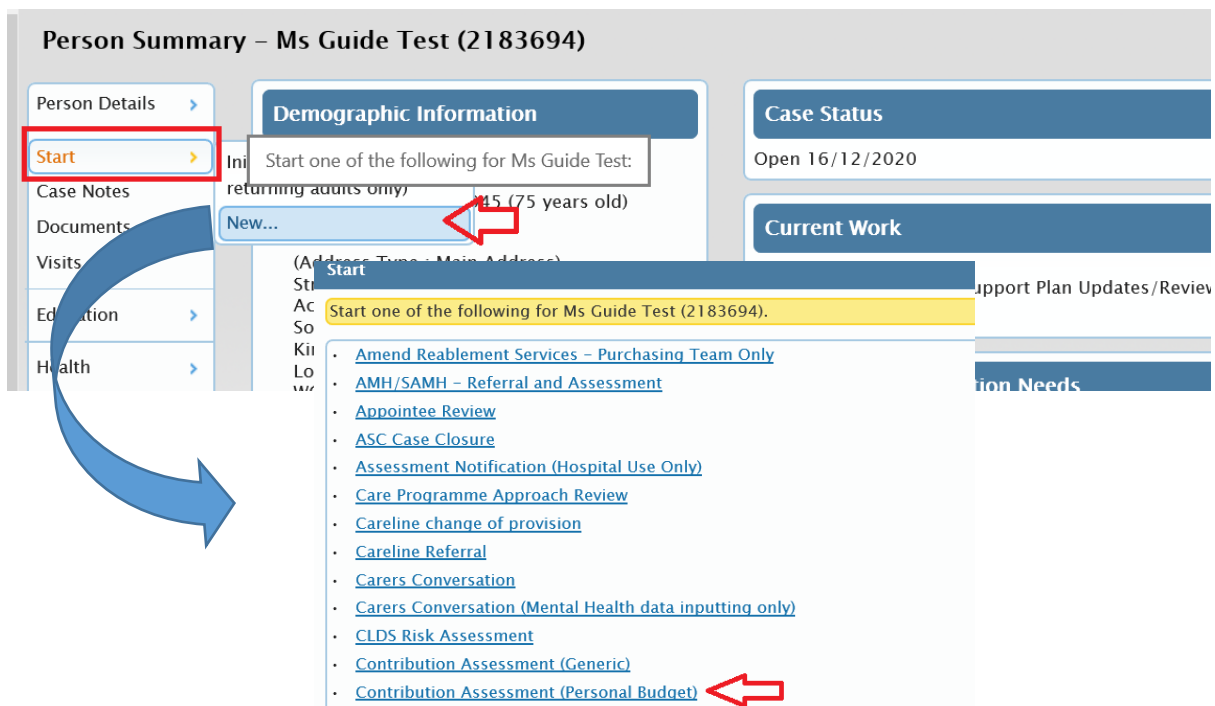


Adding/ Amending a Contribution for a Direct Payment: Awards and Contributions team

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:



Person Summary – Ms Guide Test (2183694)

Person Details > **Start** > Demographic Information

Case Status: Open 16/12/2020

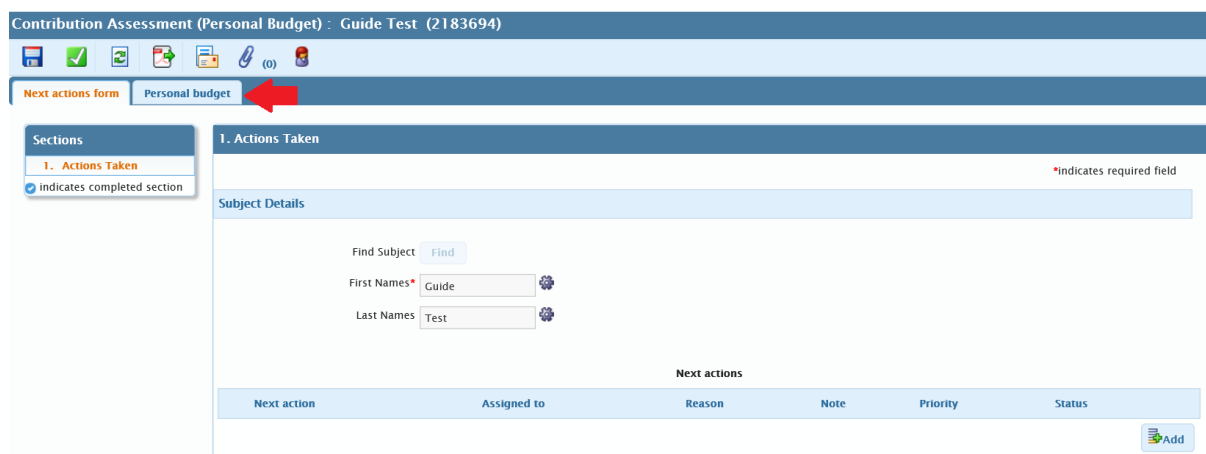
Current Work: Support Plan Updates/Review

