

## 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
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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)

**PLEASE NOTE - THIS WILL AUTOMATICALLY POPULATE THE FIRST RESULT ON THE DROP-DOWN LIST. YOU MUST ENSURE THAT YOU SELECT THE CORRECT OPTION FROM THE DROP-DOWN LIST.**

**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.

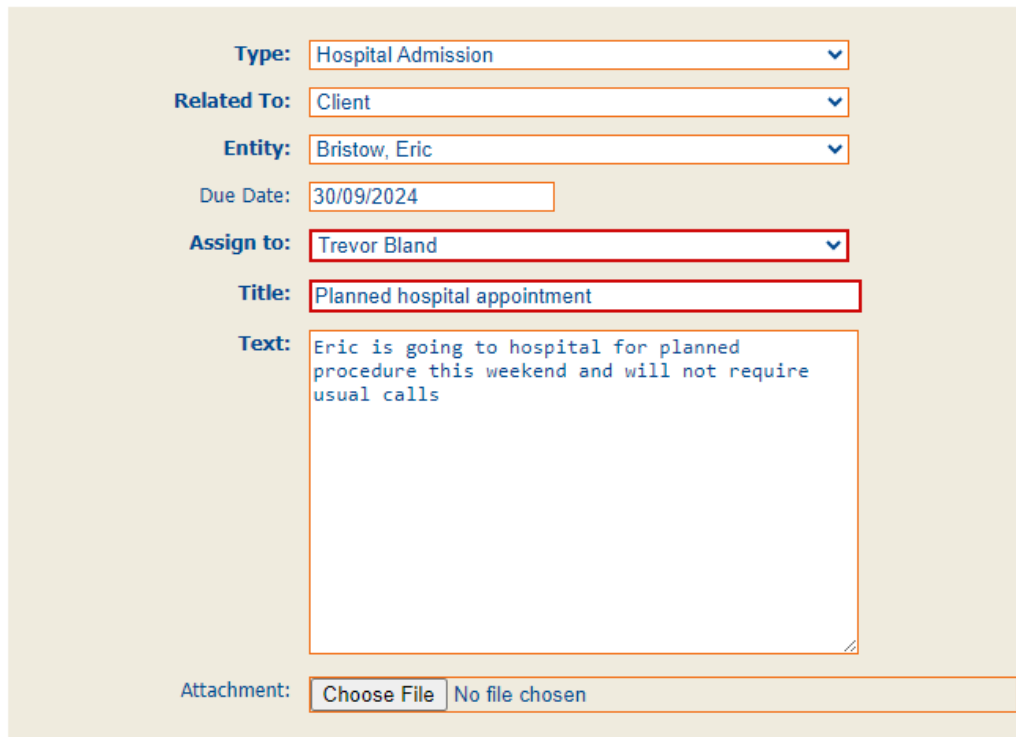
**Assign To** – Drop-down options allows you to select which team/person at the local authority will receive the action

**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



The screenshot shows the 'New Action' form with the following fields filled out:

- Type:** Hospital Admission
- Related To:** Client
- Entity:** Bristow, Eric
- Due Date:** 30/09/2024
- 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
	27/09/2024 15:01	<a href="#">Planned hospital appointment</a>	Mr Eric Bristow (Client)	30/09/2024	Hospital Admission	LA (Trevor Bland)

- To view the full details, click on the link with the title name
- This also allows you to view any related links
- You can also add further comments or attachments by selecting '**Comment**' or if nothing further is required, you can '**Request Closure**'

**Planned hospital appointment**  Pending  
Due Date: 30 Sep 2024

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

**27 Sep 2024 15:01 Phil Taylor (Ally Pally Ltd)**  
Eric is going to hospital for planned procedure this weekend and will not require usual calls.  
*Assigned to Trevor Bland  
Due Date set to 30 Sep 2024*

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

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

- Additional comments will be added and sent through to Bradford Council when you select '**Submit**'

### Request Closure

Comment

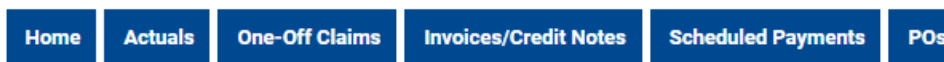
Attachment

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...

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

- 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
- You can use the 'Assigned To' filter to view Actions assigned to Provider or Local Authority
- To view the details including response, click the link within the **title** name

## Actions and Change Requests

### Actions


[New Action](#)

Assigned To: [Any] ▼

Type: [Any] ▼

View Actions


Include Done Actions

Status	Last Post Date	Title	Re:	Due	Type	Assigned To
	27/09/2024 15:10	<a href="#">Planned hospital appointment</a>	Mr Eric Bristow (Client)	30/09/2024	Hospital Admission	Provider

- This will show the details including the reply from Bradford Council
- You can reply by selecting **Reply** or you can reply and request closure by selecting **Request Closure**

## Action Details

[Back](#)

**Planned hospital appointment**  Pending  
Due Date: 30 Sep 2024

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

**27 Sep 2024 15:01 Phil Taylor (Ally Pally Ltd)**  
Eric is going to hospital for planned procedure this weekend and will not require usual calls.  
*Assigned to Trevor Bland*  
*Due Date set to 30 Sep 2024*

**27 Sep 2024 15:07 Phil Taylor (Ally Pally Ltd) Request Close**  
Sorry, forgot to mention that calls will resume on Monday morning. Thanks.

**27 Sep 2024 15:10 BRADFORD\Blandt**  
Thank you for letting us know. Please could you advise 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

### Request Closure

Comment

Attachment

Assign To

Due Date

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

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

## [Actions and Change Requests](#) **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 (filter 'type' and 'assigned to' if required)
- 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:

[View Actions](#)

Include Done Actions

Status	Last Post Date	Title	Re:	Due	Type	Assigned To
	27/09/2024 15:17	<a href="#">Planned hospital appointment</a>	Mr Eric Bristow (Client)	30/09/2024	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: 30 Sep 2024

**27 Sep 2024 15:01 Phil Taylor (Ally Pally Ltd)**  
Eric is going to hospital for planned procedure this weekend and will not require usual calls.  
Assigned to Trevor Bland  
Due Date set to 30 Sep 2024

**27 Sep 2024 15:07 Phil Taylor (Ally Pally Ltd) Request Close**  
Sorry, forgot to mention that calls will resume on Monday morning. Thanks.

**27 Sep 2024 15:10 BRADFORD\Blandt**  
Thank you for letting us know. Please could you advise when the last call will be?  
Assigned to Ally Pally Ltd

**27 Sep 2024 15:16 Phil Taylor (Ally Pally Ltd) Request Close**  
Apologies, the 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  
Due Date set to 30 Sep 2024

**27 Sep 2024 15:17 BRADFORD\Blandt Closed**  
Thank you. I've now closed this action.

Related links:

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