

Quick 'How To' Guides

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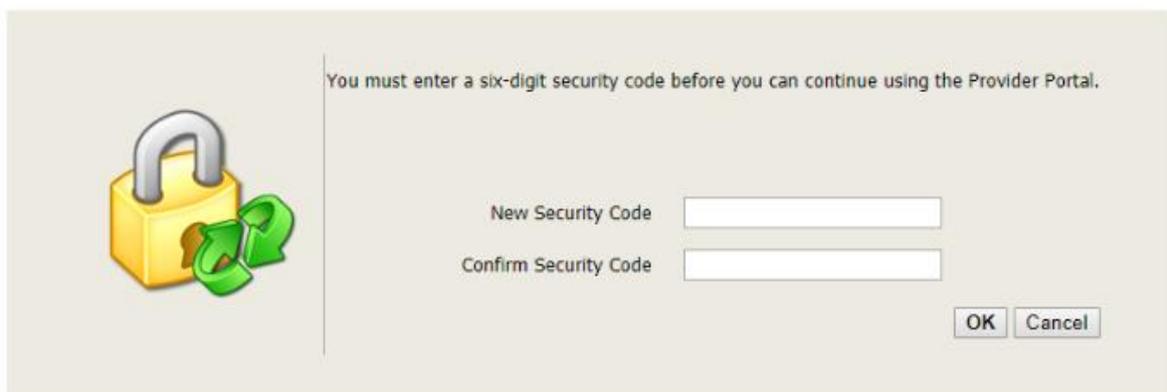
[Using Reports](#)

[New User:](#)

New user accounts will be created by Bradford Council. Once your account has been created, you will be notified of the email address and password you will need to log in. You will also be given a link to the Provider Portal.

When you first log in, you will be required to also create a six-digit security code.

Change Security Code

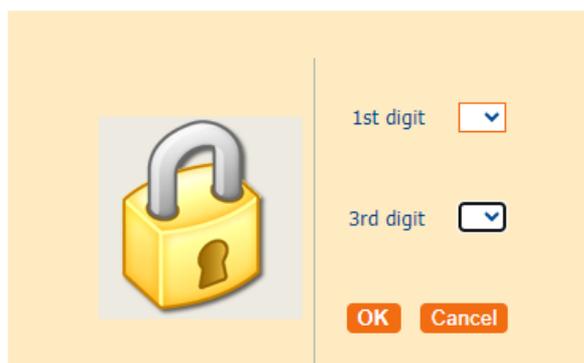


Your security code must follow these rules:

- Exactly 6 digits
- Only 0-9
- Must be different from the previous security code
- No digit appears more than 4 times
- No sequences of more than three consecutive digits up or down (e.g. security codes containing 1234 or 4321 are not allowed)

Whenever you log in, you will be asked to enter specified digits from your code

[Log in to your Provider Portal](#)Please enter the following digits from your six-digit security code.



Forgotten password/Reset password

If you have forgotten your password or are locked out, you will need to email provider.portal@bradford.gov.uk to request the account unlocking,

Your account will be locked if you have not accessed the Provider Portal within the last 90 days.

If you wish to reset your password and/or your six-digit security code, you can do this from the Provider Portal home page.



[Change Password](#)



[Change Security Code](#)

Actuals

- *Important Note: The contract management system does not generate or accept actuals beyond the current week*
- Each actual has a coloured background indicating its status with respect to the planned delivery:
Grey: Actual units/hours equal planned units/hours
Green: Actual units/hours exceed planned units/hours
Red: Actual units/hours are less than planned units/hours
- If you see the message 'There are no actuals for this week', it is because there were no clients receiving services that week.

- If you see the client name(s) but no details of the service, click '**Generate Actuals**'

Service Level: [All Service Levels] Client: [All Clients]

Show Clients with Actuals: [No Selection] Actuals: Unplanned Planned Intermittent Locked

Actual	Service Level	PI	Frstd	Msd	Xtr	Vst	Total Cost	Comments
Mr Eric Bristow	96836000							<input type="button" value="Add/Edit"/> <input type="button" value="Confirm"/>
Miss Fallon Sherrock	ab836000							<input type="button" value="Add/Edit"/> <input type="button" value="Confirm"/>
Mr Sid Waddell	8c846000							<input type="button" value="Add/Edit"/> <input type="button" value="Confirm"/>
Mr Jocky Wilson	c9836000							<input type="button" value="Add/Edit"/> <input type="button" value="Confirm"/>
Mr Peter Wright	e0946000							<input type="button" value="Add/Edit"/> <input type="button" value="Confirm"/>