Start one of the following for Ms Guide Test (2183694):

- Amend Reablement Services – Purchasing Team Only
- AMH/SAMH – Referral and Assessment
- Appointment Review
- ASC Case Closure
- Assessment Notification (Hospital Use Only)
- Care Programme Approach Review
- Careline change of provision
- Careline Referral
- Carers Conversation
- Carers Conversation (Mental Health data inputting only)
- CLDS Risk Assessment
- Contribution Assessment (Generic)
- Contribution Assessment (Personal Budget)**

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:



Contribution Assessment (Personal Budget) : Guide Test (2183694)

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					

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

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

Total Allocated: £11,247.21
 Period Duration: 12 months




Budget | **Provision & Contributions**

Budget Element	Start Date	End Date	Status
Personal budget			Current
Indicative budget allocation	16/12/2020		Current

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

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



Budget | **Provision & Contributions**

Service/Element	Element Type	Start Date	End Date	Status	Change Type	Actions
DP Card Scheme		16/12/2020		Current		  
DP - Standard Rate - Card	P	16/12/2020				

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

- 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':**

Elements in this Service

Element	Start Date	End Date	Status	Change Type	Actions
DP - Standard Rate - Card	16/12/2020				  

Average Per Week : £215.70 for 15 units


Change Standard Settings | **Add Element**

OK | Cancel

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

Amend DP Card Scheme > New Element

Filter the element types list by category

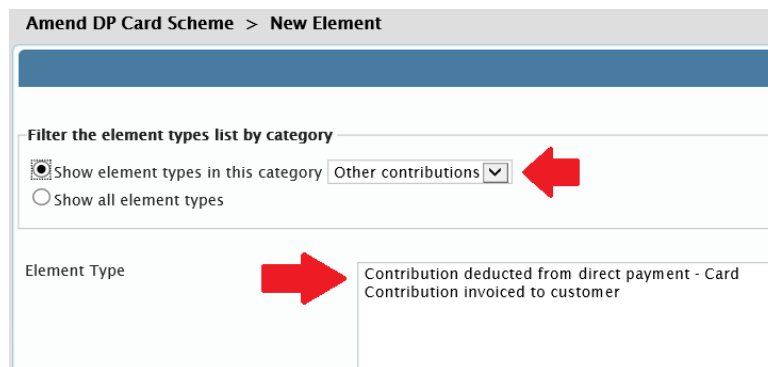
Show element types in this category DP Card - Ongoing 

