



Provider's Guide

SPOCC.Net 7

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1 Introduction

The process of data submission to the Supporting People team by Providers can be extremely labour intensive.

The SPOCC program is Oxford Computer Consultants' contribution to the SP programme which equips local authorities with the tools they need to manage their participation in the Supporting People initiative and improve the provision of support services.

The inclusion of Internet access for the purposes of data exchange is seen as an important development to help reduce workloads and streamline the business processes between the SP team and the Provider.

SPOCC.Net does this by providing a secure online link between the Provider and the SP team, which will both reduce the time spent on data exchange and help eliminate the possibility of data errors.

2 What's New in SPOCC.Net Version 7.0?

2.1 New Feature: Edit Client Information for all current clients

SPOCC.Net now enables the provider to view and edit the client information for all the current clients from the 'Manage Services' section. Subsequently, there is a new 'Client Details' tab on Manage Service screen.

Clicking on the name of the Client you wish to manage will open the Update Client Details screen. All the changes waiting to be accepted by the Support Team for a particular client can be examined by using the 'X change(s) pending' links in the Client Details tab.

2.2 New Feature: User Assignments can be managed by the Provider

SPOCC.Net now allows Users (with appropriate permission) to manage the Services, Contracts, etc that their Provider's Users are assigned to. For example; Users can be assigned to new Services, moved from one Service to another, or have their login revoked.

In SPOCC.Net version 6.0, the Provider could only edit the details of a User, not change their assignments or revoke their login.

2.3 Enhanced: Include/Exclude Non-Current Items

SPOCC.Net has now moved this functionality directly onto the "Client Schedules" tab and changed the checkbox to a command button so it is more readily available. There is also an additional button on the new "Client Details" tab.

These buttons will either read "Include Non-Current Items" or "Exclude Non-Current Items" depending on which way the option is currently set. The buttons on the two tabs will always read the same, so clicking one will reload the results on both tabs, keeping the items displayed in synch.

In SPOCC.Net version 6.0, the "Include client schedules which have ended" checkbox was only available from the initial "Manage Services" page.

2.4 Enhanced: Support for QAF Lite and QAFs for multiple Services

SPOCC.Net now allows Providers to create QAF Lites for Small Providers, Sole Traders and Community Alarm Services. They also have the option to create one QAF that spans multiple Services and there is more space for evidence remarks in their submission.

In SPOCC.Net version 6.0, you could only create Standard QAFs for single Services.

2.5 'Request New Schedule' is available at the top and bottom of the Client Schedules list

SPOCC.Net now has a copy of the "Request New Schedule" link to be available at the top of the page, below the tab label and sub-heading 'Client Schedules'. The provider now no longer needs to scroll down to the bottom of the web-page if they happen to have a long list of Client Schedules.

In SPOCC.Net version 6.0, the "Request New Schedule" link was only available at the bottom of the screen with the 'Client Schedules' tab, above 'return to secure services'.

2.6 'Request Update' is available at the top of the Service Details list

SPOCC.Net has now moved the "Request Update" link to be available at the top of the page, below the tab label and sub-heading 'Service Details'. The provider now no longer needs to scroll down to the bottom of the web-page if they happen to have a long list of provider specified availability forms (*one per service level, if the LA concerned has purchased the 'Service availability at Service Level' module*).

In SPOCC.Net version 6.0, the "Request update" link was only available at the bottom of the screen with the 'Service Details' tab, above 'return to secure services'.

2.7 Change: Client 'Reference' now has it's own column

SPOCC.Net now has an additional column specifically to display the Client Reference, labelled 'Reference' that lies to the left of the 'Service Level' column for each client specified.

This can be seen in two instances on the Service screen:

- In the table of clients scheduled for a service (i.e. on the 'Client Schedules' tab)
- In the table of client details for a service (i.e. on the new 'Client Details' tab)

In SPOCC.Net version 6.0, the Client 'Reference' was only shown if it existed, and was difficult to read as it was simply appended to the client name in square brackets.

2.8 Change: Total No. of current schedules now has correct label

Beneath the Client schedules table there is a total figure which is still calculated, as it was in previous versions of SPOCC.Net, to be the total number of current schedules. The label attached to this figure has been changed to correctly read "Total Number of Current Schedules: X".

In SPOCC.Net version 6.0, the label had read "Total Clients with Current Schedule: X" which is incorrect as the number of current schedules is not necessarily the same as the number of current clients as each client may have more than one schedule with the service.

i.e. our initial label had remained the same since the early releases of SPOCC.Net, when it was assumed that there was only one schedule per client.

3 Overview

SPOCC.Net enables two distinct on-line functions.

- 1) **Secure Services** (each Provider will only have access to their own data):
 - a. Providers can download copies of their PI workbooks which will be pre-populated with their core data, thus helping to eliminate errors. The workbooks can then be completed with current data changes and submitted to the SP team who can examine the contents before deciding to import. (See sections [6.2](#) & [7.4](#))
 - b. Providers can also submit changes to Client Schedules e.g. New Clients, Ending service etc (See sections [7.1](#) & [7.1.2](#)) and examine the status of such submissions (See section [7.3](#))
 - c. Providers can submit changes to Service Details, Properties and Contacts
 - d. Providers can Manage Referrals (where the LA has purchased the Client Needs / Referrals module)
 - e. QAFs can be created, edited and submitted (See section [7.1.5](#))
 - f. Providers can download copies of such monthly reports that the LA permits. (See section [6.1](#))

Please note that data submitted to the LA via SPOCC.Net is not automatically entered into the SPOCC system. Submissions are made and can be Accepted or Rejected by the SP team; in either case the Provider can check on-line the status of the submission. (See section [7.3](#))

- 2) **Public Services:** Allows the public (e.g. Social Workers, Service Users) to search for Services. No password is required for this service.

The criteria *Include services with no available places* allows the users of the site to find all the services that have places available as specified by the provider (or include those which do not)

Sensitive Services (e.g. Women's Refuge) have the option of either not displaying any contact details (i.e. address, 'phone number etc) or of not appearing at all in public searches.

N.B. These 'confidential' settings are controlled by the SP team and you should discuss your requirements with them.

3.1 Intended audience

This guide is aimed at Providers who are users of the SPOCC.Net system and is intended to cover most of the basic processes that the User will encounter. This will include the submission of data concerning changes to Client schedules, the downloading and uploading of Performance workbooks, the downloading of periodic reports and the administration of SPOCC.Net Users & Contacts and their passwords and User names.

3.2 SPOCC.Net Privacy and Security Policy

Your local authority's statement regarding the Privacy and Security of SPOCC.Net can be examined by clicking on the SPOCC.Net *privacy and security policy* text on either the Login or Secure Services home pages.

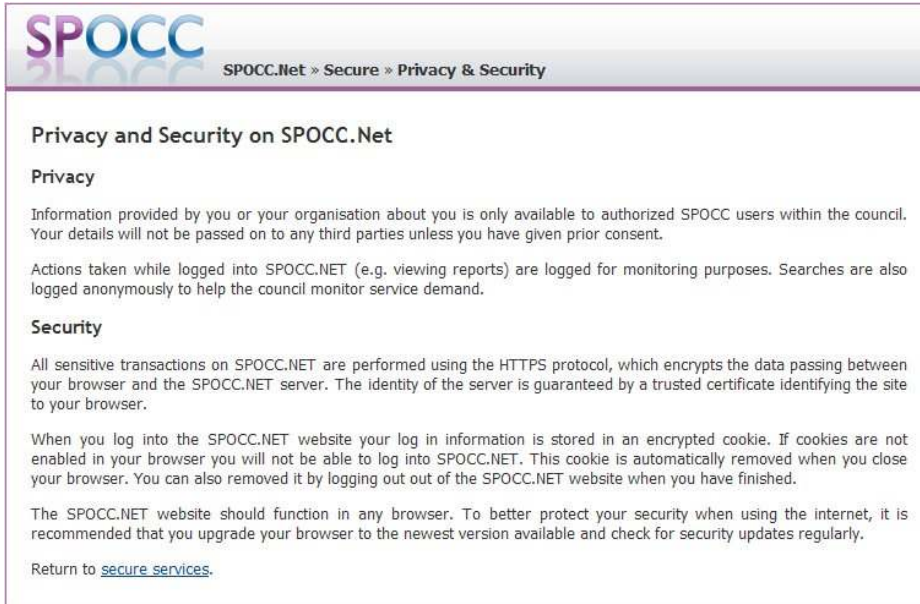


Figure 1 Privacy & Security on SPOCC.Net

3.3 Navigating the site.

Click on the links to navigate to your desired location.

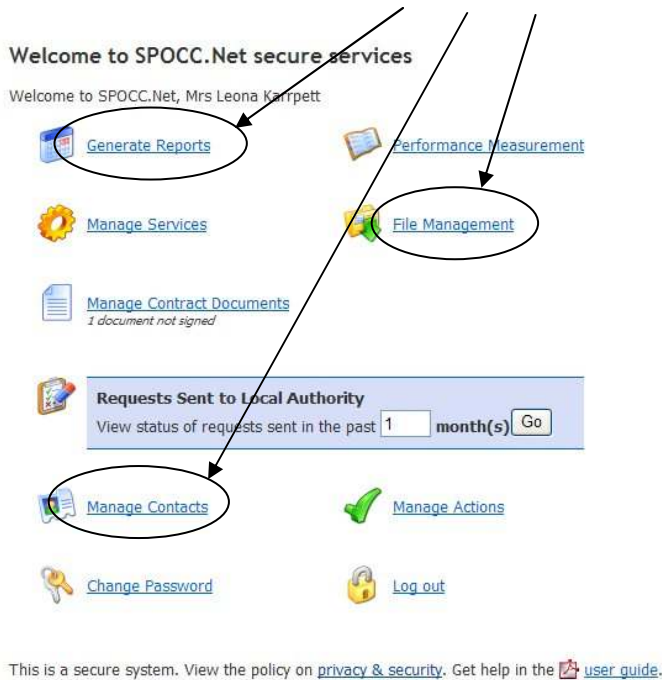


Figure 2 Navigation hyperlinks

Click on any point in the 'breadcrumbs' trail to return to previously visited screens

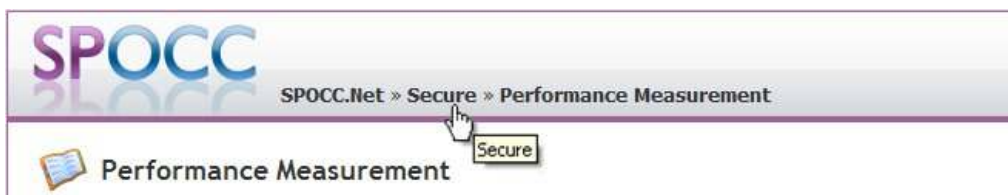


Figure 3 'Breadcrumbs'

Clicking on the return to 'secure services' text when it is displayed will return you to the Secure Services home page.



Figure 4 The text link back to the Secure Services home page

3.4 Mandatory fields

Mandatory fields in SPOCC.Net are in **bold type** and must be completed before any submission. If you fail to comply you will receive a reminder as below:

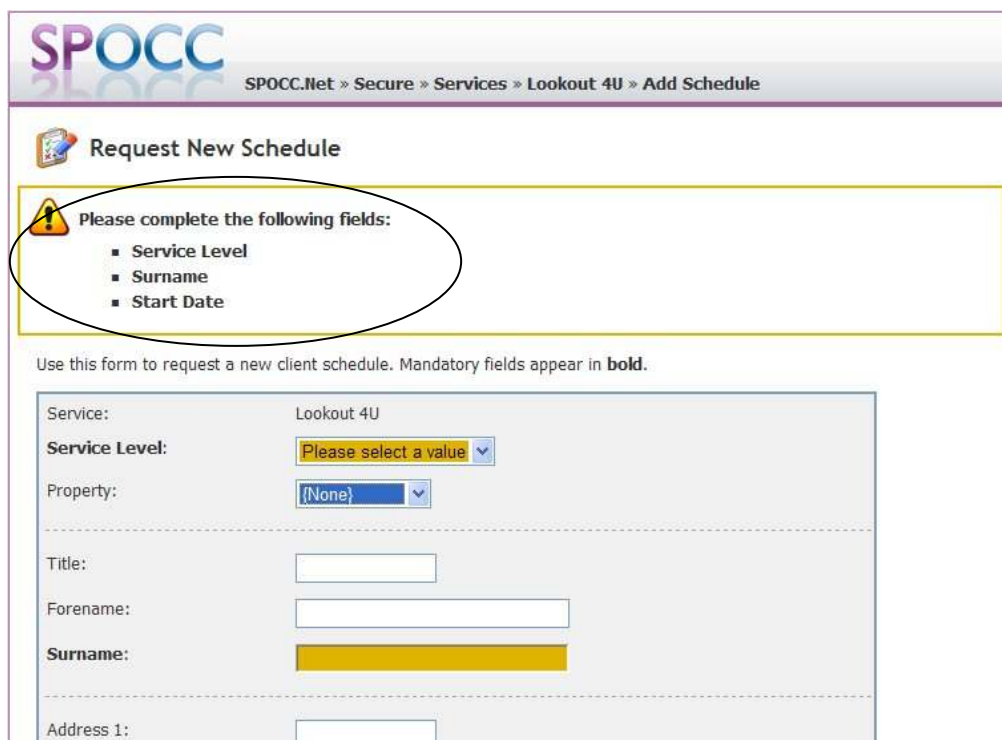


Figure 5 Reminder that a Mandatory Field has not been completed.

4 Obtaining a Login

In order to use the Secure Services part of SPOCC.Net it is necessary to obtain a login from the SP team. This can be applied for by e-mail to the SPOCC.Net administrator at your LA. who will supply you with both a User name and Password.

Figure 6 Requesting a Log - in (1)

You will be taken to this screen where you should fill in the requested details.

Figure 7 Requesting a Log - in (2)

Your new login details will be sent to the email address that you supply.

4.1 Forgotten your Password?

If you have forgotten your password you should click on the appropriate link and follow the instructions; you will receive an e-mail from the SP team with your current password.

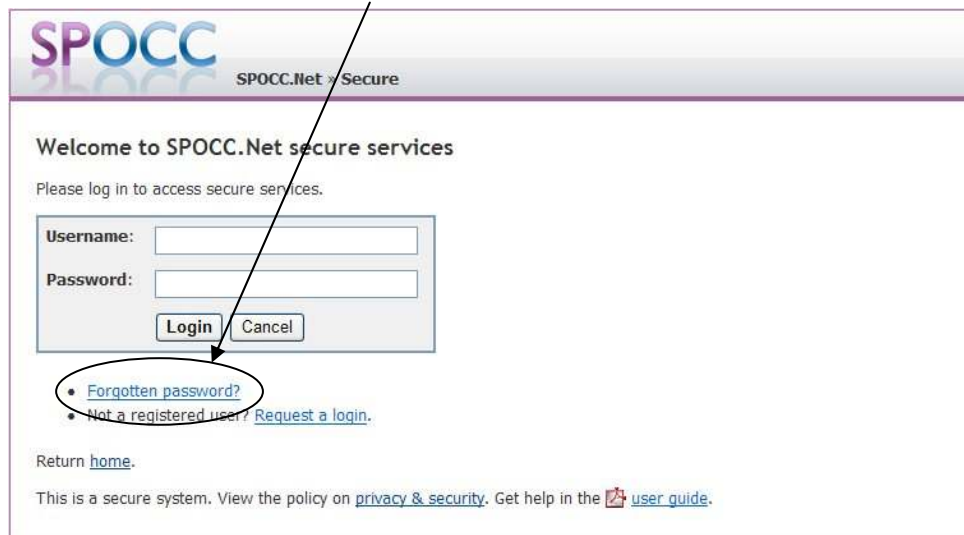


Figure 8 Forgotten Password?

4.2 Changing your Password

Once logged in you can change you own password; first click on the *Change Password* link on the Welcome screen:



Figure 9 The 'Change Password' link

Enter your new password in both boxes and click on the *Change Password* button to complete the change.



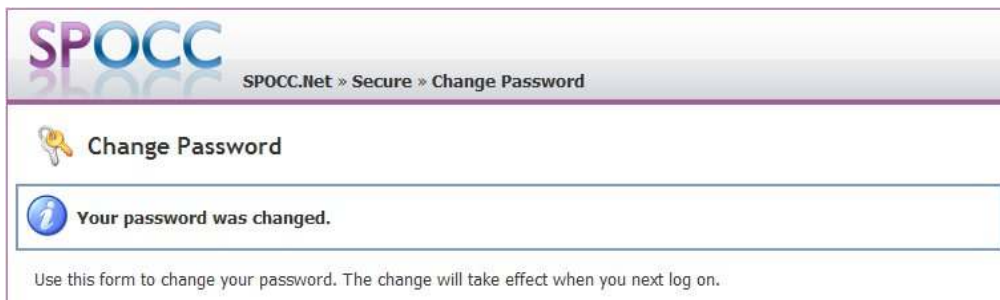
The screenshot shows the SPOCC Change Password form. At the top, the SPOCC logo is on the left, and the breadcrumb "SPOCC.Net » Secure » Change Password" is on the right. Below the logo is a key icon and the title "Change Password". A message reads: "Use this form to change your password. The change will take effect when you next log on." The form contains a table with the following information:

Name:	Mrs Leona Karrpett
Username:	LKarrpett
Current Password:
New Password:
Confirm New Password:

At the bottom of the form are two buttons: "Change Password" and "Cancel". Below the form is a link: "Return to [secure services](#)."

