

UC43 CM - Third Party Deductions (Self-Paced)

Accessible Product Version 40.0

Calculate deductions video transcript (Manual Deduction Calculator)

Hello everyone. This video will show you how to complete the calculate deductions to-do using the Manual Deductions Calculator.

This to-do is generated when the service cannot do an auto-calculation and there are deductions we need to take into account.

When your claim has an outstanding calculate deductions to-do, you'll first need to open the Manual Deductions Calculator.

The Manual Deductions calculator is found within the Resources section of Universal Learning.

Once in Resources, select 'Calculators' and then from the calculator list select 'Manual Deduction Calculator'.

A pop up will appear at the bottom of the screen, you just need to select 'Open'.

It can take a moment or two for the calculator to open.

Okay, so once the calculator is open, you need to select 'Enable Editing' in the yellow banner at the top. Once this is done, we need to select 'Enable Content'. This allows us to edit and use the calculator.

The easiest way to arrange your screen when completing a calculate deductions to do is to split your screen.

We can do this by selecting the service, holding down the Windows logo key on your keyboard and pressing the left arrow key. This moves the service to the left.

On Windows 10 devices you get the option of what else you want to open on the right hand side of the screen. In this case, it will be the Manual Deductions calculator.

However, if you're not on a Windows 10 device, what you'd need to do is go back to the calculator, press the Windows logo key on your keyboard again, but this time press the right arrow key, moving it to the right of the screen.

As you can see, that means that we've got both the service and the calculator open on our screen.

Now that we are all set up, let's start.

The first thing we need to do is make sure that we're still on the claimant overview screen on the service. This is so that we can import the claimants' personal information onto the calculator.

We do this by making sure we're on the overview screen and then going to the calculator and selecting 'Import Claimant Data', this green button at the top.

Once you press this, it brings across the claimants' personal information - the name, age, contract I.D. and the calculator even works out to the standard allowance for you.

Once this is done, we go to the calculate deductions to-do.

As you can see any deductions that the service can automatically process, like advances, sanctions, fraud penalties and debt management managed debts will be displayed here.

On this claim, we also have third party deduction for rent arrears. It's these third party deductions that we use the calculator to calculate.

Leave the calculate deductions to-do open on the service and go back to the calculator.

Select the 'Populate from Deductions to-do' button. This pulls through the deductions data from the to-do for you.

You must check that the information the calculator has pulled through mirrors the information on the to-do. As we can see in this case, it mirrors it perfectly, £55.05 for advances, and then £700 outstanding for the rent arrears.

If for any reason the information does not pull across to the calculator, you do have the option to manually add a deduction. To do this, select the 'Manually add Deduction' button. This displays a pop up where you can select the type of deduction from the drop down here.

For the purpose of this example, I'll just select gas.

As you can see, that then gives us two new fields to fill in. Outstanding amount would be found in this column on the to do, so if this was a rent arrears one, it would be £700.

And ongoing amount is the ongoing consumption amount that can be present for certain deductions and that would go in this field.

For this example, we won't be adding a new deduction, so we can just close text box, however, what you would need to do is select 'submit to form' if you had added one.

You can now see the deductions you have added in the relevant fields on the calculator.

Just to note, should you need to, you can also remove a deduction from the calculator by selecting 'remove deduction entry'.

This button displays a pop up that lists all the deductions currently listed on the calculator. You would select the one you want to remove and then select 'Delete'. But again, for the purpose of this example, we're not deleting any.

Once we're happy that all the deductions have been added into the calculator, we can select the 'GO Calculate all deductions' button at the bottom here. This will start the calculation.

If there are rent arrears added to the calculator, like in this example, you will receive a pop up asking if you want to take the maximum figure for rent arrears.

This is a prompt for you to check on the calculate deductions to-do if there is a financial hardship decision in place.

This information would be displayed here in the third party deductions box just under the title.

In this example, there isn't a financial hardship decision so we will take the maximum amount for rent arrears and select 'Yes'.

If there was a financial hardship note in the to-do, we would select 'No'.

But we are selecting 'yes', because we are taking the maximum because we've no financial hardship decision.

Once this is done, we get asked if we want to save the manual deductions calculator for upload to the service. Select 'Yes', and this will open the 'Save As' window.

As you can see, the calculator has automatically been given the correct name, so all we need to do is make sure that we're saving it in our ALPS Daily saves folder.

Select 'Save'. This process can take a few moments as it's processing it to the folder. Once it's done, though, the next pop up shows us a breakdown of the deductions we have entered, and how much the calculator has determined we need to take for each one.

As you can see from this example, it only shows us the rent arrears figure of £67.91. This is because the advances figure is already on the service. This pop up will only ever show figures we need to input onto the to-do.

As advances is already on the to-do, it's not listed here.

Select 'OK' and we can also see that the amount is now present in this end column on this table and also in these boxes at the bottom.

We can now use this information from the calculator to complete the calculated deductions to-do.

We go back onto the service and input the rent arrears amount here. So that's £67.91. We then input the total deductions amount here in these boxes.

We don't need to add the advance amount here as that's already input automatically into the service as we've seen.

The total it asks for here is just the total of any deductions calculated using the calculator.

So in this example it would be £67.91 as the only deductions we've calculated are for the rent arrears.

Once we're happy that all the amounts have been entered, we need to scroll back up on the to-do and upload the calculator that we saved earlier.

Select it from the list that appears and select 'Open'.

That adds it into the to-do for us.

Before we complete the to-do we need to do one final check.

Check that the calculator has been uploaded. We check that we input the amounts correctly from the calculator, and then we select done to complete the calculate deductions to-do.