Show all element types

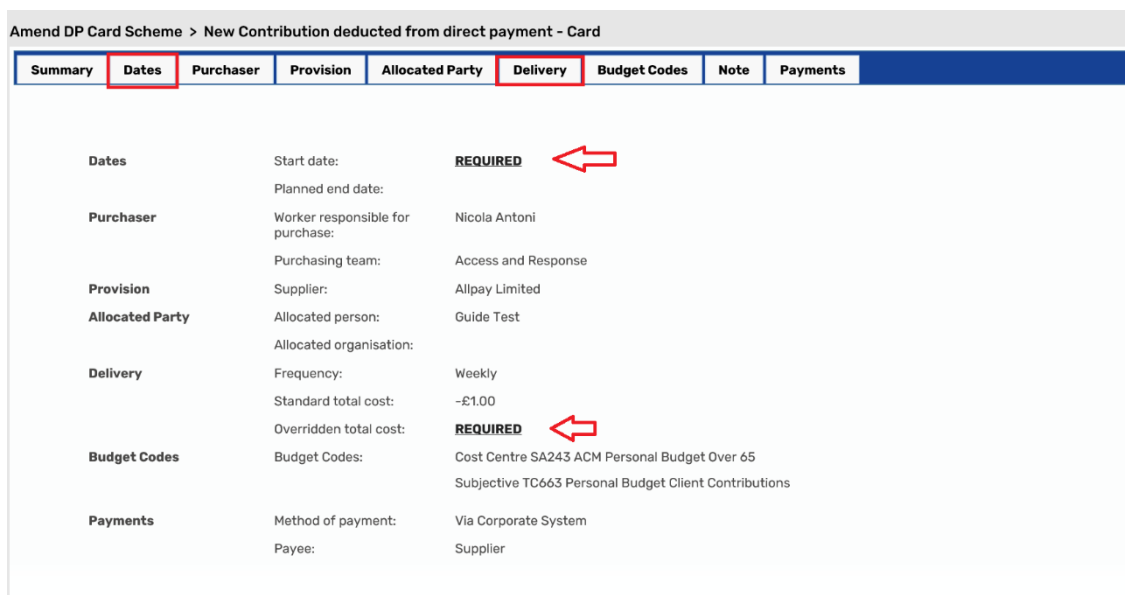
Element Type

- DP - Standard Rate - Card
- DP - Agency Rate - Card
- DP - Variable Rate - Card
- Day Services - Card
- Residential respite - Card
- Transport - Card
- Carer - Card (Weekly)
- Other - Card

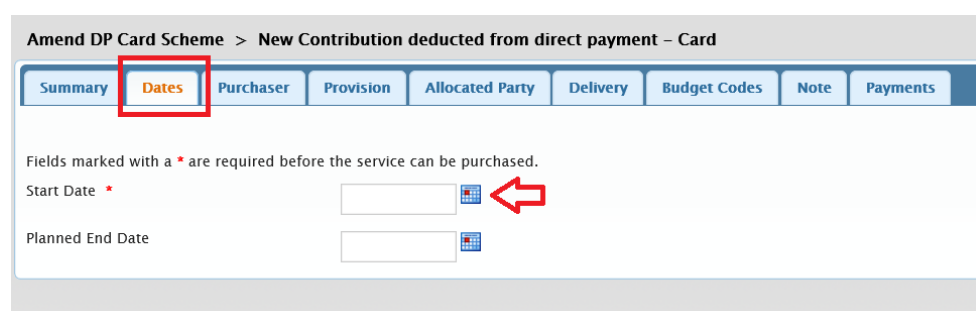
- [To add a client contribution](#), select **Other contributions**, and choose one of the element types that applies to the contribution you are adding:



- 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):

Amend DP Card Scheme > New Contribution deducted from direct payment – Card

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

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

Frequency *

Standard Cost £

Overridden Cost £

- Then select **'OK'**.

Or

- [To add nil contribution](#), select **Information**, and choose one the element types that applies:

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

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

Amend DP Card Scheme > New Nil contribution

Summary	Dates	Provision	Delivery	Note	Notifications
---------	--------------	-----------	----------	------	---------------

Dates Start date: **REQUIRED**
 Planned end date:

Provision Supplier: Allpay Limited

Delivery Frequency: Weekly



Notifications Notification to: Supplier


- 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

Amend DP Card Scheme > New Nil contribution

Summary **Dates** Provision Delivery Note Notifications

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

Start Date *  






Planned End Date 

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






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			New	 
Average Per Week : -£40.00					
DP - Standard Rate - Card	16/12/2020				  








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

Elements in this Service	Start Date	End Date	Status	Change Type	Actions
Contribution deducted from direct payment - Card	16/12/2020			New	 
Average Per Week : -£40.00					
DP - Standard Rate - Card	16/12/2020				  

- 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:

Budget Provision & Contributions

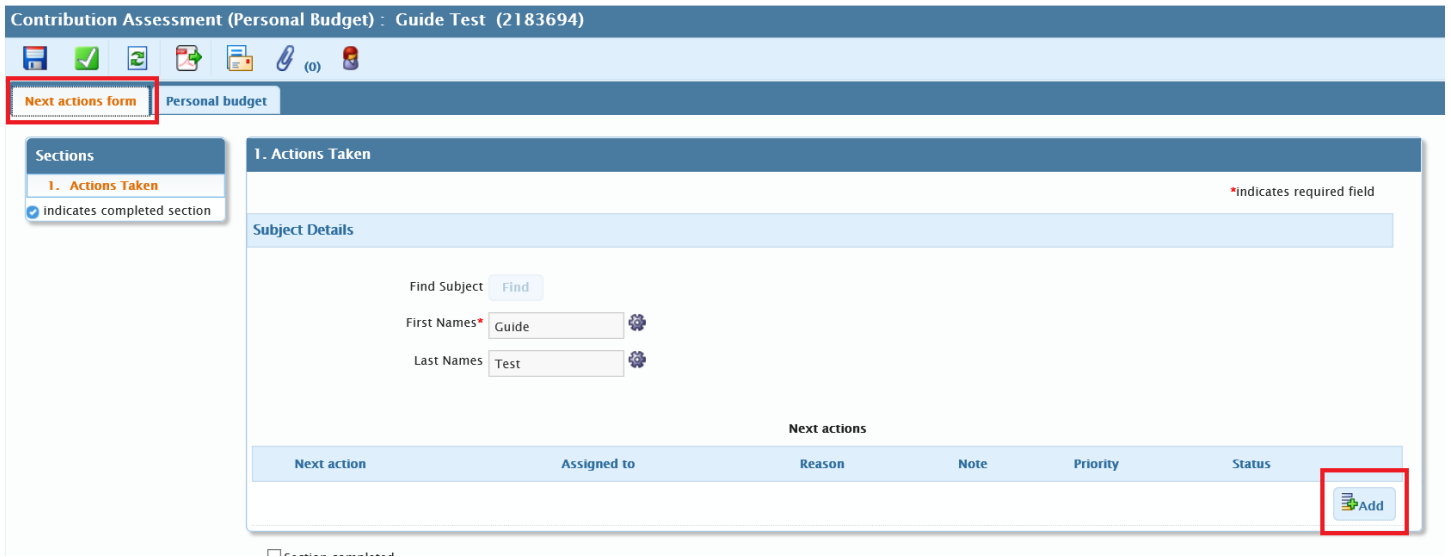
Sort By Service Filters All

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

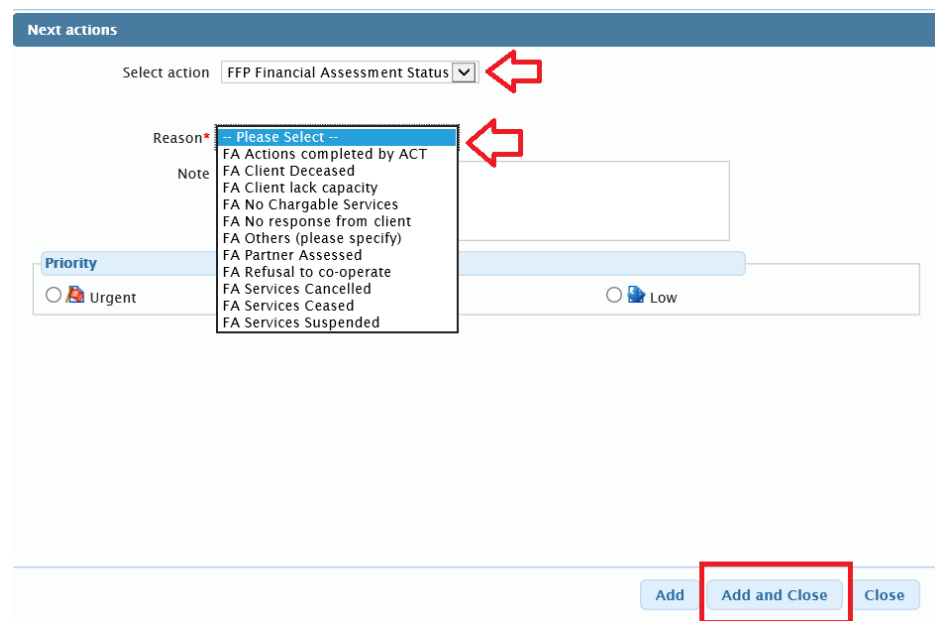
Amend Budget Period Update 903 Codes Draft Purchase Orders Authorisation Tasks Add Provision