Figure 10 Enter the new Password and confirm it by writing it a second time

The text will confirm the action



The screenshot shows the SPOCC Change Password form after successful completion. The SPOCC logo and breadcrumb "SPOCC.Net » Secure » Change Password" are at the top. Below the key icon and title "Change Password", a message box with an information icon contains the text: "Your password was changed." Below this message box is the same instruction: "Use this form to change your password. The change will take effect when you next log on."

Figure 11 Confirmation that your Password has been changed.

5 Logging on

Log on by navigating to the SPOCC.Net home page for your LA. Click on the 'Access secure services for providers' link.



Figure 12 Logging on to secure services

The home page will look something like this (it will probably be customised by your LA but will still contain the options shown here)

Enter your Username and Password in the places indicated and press 'Login'.



Figure 13 Enter your log in password

Your local authority will stipulate the length of time that your password remains valid. If it needs changing you will receive a prompt; if your password has expired you will need to contact your LA.

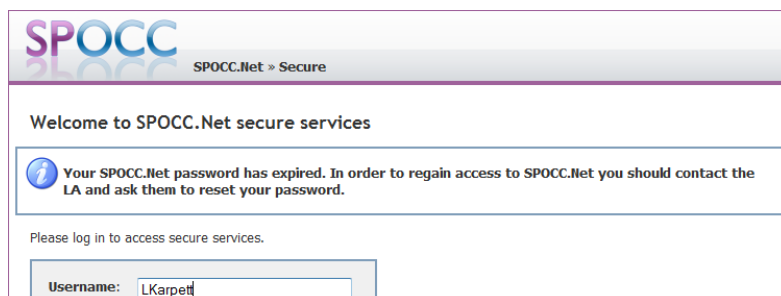


Figure 14 Expired Password reminder

NB You will be denied access to the website unless you change your password. After a set number of days, specified by your LA, your password will expire and you will need to apply to have it re-allocated.

5.1 The Secure Services Home page



Figure 15 The secure services homepage – The ‘Welcome’ screen

The options open to the User are almost all accessed via the Secure Services home page. From here you can:

- Generate Reports
- Manage Services(Client Schedules/Service Details/ QAF submissions)
- Manage Contract Documents
- View the status of requests you have sent to the Local Authority in the last ‘x’ months.
- Upload/Download Performance Measurement Workbooks
- Upload/Download Service Rich data workbooks
- Manage Contacts
- Manage Actions
- Change your Password
- Log out
- View the SPOCC.Net privacy and security policy
- SPOCC.Net User Guide

5.2 Limiting Accessibility

If a Provider has requested that SPOCC.Net access be limited and the SP team has activated this then access to SPOCC.Net for a Provider’s Contacts will be limited as follows:

- If a Contact is assigned Organisation Contact – *access to all Services for the Provider.*
- If a Contact is assigned Service Manager, Emergency Contact, Self-referral, Out of Hours or Self-referral Office Hours – *access limited to those Services covered by the assignments.*

E.g. Service Manager for Service A will only be able to manage the affairs of Service A; Service Manager for Service B who is also Emergency Contact for Service A will be able to manage the affairs of both Services A & B

- If a Contact is assigned Contract Contact – *access limited to those Services covered by the Contract(s) (and the Contract(s) themselves) for which the Contact is assigned as Contract.*

This security limits (a) the Services that a contact can manage, (b) the Contracts with Contract Documents that a contact can manage, (c) the Services actually shown in the Generated Reports and (d) the Services to which the Contact can assign other Contacts.

5.3 Managing Contacts

If your login has permission to manage Contacts in SPOCC.Net, you can make changes to a Contact's details or add new Contacts by navigating to the *Manage Contacts* area. As with many areas of SPOCC.Net this is accessed via the Secure Services home page:



Figure 16 The 'Manage Contacts' link on the Secure Services home page

Clicking on the 'Manage Contacts' link (the text itself) will open the Manage Contacts overview screen:

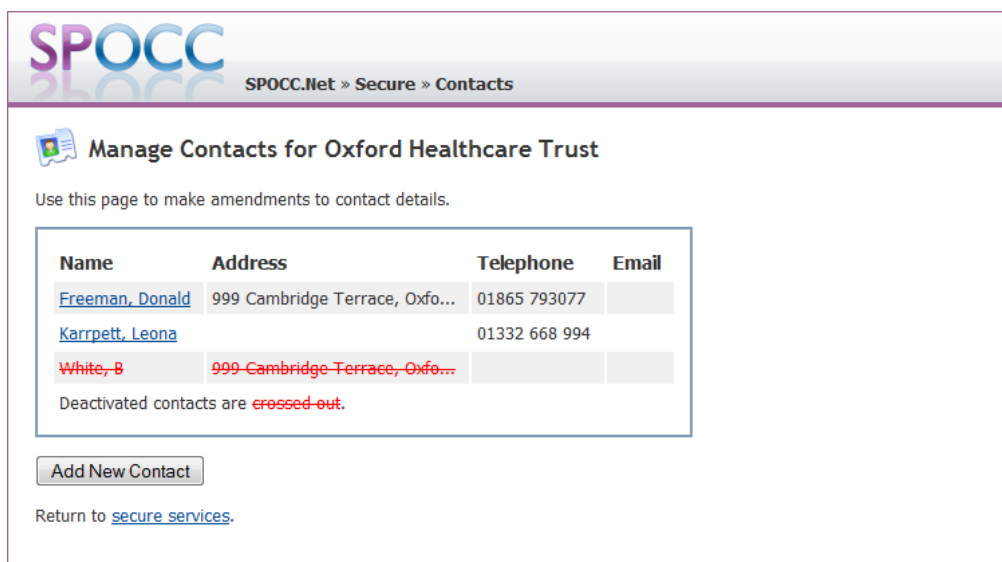


Figure 17 The 'Manage Contacts' overview screen

The Manage Contacts screen will contain a list of all current Contacts who have been given SPOCC.Net access. Any Contacts **crossed-out** have been deactivated by the LA, they can be reactivated but you will need to contact the LA to ask them to do it.

5.3.1 Editing a Contact's Details

You can edit the details by clicking on the Contact's name, which will open an 'Edit Contact' screen for that specific Contact; this screen will display the current details for this Contact, as held in the SPOCC system.

The image displays two side-by-side screenshots of the 'Edit Contact Details' form in the SPOCC system. The left screenshot shows the initial state with a dropdown menu for 'Type' open, listing roles like Admin, Finance Director, Secretary, Service Manager, and Telephonist. An arrow points to this dropdown. The right screenshot shows the same form after editing, with the 'Type' dropdown closed and the 'Request Comment' field containing the text 'new mobile and email'. Both forms include fields for personal details, contact information, address, and login permissions.

Figure 18 Editing the details of an existing Contact

5.3.2 Assigning a Contact to a Role

One change you may want to make is to change the Services to which this Contact is assigned. To make a new assignment, click the *Add* button to the right of the *Assigned To* list. You'll first be asked to select the role you want to assign this Contact to; the following choices are available:

- Contact for organisation
- Service Manager for service
- Emergency contact for service
- Self Referral Office Hours contact for service
- Self Referral Out of Hours contact for service
- Service SPOCC.Net Manager for service [only available if provider access restrictions are enabled]
- Contact for contract
- Contact for accreditation

Make your choice and click the *Select* button. You will then be shown a list of all the entities (organisation, services, contracts, or accreditations) appropriate for the role you chose. If any of the entities in the list currently have a Contact assigned to them then you will see a note next to the item saying “(currently assigned to xxx)”, where xxx is the name of the Contact.

Choose the assignments you would like to make by selecting from the entities in the list by clicking on them. You can select more than one by holding down the Ctrl key on the keyboard while you click.

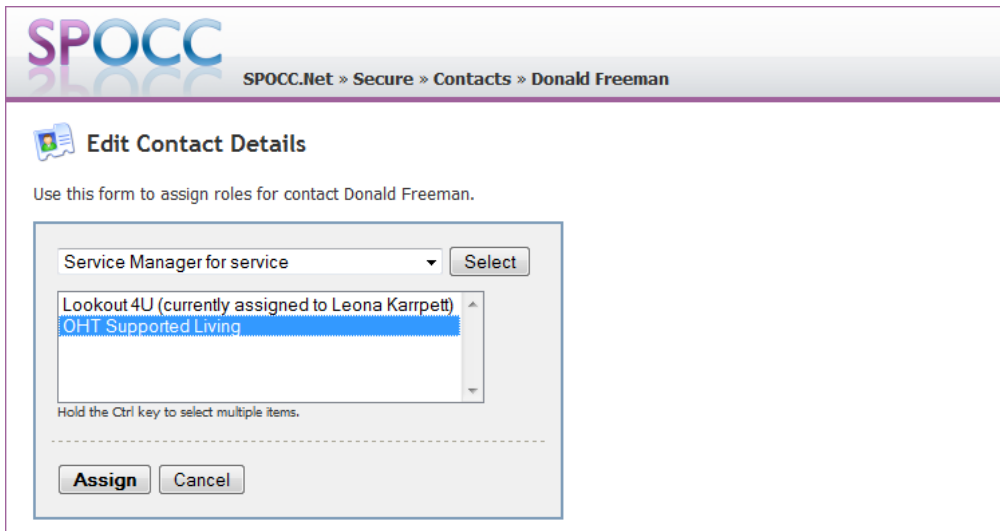


Figure 19 Assigning a Contact to a new role

Once you have made your choice, click on *Assign* and you will be returned to the main *Edit Contact Details* screen, where your change will be reflected in the *Assigned To* list.

To remove an assignment, simply select the assignment from the *Assigned To* list and click the *Delete* button to the right.

5.3.3 Requesting Changes to a Contact

Once you have made whatever changes are required, add any explanatory text to the Request Change field (for this individual submission) and then click on the 'Save Changes' button. Your request for changes to the Contact's details will be sent to the SP team. The status of the request (i.e. 'pending') will be shown against the Contact's name on the Manage Contacts overview screen:



Figure 20 The change is 'pending'

Whilst the status is still set to 'pending' the proposed changes can be viewed by clicking on the '1 change pending' text link which will open the 'Changes to Contact screen.

SPOCC
SPOCC.Net » Secure » Contacts » Changes to Contact

Changes to Contact

Values that have been removed or replaced are ~~crossed-out~~ and new values are **highlighted**.

Karrpett, Mrs Leona

Type: Update (Pending) Submitted: 10 November 2008 at 18:44

Active	True
Title	Mr
Forename	Donald
Surname	Freeman
Telephone	01865 793077
Mobile	07755 666555
Email	donfreeman2@555.org.uk
Position	Contract Contact
AssignedTo	• Contact for contract OHT 223
Address1	999 Cambridge Terrace
Town	Oxford
Postcode	OX99 9HN
Confidential	False
DisabledAccess	Not Set
HasAccessToSpoccllet	False
Comments	new mobile and email

Return to [secure services](#).

Figure 21 Visual changes to Contact

Any entries that have been removed or replaced will be ~~in red type and crossed out~~; new submissions will be **highlighted in bold**.

Once the SP team have accepted the changes the new information will be entered in the SPOCC system and this 'pending' change will disappear from the Manage Contacts overview screen.

5.3.4 Adding a New Contact

A similar process is carried out when adding a new Contact. From the Manage Contact overview screen click on the 'Add new Contact' button then add the new Contact's details. When all the details are entered you should click on the 'Add Contact button to submit them to the SP team.

SPOCC
SPOCC.Net » Secure » Contacts » Add New

Add New Contact

Enter new contact details and click save. Mandatory fields appear in **bold**.

Title	<input type="text"/>		
Forename	<input type="text"/>		
Surname	<input type="text"/>		

Telephone	<input type="text"/>	Mobile	<input type="text"/>
Fax	<input type="text"/>	Pager	<input type="text"/>
E-mail	<input type="text"/>	Web Address	<input type="text"/>

Position	<input type="text"/>		
Type	<input type="text" value="Admin"/> <input type="text" value="Finance Director"/> <input type="text" value="Secretary"/> <input type="text" value="Service Manager"/> <input type="text" value="Telephonist"/>		
<small>Hold the Ctrl key to select multiple types.</small>			
Assigned To	<input type="text"/>	<input type="button" value="Add"/>	

Address 1	<input type="text"/>		
Address 2	<input type="text"/>		
Address 3	<input type="text"/>		
Address 4	<input type="text"/>		
Town	<input type="text"/>	Postcode	<input type="text"/>
UPRN	<input type="text"/>	USRN	<input type="text"/>

Directions	<input type="text"/>		
<input type="checkbox"/> Confidential	Disabled Access	<input type="text" value="Not Set"/>	
<input type="checkbox"/> Contact can log in to SPOCC.Net	Username	<input type="text"/>	

Request Comment:	<input type="text"/>		

<input type="button" value="Add Contact"/>		<input type="button" value="Cancel"/>	

Figure 22 The 'Add New Contact ' screen

N.B. The process of requesting a SPOCC.Net login and password management is described in section 4

5.3.5 Deleting a Contact

To delete a Contact, click on the Contact's name, which will open an 'Edit Contact' screen, and click on the *Delete this Contact* button at the bottom of the page.

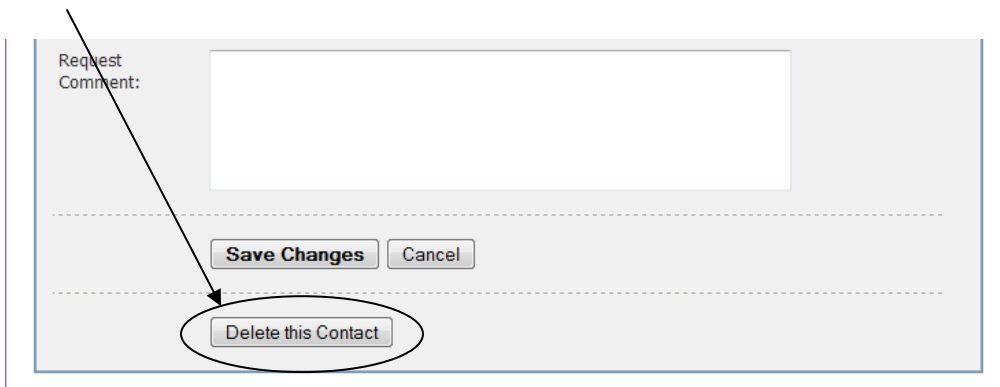


Figure 23 Delete this Contact

You will be alerted if the Contact is currently assigned to anything, but these are just warnings, you will still be able to request the change by filling in any comments for the LA and clicking on the *Delete* button to submit the request.

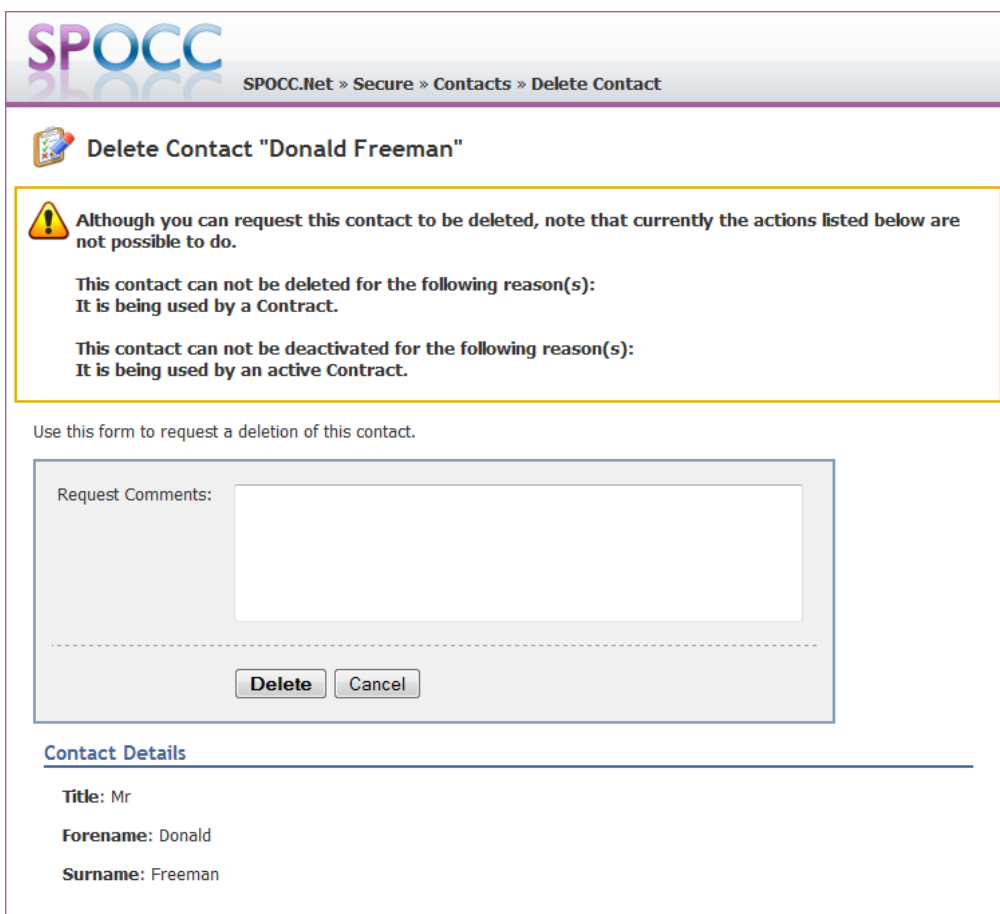


Figure 24 Delete Contact screen

5.4 Managing Referrals

N.B. This functionality will only be active where the LA concerned has purchased the Client Referral module.