Total: £0.00 of £0.00

Pages: 1

Recording Actuals

Missed calls

- In this example, the planned service was 5hrs
- Only 4hrs were provided
- 1hr was not provided
- The figure in **Actual** needs to be amended to reflect the 4hrs provided
- The figure in **Missed** needs to be amended to reflect the 1hr not provided
- A **comment** must be recorded

Actual	Service Level	PI	Frstd	Msd	Xtr	Vst	Total Cost	Comments
4 x Hours	Homecare Flexible - Bradford - Single-handed	5	0	1	0	5	£80.00 = 4 (Actual + Frstd) Hours x £20.00	Cancelled in advance

Week Total: £80.00

Extras (claiming more than planned service)

- In this example, the planned service was 5hrs
- Provider is claiming a total of 5hrs 30mins as more time required on a call
- The figure in **Actual** is amended to reflect the 5hrs 30mins provided
- The figure in **Xtr** is amended to reflect the 30mins extra
- A **comment** must be recorded

Actual	Service Level	PI	Frstd	Msd	Xtr	Vst	Total Cost	Comments
5.5 x Hours	Homecare Flexible - Bradford - Single-handed	5	0	0	0.5	5	£110.00 = 5.5 (Actual + Frstd) Hours x £20.00	Took longer as client unwell

Frustrated calls – This must only be used for hospital retention

- The **only** time ‘Frustrated’ should be used is when you are claiming hospital retention
- In this example, the planned service is 14hrs
- Client received 10hrs of the planned service but was then admitted to hospital
- The figure in **Actual** reflects the 10hrs provided
- The figure in **Frstd** reflects the 4hrs not provided – this will still be paid
- The **comment** must be ‘Hospital Week 1’ or ‘Hospital Week 2’

Actual	Service Level	PI	Frstd	Msd	Xtr	Vst	Total Cost	Comments
10 x Hours	Homecare Flexible - Bradford - Double-handed	14	4	0	0	14	£560.00 = 14 (Actual + Frstd) Hours x £40.00	Hospital week 1

Week Total: £560.00

Attempted calls or short-notice cancellation:

If a client does not give sufficient cancellation notice or is not home/refuses care, record calls as follows:

- In this example, the planned service is 5hrs
- One 30min call was not provided but client had not given enough notice so payment still required
- The figure in **Actual** reflects the total number of hours being claimed
- The figure in **Msd** reflects the 30min call not provided
- The **comment** details the reason

Actual	Service Level	PI	Frstd	Msd	Xtr	Vst	Total Cost	Comments
5 x Hours	Homecare Flexible - Bradford - Single-handed	5	0	0.5	0	5	£100.00 = 5 (Actual + Frstd) Hours x £20.00	Late cancellation on Tues

Exception (Exclamation) alert



Exception settings are alerts which highlight a possible issue with your submission. These are also brought to the attention of the Local Authority.

Whenever you see the Exception alert, you can hover over the icon which will advise that you can view the details by clicking on the icon

Actual	Service Level	PI	Frstd	Msd	Xtr	Vst	Total Cost	Comments
Mr Eric Bristow 96836000							£180.00 of £180.00	Add/Edit Confirm
 1 x Hour	Homecare Flexible - Bradford - Double-handed	1	0	1	0	1	£40.00 = 1 (Actual + Frstd) Hour x £40.00	Call cancelled this week
This Actual has one or more exceptions. Click to view details.								
7 x Hours	Homecare Flexible - Bradford - Single-handed	7	0	0	0	7	£140.00 = 7 (Actual + Frstd) Hours x £20.00	

The following are examples of exceptions which are triggered because of the actuals claimed.

Exception Example – Actual does not add up

In this example (Eric Bristow), the exception advises that the **Actual does not add up**. The full service was not provided as it had been cancelled in advance.

The planned service was 1hr

The actual claimed is 1hr (the actual defaults to the planned service and you are required to amend this accordingly)

There is 1hr missed call recorded

The total cost is showing that 1hr is being claimed

Exceptions

Actual does not add up The Actual (Mr Eric Bristow (96836000), 06/06/2022, Ally Pally Home Care - Homecare Flexible - Bradford - Double-handed) value: 1 does not equal the result Actual (0) of planned - frustrated - missed + extra.