3. Finishing the Contribution Assessment (Personal Budget) step

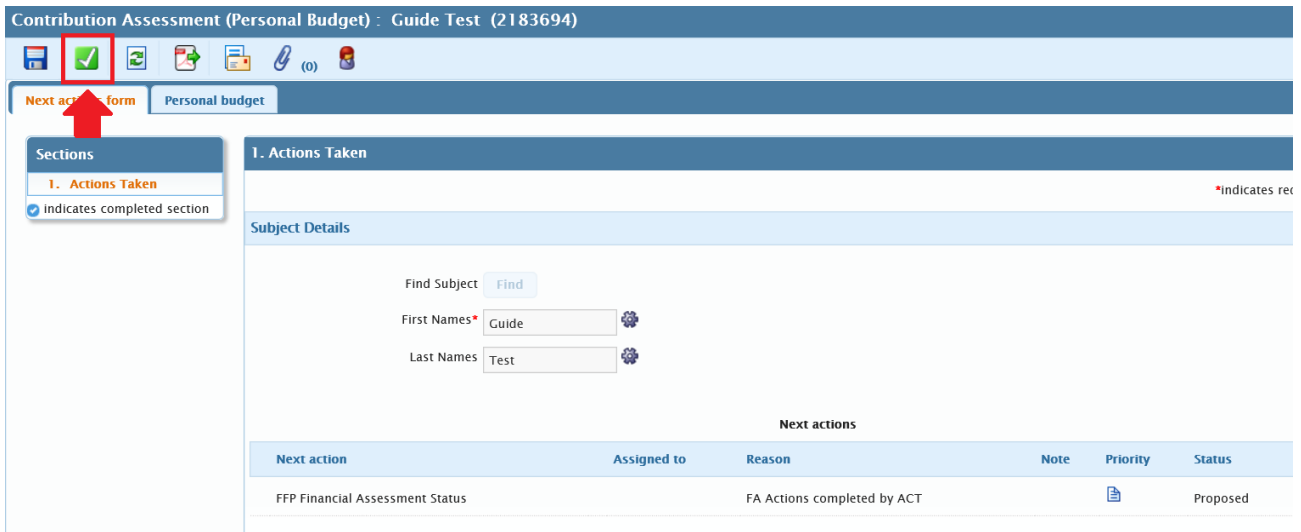
- To finish this step, select the **Next actions form** tab, and click on 'Add':



- 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:



Contribution Assessment (Personal Budget) : Guide Test (2183694)

Next actions form | Personal budget

Sections

- 1. Actions Taken
- Indicates completed section

1. Actions Taken

Subject Details

Find Subject Find

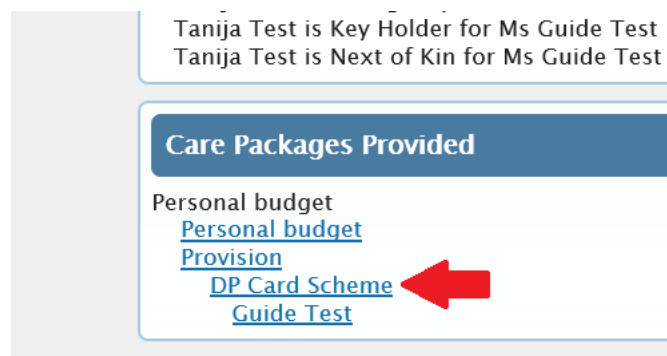
First Names*

Last Names

Next actions

Next action	Assigned to	Reason	Note	Priority	Status
FFP Financial Assessment Status		FA Actions completed by ACT			Proposed

