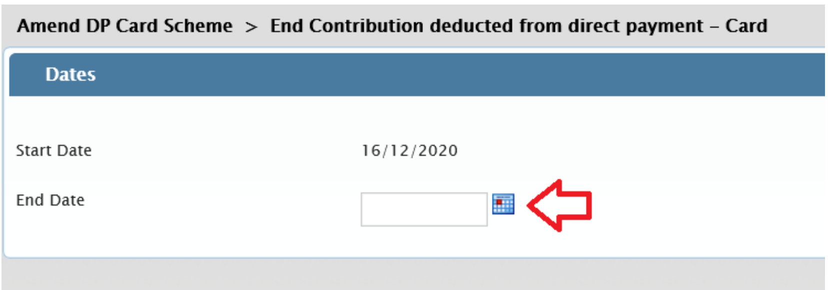


- Find the contribution element, and select the end button- the red square icon:



Please note, the icon here will cancel the entire contribution (as if it never happened). This is only to be used if a contribution has never been deducted and it was put on in error for instance.

- Simply add an End Date, and select 'OK':



- You can see this has now been ended:

- **Select 'OK'** and move onto the Next actions tab to finish this workflow step (see Section 3 of this guide).