OK

Actual	Service Level	PI	Frstd	Msd	Xtr	Vst	Total Cost	Comments
⚠ 1 x Hour	Homecare Flexible - Bradford - Double-handed	1	<input type="text" value="0"/>	1	<input type="text" value="0"/>	<input type="text" value="1"/>	£40.00 = 1 (Actual + Frstd) Hour x £40.00	Call cancelled this week
<input type="text" value="7"/> x Hours	Homecare Flexible - Bradford - Single-handed	7	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="7"/>	£140.00 = 7 (Actual + Frstd) Hours x £20.00	<input style="width: 100%;" type="text"/>
Add Actual: Unplanned <input style="width: 100%;" type="text" value="[No selection]"/> Add								

Solution – The actual needs to be amended to 0 (zero) as no service provided

Actual	Service Level	PI	Frstd	Msd	Xtr	Vst	Total Cost	Comments
0 x Hours	Homecare Flexible - Bradford - Double-handed	1	<input type="text" value="0"/>	<input type="text" value="1"/>	<input type="text" value="0"/>	<input type="text" value="1"/>	£0.00 = 0 (Actual + Frstd) Hours x £40.00	Call cancelled this week
<input type="text" value="7"/> x Hours	Homecare Flexible - Bradford - Single-handed	7	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="7"/>	£140.00 = 7 (Actual + Frstd) Hours x £20.00	<input style="width: 100%;" type="text"/>
Add Actual: Unplanned <input style="width: 100%;" type="text" value="[No selection]"/> Add								

Week Total: £140.00

Exception Example – Plan exceeded for week:

In this example (Sid Waddell), the exception advises the **Plan exceeded for week**. This is because the planned level of service was 1 and a total of 3 are being claimed.

This has been accurately recorded, the actuals reflect the 3, the correct number of extras are shown and a reason has been stated.

Exceptions

Plan exceeded for week The Actual (Mr Sid Waddell (8c846000), 06/06/2022, Ally Pally Home Care - Homecare Flexible - Bradford - Single-handed) exceeds the planned service level Actual by 200%.

Actual	Service Level	PI	Frstd	Msd	Xtr	Vst	Total Cost	Comments
<input style="width: 40px; border: 1px solid red;" type="text" value="3"/> x Hours	Homecare Flexible - Bradford - Single-handed	1	<input style="width: 40px; border: 1px solid red;" type="text" value="0"/>	<input style="width: 40px; border: 1px solid red;" type="text" value="0"/>	<input style="width: 40px; border: 1px solid red;" type="text" value="2"/>	<input style="width: 40px; border: 1px solid red;" type="text" value="1"/>	£60.00 = 3 (Actual + Frstd) Hours x £20.00	<input style="width: 150px; border: 1px solid red;" type="text" value="Extra calls req by SW"/>
Add Actual: Unplanned <input style="width: 150px; border: 1px solid red;" type="text" value="[No selection]"/> <input style="float: right;" type="button" value="Add"/>								

Week Total: £60.00

There isn't anything further that needs to be done with this claim.

****IMPORTANT**** Whenever this exception is triggered, the entire payment for that client will be suspended pending approval/rejection by Bradford Council.

[View pending payments and non-payable items](#)

- Go to Scheduled Payments



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

- Select the applicable financial year and period (week)

Scheduled Payments

Financial year: **2022/2023**

Contract: **Ally Pally Care**

Ally Pally Ltd

- 8 Jun 2022 to 12 Jun 2022**
Unconfirmed
- 30 May 2022 to 5 Jun 2022**
Confirmed
- 23 May 2022 to 29 May 2022**
Confirmed
- 16 May 2022 to 22 May 2022**
Confirmed

- This will detail what is due to be paid for that week
- It will also show any payment(s) **not** due to be paid
- This page defaults to the Payable tab. Further details can be found by selecting the Non-Payable tab

Start Date:	06 Jun 2022	<table border="1"> <tr> <td></td> <td>Total</td> </tr> <tr> <td>Payable</td> <td>£760.00</td> </tr> <tr> <td>Non-Payable</td> <td>£60.00</td> </tr> </table>		Total	Payable	£760.00	Non-Payable	£60.00
	Total							
Payable	£760.00							
Non-Payable	£60.00							
End Date:	12 Jun 2022							
Status:	Unconfirmed							