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

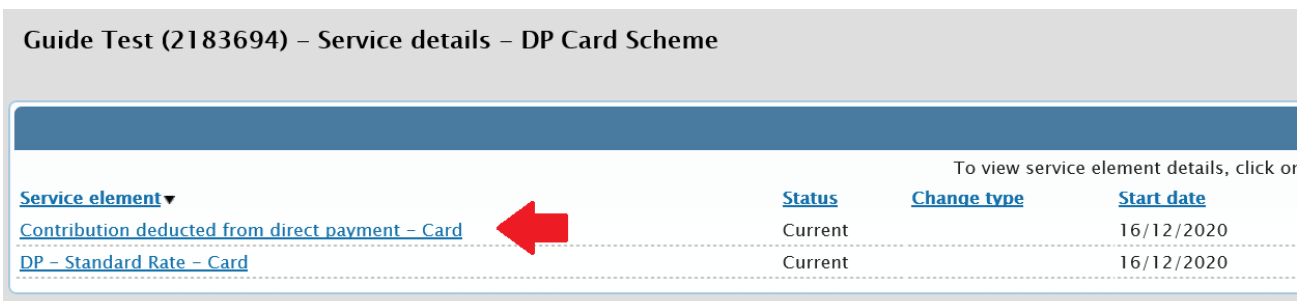


Tanija Test is Key Holder for Ms Guide Test
Tanija Test is Next of Kin for Ms Guide Test

Care Packages Provided

Personal budget
[Personal budget](#)
[Provision](#)
[DP Card Scheme](#)
[Guide Test](#)

- 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:



Guide Test (2183694) – Service details – DP Card Scheme

To view service element details, click on

Service element	Status	Change type	Start date
Contribution deducted from direct payment – Card	Current		16/12/2020
DP – Standard Rate – Card	Current		16/12/2020

- 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:

Contribution Assessment (Personal Budget) : Guide Test (2183694)

Next actions form **Personal budget**

Total Budget for period: £14,000.36 Total Allocated: £11,247.21
 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	Cha
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			

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







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

Budget **Provision & Contributions**

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				  

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

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






Elements in this Service	Start Date	End Date	Status	Change Type	Actions
Contribution deducted from direct payment - Card	16/12/2020				  
Average Per Week : -£40.00					
DP - Standard Rate - Card	16/12/2020				  

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

Amend DP Card Scheme > Amend Contribution deducted from direct payment - Card

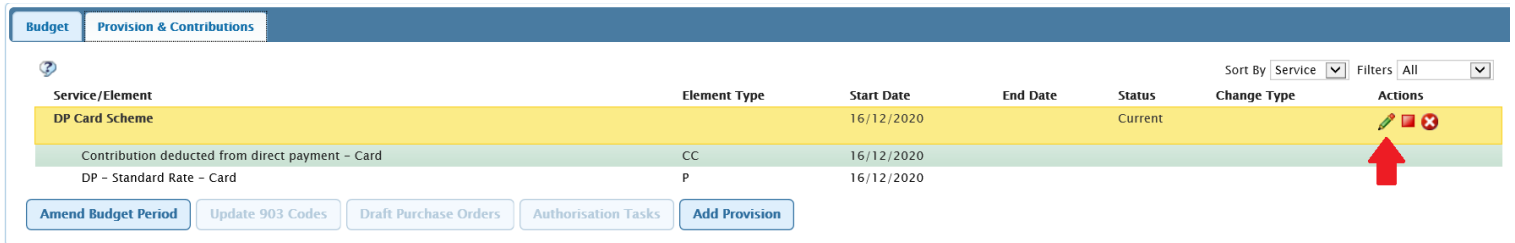
Summary	Dates	Purchaser	Provision	Allocated Party	Delivery	Budget Codes	Note	Payments
Dates	Start date:				16/12/2020			
	Change date:				REQUIRED			
	Planned end date:							
Purchaser	Worker responsible for purchase:				Nicola Antoni			
	Purchasing team:				Access and Response			
Provision	Supplier:				Allpay Limited			
Allocated Party	Allocated person:				Andy Test			
	Allocated organisation:							
Delivery	Frequency:				Weekly			
	Standard total cost:				-£1.00			
	Overridden total cost:				-£40.00			
Budget Codes	Budget Codes:				Cost Centre SA243 ACM Personal Budget Over 65 Subjective TC663 Personal Budget Client Contributions			
Payments	Method of payment:				Via Corporate System			
	Payee:				Supplier			

