

Communicating with Local Authority

- On the Provider Portal home page, select Actions and Change Requests



Ally Pally Ltd

Pick a task...



[Actuals](#)

Submit your actuals to Bradford using the online form or bulk import facility



[Invoices/Credit Notes](#)

View and create your invoices/credit notes online



[Scheduled Payments](#)

View and confirm or reject scheduled payments.



[One-Off Claims](#)

View and create One-Off Claims



[Purchase Orders](#)

View & print purchase orders



[Reports](#)

View & print financial reports



[Contract Documents](#)

View & download contract documents



[Organisation Details](#)

View and Request Changes to Organisation Details



[Service Details](#)

View and Request Changes to Service Details



[Contacts](#)

View and Request Changes to Contacts



[Actions and Change Requests](#)

No open Actions



[Care Package Line Items](#)

View Care Package Line Items

- You will be taken to the following screen. This would detail any current/pending actions.
- To create a new Action, select 'New Action'



Actions and Change Requests

Actions

[New Action](#)

Assigned To:

Type:

[View Actions](#)

Include Done Actions

| Status | Last Post Date | Title | Re: | Due | Type | Assigned To |
|--------|----------------|-------|-----|-----|------|-------------|
|--------|----------------|-------|-----|-----|------|-------------|

There are no actions that match your filter criteria

- Complete the fields accordingly. Mandatory fields are shown in **bold** on the Portal

Type – Drop-down options of what the action relates to e.g. Deceased, Contract Query, Service Ended

Related To – Drop-down options of the category it relates to e.g. Contract, Client, Service

Entity – Drop-down options of the specific name or reference of what entity this action relates to (options will change depending on what has been selected on 'Related To' field)

Due Date is an optional field. If you required a response by a particular date, you can select the date here. This would then show whether the action is overdue or not.

Assign To – Drop-down options allows you to select which team/person at the local authority will receive the action

Title – Free-text box where you would write the name of the action

Text – The message that is to be sent to the local authority

Attachment – This is optional. Should you need to provide any supporting documents, these can be added here.

New Action

Type: Hospital Admission

Related To: Client

Entity: Bristow, Eric

Due Date: 22/03/2024

Assign to: Trevor Bland

Title: Planned hospital appointment

Text: Eric is going to hospital for planned procedure this weekend and will not require usual calls.

Attachment: Choose File No file chosen

Create Action

Cancel

- Once all of the information has been completed, select '**Create Action**'

- The action has now been created and submitted to Bradford Council
- This shows the status of the action as well as details such as a due date (if set) and who it has been assigned to.

 Actions and Change Requests

 Action has been created.

Actions

[New Action](#)

Assigned To: Type: [View Actions](#)

Include Done Actions

| Status | Last Post Date | Title | Re: | Due | Type | Assigned To |
|---|------------------|--|--------------------------|------------|--------------------|-------------------|
|  | 20/03/2024 14:16 | Planned hospital appointment | Mr Eric Bristow (Client) | 22/03/2024 | Hospital Admission | LA (Trevor Bland) |

- To view the full details, click on the link with the title name
- This also allows you view view any related links
- You can also add further comments or attachments by selecting 'Comment'

Planned hospital appointment  Pending
Due Date: 22 Mar 2024

Re: Mr Eric Bristow (Client)
Type: Hospital Admission

20 Mar 2024 14:16 Phil Taylor (Ally Pally Ltd)
Eric is going to hospital for a planned procedure this weekend and will not require usual calls.
Assigned to Trevor Bland
Due Date set to 22 Mar 2024

Related links: [Purchase Orders for Mr Eric Bristow](#)
[Service details for Ally Pally Home Care](#)

[Comment](#) [Request Closure](#)

- Comments will be added and sent through to Bradford Council when you select 'Submit'

Comment

Comment

Attachment

Due Date

[Submit](#) [Cancel](#)

- On the home page, you will see that **Actions and Change Requests** now shows that there is '1 open Action'. The colour of the icon has also changed from green to orange as the action is pending



Ally Pally Ltd

Pick a task...