Payable		Non-payable		
Cost / Income	Reason for Payment	Applicable Dates	Amount	Status
Ally Pally Home Care 2022/2023				
Mr Eric Bristow (96836000) (Total: £140.00)				
Cost	Homecare Flexible - Bradford - Single-handed (Hour), Spot.	06/06/2022 - 12/06/2022	£140.00	Pay
Miss Fallon Sherrock (ab836000) (Total: £40.00)				
Cost	Homecare Flexible - Bradford - Single-handed (Hour), Spot.	06/06/2022 - 12/06/2022	£40.00	Pay
Mr Jocky Wilson (c9836000) (Total: £560.00)				
Cost	Homecare Flexible - Bradford - Double-handed (Hour), Spot.	06/06/2022 - 12/06/2022	£560.00	Pay
Mr Peter Wright (e0946000) (Total: £20.00)				
Cost	Homecare Flexible - Bradford - Single-handed (Hour), Spot.	06/06/2022 - 12/06/2022	£20.00	Pay

Confirm/Reject

- Any payment(s) that are Non-Payable will be detailed here including the status e.g. 'Suspend'

Start Date:	06 Jun 2022		Total
End Date:	12 Jun 2022		£760.00
		Payable	
		Non-Payable	£60.00
Status:	Unconfirmed		

Payable	Non-payable			
Cost / Income	Reason for Payment	Applicable Dates	Amount	Status
Ally Pally Home Care 2022/2023				
Mr Sid Waddell (8c846000) (Total: £60.00)				
Cost	Homecare Flexible - Bradford - Single-handed (Hour), Spot. (Adj)	06/06/2022 - 12/06/2022	£60.00	Suspend

Confirming Actuals:

- Once the actuals have been updated accordingly, you need to confirm them.
- This acts as Bradford Council's notification that you have submitted all actuals for that week
- Go to Scheduled Payments



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

- Select the applicable financial year and period (week)

Scheduled Payments

Financial year:
2022/2023

Contract:
Ally Pally Care

Ally Pally Ltd

- 6 Jun 2022 to 12 Jun 2022
Unconfirmed
- 30 May 2022 to 5 Jun 2022
Confirmed
- 23 May 2022 to 29 May 2022
Confirmed

- You will see details of the claim for that week and that the status is **'Unconfirmed'**
- Select the **Confirm/Reject** button

Start Date:	06 Jun 2022			Total
End Date:	12 Jun 2022			£760.00
			Payable	£760.00
Status:	Unconfirmed		Non-Payable	£60.00

Payable		Non-payable		
Cost / Income	Reason for Payment	Applicable Dates	Amount	Status
Ally Pally Home Care 2022/2023				
Mr Eric Bristow (96836000) (Total: £140.00)				
Cost	Homecare Flexible - Bradford - Single-handed (Hour), Spot.	06/06/2022 - 12/06/2022	£140.00	Pay
Miss Fallon Sherrock (ab836000) (Total: £40.00)				
Cost	Homecare Flexible - Bradford - Single-handed (Hour), Spot.	06/06/2022 - 12/06/2022	£40.00	Pay
Mr Jocky Wilson (c9836000) (Total: £560.00)				
Cost	Homecare Flexible - Bradford - Double-handed (Hour), Spot.	06/06/2022 - 12/06/2022	£560.00	Pay
Mr Peter Wright (e0946000) (Total: £20.00)				
Cost	Homecare Flexible - Bradford - Single-handed (Hour), Spot.	06/06/2022 - 12/06/2022	£20.00	Pay

Confirm/Reject

- Details of the Care Package Line Items will be detailed.
- You can then add any relevant comments. Once done, click **'Confirm'**

Start Date:	06 Jun 2022		Total
End Date:	12 Jun 2022		£760.00
		Payable	
		Non-Payable	£60.00
Status:	Unconfirmed		

Comments:
 All actuals submitted for period 6th - 12th June
 Please consider suspended payment of £60 for Sid. Planned 1hr provided plus additional 2hrs as requested by Social Worker