- 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:

Elements in this Service	Start Date	End Date	Status	Change Type	Actions
▼ Contribution deducted from direct payment - Card	16/12/2020			Amended	 
Average Per Week : -£45.00					
▶ DP - Standard Rate - Card	16/12/2020				  

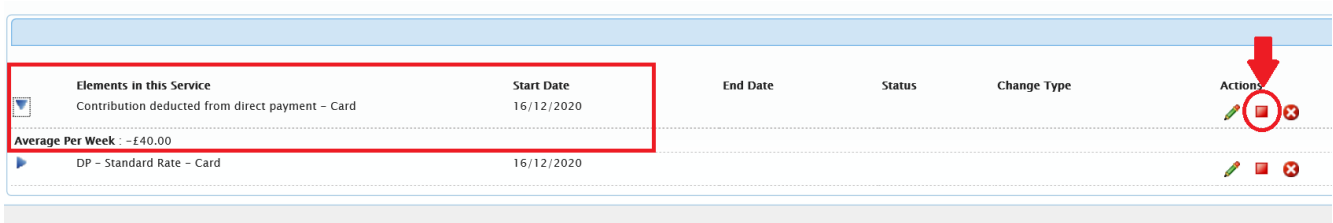
- **Select 'OK'**, and move onto the Next actions tab to finish this workflow step (see Section 3 of this guide).

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




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

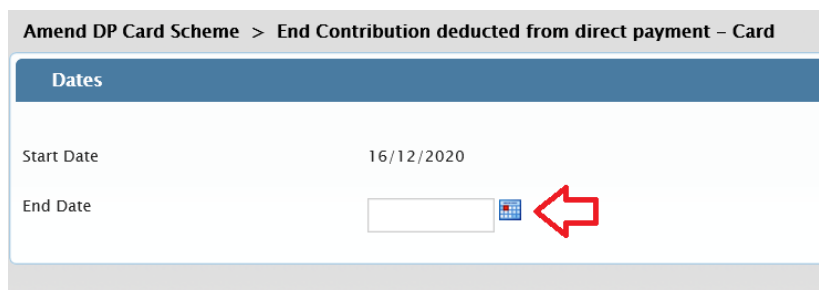
- Find the contribution element, and select the end button- the red square icon:



Elements in this Service	Start Date	End Date	Status	Change Type	Actions
Contribution deducted from direct payment - Card	16/12/2020				[Pencil] [Red Square] [X]
Average Per Week : -£40.00					
DP - Standard Rate - Card	16/12/2020				[Pencil] [Red Square] [X]

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':



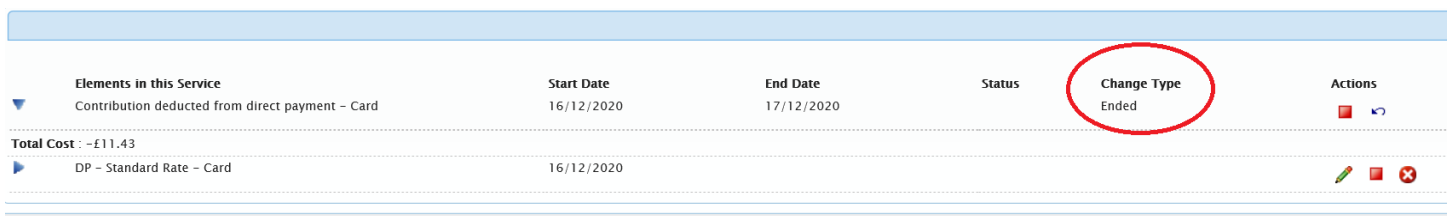
Amend DP Card Scheme > End Contribution deducted from direct payment - Card

Dates

Start Date: 16/12/2020

End Date: 

- You can see this has now been ended:



Elements in this Service	Start Date	End Date	Status	Change Type	Actions
Contribution deducted from direct payment - Card	16/12/2020	17/12/2020		Ended	[Red Square] [X]
Total Cost : -£11.43					
DP - Standard Rate - Card	16/12/2020				[Pencil] [Red Square] [X]

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