| | |
|---|---|
|  Actuals Submit your actuals to Bradford using the online form or bulk import facility |  Invoices/Credit Notes View and create your invoices/credit notes online |
|  Scheduled Payments View and confirm or reject scheduled payments. |  One-Off Claims View and create One-Off Claims |
|  Purchase Orders View & print purchase orders |  Reports View & print financial reports |
|  Contract Documents View & download contract documents |  Organisation Details View and Request Changes to Organisation Details |
|  Service Details View and Request Changes to Service Details |  Contacts View and Request Changes to Contacts |
|  Actions and Change Requests 1 open Action |  Care Package Line Items View Care Package Line Items |

- Actions can only be closed by Bradford Council. If no further action required, the action will be closed.
- Bradford Council can reply if appropriate and this would change the 'Assigned To' status to Provider
- To view the details including response, click the link within the title name

Actions and Change Requests

Actions

[New Action](#)

Assigned To:

Type:

[View Actions](#)

Include Done Actions

| Status | Last Post Date | Title | Re: | Due | Type | Assigned To |
|---|------------------|--|--------------------------|------------|--------------------|-------------|
|  | 20/03/2024 15:02 | Planned hospital appointment | Mr Eric Bristow (Client) | 22/03/2024 | Hospital Admission | Provider |

- This will show the details including the reply from Bradford Council
- You can reply by selecting **Reply**

Action Details

[Back](#)

Planned hospital appointment  Pending
Due Date: 22 Mar 2024

Re: Mr Eric Bristow (Client)
Type: Hospital Admission

20 Mar 2024 14:16 Phil Taylor (Ally Pally Ltd)
Eric is going to hospital for a planned procedure this weekend and will not require usual calls.
Assigned to Trevor Bland
Due Date set to 22 Mar 2024

20 Mar 2024 14:52 Phil Taylor (Ally Pally Ltd)
Sorry, forgot to mention that calls will resume on Monday morning. Thanks.

20 Mar 2024 15:02 BRADFORD\Blandt
Thank you for letting us know. Please could you let us know when the last call will be?
Assigned to Ally Pally Ltd

Related links: [Purchase Orders for Mr Eric Bristow](#)
[Service details for Ally Pally Home Care](#)

[Comment](#) [Reply](#) [Request Closure](#)

- Type the response and submit

Reply

Comment

Attachment No file chosen

Assign To

Due Date

[Submit](#) [Cancel](#)

- Once Bradford Council have closed the action, you will see that the home page shows '**No Open Actions**'



- You can view the completed actions by selecting Actions and Change Requests

- Tick the box for 'Include Done Actions' and then click the 'View Actions' button
- This will show all closed actions. To view the full details, click the link within the title name

Actions and Change Requests

Actions

[New Action](#)

Assigned To: Type:

Include Done Actions [View Actions](#)

| Status | Last Post Date | Title | Re. | Due | Type | Assigned To |
|---|------------------|--|--------------------------|------------|--------------------|-------------|
|  | 20/03/2024 15:19 | Planned hospital appointment | Mr Eric Bristow (Client) | 22/03/2024 | Hospital Admission | |

- The full history of the action and conversation between provider and local authority will be shown

Planned hospital appointment
 Re: Mr Eric Bristow (Client)
 Type: Hospital Admission

 Done
 Due Date: 22 Mar 2024

20 Mar 2024 14:16 Phil Taylor (Ally Pally Ltd)
 Eric is going to hospital for a planned procedure this weekend and will not require usual calls.
 Assigned to Trevor Bland
 Due Date set to 22 Mar 2024

20 Mar 2024 14:52 Phil Taylor (Ally Pally Ltd)
 Sorry, forgot to mention that calls will resume on Monday morning. Thanks.

20 Mar 2024 15:02 BRADFORD\Blandt
 Thank you for letting us know. Please could you let us know when the last call will be?
 Assigned to Ally Pally Ltd

20 Mar 2024 15:16 Phil Taylor (Ally Pally Ltd)
 Apologies, last call will be the teatime call on Friday. The bedtime call will not be provided. If no further queries, please close this action. Thank you.
 Assigned to Trevor Bland

20 Mar 2024 15:19 BRADFORD\Blandt
 Thanks for confirming. I've now closed this action.
 Assigned to Ally Pally Ltd

20 Mar 2024 15:19 BRADFORD\Blandt Closed
 Closed

Related links: [Purchase Orders for Mr Eric Bristow](#)
[Service details for Ally Pally Home Care](#)