Confirm **Reject** **Cancel**

Care Package Line Items

SSRef	Client	Service	Service Level	Start Date	End Date	Cost	Pricing	CPLI ID
96836000	Bristow, Eric	Ally Pally Home Care	Homecare Flexible - Bradford - Single-handed	05/04/2021	-	£140.00 Weekly	7 x Hours at £20.00 (Spot)	1523
ab836000	Sherrock, Fallon	Ally Pally Home Care	Homecare Flexible - Bradford - Single-handed	14/03/2022	-	£40.00 Weekly	2 x Hours at £20.00 (Spot)	1708
8c846000	Waddell, Sid	Ally Pally Home Care	Homecare Flexible - Bradford - Single-handed	05/04/2021	-	£20.00 Weekly	1 x Hour at £20.00 (Spot)	1564
c9836000	Wilson, Jocky	Ally Pally Home Care	Homecare Flexible - Bradford - Double-handed	05/04/2021	-	£560.00 Weekly	14 x Hours at £40.00 (Spot)	1524
e0946000	Wright, Peter	Ally Pally Home Care	Homecare Flexible - Bradford - Single-handed	12/07/2021	-	£20.00 Weekly	1 x Hour at £20.00 (Spot)	1563

- The Status will change to Confirmed

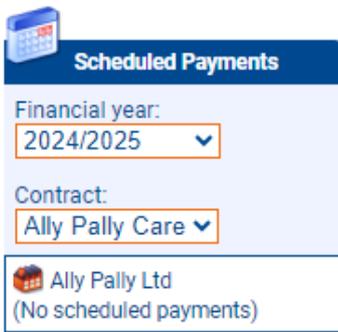
Start Date:	06 Jun 2022		Total
End Date:	12 Jun 2022		£760.00
		Payable	
		Non-Payable	£60.00
Status:	Confirmed		
Comment:	All actuals submitted for period 6th - 12th June Please consider suspended payment of £60 for Sid. Planned 1hr provided plus additional 2hrs as requested by Social Worker		

View Remittance Advice

- Go to Scheduled Payments

Home Actuals One-Off Claims Invoices/Credit Notes **Scheduled Payments** POs Reports Help Logout

- Select the financial year and contract that it relates to



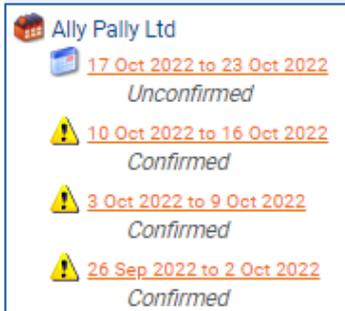
Scheduled Payments

Financial year:
2024/2025

Contract:
Ally Pally Care

Ally Pally Ltd
(No scheduled payments)

- Select the applicable week



Ally Pally Ltd

- 17 Oct 2022 to 23 Oct 2022
Unconfirmed
- 10 Oct 2022 to 16 Oct 2022
Confirmed
- 3 Oct 2022 to 9 Oct 2022
Confirmed
- 26 Sep 2022 to 2 Oct 2022
Confirmed

- This will open details of the payment period. Select the **Download Remittance Advice Report** button at the bottom of the page

[Download Remittance Advice Report](#)

Responding to Disputes

- When a dispute has been raised, an email notification will be sent which contains a link to the dispute. You will also see on the Portal Home page that there is a dispute awaiting action



Disputes
1 open Dispute (1 awaiting action)

- Click on Disputes to view details of the open dispute
- Click on the **Edit** button

Client: Actuals/Visits from:

Status: In Dispute Resolution Requested Resolved to:

[View](#) [Reset](#)

Client	Status	Reason	Details	Response	Date Range
Wilson, Jocky	In Dispute	Unauthorised extra	This extra was not agreed. If the service needs to be increased, please submit the relevant request. Please adjust the claim for only the planned hours delivered.		22/08/2022 - 28/08/2022

[Edit](#)

- To respond, type any comments in the response box and then select **Request Resolution**

Client: Wilson, Jocky
Status: In Dispute
Reason: Unauthorised extra
Details: This extra was not agreed. If the service needs to be increased, please submit the relevant request. Please adjust the claim for only the planned hours delivered.

