

Instructions for Access People Planner setup for Essex County Council data transfer

People Planner must be configured with the Essex CC as a Service Funder/Customer in order that the data transfer can be set to only send visit data to Essex CC which relates to their Service Packages. Each Service Package must also have an ID/Mosaic reference included.

How to set the Mosaic reference

1. Open People Planner
2. Navigate to the Service Funder/Customer screen
3. Select Essex CC (or the name you have given to them)
4. Select "Service users" from the quick links on the right
5. Select a Service user from the list
6. Select "Service Funder" (this may be "Customer" if you use this terminology) from the quick links menu on the right
7. Select Essex CC from the list (or the name you have given to them)
8. The below screen should be shown, enter the reference in the "ID" field
9. Repeat for all Service users/Service Packages

27 October 2021 [SUPPORT](#) 4 Events 6 Alerts

Dashboard HR **Service User** Planning Monitoring Finance Reports Settings

Customer Service User Other

Service Funder : Mrs [REDACTED]

General Communication Travel Invoice Invoice Contact PO EMS Other QuickLinks

Type * Social Services
Name * Essex County Council Start date * 17/12/2015

Description * Essex County Council

Customer Information

ID 500 [REDACTED]
Order Number
Address * Commercial Team/ Adults
E1 County Hall
Market Road
City / Town * Chelmsford
County Essex
Post code * CM1 1QH

Rate Sheet: Essex County Council new rate £18.04
Branch * Brentwood
Area * Head Office
Status * Active

QuickLinks: Rate Sheets (✓), Travel Details (⚠), Adhoc Invoices

Logout Access Workspace Support Community Support Framework New Window

How to set up the your Customer/Service funder

1. Create a Customer/Service funder for Essex CC and enter the usual information
2. Open the Service Location/Service user record for each person related to Essex CC
3. Select "Service funder" (this may be "Customer" if you use this terminology) in the quick links menu on the right
4. Click on the + button on the right
5. Select "Existing" from the list which appears
6. Select the Customer/Service funder you just created
7. Enter the Essex CC Mosaic reference in the "ID" field
8. Click save
9. Note, if you are invoicing via People Planner changing the Service Funder/Customer relationship can change the invoicing setup

Customer : Essex County Council

QuickLinks

- Tasks ▲
- Branch & Area ✓
- Service Users ✓
- Notes ✓
- Terminate

Type* Social Services

Name* Essex County Council Start date* 17/12/2015

Address* Commercial Team/ Adults
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Market Road

City / Town* Chelmsford Branch* Brentwood

County Essex Area* Head Office

Post code* CM1 1QH Status* Active

Hillingdon Customers - Filter

Customer [Search] Selected All

Customer	Selected
[Redacted]	<input type="checkbox"/>
Essex county council	<input checked="" type="checkbox"/>
Essex County Council	<input checked="" type="checkbox"/>
Essex County Council	<input checked="" type="checkbox"/>
Essex County Council	<input checked="" type="checkbox"/>
Essex County Council -	<input checked="" type="checkbox"/>
[Redacted]	<input type="checkbox"/>
[Redacted]	<input type="checkbox"/>

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