The service needs of a Client can be assessed by an LA's Client Placement team and the team can 'refer' Clients to appropriate Services for acceptance (or rejection) by the Provider of that Service.

Details are of the referral are passed online to the Provider(s) who, having logged on to SPOCC.Net, can access them via the Manage Referrals function.

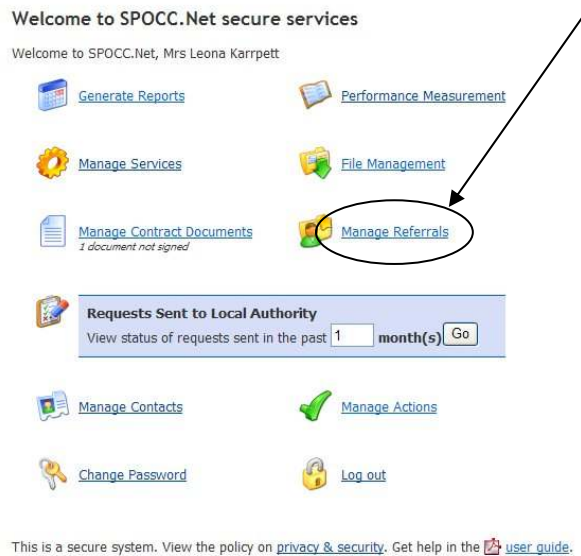


Figure 25 The Manage Referrals link on the Provider's SPOCC.Net screen

By default active referrals will be listed but the Provider can choose to see previous referrals by making changes to the 'date from' field:

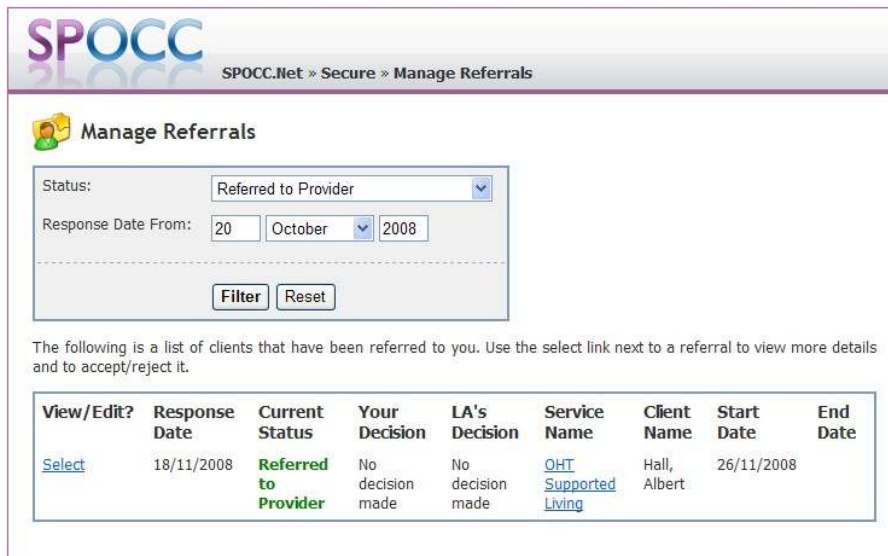


Figure 26 The Provider's Manage Referrals area

The Provider can open a Referral by clicking on the *Select* text beneath the 'View/Edit?' heading.

Only the Referrals for those services available for the contact currently logged in are visible in the list. Please see Chapter 5.2 - Limiting Accessibility.

SPOCC
SPOCC.Net » Secure » Manage Referrals » Referral Details

Referral Details

Current Status: Referred to Provider
This client will be placed with a service on 18/11/2008.
 Please make a decision before this date.

Decision: Rejection Reason:

Comments:

Referral Details

LA's Decision: No decision made
Service: OHT Supported Living
Service Level: 1 - 1 (1949)
Start Date: 26/11/2008
Units Per Week: 1

Client Details

Forename: Albert **Current address:** (address confidential)
Family Name: Hall **Mobile:**
Gender: M **Tel:** 0207 555 666889
NI Number: AB 12 34 56 **Needs Assessment Report:** The client does not have a completed needs assessment.
 Z
Housing ID: 1234 56789
HB ID: 1234 56789
SSID: 1234 56789
Date of Birth: 07/04/1987
Age: 21

Ethnicity, Culture & Religion

Ethnic Origin:
Religion:

Services

Service	Service Level	Property	Start Date
Lookout 4U	1 (1943)		02/10/2003

This client is receiving services from other providers.

Support Needs

Primary Client Group:
Secondary Client Groups:
Excludable Groups:

Figure 27 Referral details

Details of the referral include the date by which the Provider should respond and is noted in the phrase under the Current Status field which reads "This client will be placed with a service on **/**/****". The response date is normally 7 days from the day the referral was created or the day before the client should start the service for emergency placements..

In addition to the Referral and Client details, the Provider(s) can see the following information about the Client (where these values have been entered in SPOCC):

- Ethnicity, Culture & Religion
- Client Contact (inc. an optional link to their Needs Assessment Report, if any exists)
- Existing Services
- Other referrals for this service
- Support Needs (from the Client Needs & Groups tab)

The Provider(s) may then respond by setting the:

- *Status* of the referral (by selecting from the 'Decision' list)
- *Reject reason* (mandatory if Client is declined)
- *Comments* can be added

The Provider clicks on Save to action the response; this is reflected in the Referral item:

View/Edit?	Response Date	Current Status	Your Decision	LA's Decision	Service Name	Client Name	Start Date	End Date
Select	18/11/2008	Referred to Provider	Accepted client	No decision made	OHT Supported Living	Hall, Albert	26/11/2008	

The provider may change their response until the LA wishes to make a decision about the referral. On the Decision Date the Client Placement team will then review all the referrals for the specified client and can convert the accepted Referral into a Scheduled Service.

Note that this approach allows several Providers to accept the same Client and still lets the Client Placement / SP team choose the most appropriate Service for the Client (which may not have been the first to accept).

Furthermore, depending on the policy of your LA you can select the Needs Assessment reports for a given client from the Referrals page:

If the client has any completed Needs Assessments in SPOCC (part of the optional Client Needs Assessments and Outcomes module) then the Providers will be able to open the Client's Needs Assessment Report from the 'Download Report' button in the Client Details section:

Client Details	
Forename: Albert	Current address: (address confidential)
Family Name: Hall	Mobile:
Gender: M	Tel: 0207 555 666889
NI Number: AB 12 34 56 Z	Needs Assessment Report: <input type="button" value="Download Report"/>
Housing ID: 1234 56789	
HB ID: 1234 56789	
SSID: 1234 56789	
Date of Birth: 07/04/1987	
Age: 21	

Figure 28 Referral details can include the Client Needs Assessment Report

Alternatively, if the Client doesn't have any completed Needs Assessments then a message will appear instead of the 'Download Report' button:

Client Details	
Forename: Albert	Current address: (address confidential)
Family Name: Hall	Mobile:
Gender: M	Tel: 0207 555 666889
NI Number: AB 12 34 56 Z	Needs Assessment Report: The client does not have a completed needs assessment.
Housing ID: 1234 56789	
HB ID: 1234 56789	
SSID: 1234 56789	
Date of Birth: 07/04/1987	
Age: 21	

Figure 29 Referral details can confirm if a Client has no completed Needs Assessments

5.5 Managing Actions

Actions are timed tasks that are set by the SP team at your local authority and need to be completed by the assigned person within a specified time frame

Such Actions that have been ascribed to one of a Provider's Contacts can be managed by clicking on the 'Manage Actions' link on the Manage Service screen which will open the Manage Actions screen..



Figure 30 The 'Manage Actions' button on the Manage Secure Services screen

Any current actions will be listed. This list can then be limited to either Actions for the logged on User or for the Service as a whole. Check the appropriate box and click on the Filter button to limit the list.

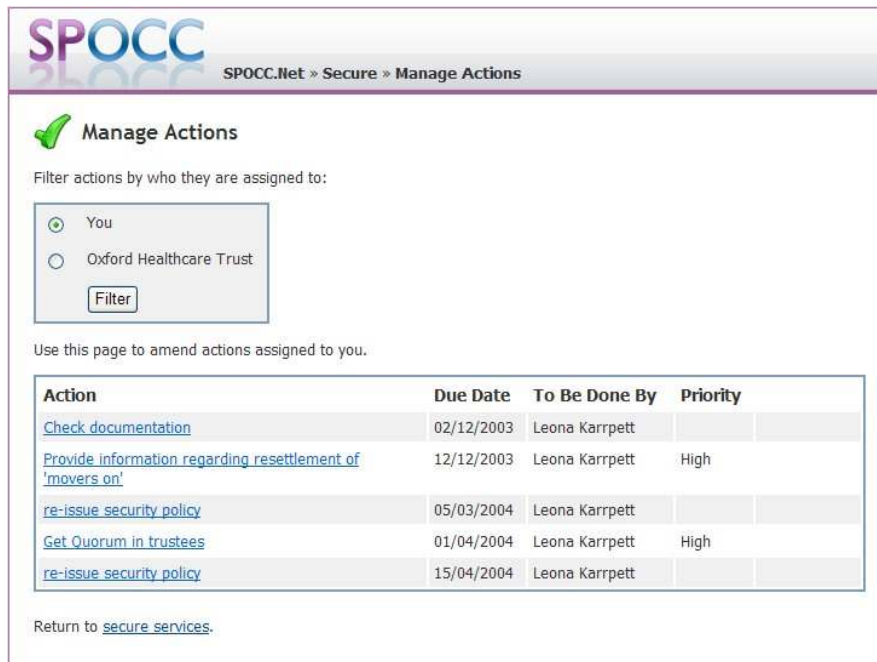


Figure 31 The Manage Actions screen

The Action can then be opened for editing purposes by clicking on the text link which is displayed beneath the Action title.

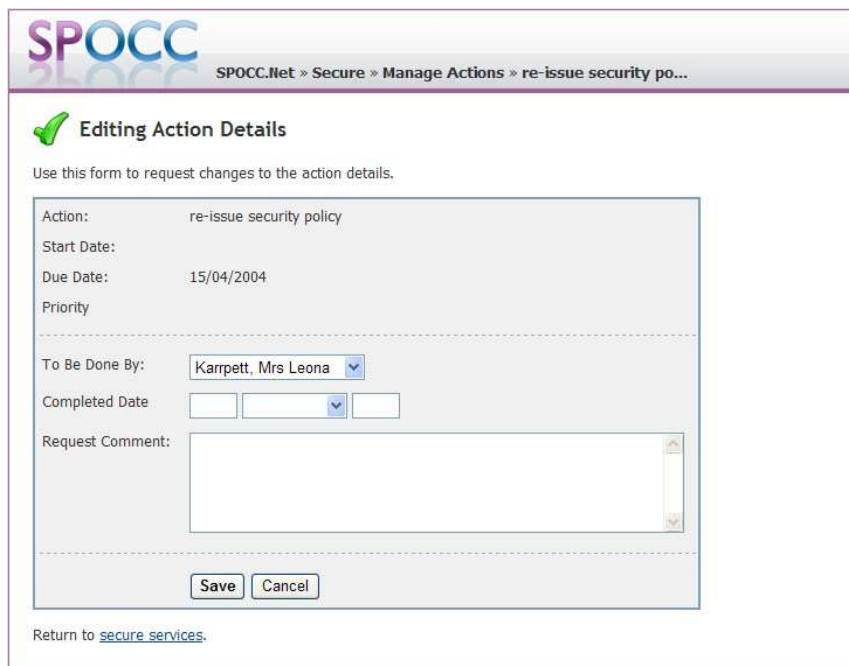


Figure 32 Editing an Action

From the Editing Action Details screen the User can either add a Completed Date if the Action has in fact been completed or re-assign the Action to a colleague. A *Request Comment* field enables you to add notes about the request*

Click on the Save button to complete the edit or Cancel if appropriate.

- N.B. These Request Comments are stored in SPOCC with the request and *not* the Action; as the name suggests they are intended to be comments about the request rather than comments about the Action.

6 Downloading

SPOCC.Net gives the Provider the possibility of downloading various items directly from the SPOCC system. You should first click on the 'Download schedules' link on the Secure Services home page.

6.1 Reports

In order to download your reports you should first click on the 'Generate Reports' link on the Secure Services home page which will take you to the Generate Reports screen.

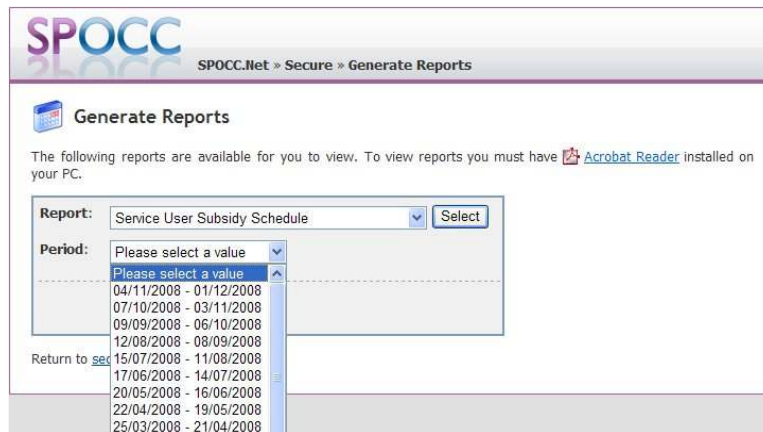


Figure 33 The Generate Reports screen – Period drop-down lists all paid payment periods.

Depending on the policy of your LA you can select and download reports for any paid payment period from the following list:

- External Payments
- Payment Items
- Payment Items with Client Information
- Service Adjustment Schedule
- Service Subsidy Summary
- Service User Adjustment Schedule
- Service User Means Schedule
- Service User Subsidy Schedule
- Service User Subsidy Schedule with Unit Type

e.g. The Service User Subsidy Schedule is requested for the period 26th April '05 – 23rd May '05:



Figure 34 The 'Generate Report' button

Alternatively, depending on the policy of your LA you can select and download client based reports for a given client from the extra list:

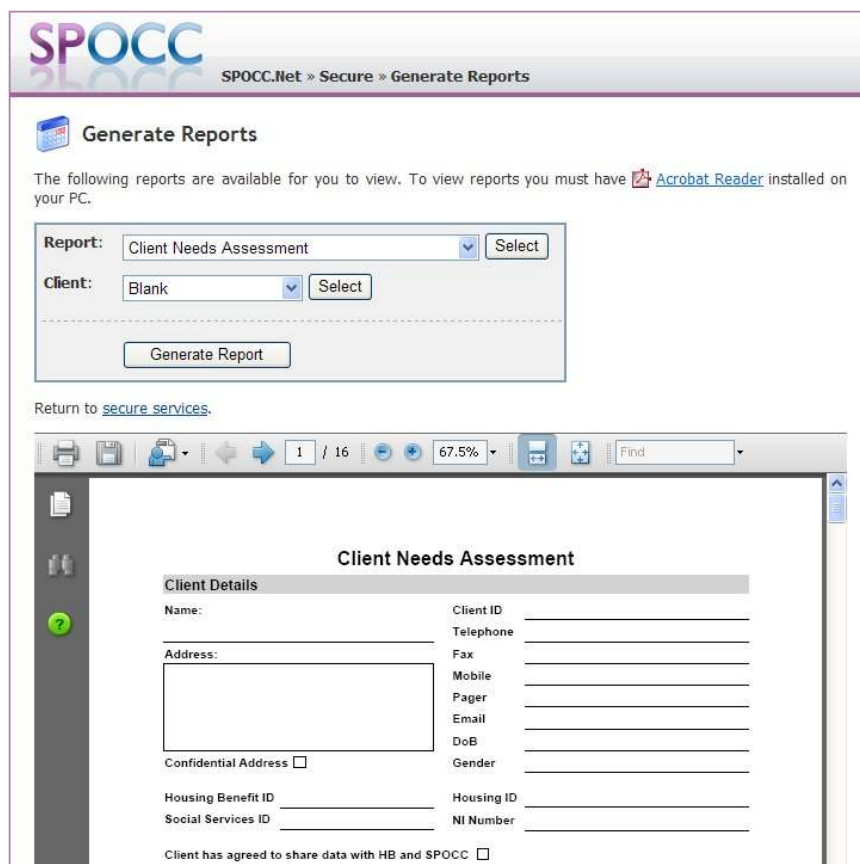
- Clients Needs Assessments (part of the optional Client Assessments and Outcomes module)



Figure 35 The client drop-down is available for client based reports

The provider will only be able to view completed Needs Assessments.
i.e. those assessments whose status has been set to 'Finalised' by the SP Team.

The list of Clients available from the drop-down will have an entry labelled 'Blank' at the top of the list. Select this Blank option to generate an empty 'Client Needs Assessment' report.



When you are ready you should then press the 'Generate Report' button.

If there is no information available for the Report that you are attempting to generate you will receive a message.



Figure 36 'No information is available for the criteria you have requested.'

If the SPOCC system contains the information that you have requested then the Report will be generated and should look like the page shown below.

Only the services available for the contact currently logged in are visible in the report. Please see Chapter 5.2 - Limiting Accessibility.

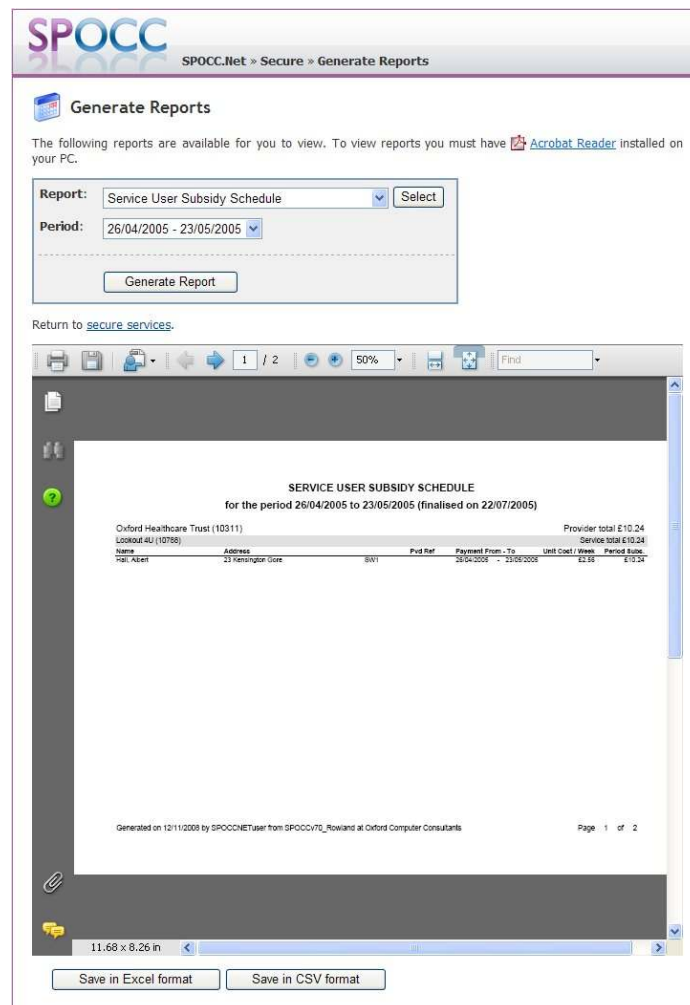


Figure 37 The schedule is generated.

Use the Acrobat task bar at the top of the page to save and/or print your report.

N.B. There are options to save the report as either a Microsoft Excel file or a comma delimited text file are included at the foot of the page.



Figure 38 Save as either a Microsoft Excel or a comma delimited text file if required.

Please note that in order to view reports you will need 'Acrobat Reader' installed on your PC; a link to the Adobe website is included if you need to carry out the installation.



Figure 39 Installing Adobe Acrobat Reader

6.2 Downloading PI Workbooks

The Provider can download a copy of their PI workbook(s) which will be populated with the core data as held on SPOCC, thus helping to eliminate errors and misunderstandings.

These workbook(s) can then be completed with the current data and submitted to the SP team who can examine the contents before deciding whether or not to import them into the main system.

In order to download a PI workbook you should first click on the 'Performance Measurement workbooks' button on the SPOCC Secure Services home page which will take you to the Performance Measurement screen.

secure services.'"/>

Figure 40 The Performance Measurement download screen.

You should use the drop down boxes provided to select the Service, workbook type and the period the workbook should cover. Here we have chosen the Service 'Look out 4', Workbook type 'SPPI(2004)a' and the period 1st April 2005 – 30th June 2005.

Only the services available for the contact currently logged in are visible in the drop-down list. Please see Chapter 5.2 - Limiting Accessibility.

secure services.' is still present at the bottom."/>

Figure 41 Downloading a pre-filled SPPI(2004)a workbook

Clicking on the 'Download' button will now generate the pre-populated workbook ready for you to enter the current details. This workbook should now be saved.

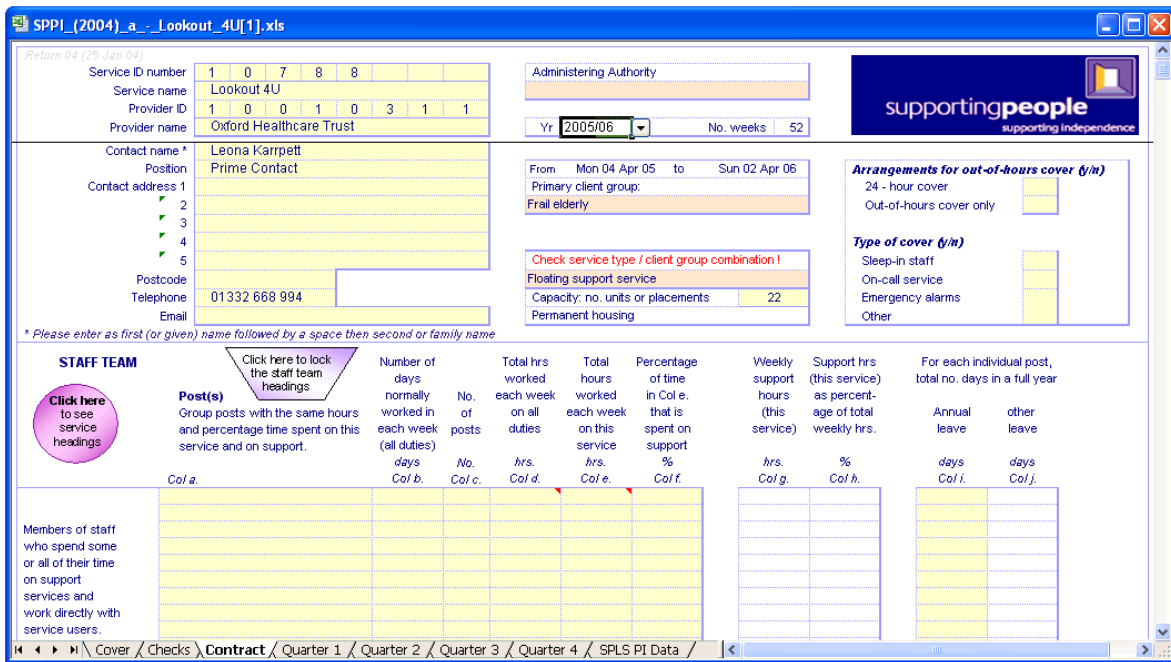


Figure 42 The downloaded workbook

N.B The process of uploading a P.I. workbook for a quarterly submission to the SP team is described in section 7.4

6.3 Downloading Service Rich Data workbooks

The Provider can download copies of the Service Rich data workbook which are populated with such data as currently held on SPOCC.

These workbooks can then be filled with further data and submitted to the SP team who can examine the contents before deciding whether or not to import them into the main system.

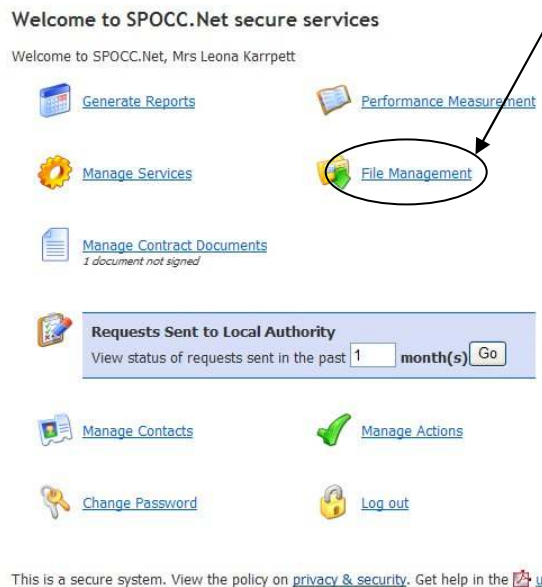


Figure 43 To Download a Service Rich workbook first click on the 'File Management' link

You then need to select the 'Type of Download' and press the 'Select' button (The 'File Type' field should now be automatically filled in).

Select the Service from the 'Selection' drop down list.




Figure 44 Stipulate the 'Type of Download' & 'File Type' and select the Service from the 'Selection' drop down list

When you have made your selection, click on the 'Download' button to complete the process.

6.4 Downloading Provider Data Interchange files

The Provider can download Remittance files, also known as Provider Data Interchange, or PDI, files which are populated with the client data that is currently stored in SPOCC.

N.B. Despite the fact that both the PDI Remittance file saved in the download and the PDI file used in the upload to SPOCC are both CSV, or comma delimited, text files, they each have a distinct specification. Subsequently, they should not be mixed up.

The main advantage of the Remittance files is that they provide a full picture for each Client that is not available in any other report. This includes name and address information separated into individual fields to make it easier to sort in Excel.

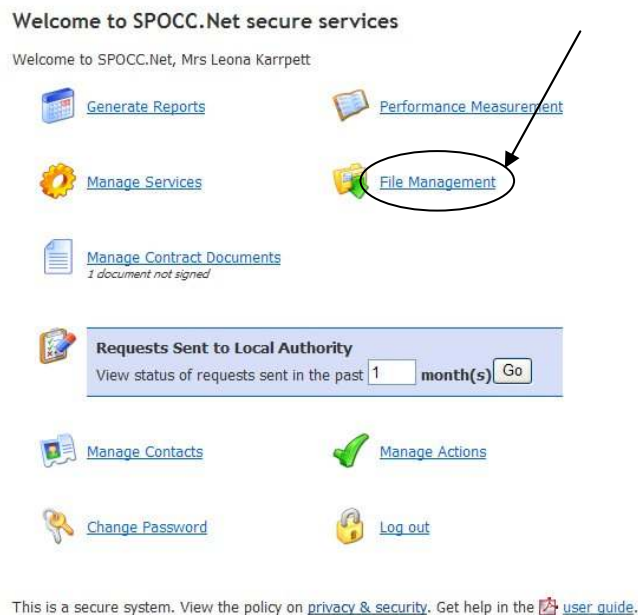


Figure 45 To Download a Provider Data Interchange file first click on the 'File Management' link

You then need to select the 'Type of Download' and press the 'Select' button (The 'File Type' field should now be automatically filled in)

Select the period from the 'Selection' drop down list.

Download files from LA
Use this form to download files from SPOCC.

Type of Download: Provider Data Interchange

Selection: 25/04/2006 - 22/05/2006

Return to [secure services](#).

Figure 46 Stipulate the 'Type of Download' & 'File Type' and select the Period from the 'Selection' drop down list

When you have made your selection, click on the 'Download' button to complete the process.

In the example shown above, the Provider Data Interchange download will only contain those services available for the contact currently logged. Please see Chapter 5.2 - Limiting Accessibility.

7 Uploading information

7.1 Managing Services

Click on the 'Manage Services' link on the welcome screen

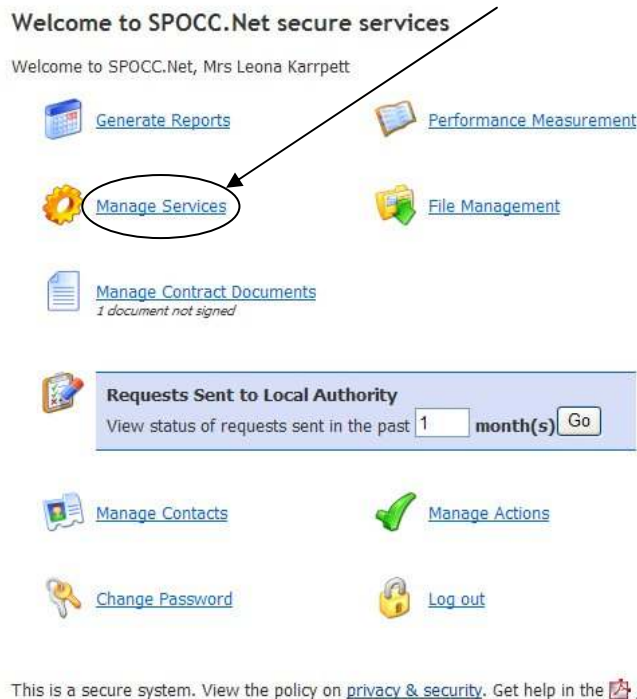


Figure 47 The 'Manage Services' link on the welcome screen

Select the Service you wish to manage from the drop down list.

SPOCC
SPOCC.Net » Secure » Services

Manage Services

Use this form to pick a service to manage.

Service:

Return to [secure services](#).

Figure 48 Select the Service

Pressing the 'Manage' button will open the 'Manage Service' screen for the selected Service. *(If you wish to include information concerning Clients whose schedules have ended then select the command button "Include Non-Current Items" on either the 'Client Schedules' or 'Clients Details' tab.)*

Only the services available for the contact currently logged in are visible in the list. Please see Chapter 5.2 - Limiting Accessibility.

SPOCC
SPOCC.Net » Secure » Services » Lookout 4U

Lookout 4U

Client Schedules | Client Details | Properties | QAFs | Service Details | Manage another service »

Client Schedules

[Request New Schedule \(4 pending\)](#)

The following clients are scheduled for this service.

Client	Reference	Service Level	Units	Start Date	End Date (Reason)	
Hall, Mr Albert		1 - Service Level 1	1.00	02/10/2003	03/05/2009 (Change of Service)	2 changes pending
Inurye, Mr Clint		1 - Service Level 1	1.00	01/02/2005	19/05/2008 (Change of Service)	
Theakston, Ms Sarah		1 - Service Level 1	1.00	01/04/2004	03/05/2009	
Thorpe, Miss Anne		2 - Service Level 2	1.00	15/10/2003	23/04/2004 (Change of Service)	

Total Number Of Current Schedules : 0

[Request New Schedule \(4 pending\)](#)

Return to [secure services](#).

Figure 49 The selected Service's management screen.

From here additions and amendments can be made to:

- New Client Schedules
- Existing Client Schedules
- Existing Client Details
- Properties
- QAFs
- Service Details

7.1.1 New Client Schedules

Details of new Clients and their scheduled service can be submitted to your LA via SPOCC.Net. You should proceed as follows: -

From the Secure Services home page click on 'Manage Services'. Now select the Service you wish to schedule and press 'Manage'.

SPOCC
SPOCC.Net » Secure » Services

Manage Services

Use this form to pick a service to manage.

Service:

Return to [secure services](#).

Figure 50 Selecting the Service you wish to schedule

You are then taken to a screen showing an overview of the selected service. This information will include a figure showing the 'Total Clients with Current Schedule'. *If you wish to include information concerning Clients whose schedules have ended then select the command button "Include Non-Current Items"*.

To schedule the Service to a new client click on the 'Request New Schedule' link.

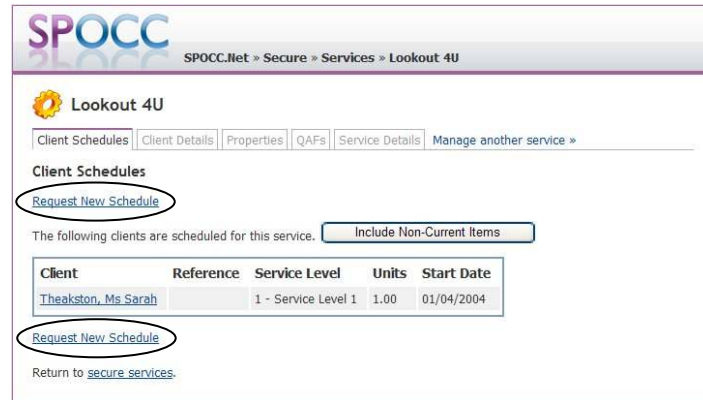


Figure 51 The 'Request New Schedule' link

Details of the new Client and their service requirements can now be entered on the form that appears. As in the example below, the Property field will be automatically filled in if there is only one for a given service and level combination. Remember that the **bold** fields are mandatory: -

SPOCC
SPOCC.Net » Secure » Services » Lookout 4U » Add Schedule

Request New Schedule

Use this form to request a new client schedule. Mandatory fields appear in **bold**.

Service: Lookout 4U
Service Level: 1 - Service Level 1
Property: Heltra House

Title: Mr
Forename: Albert
Surname: Hall

Address 1:
Address 2:
Address 3:
Address 4:
Town:
Postcode:
UPRN:

Copy Address from Property

Gender: M
Date of Birth: 31 August 1943
Ethnicity: Not known
NI Number:
HB Number:

Tenancy Reference No.:
Start Date: 24 April 2006
End Date:
Reason For End Date: Please select a value

Estimated Units Per Week: 1.00

Request Comment: second schedule

Add Client Schedule Cancel

Figure 52 The 'Request New Schedule' form


Pressing the 'Add Client' button will send the request to the SP team. Please note that the Manage Service screen will now reflect this as below:



Figure 53 The Pending Item appears

Note also that the '1 pending' text has appeared beside the *Request New Schedule* link. You can examine the pending items by clicking on the '1 pending' text. Any changes made and submitted to existing will be also flagged as Pending until accepted or rejected by the SP team

SPOCC
SPOCC.Net » Secure » Services » Lookout 4U » New Schedules

 **New Schedules**

Values that have been removed or replaced are ~~crossed-out~~ and new values are **highlighted**.

Karrpett, Mrs Leona

Type: New (Pending) Submitted: 12 November 2008 at 12:37


Title	Mr
Forename	Albert
Surname	Hall
Gender	M
DateOfBirth	31/08/1943 00:00:00
Provider	Oxford Healthcare Trust
Service	Lookout 4U
ServiceLevel	1 - Service Level 1
Property	Heltra House
StartDate	24/04/2006 00:00:00
EstimatedUnitsPerWeek	1.00
Comments	second schedule

Return to [secure services](#).

Figure 54 Examining a 'pending' request

If the SP team accepts the new schedule then the '1 pending' figure beside the Request New Schedule text will disappear and the new Client's schedule will appear in the list.

SPOCC
SPOCC.Net » Secure » Services » Lookout 4U

 **Lookout 4U**

Client Schedules | Client Details | Properties | QAFs | Service Details | Manage another service »

Client Schedules

[Request New Schedule](#)

The following clients are scheduled for this service.

Client	Reference	Service Level	Units	Start Date
Hall, Mr Albert		1 - Service Level 1	1.00	24/04/2006
Theakston, Ms Sarah		1 - Service Level 1	1.00	01/04/2004

[Request New Schedule](#)

Return to [secure services](#).

Figure 55 The new schedule is accepted and appears in the list.

If the SP team rejects the new schedule the '1 pending' figure beside the Request New Schedule text will still disappear but the new Client's schedule will not appear in the list.

You can see the status of all submitted requests, including those that are rejected, by following the procedure described in section 7.3 'Examining the status of submitted requests'

7.1.2 Changes to current Client Schedules

Your LA can be notified of any changes to current Client schedules (e.g. Change to number of Units, End of Service etc) by submitting the details as follows: -

Figure 56 Selecting the service you wish to manage

Only the services available for the contact currently logged in are visible in the list. Please see Chapter 5.2 - Limiting Accessibility.

From the Secure Services home page click on 'Manage Services'. Now select the Service whose schedule you need to change and press 'Manage'.

When the 'Manage Services' screen opens, select the 'Client Schedules' tab. *If you wish to include information concerning Clients whose schedules have ended then select the command button "Include Non-Current Items".*

Now select the Client whose schedule needs to be changed by clicking on their name. (The tool tip which appears when your cursor hovers over the name confirms that clicking on the name link will enable you to 'Request Update').

Client	Reference	Service Level	Units	Start Date
Hall, Mr Albert		1 - Service Level 1	1.00	24/04/2006
Theakston		1 - Service Level 1	1.00	01/04/2004

Figure 57 The 'Request Update' tool tip.

In this example we are going to change the number of units per week for *Mr Lars Busholm* from 1 to 2 and then click on the 'Save changes' button.

Figure 58 The 'Update Schedule' screen.

The 'Manage Services' screen will acknowledge the request and set it to 'Pending' until the SP team either accept or reject it.

Client	Reference	Service Level	Units	Start Date	
Hall, Mr Albert		1 - Service Level 1	1.00	24/04/2006	1 change pending
Theakston, Ms Sarah		1 - Service Level 1	1.00	01/04/2004	

Figure 59 The change is submitted and is 'pending' a decision.

In order to follow the progress of any submitted changes you should follow the procedure in section 7.3 'Examining the status of submitted requests'.

7.1.3 Editing existing Client Details

From the Manage Service screen select the Client Details tab; the Service's existing clients will be listed.

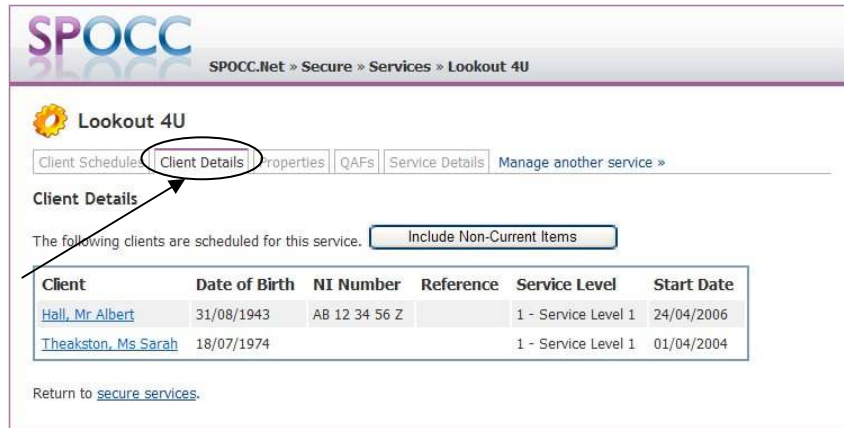


Figure 60 The Manage Service's Client Details tab

The Client Details tab enables the provider to manage the entire list of current clients of the Service selected. Clicking on the name of the Client you wish to manage will open the Update Client Details screen.

SPOCC
SPOCC.Net » Secure » Services » Lookout 4U » Update Client Details

Update Client Details

Use this form to request an update to this client. Mandatory fields appear in **bold**.

Client: Hall, Mr Albert

Address 1:

Address 2:

Address 3:

Address 4:

Town:

Postcode:

UPRN:

Gender:

Date of Birth:

Ethnicity:

NI Number:

HB Number:

Request Comment:

Figure 61 The Manage Service's Update Client Details screen

Enter new values that you require and press on Save. The updated values will then be included in a SPOCC.Net request of the *Update Client* type. Until this request is accepted by the support team, it will appear as a 'change pending' in the Client Details screen:

Lookout 4U

Client Schedules | **Client Details** | Properties | QAFs | Service Details | Manage another service »

Client Details

The following clients are scheduled for this service.

Client	Date of Birth	NI Number	Reference	Service Level	Start Date	
Hall, Mr Albert	31/08/1943			1 - Service Level 1	24/04/2006	1 change pending
Theakston, Ms Sarah	18/07/1974			1 - Service Level 1	01/04/2004	

Return to [secure services](#).

Figure 62 The Manage Service's Update Client Details screen

You may review all the changes for a particular client, regardless of who made each change, by clicking on the 'N change(s) pending' link from the Clients Detail tab:

SPOCC
SPOCC.Net » Secure » Services » Lookout 4U » Changes to Client Details

Changes to Client Details

Values that have been removed or replaced are **crossed-out** and new values are **highlighted**.

[Karrpett, Mrs Leona](#)

Type: Update (Pending) **Submitted:** 20 November 2008 at 14:39

Client	Hall, Mr Albert
Address1	23 Kensington Gore
Town	London
Postcode	SW1
Gender	M
DateOfBirth	31/08/1943 00:00:00 30/11/1942 00:00:00
Comments	corrected date of birth

Return to [secure services](#).

Figure 63 View your intended Client Detail changes

7.1.4 Updates to Properties

From the Manage Service screen select the Property tab; the Service's properties will be listed.

SPOCC
SPOCC.Net » Secure » Services » Lookout 4U

Lookout 4U

Client Schedules | Client Details | **Properties** | QAFs | Service Details | Manage another service »

Properties

This service lists the following properties.

Name	Address Line 1	Postcode
Heltra House	12a Chancel Road	BA3 7GF

Return to [secure services](#).

Figure 64 The Manage Service's Properties tab

Clicking on the name of the Property you wish to manage will open the Property management screen.

Figure 65 The 'Update Property' screen

Enter the values that you require and press on save. These updated values will then be included in any future Service Rich workbook upload made to the L.A. (See section 7.5)

7.1.5 QAFs

Selecting the 'QAF' tab from the Manage Service screen will display a list of any QAFs returned during the last year and those commenced but not yet submitted:

Figure 66 The Manage Service's QAF tab

7.1.5.1 NEW QAFs

To create a new QAF click on the *Submit a new QAF* link; you will then be asked what type of QAF you would like to create:

Figure 67 Choose QAF Type

You have a choice of:

- QAF
- QAF Lite (Community Alarm)
- QAF Lite (Small Provider)
- QAF Lite (Sole Trader)

Make your choice based on the type of Service and any instructions your Local Authority has given you, and then click the *Continue* button. Note that you cannot change the type of QAF later on. In this example we have selected the *QAF* type. You are now presented with a new QAF submission form:

Objective	Performance Level
Needs & Risks	D
Support Plans	D
Health & Safety	D
Abuse	D
Diversity	D
Complaints	D

Figure 68 A new QAF

You should fill in the *Date Requested* and *Name* boxes and then select any additional Services that this QAF applies to in the *Additional Services* list - you can select more than one by holding down the Ctrl key on your keyboard and clicking on the ones you want from the list.

When you are happy with the details you can click on *Save*. The new QAF will then become available in the *QAFs not yet submitted to the LA* list and can be opened for editing by clicking on the QAF name link.

SPOCC
SPOCC.Net » Secure » Services » Lookout 4U

Lookout 4U

Client Schedules | Client Details | Properties | **QAFs** | Service Details | Manage another service »

QAFs

This service has the following assessments.
Only QAFs with a date returned within the last year are displayed.

Self Assessed						Validated							
Name	A	B	C	C-	D	Not Set	A	B	C	C-	D	Not Set	Returned

QAFs not yet submitted to the LA

Name	Last Updated	Updated By
2008 QAF 1 - Lookout 4U	12/11/2008	Leona Karrpett

[Submit a new QAF](#)

Return to [secure services](#).

Figure 69 QAFs that are yet to be submitted to the LA are listed separately

7.1.5.2 FILLING IN THE QAF

Each Core Objective has a questionnaire that should be completed. Firstly click on either the objective's tab or name to open the questionnaire for that area.

SPOCC
SPOCC.Net » Secure » Services » Lookout 4U » Update QAF

Update QAF

Overview | **Needs & Risks** | Support Plans | Health & Safety | Abuse | Diversity | Complaints

C1.1 Needs & Risks Complete

Assessments of needs and risks are carried out for all Service users. Processes place users' views at the centre, are managed by skilled staff and involve carers and/or other professionals.

Notes:

Calculated Performance Level: D

Performance Level C Previous Next

i) The needs of service users and any inherent risks are assessed on a consistent and comprehensive basis prior to a service being offered, or very shortly afterwards as appropriate to the needs of the client group.

a) The needs and risk assessment process is written down and staff can describe the procedures that are followed. Please select a value

Remarks:

b) There is an assessment tool appropriate to the service user group. Please select a value

Remarks:

c) The needs and risk assessment procedures are covered in staff induction and/or training programmes. Please select a value

Remarks:

Figure 70 Each Core objective's questionnaire needs to be completed.

Use the drop down boxes to respond to each of the questions; your score on the 'Overview' tab will be recalculated each time you click on the 'Complete' button.

N.B. Your recalculated score and all your *completed* changes will be discarded unless you Save or Submit this QAF (see section 7.1.4.3).

Please note that to achieve a mark of 'C' for an objective each of the questions in the Performance Level C area need to be set to either 'Yes' or 'N/A'; to achieve a 'B' or 'A' then all questions in those respective areas must be answered in the same way.

You need to complete the questionnaire for the six Core objectives and select a score from the drop down lists for the Supplementary if they are being used.

There is also the option for the users to add a remark against each and every question – The remark will be saved even if the corresponding question does not have an answer selected from the appropriate drop-down list.

7.1.5.3 SAVING OR SUBMITTING A QAF

You need not complete the QAF in one session; save it by clicking on the 'Save' button at the foot of the 'Overview' tab thus enabling you to continue work at a later date.

N.B. You *must* remember to click on the 'Complete' button on the tab you have been editing before moving to the any other tab, otherwise you will lose your changes made to the tab you were on.

Clicking on the *Submit* button will submit the QAF immediately to the LA and, unless the QAF is rejected by the LA (see below), no further changes will be possible.

N.B. If you choose the *Save* option you will be returned to the Service's QAF screen. Click on the link (the QAF name) in order to re-edit work on any QAF not yet submitted to the L.A.

7.1.5.4 VIEWING AN ACCEPTED QAF

In this example, we can create a second QAF to accompany the first QAF that the LA has accepted:

SPOCC
SPOCC.Net » Secure » Services » Lookout 4U

Lookout 4U

Client Schedules | Client Details | Properties | **QAFs** | Service Details | Manage another service »

QAFs

This service has the following assessments.
Only QAFs with a date returned within the last year are displayed.

Name	Self Assessed					Not Set	Validated					Not Set	Returned
	A	B	C	C-	D		A	B	C	C-	D		
2008 QAF 1 - Lookout 4U	0	0	0	0	6	0	0	0	0	0	6	12/11/2008	

QAFs not yet submitted to the LA

Name	Last Updated	Updated By
2008 QAF 2 - Lookout 4U	12/11/2008	Leona Karrpett

[Submit a new QAF](#)

Return to [secure services](#).

Figure 71 The First QAF appears read-only once accepted

7.1.5.5 RE-EDITING AND RE-SUBMITTING A QAF THAT HAS BEEN REJECTED.

Once the QAF is submitted to the LA it can no longer be edited. The Provider can ask the LA to specifically reject the QAF then it may be re-edited and re-submitted by selecting 'Resubmit' from the subsequent refresh of the above page:

SPOCC
SPOCC.Net » Secure » Services » Lookout 4U

Lookout 4U

Client Schedules | Client Details | Properties | **QAFs** | Service Details | Manage another service »

QAFs

This service has the following assessments.
Only QAFs with a date returned within the last year are displayed.

Name	Self Assessed					Not Set	Validated					Not Set	Returned
	A	B	C	C-	D		A	B	C	C-	D		
2008 QAF 1 - Lookout 4U	0	0	0	0	6	0	0	0	0	0	6	12/11/2008	

QAFs rejected by the LA

Name	Reviewed By	Rejection Reason	Remarks
2008 QAF 2 - Lookout 4U	spoccadmin	Already exists in SPOCC	Resubmit

[Submit a new QAF](#)

Return to [secure services](#).

Figure 72 The Second QAF appears to be 're-editable' once rejected

After the Resubmit link is clicked, the "Add QAF" page is opened. The contents of the new QAF are copied from the QAF that was originally submitted – even including the 'Request Comment' on the Summary tab.

The overview text on the Summary tab is different compared to the text displayed while adding blank

QAF ("This is a new QAF. Its contents have been copied from the QAF previously rejected by the LA.", and the blank QAF text is "This is a new blank QAF. It consists of a set of questions designed to measure service performance.").

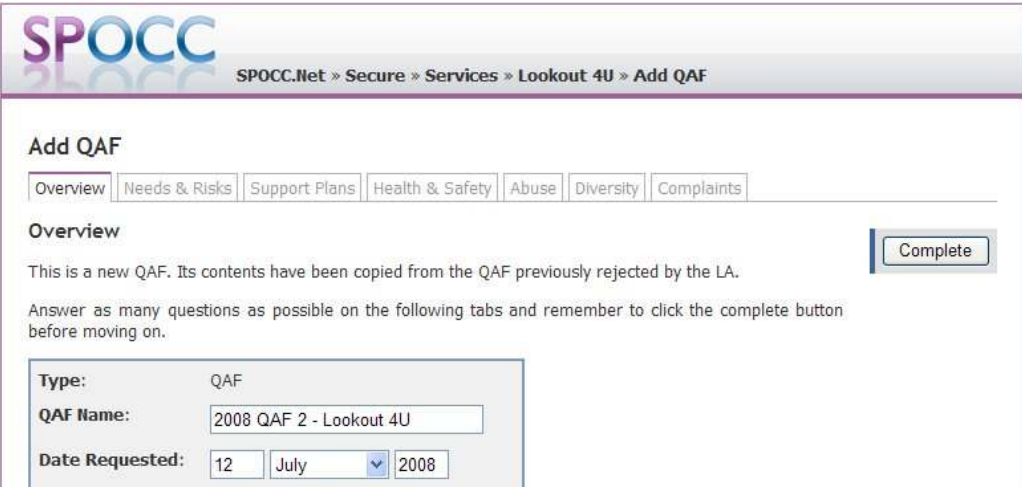


Figure 73 The Re-Submitted QAF is presented as a new QAF

7.1.6 Updates to Service Details

7.1.6.1 SERVICE DETAILS

Additional details concerning the Service can be registered by selecting the Service Details tab from the Manage Services screen.

You can specify the number of available places on a service in the *Manage Services* area on the *Service Details* tab. The value entered in the Available Places field is saved immediately and does not require approval from the local authority. These values will be available to the public in the Service Search area of SPOCC.Net and will be visible to the SP team on their SPOCC system; they have no effect on any payment or calculation and are included for information purposes only.

Figure 74 The 'Service Details' tab with the 'Request update' link

Click on the 'Request Update' link to open the Service Details update screen. The data can be entered by checkbox, free text or selection from a list.

Please note that multiple selections are possible from lists by holding down CTRL and selecting with the cursor.

SPOCC
SPOCC.Net » Secure » Services » Lookout 4U » Details

Service Details

Use this form to request changes to the service details. Mandatory fields appear in **bold**.

Public Service Name:

Description:

Supported Religions:

Leasehold Units Funded:

Tenure Type:

Supported Languages:

Location:

Hold the Ctrl key to select multiple items.

Accepts emergency referrals? Support for visual impairment?
 Access to interpreter? Support for hearing impairment?
 Waiting list in operation?

Request Comment:

Figure 75 Updating 'Service Details'

N.B. The list box for 'Tenure type' will only appear where appropriate.

The text that you enter for the 'Public Search Name' will appear in SPOCC.Net's public search for services results area, instead of the Service ID. Furthermore, when you select the service from this list, the service details page will also be titled with the Public Search Name.

Only the 'Description' field from the Service Details update screen will also be shown in the public service details page.

However, please note that any changes that the Provider makes will not be seen in the public search area until they have been accepted by the SP team.

N.B. This functionality will only be active where the LA concerned has purchased the 'Service Availability at Service Level' module

The details of Service Availability per service level are passed online from the Provider to the SP team using the Service Details tab. By default the Total Units Available are blank (and represents an unknown value).

The screenshot shows the SPOCC Net interface for 'Lookout 4U'. The breadcrumb trail is 'SPOCC.Net > Secure > Services > Lookout 4U'. The 'Service Details' tab is active, with other tabs like 'Client Schedules', 'Client Details', 'Properties', 'QAFs', and 'Manage another service >' visible. Under 'Service Details', there is a 'Request update' link. The 'Service Availability' section contains two forms:

Service level:	1
Description:	Service Level 1
Contract:	Subsidy payment of £2.56 per Hour per client per week
Hours in use:	2
Total Hours available:	<input type="text"/> Last updated: 26/11/2003 13:21:36
<input type="button" value="Save All"/>	

Service level:	2
Description:	Service Level 2
Contract:	Gross (fixed) payment of a total of £255.00 for all clients on this service per week
Units contracted:	12.00
Units available under this contract:	<input type="text"/> Last updated: 26/11/2003 13:22:19
<input type="button" value="Save All"/>	

At the bottom, there is a link: 'Return to [secure services](#)'.

Figure 76 The 'Service Details tab (per Service Level) with the 'Request Update' link

N.B. Remember to click on the 'Save All' button to commit any edits made to this tab before moving away from this screen.

Note that the total of the figures per Service Level may not necessarily add up to the Availability column in the public search results. This will only display a value if the SP team have selected the appropriate option for the service.

The Provider should be aware that the SP team has four options. The amount used in the availability column should use the appropriate value based on the options 1-3, shown below, selected for the service:

- 1 - Always Use the Provider Specified Availability,
- 2 - Always Use the SPOCC Calculated Availability,
- 3 - Use the Provider Specified Availability or the SPOCC Calculated Availability if the Provider Specified Availability is not entered,
- 4 - Don't use either.

Option 3 represents the normal behaviour of SPOCC before the upgrade to v6.0 and is the default selection, until the SP team select a different option.

For example, Block gross services that do not record clients in SPOCC would be better not to show availability at all, or to show the provider submitted availability only.

Note, that if you accidentally type 'UNKNOWN' (instead of blank) into the 'Units Available under this contract' field for Service Level 2, say, SPOCC.Net will show a warning and revert to the value that you had before your edit. The Warning message informs the user that only positive numbers or blank characters can be used and which service level the warning corresponds to:



Figure 77 The 'Service Level specific' Service Details warning message

7.2 Managing Contracts

The provider can manage the Contract Documents that are currently held on SPOCC and can add comments on the latest version. The purpose of making Contract Documents available in SPOCC.Net is so that they can eventually be agreed upon and signed.

To assist the Provider, the number of unsigned contract documents for the contact logged in is quoted underneath the 'Manage Contract Documents' link.

Click on the 'Manage Contract Documents' link on the welcome screen:



Figure 78 The 'Manage Contract Documents' link on the welcome screen

Select the Contract you wish to manage from the drop down list (*If you wish to include more than just the contracts that have signed documents uncheck the appropriate box and select Reload Contracts*).

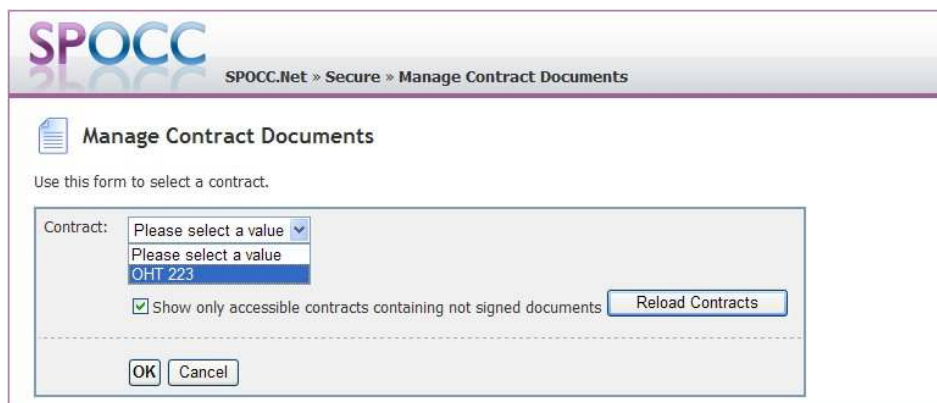


Figure 79 Select the Contract

Only the contracts available for the contact currently logged in are visible in the list. Please see Chapter 5.2 - Limiting Accessibility.

Pressing the OK button will open the 'Manage Contract' screen for the selected Contract.



Figure 80 The selected Contract's management screen

From here amendments can be made to Contract Documents that have been created in SPOCC. It is possible to:

- Edit Provider Comments,
- Sign the Document (if it is not signed already),
- View the Document,
- View Document History.

Note that the 'Progress' of any given contract document is always controlled by the SP team. Even if the provider signs a contract document the 'Progress' will remain as is until the SP team manually sets the progress to 'Signed'.

The SP team may create contract documents that the Provider will not see until the Progress is 'publishable'. 'Draft Sent' and 'Signed' are just two publishable states of Progress. Other publishable states include 'Draft Received' and 'Draft Agreed' which enable the final version of the contract document to be agreed upon before it is signed.

To manage the Contract Documents for another Contract, select the 'Choose different contract' link.

7.2.1 Edit Provider Comments

Contract Documents are submitted by the LA using SPOCC. You should open the Secure Services home page and click on 'Manage Contract Documents' to view the list of contracts that have unsigned contract documents:



Figure 81 Selecting the Contract you wish to manage

Only the contracts available for the contact currently logged in are visible in the list. Please see Chapter 5.2 - Limiting Accessibility.

Select the Contract you wish to manage and press 'OK'. You are then taken to a screen listing a summary of all the contract's documents. This includes the Provider's comments and the LA comments upon the latest version of each contract document.



Figure 82 Selecting the Contract Document you wish to comment upon

Decide which Contract Document you wish to edit and press 'Edit'.

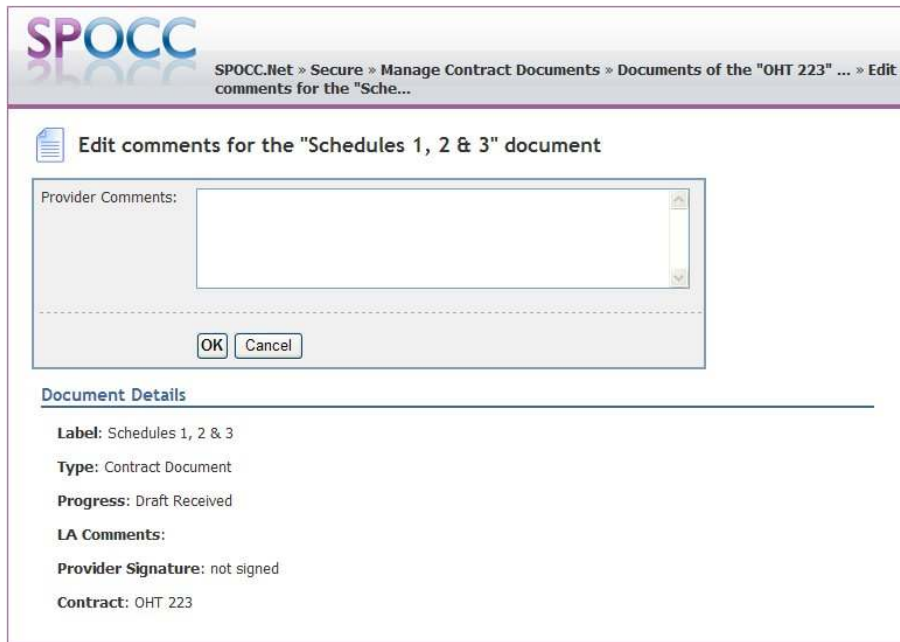


Figure 83 The 'Edit Provider Comments' screen

Enter the comments that you wish to add and Press OK. You will be able to revisit this screen at any time to edit these comments. Each time you OK a change to the Comments the SP team will receive a 'Notification request' and the comment will automatically visible to the SP team whether or not it is accepted. If the SP team accept the change then this is confirmation that they have seen it.

Press Cancel to return to the Manage Contract screen without saving your changes.

7.2.2 Sign the Document

Click on the 'Sign' link on the Manage Contract screen:



Figure 84 The 'Sign' link on the Manage Contract screen

You are taken to a screen that looks very similar to the Edit Provider Comments screen, with the exception of the 'OK' button, which has been replaced by 'Submit':

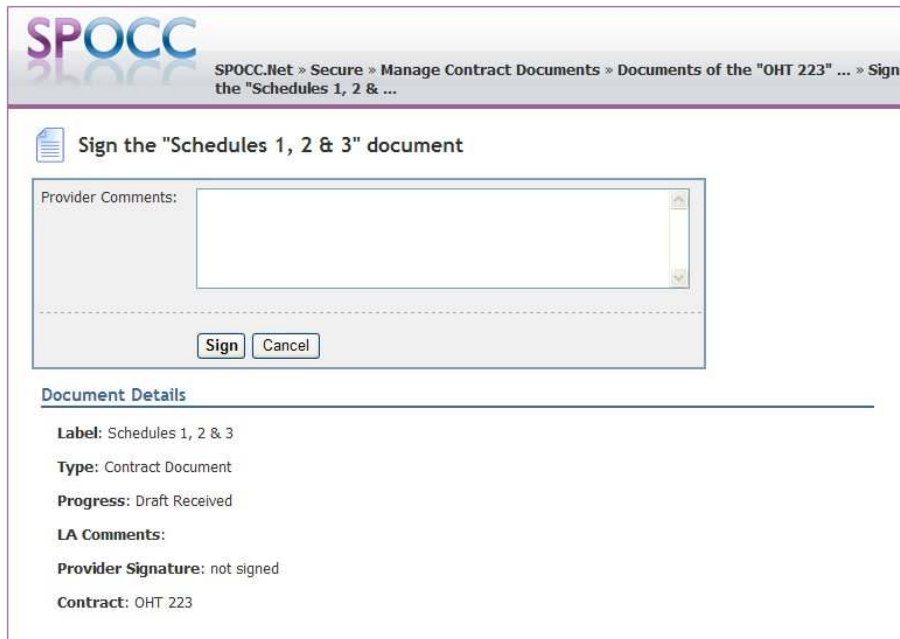


Figure 85 The ‘Sign Provider Comments’ screen

Edit the comments that are appropriate for this final version of the contract document and press ‘Sign’. Note that you will still be able to edit this comment again by revisiting this screen at any time.

Alternatively, press ‘Cancel’ to return to the Manage Contract screen without saving your changes.

Note that if the Progress of the contract document had been set to ‘Signed’ by the SP team, the screen will open to show an additional ‘acknowledgement’ checkbox and a text description:

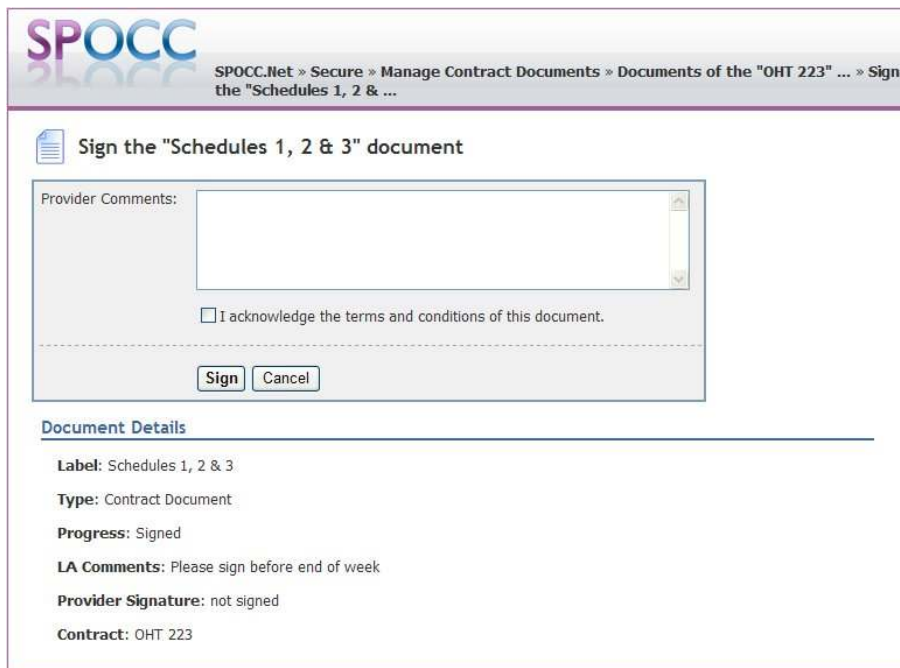


Figure 86 The pre-signed ‘Sign Provider Comments’ screen

The ‘acknowledgement’ checkbox must be checked by the Provider otherwise the document cannot be signed. If the Provider unintentionally forgets to check the acknowledgement checkbox, then they will get the following warning:

Sign the "Schedules 1, 2 & 3" document

You must acknowledge the terms and conditions of this document.

Provider Comments: Agreed

I acknowledge the terms and conditions of this document.

Document Details

Label: Schedules 1, 2 & 3
Type: Contract Document
Progress: Signed
LA Comments: Please sign before end of week
Provider Signature: not signed
Contract: OHT 223

Figure 87 Warning for un-acknowledged 'Signed Document' screen

Once the Provider has added their signature and the SP team have marked the progress to be 'Signed', the Contract document will appear signed at both ends:

SPOCC
SPOCC.Net » Secure » Manage Contract Documents » Documents of the "OHT 223" ...

Documents of the "OHT 223" contract

The following is a list of documents currently available for this contract.

Label	Type	Progress	LA Comments	Provider Comments	Provider Signature
Schedules 1, 2 & 3	Contract Document	Signed	Please sign before end of week	Agreed Edit	Karrpett, Mrs Leona, 12/11/2008 17:12:57 View History

[Choose different contract](#)
[Return to secure services page](#)

Figure 88 Signature, Date and Time are saved when a document is Signed

Also, if you re-visit Manage Contract Documents at another time, you will find that the contract can no longer be selected from the Manage Contract Screen:

SPOCC
SPOCC.Net » Secure » Manage Contract Documents

Manage Contract Documents

Use this form to select a contract.

Contract:

Show only accessible contracts containing not signed documents

Figure 89 Contracts with signed documents will appear to be omitted from Manage Services

In order to access those Contract documents that have just been signed and re-edit the Provider Comments; Uncheck the option to Show only accessible contracts with un-signed documents and press 'Reload Contracts'. Re-select the drop-down list of contracts:

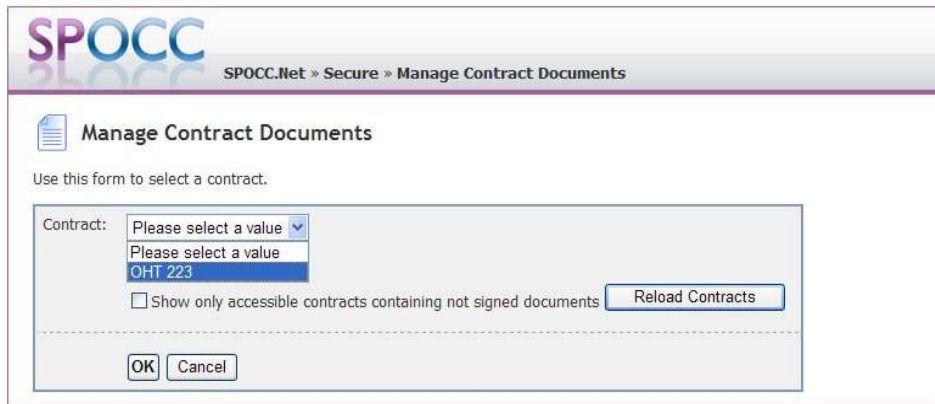


Figure 90 Uncheck 'Show only' and Reload Contracts to view all Contracts with Contract Documents

Select the Contract and press 'OK' to open the manage contract screen.

7.2.3 View the Document

Click on the 'View' link on the Manage Contract screen:



Figure 91 The 'View' link on the Manage Contract screen

The latest version of the contract document will open in MS Word.

7.2.4 View Document History

The Provider can view the variations of each document over time. Each version keeps the Provider's comment and the LA comment made at the time. If a past version of the document is signed then the Providers Name, Date and time can also be seen in the Provider's Signature.

SPOCC
 SPOCC.Net » Secure » Manage Contract Documents » Documents of the "OHT 223" ... »
 History of the "Schedules 1..."

History of the "Schedules 1, 2 & 3" document

The following is a list of all versions of this document.

Check-In Date	Progress	LA Comments	Provider Comments	Provider Signature	
08/06/2004 09:49:09	Draft Received				View
09/11/2007 12:16:32	Signed	Please sign before end of week	Agreed	Karrpett, Mrs Leona, Nov 12 2008 5:12PM	View

[Return to document list](#)

Figure 92 View earlier Documents and Comments from the 'History' screen

When you have finished viewing the contract documents from any version return to managing the contract documents by selecting the 'Return to document list' link.

7.3 Examining the status of submitted requests

After having submitted new items to the SP team you can examine the status of any of these items for a stipulated period (e.g. the last month, 2 months etc) by selecting the period for which information is required on the Secure Services home screen. Items that have yet to be processed will be marked as 'pending'.

Firstly, from the Secure Services home page, enter the number of months you wish to examine and then press 'Go'.

Welcome to SPOCC.Net secure services

Welcome to SPOCC.Net, Mrs Leona Karrpett

- [Generate Reports](#)
- [Performance Measurement](#)
- [Manage Services](#)
- [File Management](#)
- [Manage Contract Documents](#)
1 document not signed
- Requests Sent to Local Authority**
View status of requests sent in the past month(s)
- [Manage Contacts](#)
- [Manage Actions](#)
- [Change Password](#)
- [Log out](#)

This is a secure system. View the policy on [privacy & security](#). Get help in the [user guide](#).

Figure 93 Stipulating the period for which you wish to examine requests

You can now examine the status of all requests made during, in this case, the last month.



Requests over 1 Month

Values that have been removed or replaced are ~~crossed-out~~ and new values are **highlighted**.

Karrpett, Mrs Leona

Type: Notification (Pending) **Submitted:** 12 November 2008 at 17:12

Contract	OHT 223
Document	Schedules 1, 2 & 3
DocumentVersionID	436
ProviderComments	Agreed
ProviderSignature	Karrpett, Mrs Leona, Nov 12 2008 5:12PM

Karrpett, Mrs Leona

Type: Update (Approved) **Submitted:** 12 November 2008 at 16:06

Client	Hall, Mr Albert
Service	Lookout 4U
ServiceLevel	1 - Service Level 1
Property	Heltra House
StartDate	24/04/2006 00:00:00
EstimatedUnitsPerWeek	1.00 2.00
Comments	increase units

Figure 94 Examining the status of requests submitted to the L.A.

Notice that the Client schedule has been 'approved'. Had the submission been rejected for whatever reason (e.g. Duplicated Client, Duplicated schedule etc) the Submission 'Type' field will contain an entry 'Rejected' and the reason stated in the Remarks field.

Karrpett, Mrs Leona

Type: New (Rejected) **Submitted:** 12 November 2008 at 15:56
Remarks: Already exists in SPOCC:

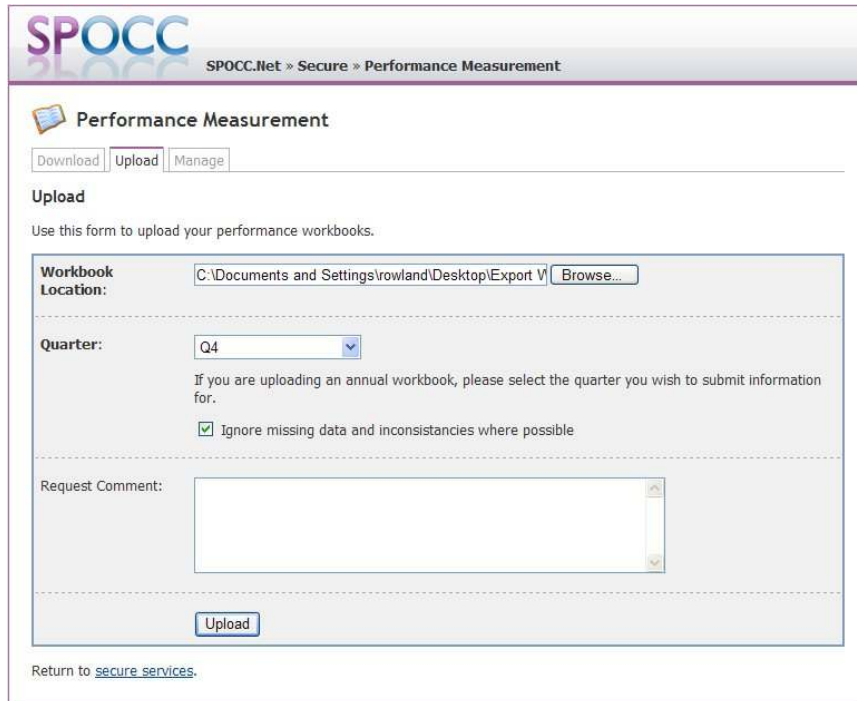
QAF Type	QAF
QAF Name	2008 QAF 2 - Lookout 4U
Date Requested	12/07/2008
Objective:	Performance Level: Notes:
C1.1	D
C1.2	D
C1.3	D
C1.4	D
C1.5	D
C1.6	D
Comment	

Figure 95 A rejected submission

7.4 Uploading PI workbooks

Having entered a Quarter's data into a P.I. workbook the Provider can now submit it for examination and acceptance/rejection by the SP team.

This is achieved from the 'Performance Measurement' screen which is accessed by pressing the *Performance Measurement* text on the Secure Services home page.



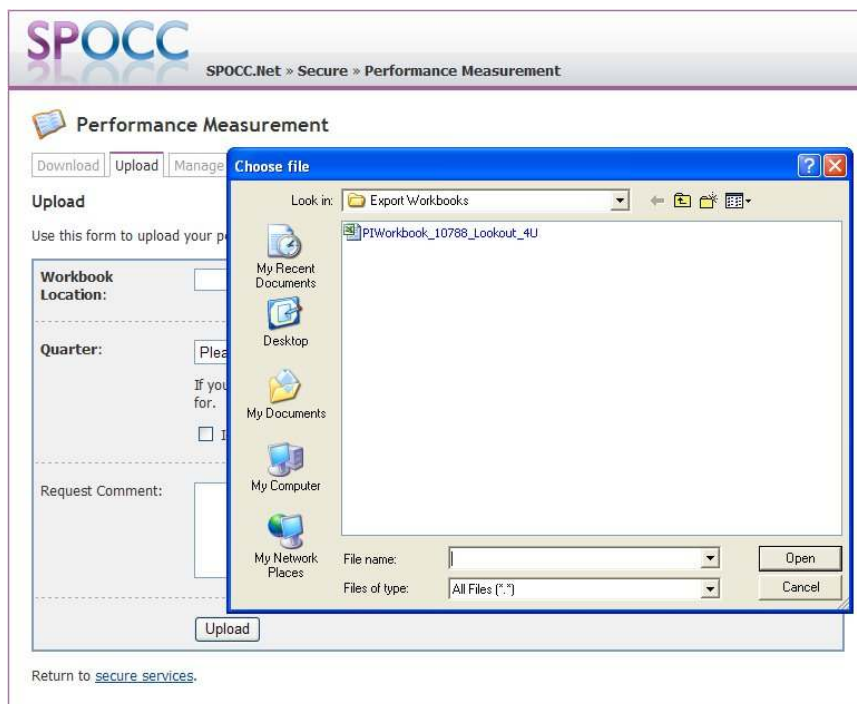
The screenshot shows the 'Performance Measurement' upload interface. At the top, the SPOCC logo and navigation path 'SPOCC.Net » Secure » Performance Measurement' are visible. Below the title, there are 'Download', 'Upload', and 'Manage' buttons. The 'Upload' section contains the following fields:

- Workbook Location:** A text box containing 'C:\Documents and Settings\rowland\Desktop\Export V' followed by a 'Browse...' button.
- Quarter:** A dropdown menu set to 'Q4'. Below it is a note: 'If you are uploading an annual workbook, please select the quarter you wish to submit information for.'
- Ignore missing data and inconsistencies where possible**
- Request Comment:** A large text area.
- Upload** button

At the bottom, there is a link: 'Return to [secure services](#).'

Figure 96 The Download/Upload screen

Type in or 'Browse' for the location of the saved document. In the illustration this is on the Desktop.



This screenshot shows the same 'Performance Measurement' upload interface as Figure 96, but with a 'Choose file' dialog box open over the 'Browse...' button. The dialog box shows the following details:

- Look in:** Export Workbooks
- File list:** PTWorkbook_10788_Lookout_4U
- File name:** (empty)
- Files of type:** All Files (*.*)
- Buttons:** Open, Cancel

The background interface is partially obscured by the dialog box, but the 'Workbook Location' field and 'Upload' button are still visible.

Figure 97 Browse for the file

Select the file and click on 'Open'; this will enter the file path in the 'Workbook location' box

Upload
Use this form to upload your performance workbooks.

Workbook Location: C:\Documents and Settings\rowland\Desktop\Export V\ Browse...

Quarter: Q4
If you are uploading an annual workbook, please select the quarter you wish to submit information for.
 Ignore missing data and inconsistencies where possible

Request Comment:

Upload

Return to [secure services](#).

Figure 98 Upload the file

If the workbook that you have selected is the Annual type you will need to select the appropriate quarter from the drop down list. Click on 'Upload' to complete the process.

SPOCC.Net will then display a summary screen which confirms the upload.

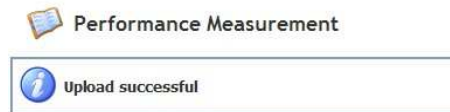


Figure 99 Confirmation of a successful upload

Any possible problems with the data will also be reported: -

SPOCC
SPOCC.Net » Secure » Performance Measurement

Performance Measurement

Warning: Your workbook (C:\Documents and Settings\rowland\Desktop\Export Workbooks\PIWorkbook_10788_Lookout_4U_0HT2.xls) cannot be imported into SPOCC for the following reasons:

Issue	Description	Workbook Value	SPOCC Value
There are one or more errors or failed checks indicated within the workbook.			

Figure 100 Any potential problems are reported.

In this (fictitious!) example no values have been supplied for several fields. If this data is nonetheless correct then you can still upload the workbook by checking the 'Ignore missing data and inconsistencies where possible' checkbox on the Performance Measurement screen and re-submit the document.

Please note that the LA will perform the same checks before accepting or rejecting the submitted workbook.

N.B The process of downloading a P.I. workbook pre-filled with the data already held in SPOCC is described in section 6.2

7.5 Uploading Service Rich Data workbooks

In order to Upload Service Rich data workbooks to the L.A. click on the 'File management' text on the Secure Services screen.

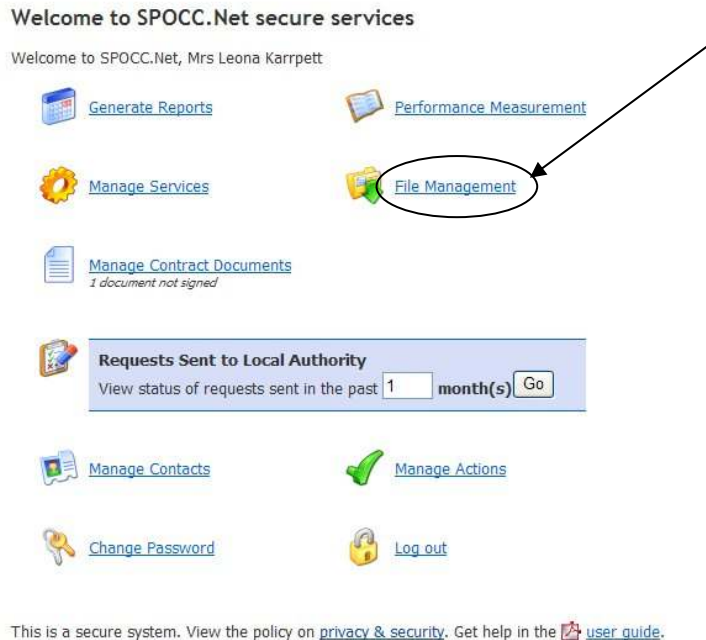


Figure 101 To Upload a Service Rich workbook first click on the 'File Management' link

Select the type of Upload from the dropdown list and click on the 'Select' button.

SPOCC
SPOCC.Net » Secure » File Management

File Management

Submit files to LA

Use this form to upload files into SPOCC.

Type of Upload:

File to Upload:

Ignore missing data and inconsistencies where possible

Request Comment:

Figure 102 Select the 'Type of Upload'

Enter the file type and the file path of the workbook that you wish to upload if it is known; if not you can use the 'Browse' button to navigate to the document's location. Enter a request comment if it will help the SP team to accept the request.

Figure 103 Enter the file path and click on 'Upload'

Click on the 'Upload' button. A successful upload will be confirmed.



Figure 104 A successful upload is confirmed.

The process of downloading a Service Rich Data workbook pre-filled with the data already contained in the SPOCC system is described in section 6.3

7.6 Uploading Provider Data Interchange files

In order to upload Provider Data Interchange, or PDI, files to the L.A. click on the 'File management' text on the Secure Services screen.

N.B. Despite the fact that both the PDI file used in the upload to SPOCC and the PDI Remittance file saved in the download are both CSV, or comma delimited, text files, they each have a distinct specification. Subsequently, they should not be mixed up.

The main advantage of uploading changes via PDI files is that they can allow a Provider to request changes to many clients and yet only one file need be submitted.

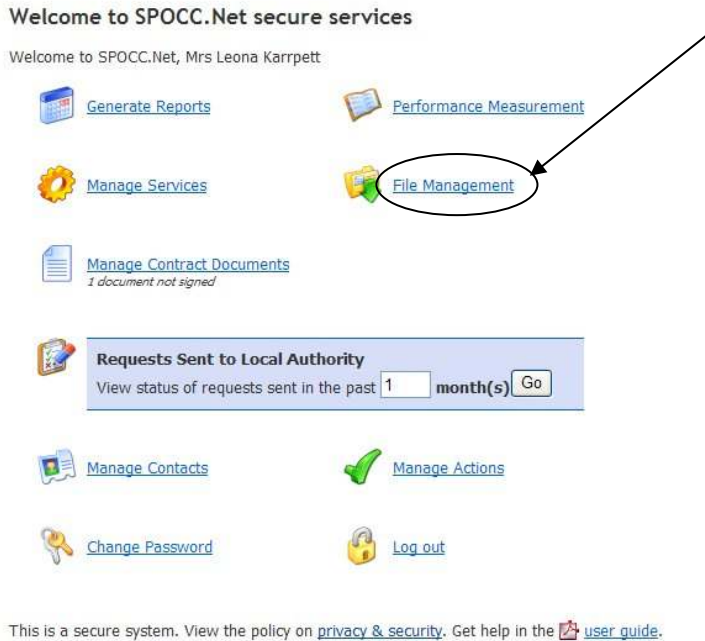


Figure 105 To Upload a PDI Client Details file first click on the 'File Management' link

Select the type of Upload from the dropdown list and click on the 'Select' button.

Enter the file path of the PDI Client Details file that you wish to upload if it is known; if not you can use the 'Browse' button to navigate to the document's location. The Provider may also enter a request comment to help describe the request for either themselves or the SP team.

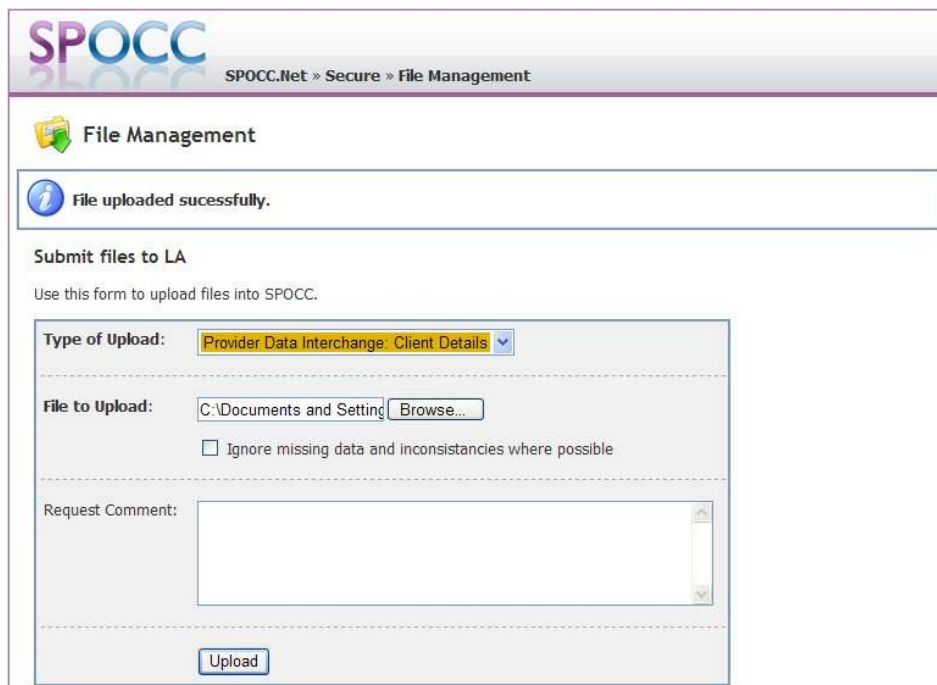


Figure 106 Enter the file path and click on 'Upload'

Click on the 'Upload' button. A successful upload will be confirmed.

 File Management

 File uploaded successfully.

Figure 107 A successful upload is confirmed.

The process of downloading a Provider Data Interchange file pre-filled with the data already contained in the SPOCC system is described in section on downloading.

7.7 Uploading Local Performance Indicators in a Managed way

The values for the all Performance Indicators for a Provider that are held in the SPOCC System can be displayed in SPOCC.Net. Local Performance Indicators can be viewed and edited by the Providers while National PI values can be submitted using the DCLG defined workbook described in section [7.3](#)

Whenever the Provider makes a change to a Local PI value, it is automatically submitted to the LA. The SP team needs to accept the change submitted before the changed value can be viewed in SPOCC.Net. Alternatively, the change could be rejected by the SP team, whereupon the request will then be marked as rejected and can be examined by the Provider as described in section 7.3.

Select the 'Manage' tab on the Performance Management screen and select the relevant Service from the drop-down list. Enter a start quarter and year to filter out PIs that are outside the date range you are interested in. Optionally, you can specify an end quarter and year to omit recent periods.

Figure 108 – Enter a service and date range to view certain Performance Indicators

Press 'Set Service/Date Range' to save the settings and open the filter where the applicable PIs are displayed. Only the services available for the contact currently logged in are visible in the drop-down list. Please see Chapter 5.2 - Limiting Accessibility.

Click on 'Filter' to generate a list of all the PIs (of those selected from the filter), each with a list of the periods (in quarters and years) for which a PI Target exists in SPOCC.

Figure 109 – Refine the filter for the Applicable PIs to reduce the number of on-screen results

To generate another list, make a different selection from the filter and click 'Filter'.

The applicable PIs for the service/date range selected will be displayed grouped by PI name, year and quarter. For each PI the overall value will be shown and colour coded; black means a value has never been entered, green means a value is meeting targets, red means a value is not meeting targets and orange/amber means the value is between the target value and the warning "close to target" value).

SPOCC
SPOCC.Net » Secure » Performance Measurement

Performance Measurement

There are 4 performance indicator(s) that can be managed. Scroll down to see the full list.

Download | Upload | **Manage**

Manage

Use this form to filter existing performance indicator value submissions and to select one for adding/editing.

Service: Lookout 4U

Start Quarter/Year: Q2 2003

End Quarter/Year: Q3 2003

Set Service/Date Range

Applicable PIs: All (overrides selections)

KPI 1a LPI 3a SPI 3a

KPI 3a SPI 1b SPI 4a

KPI 3b SPI 2b SPI 8a

Filter | Reset

KPI 3b
Percentage of new service users that have accessed SP and are from a BME group

Year	Quarter	Value	A	B
2003	2		0	0
2003	3		0	0

LPI 3a
Percentage of Unpaid Support Hours

Year	Quarter	Value	A	B
2003	2		0	0
2003	3	15.00	18.00	120.00

[Add...](#)
[View Details...](#) [Edit...](#)

SPI 1b
Percentage availability (support)

Year	Quarter	Value	A	B
2003	2		0	0
2003	3	96.37	451.00	468.00

[View Details...](#)

SPI 2b
Percentage utilisation (support)

Year	Quarter	Value	A	B	C
2003	2		0	0	0
2003	3	0.60	12.00	22.00	91.00

[View Details...](#)

Return to [secure services](#).

Figure 110 – Only the Local Performance Indicator can be managed

Any PI which has a value will have a *View Details...* link next to it. By clicking this link the full details of the PI will be displayed which includes the name and definition as well as the name and definition of each of the individual items used to calculate the PI value.

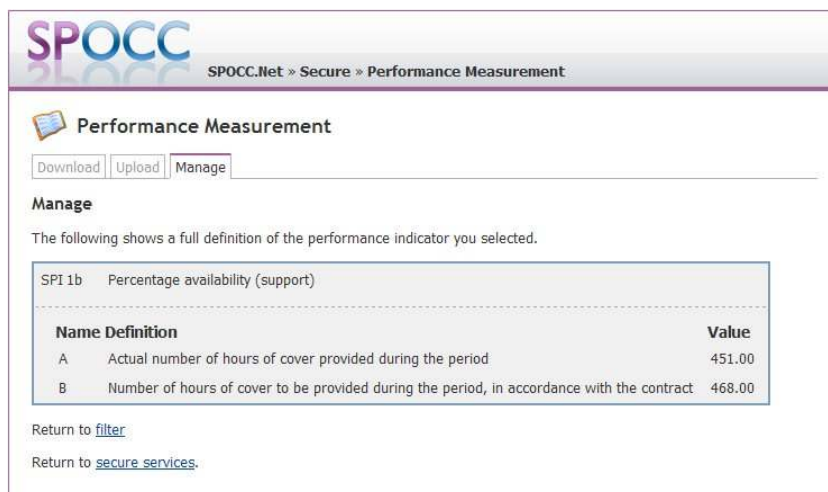


Figure 111 - Select 'View Details' to see the values of the Non-Local PI 'SPI 1b'

For Local PIs an 'Add...' or 'Edit...' link will be available depending on if the PI in question has a PI value or not. Select 'Add...' or 'Edit...' link to display a screen that will enable you to enter the values for the individual items used to calculate the PI value along with a comment.

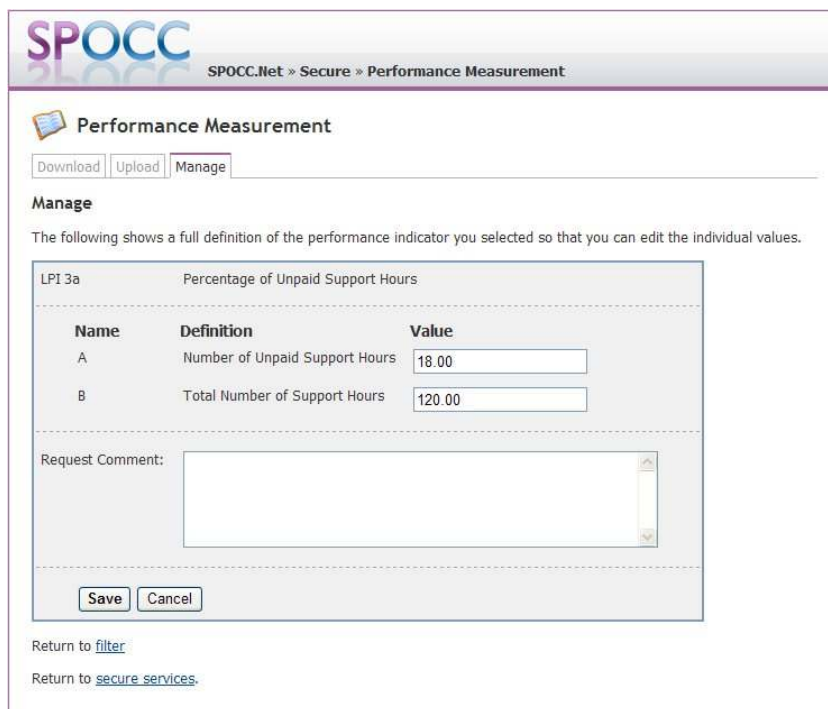


Figure 112 – Select 'Edit..' to Modify Values for the Local PI 'LPI 3a'

For example, enter the values 18 and 120 for the values A and B respectively. The Provider can press the 'Save' command to submit these edited values to the SPOCC System. Alternatively, press Cancel to lose the edits.

Selecting either 'OK', 'Cancel' or 'Return to filter' will re-open the screen to allow you to filter for another service.

Figure 113 - The form to filter existing Performance Indicators is reset after each submit

In order to view the submitted items you must re-enter the filter settings from earlier and click 'Filter'.

LPI 3a Percentage of Unpaid Support Hours					
Year	Quarter	Value	A	B	
2003	2		0	0	Add...
2003	3	15.00	18.00	120.00	View Details... Edit... 1 change pending

Figure 114 - 'Change pending' links allow you to view specific submissions

In the list of PI Targets and PI Values, there will now be displayed the appropriate '1 change pending' link that can be selected to view the individual submitted change:

Data Items:		Name	Value
	A	18.00	20.00
	B		120.00

Figure 115 - Individual Change to Performance Indicators

This entry, along with all other PIs submitted in the last month, can be seen from the welcome screen by selecting 'Go' from the 'Requests Sent to Local Authority' section.

Once the submitted change has been accepted by the SP team, the Provider can then view the new PI values in the results section. Providers are still able to edit this value again at any time.

The screenshot shows the SPOCC Performance Measurement interface. At the top, it says 'SPOCC' and 'SPOCC.Net » Secure » Performance Measurement'. Below this is a 'Performance Measurement' section with a message: 'There are 2 performance indicator(s) that can be managed. Scroll down to see the full list.' There are buttons for 'Download', 'Upload', and 'Manage'. A 'Manage' section follows, with instructions: 'Use this form to filter existing performance indicator value submissions and to select one for adding/editing.' The form includes a 'Service' dropdown set to 'Lookout 4U', 'Start Quarter/Year' (Q2, 2003) and 'End Quarter/Year' (Q3, 2003) dropdowns, and a 'Set Service/Date Range' button. Under 'Applicable PIs', there are checkboxes for 'All (overrides selections)', 'KPI 1a', 'LPI 3a' (checked), 'SPI 3a', 'KPI 3a', 'SPI 1b', 'SPI 4a', 'KPI 3b', 'SPI 2b', and 'SPI 8a'. 'Filter' and 'Reset' buttons are at the bottom of the form. Below the form is a table for 'LPI 3a Percentage of Unpaid Support Hours':

Year	Quarter	Value	A	B	
2003	2	0	0	0	Add...
2003	3	16.67	20.00	120.00	View Details... Edit...

At the bottom, there is a link: 'Return to [secure services](#).'

Figure 116 - Once an LPI has been accepted you are still able to edit these later

8 Frequently Asked Questions

8.1 Can I check my payments?

Yes. There are a number of Reports concerning payments that can be both examined and downloaded if your LA has agreed. The exact Reports available will depend on local policy but the full list is:

- Service User Subsidy Schedule
- Service User Means Schedule
- Service Subsidy Summary
- Payment Items
- Service User Adjustment Schedule
- Service Adjustment Schedule
- External Payments
- Service User Subsidy Schedule with Unit Type

The procedure for downloading these items is described in section [6.1](#)

8.2 Can I analyse the data from my Reports?

Yes. SPOCC.Net gives you the option of printing out the PDF file or saving the data as an Excel document which can be analysed as you wish.

8.3 Can other Providers see my data?

No. The SPOCC.Net Secure Services area is specifically designed to give you access to only your own data. By the same token you cannot examine the details of any other Provider's data.

N.B. This does not apply to the Public areas of SPOCC.Net which, by definition, are accessible to all with web access.

8.4 Which ID should I use in my PI workbook?

If you download a copy of a performance workbook it will be pre-populated with the correct IDs that your SP team and the SPOCC system are expecting.

8.5 How quickly is my new data processed?

When you submit a request it will appear almost instantly on the SPOCC system at your local authority. The time taken to respond will depend on your SP team who will need to examine each submission that you make before deciding whether to accept or reject your request.

No data is ever changed in the SPOCC system until it is approved by the SP team.

8.6 How secure is SPOCC.Net?

This depends upon the Security certificate that your LA has purchased, usually 128 bit SSL encryption.

9 Appendix A: What's New in SPOCC.Net Version 6.0?

9.1 New Feature: Managing Contract Documents

SPOCC.Net now enables the Provider to comment on the progress of the Contract Documents in SPOCC. The documents are edited by the SP team, and made available to the Provider. The Provider can view any version of the contract documents and can use a large text field 'Provider Comments' to enter comments on the latest version and inform the SP team of any changes that need to be made.

When a contract document is signed, the contacts name, date and time are stamped against the latest version of the document. Furthermore, Providers are also able to edit these comments for any contract document, whether it has been signed off on or not.

There is a new link on the Welcome page for Contract Documents and a useful count below this link that informs the contact currently logged in of how many contract documents remain unsigned.

9.2 New Feature: Accessibility can now be limited to certain contacts

SPOCC now has a limiting functionality where access can be limited to only those SPOCC.Net contacts for the Provider who have the following:

- If a Contact is assigned Organisation Contact – *access to all Services for the Provider.*
- If a Contact is assigned Service Manager, Emergency Contact, Self-referral, Out of Hours or Self-referral Office Hours – *access limited to those Provider Services covered by the assignments.*
- If a Contact is assigned Contract Contact – *access limited to those Services covered by the Contract(s) for which the Contact is assigned as Contract.*

This functionality is optional, so the Provider will need to request this feature from the SP team.

If the functionality was to be disabled for an individual Provider then all the SPOCC.Net contacts for the Provider will be able to access all the Services, Contracts and Contract Documents.

Explicit contacts are made, as usual, by communicating with the SP team directly.

9.3 New Feature: Availability can be selectively shown in Search for Services

The availability column shown in the public search results and on the details page after selecting a search result to use should only display a value if the SP team have selected the appropriate option for the service.

The provider should be aware that the SP team has four options. The figure used in the availability column should use the appropriate value based on the options 1-3, shown below, selected for the service:

- 1 - Always Use the Provider Specified Availability,
- 2 - Always Use the SPOCC Calculated Availability,
- 3 - Use the Provider Specified Availability or the SPOCC Calculated Availability if the Provider Specified Availability is not entered,
- 4 - Don't use either.

After the upgrade of SPOCC to version 6.0, the Provider should expect the behaviour to default to option 3, which is identical to the behaviour shown in SPOCC version 5.1.

9.4 New Feature: A Provider can now advise the SP team of a change in Property

Users of SPOCC.Net can now change the Property of an existing Client Service Schedule. This uses the same drop-down selection box that is seen on the 'Request New Schedule' page.

The 'Request New Schedule' page now has the Tenancy Reference field, so this may need changing at the same time as the Property.

9.5 New Feature: Client Needs Assessment Report

Users of SPOCC.Net can now select the 'Clients Needs Assessment' report from the Generate Reports page. This is part of the Needs Assessments and Outcomes optional module of SPOCC.Net and may not be available if your LA has not purchased it.

The provider will only be able to view completed Needs Assessments (i.e. those assessments whose status has been set to 'Finalised' by the SP Team. Once you select the report from the page with the generate button, you will be shown a drop-down box with a list of Clients. The 'Blank' client at the top of the list is there so the user can generate an empty 'Client Needs Assessment' report.

9.6 New Feature: PDI Remittance Report

The Providers are now able to select the 'Personal Data Interchange' report from the download section of the File Management page. This report provides the users of SPOCC.NET with the details for each client and their scheduled services.

9.7 New Feature: PDI Upload

The Providers are now able to select the 'Personal Data Interchange: Client Details' report from the upload section of the File Management page. This upload enables the users of SPOCC.NET with the facility to change details for many clients in the system by only submitting one file.

9.8 Public Search Page now includes referral routes

The users of the public search screen are now able to view all the Referral Route information entered into SPOCC for any publicly accessible Service (i.e Those services that haven't been marked as confidential).

Select the service on the public search results to view the Service Details page: the Referral Route should appear at the end of the 'Support' section, which can be found beneath the section on 'Client Groups'.

9.9 Referral Details Page now includes a link to generate the Client's Needs Assessment Reports

When Providers view or edit a referral there is now an additional "Needs Assessments Report" label in the Client Details section. This feature will only show if the LA has the optional Client Needs Assessments and Outcomes module.

If the client has any completed Needs Assessments, a button saying "Download Report" will be shown. Otherwise, if the client doesn't have any completed Needs Assessments, the button will be replaced by the message "The client does not have a completed needs Assessment."

9.10 Public Search Details Page now includes the Description

The users of the public search screen are now able to view the description of the service. Select the service on the public search results to view the public search Service Details page: the description should appear at the end of the 'Details' section at the top of the page.

The description can be edited by the Provider from the Service Details tab while managing the relevant service; Select 'Request update' to view and make any changes to the details of the service. However, please note that any changes that you make will not be seen in the public search area until they have been accepted by the SP team.

9.11 Change: 'Download Schedules' has been renamed 'Generate Reports'

We have renamed the Download Schedules page in SPOCC.NET to be closer to the actual design: Subsequently, 'Download Schedules' is now referred to as the 'Generate Reports'.

9.12 Change: 'Provider Ref' has been renamed 'Tenancy Ref'

We have also changed the label that should contain the reference for a Client Service Schedule's Tenancy: The 'Provider Reference' label on the form for requesting a new client schedule has now been renamed to 'Tenancy Reference'. A similar change can also be seen when updating a Client's request and viewing the status of requests sent to the Local Authority over the last N months.

Note that those Client Requests sent to the Local Authority prior to the upgrade to version 6.0 will still have the old 'Provider Reference' label.