Response:

Actual	Service Level	PI	Frstd	Msd	Xtr	Vst	Total Cost	Comments
Week Beginning 22 Aug 2022 (Ally Pally Home Care)							£640.00 of £640.00	Add/Edit
16	x Hours	Homecare Flexible - Bradford - Double-handed	14	0	0	2 14	£640.00 = 16 (Actual + Frstd) Hours x £40.00	Service increased

Pages:1 [Request Resolution](#) [Back](#)

Communicating with the Local Authority

- To contact the Local Authority, go to **Actions & Change Requests**



- 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						

- Input the details as applicable – Fields shown in **bold** are mandatory
- Use the drop-down boxes to select Type, Related To and Entity

Important – If option 'Client' is used in the 'Related To' field, it will AUTOMATICALLY populate the entity field with the name of the first client on the list. If the action is in relation to another individual, you must change the name

- Assign the action to a person or team
- Once complete, select **Create Action**



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

- The action has now been created and submitted
- To view the action, click the hyperlink within the title



Actions and Change Requests

✓ Action has been created.

Actions

Assigned To: [Any] Type: [Any]

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)

Using Reports:

- Go to Reports



- Reports available to you will be displayed here

Reports

The following reports are currently available. Click to view.



[Commissioned Vs Actuals](#)



[Pending Payments Exceptions](#)



[Pending Scheduled Payments](#)



[Remittance Advice Provider Payments](#)

Commissioned Vs Actuals

- This details the planned level of service and the actuals submitted
- Enter the **date from** and **date to** for the period you wish to view
- If you only wish to view results where the submission is different to the planned, tick '**Differences Only**'
- You can **View** the results on screen or **Download Data** onto a CSV file

Commissioned Vs Actuals Report

[Close and return](#)

Service Group Class	[All Service Group Cl: v	View	Download Data
Organisation	Ally Pally Ltd v		
Client	[All Clients] v		
Date From	19/06/2023		
Date To	25/06/2023		
Differences Only	<input checked="" type="checkbox"/>		
Include Weeks Without Actuals	<input type="checkbox"/>		

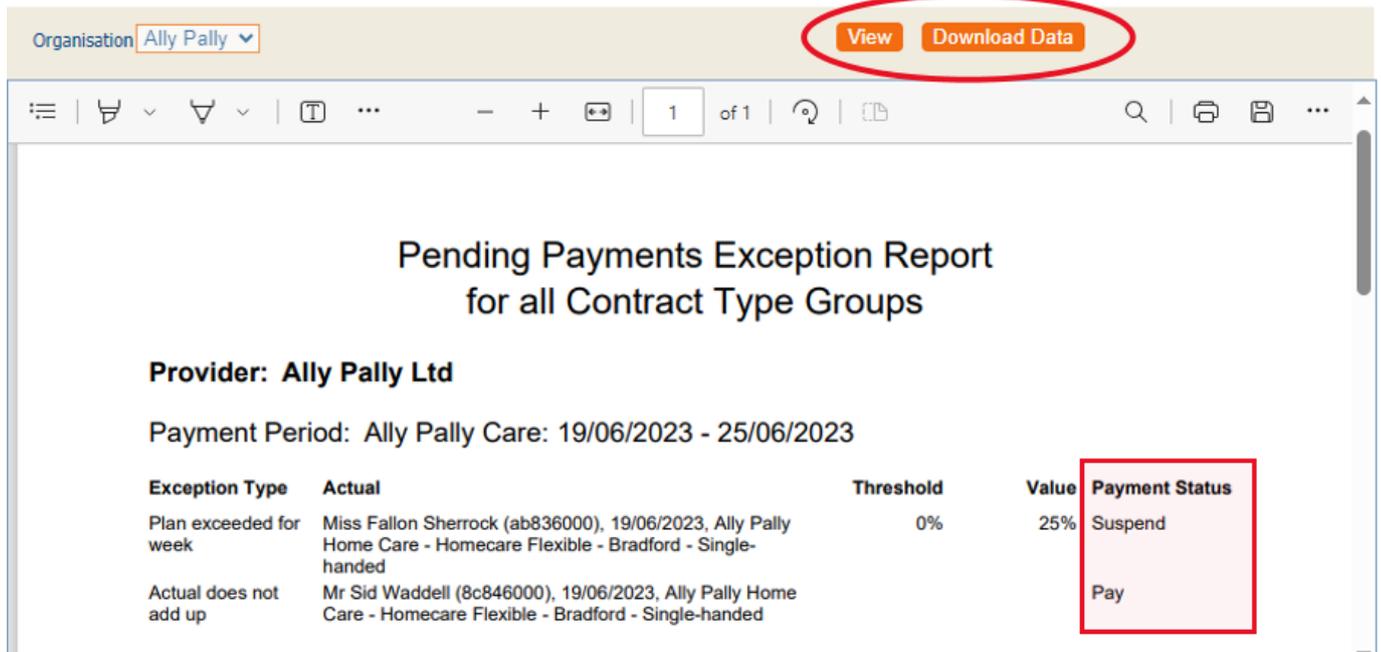
This report requires parameters. Please complete the fields above and press the View or Download Data button.

Pending Payment Exceptions

- This details any exceptions that have been triggered in the current weeks submission
- The payment status shows whether the submission is being considered for payment or suspended
- You can **View** the results on screen or **Download Data** onto a CSV file

Pending Payments Exceptions Report

[Close and return](#)



Organisation: Ally Pally

View **Download Data**

Pending Payments Exception Report for all Contract Type Groups

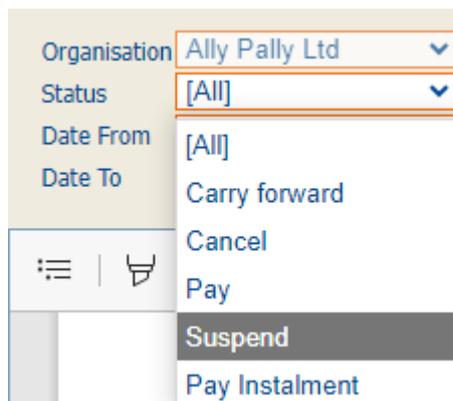
Provider: Ally Pally Ltd

Payment Period: Ally Pally Care: 19/06/2023 - 25/06/2023

Exception Type	Actual	Threshold	Value	Payment Status
Plan exceeded for week	Miss Fallon Sherrock (ab836000), 19/06/2023, Ally Pally Home Care - Homecare Flexible - Bradford - Single-handed	0%	25%	Suspend
Actual does not add up	Mr Sid Waddell (8c846000), 19/06/2023, Ally Pally Home Care - Homecare Flexible - Bradford - Single-handed			Pay

Pending Scheduled Payments

- View pending payments for the current weeks submission and the payment status
- You can **View** the results on screen or **Download Data** onto a CSV file
- You can filter on the status using the drop-down if required



Organisation: Ally Pally Ltd

Status: [All]

Date From: [All]

Date To: Carry forward

Cancel

Pay

Suspend

Pay Instalment

Organisation:

Status:

Date From:

Date To:

From 19/06/2023 to 25/06/2023

Type	Homecare		
Provider	Ally Pally Ltd	Contract	Ally Pally Care
For Period	19/06/2023 - 25/06/2023	Due	23 June 2023

Client	Service	Amount (ex. VAT)	VAT Amount
Item Notes	Item Dates	Status	
Bristow, Eric (96836000)	Ally Pally Home Care	£180.00	£0.00
Homecare Flexible - Bradford - Double-handed (Hour), Spot. Budget 'RGVQ-5840'	19/06/2023 - 25/06/2023	Pay	£40.00
Homecare Flexible - Bradford - Single-handed (Hour), Spot. Budget 'RGVQ-5840'	19/06/2023 - 25/06/2023	Pay	£140.00
Sherrock, Fallon (ab836000)	Ally Pally Home Care	£0.00	£0.00
Adj. Homecare Flexible - Bradford - Single-handed (Hour), Spot. Budget 'RGVW-5840'	19/06/2023 - 25/06/2023	Suspend	£10.00
Homecare Flexible - Bradford - Single-handed (Hour),	19/06/2023 -	Suspend	£40.00

Remittance Advice Provider Payments

- You can view any remittance advice report
- Use the drop-down menu for period to select the week you wish to view
- You can **View** the results on screen or **Download Data** onto a CSV file

Contract:

Payment Method:

Period (* Partially finalised payment periods):

Summary:

This report requires parameters. Please [Download Data](#) button.

- If you only require a summary of total amount per client, tick the summary box, otherwise leave unticked

Contract:

Payment Method:

Period (* Partially finalised payment periods):

Summary: