

Provider Portal

ICB User Guide

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2 Introduction

Working to the national digital specification the Provider Portal will enable ICB's to have an end-to-end digital solution for the CHC patient journey.

Our customers will have a more robust way of managing their providers, monitoring bed availability, improving financial governance and allow for improved document storage.

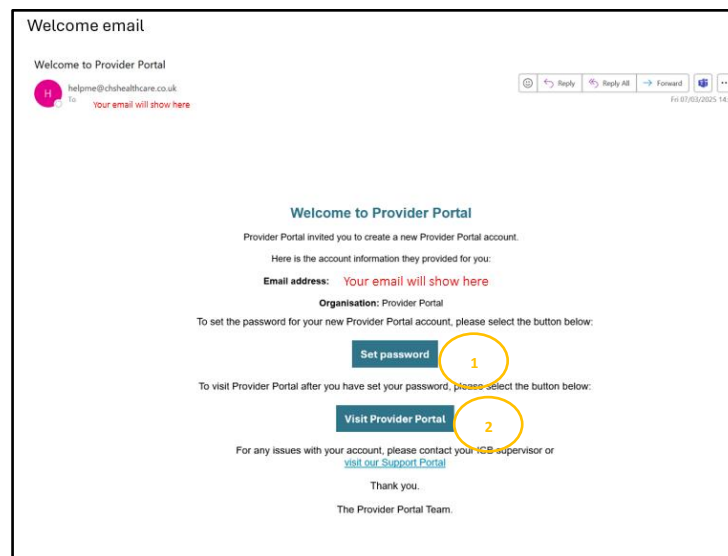
3 Logging in

As part of Multi Factor Authentication (MFA) the Provider Portal uses Single Sign On (SSO) to enable an ICB user to securely authenticate with multiple applications.

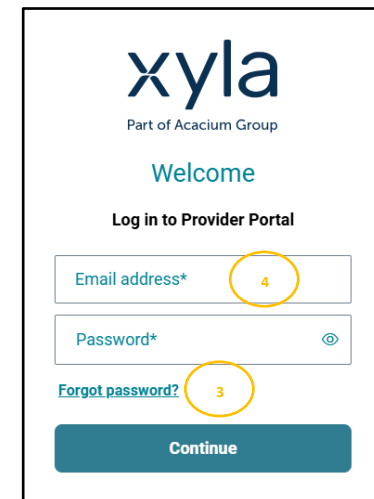
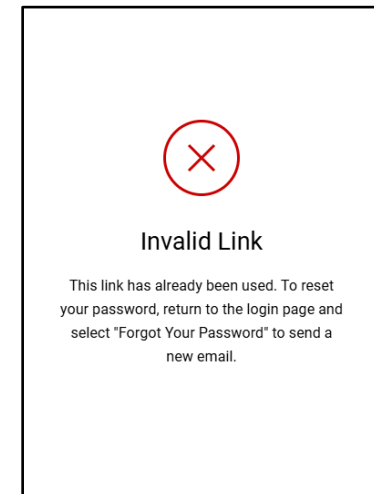
This will allow you to log in once using your preferred authenticator method for 12 hours for both the Provider Portal and BroadCare. Once you have authenticated using MFA on one browser you will need to use the same browser for SSO to work.

Please note that to use the Provider Portal you will require a BroadCare account first as your account permissions will link with the Provider Portal.

Once you have access to BroadCare, if you require access to the Provider Portal you will be set up and receive the below email, you will not automatically have access to the Provider Portal as not all BroadCare users will require access.

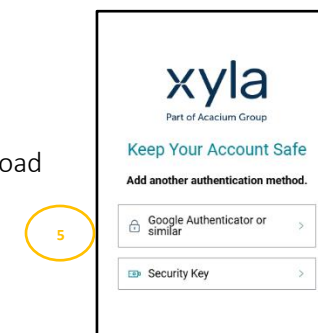


1. Click 'Set password'.
 - Please note the 'Set password' link will expire after 5 days. If you click 'Set password' after 5 days of receiving the 'Welcome' email the below message will appear, prompting you to select 'Forgot password' from your login page.
 - Please set your password before setting up MFA.
2. After you have set your password or if the 'Set password' link has expired click 'Visit Provider Portal' from your 'Welcome' email.
3. If your 'Set Password' link has expired, please click 'Forgot password?' and follow the instructions, once your password has been set click 'Visit Provider Portal' from the 'Welcome' email.
4. Enter your Email Address and Password and click 'Continue'.

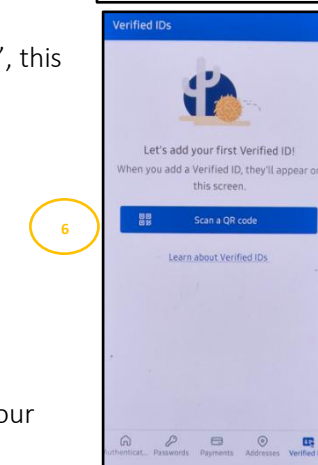


5. Please select 'Google Authenticator or similar'.

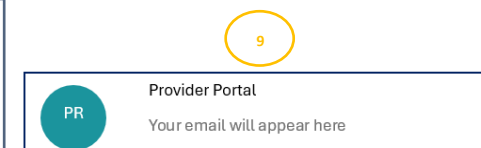
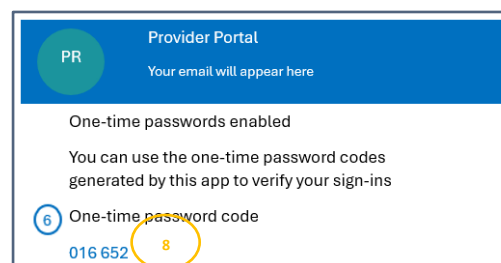
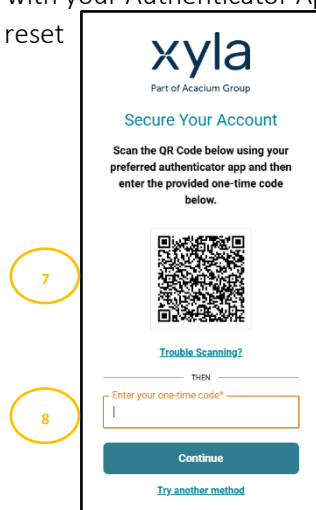
Currently ICB's use either the Google or Microsoft Authenticator App to log in to BroadCare as both are free to download and are completely safe to use on your mobiles.



6. You will be presented with a QR code, open up your Google or Microsoft Authenticator App and click 'Scan a QR code', this will open up your camera from within your app.



7. Hover over the QR code displayed on screen, this will provide you with a One-time password code.
8. Enter the code provided into the box 'Enter your one-time code'.
9. This will link the Provider Portal with your Authenticator App. Click on the Provider Portal line each time to retrieve your code, the countdown timer will reset every 30 seconds.



Microsoft Authenticator App



1. Enter your Email Address and Password into the Provider Portal
2. Select Authenticator App and a QR Code will be displayed
3. Open up your Authenticator App
4. On the bottom right click on Verified IDs button
5. Click on Scan a QR code
6. This will open up your mobile camera from within the app itself
7. Hover over the QR code that is displayed on your laptop
8. This will link your Provider Portal access to your mobile device
9. Enter your Onetime code into the box on your laptop
10. You now have access

Google Authenticator App



1. Enter your Email Address and Password into the Referral Portal
2. Select Authenticator App and a QR Code will be displayed
3. Open up your Authenticator App
4. On the top right of the app click on the + button
5. This will open up your mobile camera from within the app itself
6. Hover over the QR code that is displayed on your laptop
7. This will link your Provider Portal access to your mobile device
8. Enter your Onetime code into the box on your laptop
9. You now have access

Please note: The QR will not be required again as MFA has been set up, you will only require your Email Address, Password, and One-time code found in your Mobile's Authenticator App every 12 hours to access the Provider Portal.

4 Navigation

After you have set up MFA for the Provider Portal you can log in directly to the Provider Portal using the link you have been provided in your 'Welcome' email or through your BroadCare login using Single Sign On (SSO).

The Provider Portal will replace the Provider section.

The screenshot displays the BroadCare Provider Portal interface. On the left, a navigation menu lists various sections: Actions, Patients, Referrals, **Provider Portal** (highlighted with a yellow box), Reports, Schedule, and Administration. The main content area features a header with the BroadCare logo and a user greeting 'Welcome back Rebecca'. Below this, there are filters for 'Action Status' (set to 'Incomplete') and 'Sub Status' (set to 'All'). A 'Show Deleted' toggle is set to 'No'. Action buttons include 'Excel', 'Add Action', 'Re-allocate', and 'Filter'. A table header lists columns: ID, Created Date, Created By, Assigned To, Due Date, and Reason/Description. The table body is empty, showing the message 'There are no actions to display'.

After logging into the Provider Portal you will be presented with the below screen. The down arrow next to your name will open up and present you with your own settings.

The screenshot displays the xyla Provider Portal interface. At the top, the xyla logo and 'Part of Acacium Group' are visible. The main header includes navigation links: [Provider Search](#), [Brokerage](#), [Reporting](#), and [Admin](#). The user's name, Rebecca Maynard, is shown in the top right corner with a dropdown arrow. A yellow box highlights this dropdown menu, which contains the following options: [My account](#), [View user guides](#), [Exit Provider Portal](#), and [Log out of all platforms](#).

The main content area is titled 'Provider search' and features a tabbed interface with 'ICB library' and 'CQC library'. The 'ICB library' tab is currently selected. Below the tabs, there are several search filters:

- Provider name**: A text input field.
- Provider service type**: A dropdown menu.
- Provider status**: A dropdown menu showing 'Active, On Advice' with a close button (x) and a dropdown arrow (v).
- Provider postcode**: A text input field with a 'Postcode match' dropdown menu. Below this field, a note states: 'If you only enter part of a postcode, you must select 'Postcode match'. If you enter a full postcode, you can select a radius.'
- BroadCare ID**: A text input field.
- Tags**: A dropdown menu.

At the bottom of the search filters, there is a 'Show advanced filters' link, a 'Clear all' button, and a 'Search' button. At the very bottom of the page, there are two buttons: 'List' and 'Map'.

4.1 My Account

This will allow you to change your password by sending a password reset email.

My account

Reset password

To change your password, send a password reset email and follow the instructions.

Send password reset email

4.2 View user guides

This will allow you to view all Provider Portal user guides.

4.3 Need Help

The Need help link will provide you with next steps if you are struggling.

xyla

Part of Acacium Group

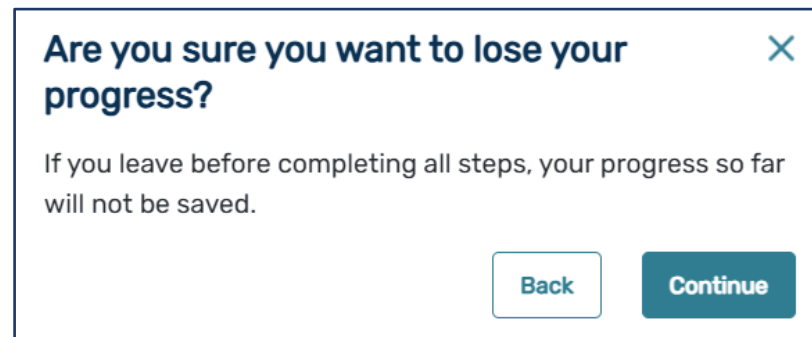
Welcome

Go to Provider Portal login

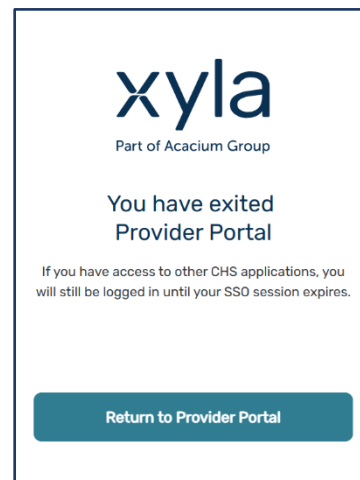
Need help?

4.4 Exit Provider Portal

This will allow you to exit the Provider Portal but keep you signed in using Single Sign On (SSO) to other platforms you have access to for instance BroadCare, for 12 hours from the time you signed into the application using your chosen authentication method. If you have not completed some steps before trying to exit a pop up will appear.

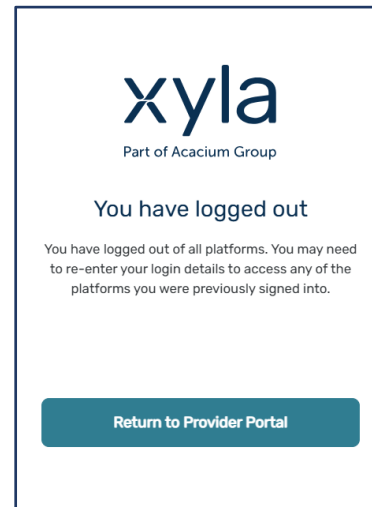


To re-enter click 'Return to Provider Portal'.



4.5 Log out of all platforms

This will log you out of all applications you have access too for instance the Provider Portal and BroadCare. To re-enter click 'Return to Provider Portal' and enter your email address, password, and authentication method.



5 Provider Search

Within the Provider search section, you can search for a Provider within 'ICB Library' and 'CQC Library' and add a new provider by clicking on 'Add Provider'.

Please note that your access to the Provider Portal is determined by your permissions that have been set by the ICB.

5.1 ICB Library

Within the ICB Library you have a standard search and advanced search facility using the below filters.

5.1.1 Standard Search

Enter the below filter information and click 'Search'.

- **Provider name**
- **Provider postcode**
- **BroadCare ID** is the unique Provider ID
- **Provider Service Type** for instance;
 - Homecare agencies
 - Hospice
 - Hospital
- **Provider Status** for instance;
 - Active
 - Inactive
 - On Advice

- **Tags**

If these have been set up on a provider record you can select using the drop down, these can be used to reference another provider e.g. if the provider is in a particular locality but has an overall company for instance Barchester Care Homes. It can also be used to highlight their specialism for instance dementia care.

The screenshot shows the 'xyla Provider Portal' interface. At the top, there's a navigation bar with 'Provider Search', 'Brokerage', and 'Admin' tabs. The 'Provider Search' tab is active. Below the navigation bar, there's a 'Provider search' section with an 'Add provider' button. The search area is divided into two columns: 'ICB library' and 'CQC library'. The 'ICB library' column contains fields for 'Provider name', 'Provider service type' (a dropdown menu), and 'Provider status' (a dropdown menu with 'Active, On Advice' selected). The 'CQC library' column contains fields for 'Provider postcode' (with a 'Postcode match' dropdown), 'BroadCare ID', and 'Tags' (a dropdown menu). There are 'Clear all' and 'Search' buttons at the bottom right of the search area. Below the search area, there are 'List' and 'Map' buttons. At the very bottom, a note says 'Please select the filters above, then select 'Search' to display all relevant providers.'

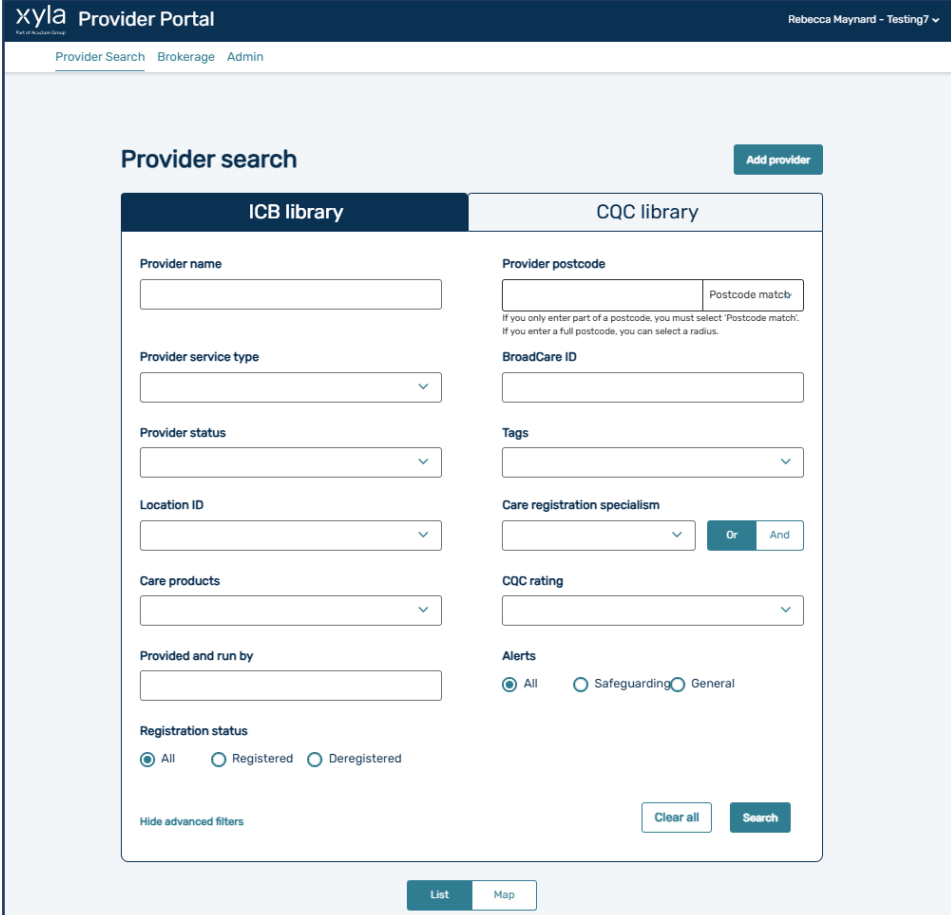
5.1.2 Advanced Search

Click on 'Show advanced filters' and the filter options will expand.

Enter the filter below and click 'Search'.

- Provider name, Provider postcode, BroadCare ID, Provider service type, Provider status, and Tags can be used as described above and;
- **Location ID** which is provider specific and stored in the provider record and is used to link the provider to CQC
- **Care registration** for instance;
 - Caring for adults over 65 yrs
 - Caring for adults under 65 yrs
 - Caring for children
- **Care Products** for instance;
 - Care
 - Based on needs
- **CQC rating** for instance;
 - Good
 - Inadequate
 - Outstanding
- **Provided and run by** is taken from the CQC register
- **Registration status**
 - All
 - Registered
 - Deregistered
- **Alerts** which highlight a concern that you wish other users to be mindful of for instance;
 - All
 - Safeguarding
 - General

Please note the Alert options will only be available once they have been added to the Alert Type Lookups within BroadCare.



List View

Map View

16 | Page

5.1.3 List View

Once the list of providers is showing you can:

1. **List providers** – this will change how the list is presented
 - A-Z provider name
 - CQC rating (overall) High-Low
2. **View provider profile** – this will open up the provider Record. You can click 'Back to search results' to come Out of the provider record
3. **Load providers**
 - By clicking 'Select all' then 'Load providers' will show each provider side by side, you can navigate by using the left and right arrows
 - Alternatively, you can click 'Select' on the providers you wish to view before clicking 'Load Providers'.
 - You can click 'Back to search results' to come Out of the provider record
4. **Create report** – this will download the information into Excel with the following tabs
 - **Description:** overview of report
 - **Provider ICB Library** – overview of provider including name, address, CQC rating, Care Products etc
 - **Tags**
 - **Contacts**
 - **Care Products**
 - **Group package rate types**
 - **Bed availability**
5. **View on Google Maps** – this will take you to google Maps to view further information and get directions.

Top Screenshot: Displaying 13 providers

- 1: A-Z provider name dropdown menu
- 2: View provider profile button
- 3: Load providers button
- 4: Create report button
- 5: View on Google Maps link

Bottom Screenshot: (IECC Care) Independent Excel Care Consortium Limited

- 3: Back to search results link

Provider details:

(IECC Care) Independent Excel Care Consortium Limited ♦

Office 56, The Colchester Centre, Hawkins Road, Colchester, Essex, CO2 8JX ♦

Provided and run by ♦

(IECC Care) Independent Excel Care Consortium Limited

Overview

◆ Data from CQC - Last updated 06/02/2025, 08:27

Overview

51°52'59.9"N 0°55'41..."

View larger map

Enterprise Car & Van Hire - Colchester

Travis Perkins

5.1.4 Map View

1. Using the scroll button on your mouse will allow you to zoom in or out of the area you wish to look at
You can also zoom in or out by using the + and – buttons
2. Clicking on the **red** pinpoints opens up the contact information for the provider
3. Clicking on the provider name in **blue** will open the provider record. You can click 'Back to search results' to come out of the provider record

Displaying 13 providers

List Map

1

2

3

The Oaks

Hartrigg Oaks, Lucombe Way, New Earswick, York,
North Yorkshire, YO32 4DS
Mrs Diane Atkinson, Registered Manager
01904750700

Back to search results

The Oaks

Overview Overview

6 Provider Record

Each provider record will have vertical tabs; by clicking on each tab you will have the ability to view and, in some cases, add and delete information as listed below, with the information being displayed on the right. To go back to the search results, please click on 'Back to search results'.

Please note that your access to the Provider Portal is determined by your permissions that have been set by the ICB.



Indicates that these fields are automatically updated by CQC – This is updated every 24 hours in the evening.

Please note that not all the fields below will appear if there is no data held within the tab for instance CQC if the provider has not been linked, Care packages, and Finance.

Overview – Provides the address, phone number, email address, manager information, BroadCare ID (unique Provider ID), Org ID, Provider Status, and Registration Status.

CQC – This provides the CQC rating, when the report was published and the ability to view the report, last inspection, location ID, provided and run by, and the ability to view the CQC information on the CQC website.

Contacts – View, Add, and Delete contact information.

Contracts – View, Add, and Delete contract information.

Bed availability – View and Edit the types of beds available. This is for domiciliary care providers.

Care Products – View, Add, and Delete Care Products.

The screenshot displays the 'Cambridge Nursing Home' provider record. On the left is a vertical navigation menu with tabs: Overview (selected), CQC, Contacts, Contracts, Bed availability, Care products, Grouped package rates, Care packages, Finance, Alerts, Notes, and Documents. The main content area is titled 'Overview' and includes a timestamp 'Data from CQC - Last updated 29/04/2025, 15:27'. The 'Provider details' section lists the name 'Cambridge Nursing Home', address '61 Cambridge Park, Wanstead, London, E11 2PR', and a link to 'Cambridge Nursing Home Ltd'. The 'Registered Manager' field is empty. The 'Phone number' is 02089891175. The 'Email' field is empty. The 'BroadCare ID' is 1069. The 'Org ID' is VLK6T. The 'Provider status' is 'Active'. The 'Registration status' is 'Registered'. A map on the right shows the location at 51°34'25.7"N 0°0'0"...

Grouped package rates (known as Roles in BroadCare) – View, Add, Delete, and Edit group package rate information.

Care Packages (known as Packages in BroadCare) – Provides information on any care packages.

Finance (known as Finance in BroadCare) – View and create Invoices and create a report.

Alerts (known as Case Management in BroadCare) - View, Add, Edit, Delete and filter Alerts. Add comments to an Alert. Please note the Alert options will only be available once they have been added to the Alert Type Lookups within BroadCare.

Notes (known as Case Management in BroadCare) – View, Delete, Add Note, filter and Assign Action to another user.

Documents (known as Case Management in BroadCare) – View, Add, Delete, filter and Download a Document.

6.1 Overview

Provides the address, phone number, email address, manager information, BroadCare ID (unique Provider ID), Org ID, Provider Status, and Registration Status.

Please note that your access to the Provider Portal is determined by your permissions that have been set by the ICB.

1. **Edit** – Allows you to change the email address and change the Provider Status:
 - Active
 - Inactive
 - On Advice

If the status is inactive or on advice a reason can be entered.

2. **Map** – Allows you to view in Default and Satellite view and as a larger map. The scroll button on your mouse will allow you to zoom in or out of the area you wish to look at, you can also zoom in or out by using the + and – buttons.
3. **Provided and run by blue hyperlink** – This takes you directly to the CQC register.
4. **Email blue hyperlink** – This opens your emails.

Cambridge Nursing Home

Overview

Data from CQC - Last updated 29/04/2025, 16:31

Provider details [Edit](#)

Cambridge Nursing Home ♦

61 Cambridge Park, Wanstead, London, E11 2PR ♦

Provided and run by ♦ 1

[Cambridge Nursing Home Ltd](#)

Registered Manager ♦

Phone number ♦

02089891175

Email

manager@cambridgenursinghome.co.uk

BroadCare ID

1069

Org ID ♦

VLK6T

Provider status

Active

Registration status ♦

Registered

Map view: 51°34'25.7"N 0°0'0"...

Map data ©2025

5. **Tags** – Allows you to view and edit any tags that have been added to the Provider.

Tags can be used to reference another provider e.g. if the provider is in a particular locality but has an overall company for instance Barchester Care Homes. It can also be used to highlight their specialism for instance dementia care.

Care offering

Provider service type ◆
Homecare agencies, Supported living

Care registration specialism ◆
Caring for adults over 65 yrs, Caring for adults under 65 yrs, Learning disabilities, Mental health conditions, Physical disabilities

Care products
1:1 Care

CQC details

Location ID ◆
1-1218715259

CQC Rating ◆ -

Finance

Day time start
00:00

Night time start
00:00

Uses scheduling
No

Vendor site reference

Care package audit
No

Tags

There are no tags currently added for this provider. Select 'Edit' to add and edit tags.

5 Edit

6.2 CQC

This provides the CQC rating, when the report was published and the ability to view the report, last inspection, location ID, provided and run by, and the ability to view the CQC information on the CQC website.

Please note that your access to the Provider Portal is determined by your permissions that have been set by the ICB.

1. View Report

This allows you to view the CQC Report.

2. View on CQC website blue hyperlink

The location ID is provider specific and is used to link the provider to CQC to update the key details which are indicated with a diamond for instance **Location ID** ◆

The key details are automatically updated every 24 hours in the evening.



Cambridge Nursing Home

Overview
CQC
Contacts
Contracts
Bed availability
Care products
Grouped package rates
Care packages
Finance
Alerts
Notes
Documents

CQC ◆ Data from CQC - Last updated 29/04/2025, 07:26

Ratings ⓘ

Overall ◆	Good
Safe ◆	Requires improvement
Well-led ◆	Good
Caring ◆	Good
Responsive ◆	Good
Effective ◆	Good

Details

Report published ◆
05/10/2019
[View report](#)

Last inspection ◆
09/02/2022

Location ID ◆
1-122191502
[View on CQC website](#) 1

Provided and run by ◆
Cambridge Nursing Home Ltd
1-101609129
[View on CQC website](#) 2

Once this has been added to the provider record you will be directed to the CQC register.

Please note that if the provider's name is changed that is linked to a specific location ID it will automatically update the name of the provider on any historic packages of care.

If you have updated the Provider with the wrong location ID, you will need to raise a ticket with the Support Desk to have this amended. This will also change any historic records. If the Provider has been acquired by another company the CQC should provide a new Location ID, in these cases we would recommend that you add the provider on separately with the new information and location ID and add on a new package of care.

6.3 Contacts

View, add, and delete contact information. For instance, to record the safeguarding lead or finance manager.

- 1. **Current/Deleted** – This toggle allows you to toggle to view the current list of contacts and those that have been deleted.
- 2. **Add contact** – This allows you to add a new contact. First Name, Last Name and Job Role are mandatory fields.

Add contact

Title

First name *

Last name *

Job role *

Phone

Mobile

Email

☐ Mark as a primary contact

Comments

Cancel

Save

- 3. Clicking on each contact will open the contact card.
- 4. After opening the contact card, you can Delete or Edit.

Cambridge Nursing Home

Overview

CQC

Contacts

Contracts

Bed availability

Care products

Grouped package rates

Care packages

Finance

Alerts

Notes

Documents

Contacts

Current

Deleted

1

2

Add contact

Mr Walter Scott

SS1

3

^

Phone

Comments

Mobile

Email address

Added: 29/04/2025, 16:39 by Rebecca Maynard

4

Last updated: 29/04/2025, 16:39 by Rebecca Maynard

Delete

Edit

6.4 Contracts

View, add, and delete contract information. For instance, the signed contract With the Provider for the brokerage episode, they have agreed to.

Please note that your access to the Provider Portal is determined by your permissions that have been set by the ICB.

- 1. **Current/Deleted** – This toggle allows you to toggle to view the current list of contacts and those that have been deleted.
- 2. **Add contract** – This allows you to add a contract to the provider.

Add contract

Has the contract been signed? No

Sign with eSignature tool?

YesNo

Contract type *

Contract reference *

Continue

Cambridge Nursing Home

Overview

CQC

Contacts

Contracts

Bed availability

Care products

Grouped package rates

Care packages

Finance

Alerts

Notes

Documents

Contracts

CurrentDeleted

Add contract

No contracts to display.

Add contract

Has the contract been signed?

Yes

No

Sign with eSignature tool?

Yes

No

Contract type *

Contract reference *

Contract issued *

Enter in the format DD/MM/YYYY.

Contract received

Enter in the format DD/MM/YYYY.

Contract start

Enter in the format DD/MM/YYYY.

Contract review

Enter in the format DD/MM/YYYY.

Contract renewal

Enter in the format DD/MM/YYYY.

Indemnity insurance

Yes

No

3

Save

Once a contract is saved it will show in the Provider Portal and a copy of the contract will be saved in the Patient’s Case Management tab in BroadCare.

6.4.1 Signing a contract with the eSignature tool

Once you have toggled to ‘Yes’ to sign with the eSignature tool the below pop up will appear.

- 1. Add the ‘Contract type’ and ‘Contract reference’ before clicking ‘Continue’.

Add contract

Has the contract been signed?

No

Sign with eSignature tool?

Yes

No

Contract type *

Contract reference *

1

Continue

New contract

*Mandatory Fields - Contract type, Contract reference, and Contract issued.

- Has the contract been signed – Allows you to toggle to Yes or No. If Yes is selected then Sign with eSignature tool will disappear.
- Sign with eSignature tool – This allows for the signature to be captured digitally and allows you to toggle to Yes or No.

No – You will follow your current process and sign the document manually.
Yes – A pop up will appear to add and sign a new contract digitally.

- 3. Indemnity insurance – Allows you to toggle to Yes or No. If Yes is selected, additional mandatory boxes will appear.

Indemnity insurance from date *

Enter in the format DD/MM/YYYY.

Indemnity insurance to date *

Enter in the format DD/MM/YYYY.

2. You can use an existing contract template, or you can upload a new document.



Add contract ✕

Choose how to prepare the document for signing

☐ Select an existing template

☒ Upload a new document

Back

A yellow circle with the number 2 is placed over the 'Upload a new document' radio button.

6.4.2 Contract Preparation – Signing with a digital signature - Using an existing template

1. Once you have selected to use an existing template, a new drop down will be available to select the template you would like to use.



Add contract ✕

Choose how to prepare the document for signing

☒ Select an existing template

☐ Upload a new document

Back

A yellow circle with the number 1 is placed over the 'Select an existing template' radio button.

The contract templates are stored within the Legalsign portal, only certain members of the ICB will have access to the portal. Legalsign uses an electronic signature (eSignature) as a digital replacement for a handwritten (wet) signature and is just as legally binding.

2. If you are unable to locate the template, you wish to use in the drop down then please contact your Legalsign colleague within your ICB to add the template for you.

Choose how to prepare the document for signing

☒ Select an existing template

☐ Upload a new document

Select an existing template *

2

▼

3. Once the template has been selected you can choose who and how the signatures are captured.
- Parallel allows individuals to sign in any order
 - Sequential allows signatures in order of signers

Signers

Signing order *

Select 'Parallel' if signers can sign the document in any order. Select 'Sequential' if signers must sign the document in a specific order.

3

Parallel

Sequential

Add signer *

Enter the full name and email address for each signer.

First name *	Last name *	Email address *
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>

Back

Continue

4

Signers

Signing order *

Select 'Parallel' if signers can sign the document in any order. Select 'Sequential' if signers must sign the document in a specific order.

Parallel

3

Sequential

Add signer *

Enter the full name and email address for each signer.

Order	First name *	Last name *	Email address *
<div><div>⬇️⬆️</div>1.</div>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<div><div>⬆️⬇️</div>2.</div>	<input type="text"/>	<input type="text"/>	<input type="text"/>

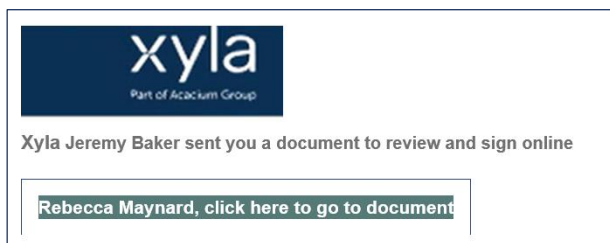
Back

Continue

4

4. Once the name and email address of the signers have been added, click 'Continue'.
5. Enter the Registered Manager name and click 'Send document'.
6. A pop up will appear asking the user if they are sure they want to send the document. If happy click 'Send document'.

The document will be sent by email.



The image shows a 'Document details' form. It has a label 'Registered Manager' above a text input field. Below the input field are two buttons: 'Back' and 'Send document'. A yellow circle with the number 5 is placed over the 'Send document' button.

The image shows a confirmation pop-up with the title 'Are you sure you want to send this document?'. It includes a close button (X) in the top right corner. The text inside says: 'You will not be able to make any changes to this document after you have sent it. Please make sure all details are correct before sending.' At the bottom are two buttons: 'Back' and 'Send document'. A yellow circle with the number 6 is placed over the 'Send document' button.

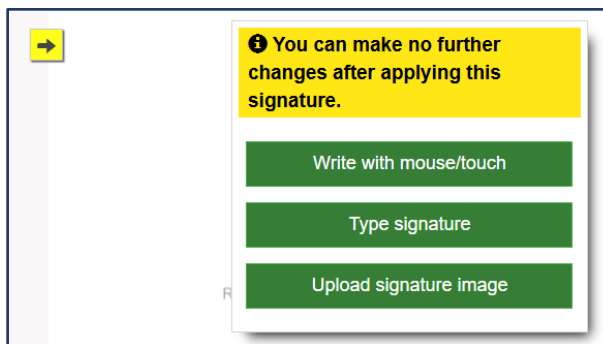
7. After the contract has been issued, the signers will receive an email, once opened they will be presented with the contract.

The user will need to tick to confirm they are authorised to accept the document, and they understand the terms of the document. The signer can now select 'Get started' and they will be taken to the part of the contract that requires their signature, the date will be automatically set based on the date the contract is signed.

If they reject the contract they can select 'Reject document'.

The image shows a two-part form for contract acceptance. The left part contains two checkboxes, both of which are checked: 'I confirm that I am authorised to accept the terms of this document.' and 'I understand that accepting the terms of this document creates a legally binding obligation.' Below these checkboxes are two buttons: 'Get started' (highlighted in green) and 'Reject document'. A yellow circle with the number 7 is placed over the 'Get started' button. A yellow arrow points from the 'Get started' button to the right part of the form. The right part of the form has a yellow arrow pointing to a text input field, a yellow circle with the number 8 is placed over the input field, and the date '28/04/2025' is displayed below it. Below the date is a yellow rectangular box, and a yellow circle with the number 9 is placed over it.

8. Add signature.
9. Clicking here will open the below pop up. From here you can select the type of signature you wish to add.



10. Once the signature has been added you will receive a pop up to advise that signatures from other parties are required.

Once all signers have added a signature an email will be sent with a copy of the contract (PDF). At the end of the document there will be a document information page to show the date and time of the signatures.

The document will be saved in Case Management on the Patient's BroadCare record.

Document signed

Status: Waiting for others

The document is now waiting to be executed by other parties.

Once all parties have completed it will be emailed to you and also be available here for download.

Close browser window or [logout](#)

Document signed

Important: save file direct to your computer, do not open in browser since this can affect file integrity.

Click here to download

The unique identifier (SHA-256) for this signed document is (this will be emailed to you):


eef2e12a13133e0914ee0d34f3c3067991fffe
551d56dc48c7f385e348a1d925

[What is SHA-256?](#)

Close browser window or [logout](#)

6.4.3 Contract preparation – Uploading a signed contract

1. If you have already received a signed contract rather than using as digital signature as described in 6.1.4.1.1 you can click 'Upload a signed contract'.



Add contract

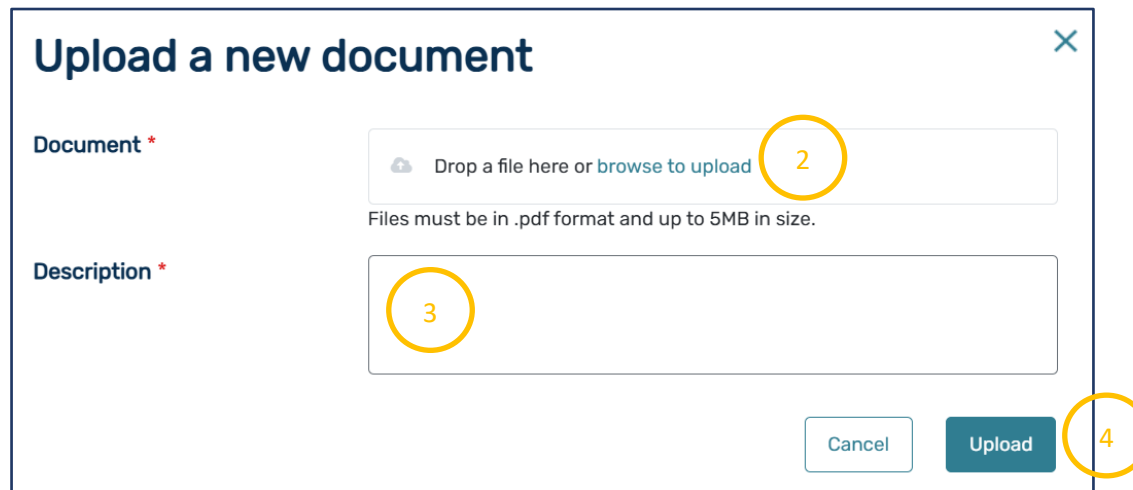
Choose how to prepare the document for signing

☐ Select an existing template

☒ Upload a new document

Back

2. Drag and drop the file or browse to upload your contract.
3. Add a description of the document.
4. Click 'Upload', this will upload the document to the brokerage episode and also save on the Patient's BroadCare record in Case Management.



Upload a new document

Document *

Drop a file here or browse to upload

Files must be in .pdf format and up to 5MB in size.

Description *

Cancel Upload

6.5 Bed availability

This allows you to view and edit the available types of beds within the setting.

Cambridge Nursing Home

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Contracts

Bed availability

Care products

Grouped package rates

Care packages

Finance

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Documents

Bed availability

Single

Personal Care

-

Single

Nursing

-

Single

Personal Care, Dementia

-

Single

Nursing, Dementia

-

Shared

Male, Personal Care

-

Shared

Female, Personal Care

-

Shared

Male, Nursing

-

Shared

Female, Nursing

-

Edit

Update bed availability

Single

Personal Care

Available beds

Single

Nursing

Available beds

Single

Personal Care, Dementia

Available beds

Cancel

Save

6.6 Care Products

View, add, and delete Care Products. For instance, the type of care being delivered i.e 1-1 Care.

Please note that your access to the Provider Portal is determined by your permissions that have been set by the ICB.

Please note you can only add a Care Product to a provider if this has already been added to the Lookups.

1. **All/Deleted** – This toggle allows you to toggle to view All of the care products and those that have been deleted.
2. **Delete/Edit** - Once a care product has been added you can Edit or Delete the information.
3. **Add care product** – This allows you to add a care product to the provider.

Care product type – This can be selected from the drop down.

From date and To date – These are the dates the care product will be available to select when a package of care is added.

Rate – This is the rate the provider is charging for the type of care being delivered.

Rate unit – This can be selected from the drop down.

Rate unit *

Day
 Unit
 Week

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Contracts
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Care products
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Documents

Care products

All Deleted

1:1 Care £0.00/Week

Available from: 01/03/2021 Available to:

Added: 31/03/2021, 19:08 by Salim Shaikh

Last updated: 09/02/2022, 17:14 by Vishvajeet M

Delete Edit

2:1 Care £0.00/Week

Based on Needs £0.00/Day

Block Beds £0.00/Day

Direct Payment £0.00/Week

Add care product

Care product type *

From date

Enter in the format DD/MM/YYYY.

To date

Enter in the format DD/MM/YYYY.

Rate

Rate unit *

Cancel

Save

6.7 Grouped package rates

(known as Roles in BroadCare)

View, add, delete, and edit group package rate information.

Please note you can only add the Grouped package rates to the provider if this has already been added to the Lookups.

Please note that your access to the Provider Portal is determined by your permissions that have been set by the ICB.

1. **All/Deleted** – This toggle allows you to toggle to view All of the grouped package rates and those that have been deleted.
2. **Delete/Edit** - Once a grouped package rate has been added you can Edit or Delete the information.
3. **Add grouped package rates** – This allows you to add grouped package rates to the provider.

Grouped package rates type – This can be selected from the drop down.

Days of the week – This can be selected from the drop down.

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CQC

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Grouped package rates

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Documents

Cambridge Nursing Home

Grouped package rates

All

Deleted

24 Hour Care

	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Bank Holiday
Day rate £/hour	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Night rate £/hour	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00

Added: 31/03/2021, 19:02 by Salim Shaikh

Last updated: 31/03/2021, 19:02 by Salim Shaikh

Carer

Add grouped package rates

Grouped package rates type *

Days of the week *

3

Select the days of the week for entering specific day and night rates.

Cancel

Save

6.8 Care Packages

View care packages that are in place for the provider.

Please note that your access to the Provider Portal is determined by your permissions that have been set by the ICB.

Cambridge Nursing Home

Care packages

Contracts	13308	Unit
Care products	13305	Unit
Care packages	13282	Unit
Alerts	13280	Unit
Documents	13275	Unit

Care packages

Hide filters

From

 Enter in the format DD/MM/YYYY.

To

 Enter in the format DD/MM/YYYY.

Contract ID

Patient BC ID

Record owner

Classification

Package type

Payment method
☒ All ☐ Schedule ☐ Non-schedule

Status
☐ All ☒ Active ☐ Closed

Care package audit
☒ All ☐ Yes ☐ No

1. **Show filters/Hide filters** allows you to filter for a particular type of care package

From and To Date – Filter on the date range of the care package

Contract ID – This is the unique Contract ID that the care package is linked to

Patient BC ID – This is the unique Patient ID within BroadCare

Record Owner – This is the record owner that has set up the care package

Classification – This is the classification that the care package has been recorded against for instance CHC or Children

Package type – How the package has been recorded for instance Grouped, Non-grouped, Unit

Payment method – How the package will be paid for instance All, Schedule (paid automatically on a monthly schedule, non-schedule (paid by invoice)

Status – All, Active, Closed

Care package audit – Additional Xyla service whereby we can assist with your packages and invoice - All, Yes, No

2. **Down arrow** opens the care package information.

This will provide you with more information on the type of care package, and its associated costs.

You can also click on the blue hyperlink to view the patient record from within BroadCare.

13308 Unit ^

Patient name jones 120	Patient BC ID 6947	
Record owner North Ridings CCG	Classification CHC/FNC	PHB status No
From 01/01/2024	To	Care product Mileage
Number of unit 1	Cost per unit £3000.00	
Total cost £3000.00	Funding & paid by Fully - Paid By NHS	
NHS percentage & cost 100% / £3000.00	LA percentage & cost 0% / £0.00	ED percentage & cost 0% / £0.00
Local authority	School authority	
By schedule No	Care package audit No	Credit No
Approved date	Approved by	

6.9 Finance

This allows you to invoice through one Provider for multiple patients.

1. **Create report** provides the invoice information
2. **Create invoice** allows you to add a new invoice
3. **Show/Hide filters** allow you to filter the invoices
4. **From** and **To** Dates
5. **Committed** (All, No, Yes) If you want to commit to paying the invoice
6. **Invoice reference**
7. **Classification** (CHC/FNC, Children)
8. **Arrow** expands the invoice to view and add information

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Create report **Create invoice** **Hide filters**

From **To**

Enter in the format DD/MM/YYYY. Enter in the format DD/MM/YYYY.

Committed **Invoice reference**

Classification

qetrew-2	£ -71.43	Committed 8
qetrew-1	£ -235.71	Committed
qetrew	£ 871.42	Committed
4321	£ 7285.71	Committed

- Committed – Yes shows the invoice has been confirmed and is ready for payment, this will allow you to view the patient invoices

getrew-2

£ -71.43

Committed

Received

01/07/2023

Invoice ID

16417

Classification

CHC/FNC

From

30/06/2024

To

30/06/2024

Payment method

Added:

25/07/2023, 10:01 by Pranav Bhatt

Last updated:

25/07/2023, 10:01 by Pranav Bhatt

Add note

Add document

View notes

View documents

View patient invoices

Patient invoices

Contract ID	Patient BC ID	Ledger Reference	From	To	Amount
9504	5690		30/06/2024	30/06/2024	£ -28.57
9511	5690		30/06/2024	30/06/2024	£ -42.86
Total					£ -71.43

Close

- Add note

Add note

Reason

Assign action to

Note

Cancel

Save

- Add document

Add document

Document

Drop a file here or browse to upload

Description

Folder

General

Cancel

Upload

- **View notes** allow you to add an additional note, view All and Deleted notes and click the down arrow to expand the note

Notes

Add Note

AllDeleted

Show filters

Financial Analyst	Supplier Case Note	Completed	⌵
Phone call to provider	Supplier Case Note	Completed	⌵
	Provider Invoice Note	Completed	⌵
	Provider Invoice Note	Completed	⌵
	Provider Invoice Note	Completed	⌵
Email from provider	Supplier Case Note		⌵

Notes

Add Note

AllDeleted

Show filters

Financial Analyst

Supplier Case Note

Completed

⌵

Note description

Test 2 and 11

Action due date

05/12/2023

Comments

No comments to display.

Added:

28/11/2023, 06:42 by Salim General

Last updated:

28/11/2023, 06:42 by Salim General

Completed:

28/11/2023, 00:00 by Salim Shaikh

Delete

Add comment

- **View documents** allow you to Add a document, and view Current, and Deleted documents. Clicking the down arrow expands the document, allowing you to you Delete, and Download it.

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Documents

Move documents

Add document

CurrentDeleted

Show filters

<input type="checkbox"/>	Funded Care Report.pdf	Folder: General	⌵
<input type="checkbox"/>	Doc.doc	Folder: General	⌵
<input type="checkbox"/>	TestDoc1For-BUG-197.docx	Folder: Salim_Vouchers	⌵
<input type="checkbox"/>	TestDoc2For-BUG-197.docx	Folder: Salim_Accounts	⌵
<input type="checkbox"/>	TestDoc3For-BUG-197.docx	Folder: Salim_Journal	⌵

Documents

Move documents

Add document

CurrentDeleted

Show filters

☐

Funded Care Report.pdf

Folder: General

⌵

Description

test

Added:

15/12/2017, 09:01 by Nikki Williams

Last updated:

15/12/2017, 09:01 by Nikki Williams

Download history (2 downloads)

Delete

Download

☐

Doc.doc

Folder: General

⌵

☐

TestDoc1For-BUG-197.docx

Folder: Salim_Vouchers

⌵

☐

TestDoc2For-BUG-197.docx

Folder: Salim_Accounts

⌵

☐

TestDoc3For-BUG-197.docx

Folder: Salim_Journal

⌵

- **Committed - No** allows you to Edit the invoice as it has not yet been confirmed/committed for payment by clicking the down arrow to expand the

The screenshot shows the 'Cambridge Nursing Home' interface. On the left is a sidebar with navigation links: Overview, CQC, Contacts, Contracts, Bed availability, Care products, Grouped package rates, Care packages, Finance (selected), Alerts, Notes, and Documents. The main 'Finance' section contains fields for 'From' and 'To' dates, a 'Committed' dropdown set to 'No', and an 'Invoice reference' field. Below these is a table with two rows: 'SS1' for £95.00 and 'qw65 invoice ref' for £357.00. A yellow arrow points from the down arrow of the 'SS1' row to a detailed invoice view on the right. This view shows the invoice for 'SS1' for £95.00, with details including 'Received' date (31/03/2021), 'Invoice ID' (13369), 'Classification' (CHC/FNC), 'From' date (01/02/2020), 'To' date (29/02/2020), 'Payment method', and user information (Added and Last updated by Salim Shaikh). At the bottom of the details view are links for 'Add note', 'Add document', 'View notes', 'View documents', and an 'Edit invoice' button.

Cambridge Nursing Home

Overview
CQC
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Finance [Create report](#) [Create invoice](#) [Hide filters](#)

From **To**
Enter in the format DD/MM/YYYY. Enter in the format DD/MM/YYYY.

Committed **Invoice reference**

Classification

SS1	£ 95.00	▼
qw65 invoice ref	£ 357.00	▼

SS1 **£ 95.00** [^](#)

Received 31/03/2021 **Invoice ID** 13369 **Classification** CHC/FNC

From 01/02/2020 **To** 29/02/2020 **Payment method**

Added: 31/03/2021, 20:22 by Salim Shaikh
Last updated: 31/03/2021, 20:22 by Salim Shaikh

[Add note](#) [Add document](#) [View notes](#) [View documents](#) [Edit invoice](#)

- Click **Edit invoice** to view the invoice

- **View packages** expand the information to view the associated patient care packages and edit the information

Invoice reference *

SS1

Received *

31/03/2021

Enter in the format DD/MM/YYYY.

Classification

CHC/FNC

Amount

95

Date paid

01/04/2021

Enter in the format DD/MM/YYYY.

Credit note

Yes

No

Filter by

From *

01/02/2020

Enter the start date of the packages you want to view.

To *

29/02/2020

Enter the end date of the packages you want to view.

View packages

Add custom invoice

Calculations

Total on invoice:

£ 95.00

Expected amount selected:

£ 0.00

Total amount selected:

£ 0.00

Invoice balance:

£ 95.00

Cancel

Save as draft

Commit

View packages

<input type="checkbox"/>	7798	<div>Sarah B... 20/05/1934 4864</div>	01/02/2020	29/02/2020	£200.00	£828.57	£828.57	No	<div>Edit</div>
<input type="checkbox"/>	9504	<div>Jane Sm... 09/09/2000 5690</div>	01/02/2020	29/02/2020	£600.00	£2485.71	£2485.71	No	<div>Edit</div>
<input type="checkbox"/>	9511	<div>Jane Sm... 09/09/2000 5690</div>	01/02/2020	29/02/2020	£900.00	£3728.57	£3728.57	No	<div>Edit</div>
<input type="checkbox"/>	10519	<div>Pauline... 08/08/1949 5682</div>	01/02/2020	29/02/2020	£1000.00	£4142.86	£4142.86	No	<div>Edit</div>
<input type="checkbox"/>	10583	<div>Chasess... 01/05/1950 1</div>	01/02/2020	29/02/2020	£155.05	£642.35	£642.35	No	<div>Edit</div>

41 | Page

- Add custom invoice

Edit invoice

Invoice reference *

Received *

Enter in the format DD/MM/YYYY.

Classification

Amount

Date paid

Enter in the format DD/MM/YYYY.

Credit note

Filter by

From *

Enter the start date of the packages you want to view.

To *

Enter the end date of the packages you want to view.

Calculations

Total on invoice:
£ 95.00

Expected amount selected:
£ 0.00

Total amount selected:
£ 0.00

Invoice balance:
£ 95.00

Add custom invoice

Contract ID *

Patient - BC ID

From *

Enter in the format DD/MM/YYYY.

To *

Enter in the format DD/MM/YYYY.

Expected amount

Invoiced amount

Ledger reference

- **Save as draft** will allow you to save if you need to make further checks and changes
- **Commit** will allow you to confirm you are happy with the invoice, you must tick each package you wish to add before clicking Commit

6.10 Alerts

View, add, edit, delete and filter Alerts. Add comments to an existing alert.

Please note that your access to the Provider Portal is determined by your permissions that have been set by the ICB.

Please note you can only add an Alert to a provider if this has already been added to the Lookups in BroadCare.

1. **All/Deleted** – This toggle allows you to toggle to view All of the Alerts and those that have been deleted.
2. **Delete alert/Edit alert** - Once an Alerts has been added you can Edit or Delete the information.
3. The **arrow** will allow you to open the Alert to view more information.
4. **Show filters** – This allows you to apply filters when searching for a particular Alert that has been added to the provider record.
5. If the Alert is open, it will show as **Current**.
6. **Add alert** – This allows you to add an alert to the provider record.

Alert type - This can be selected from the drop down for instance a Safeguarding

Alert subtype – This can be selected from the drop down for instance physical abuse

From date and To date – These are the dates the alert will be active on the provider record. The To date can be left blank when it is ongoing.

Notes – Any key information relating to the alert can be added.

6.11 Notes

(known as Case Management in BroadCare)

View, delete, add, filter and assign and action to another user.

Please note that your access to the Provider Portal is determined by your permissions that have been set by the ICB.

1. **All/Deleted** – This toggle allows you to toggle to view all the notes and those that have been deleted.
2. **Show filters** – This allows you to apply filters when searching for a particular Alert that has been added to the provider record.
3. The **arrow** will allow you to open the Alert to view more information.
4. **Completed** will show if the note has been completed/actioned.
5. **Delete** can be used if the notes require deleting.
6. **Add comment** – This can be used to add additional comments on the note.

7. **Add Note** – This allows you to add notes to the provider record.

Reason – This can be selected from the drop down. The note reason will only be available once added to the Lookups.

Assign action to – If you wish to assign the action/task to a college you can select them from the drop down as long as they are a Provider Provider Portal user.

Note – Add additional information to support the reason for the note.

6.12 Documents

(known as Case Management in BroadCare)
View, add, delete, filter and download a document.

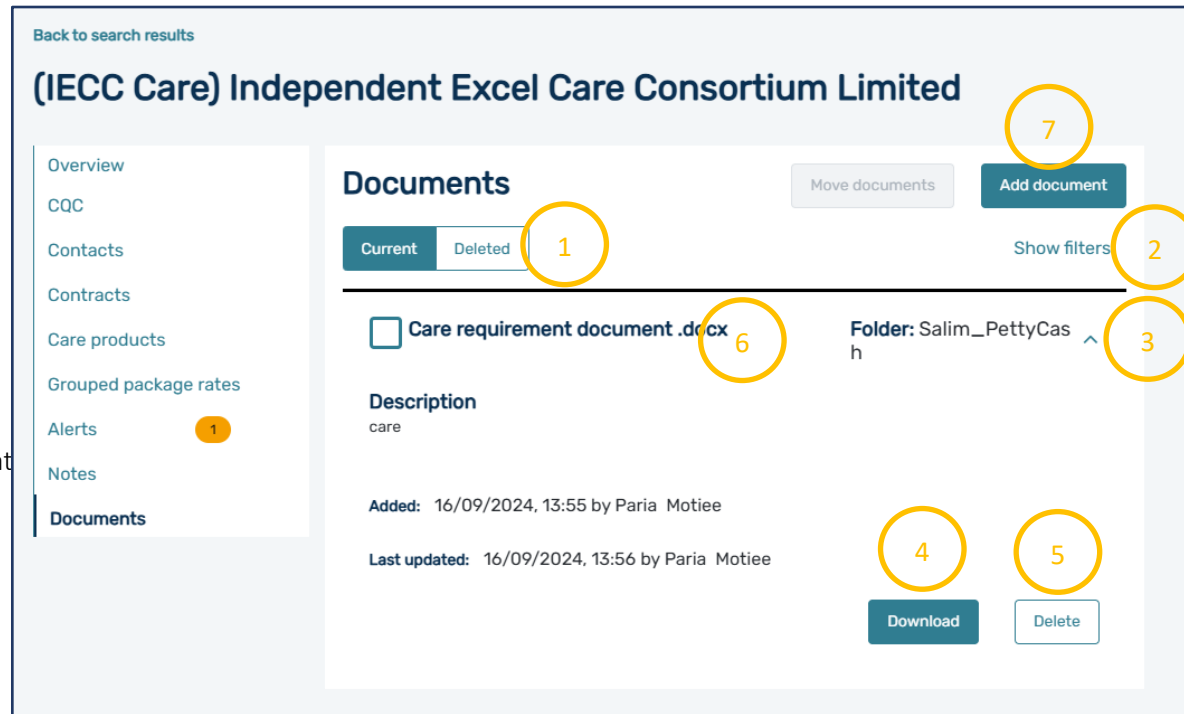
Please note that your access to the Provider Portal is determined by your permissions that have been set by the ICB.

1. **Current/Deleted** – This toggle allows you to toggle to view the current documents and those that have been deleted.
2. **Show filters** – This allows you to apply filters when searching for a particular document that has been added to the provider record.
3. The **arrow** will allow you to open the Alert to find more information.
4. **Download** – This allows you to download the Document.
5. **Delete** – This allows you to delete the Document.

6. **Move documents** – This allows you to move a document to a new folder.

- Click on the checkbox next to the document name.
- Click on move documents.
- Select the new folder before clicking save.

Please note the Folder names will only be available once they have been added to the Case Manager Folder Lookup within BroadCare.



7. **Add document** – This allows you to add a new document.

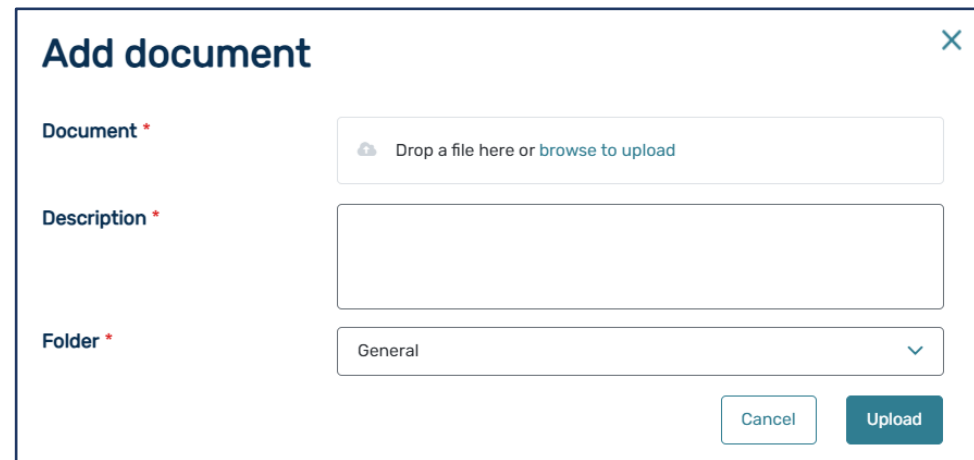
Any documents added will also appear in Case Management in BroadCare.

Document – Upload the document.

Description – Provide information on what the document is.

Folder – Select the folder you wish the document to appear in from the drop down.

Please note the Folder names will only be available once they have been added to the Case Manager Folder Lookup within BroadCare.



The screenshot shows a modal window titled "Add document" with a close button (X) in the top right corner. The form contains three required fields, each marked with a red asterisk:

- Document ***: A file upload area with a cloud icon and the text "Drop a file here or [browse to upload](#)".
- Description ***: A large text input field.
- Folder ***: A dropdown menu currently showing "General" with a downward arrow.

At the bottom right of the form are two buttons: "Cancel" and "Upload".

7 CQC Library

The CQC Library provides information on the listed providers. Within the CQC Library you have a standard search and advanced search facility using the below filters. You will be able to add a provider to the ICB Library from the CQC Library.

Please note that your access to the Provider Portal is determined by your permissions that have been set by the ICB.

7.1 Standard Search

Enter the below filter information and click 'Search'.

- **Provider Name**
- **Provider postcode**
- **Provider Service Type** for instance;
 - Homecare agencies
 - Hospice
 - Hospital
- **Location ID**

This is provider specific and stored in the provider record and is used to link the provider to CQC.

Provider search

ICB library

CQC library

Provider name

Provider service type

Provider postcode

Postcode match ▼

If you only enter part of a postcode, you must select 'Postcode match'. If you enter a full postcode, you can select a radius.

Location ID

Show advanced filters

Clear all

Search

List

Map

Please select the filters above, then select 'Search' to display all relevant providers.

7.2 Advanced Search

By clicking on 'Show advanced filters' the box will expand.

Enter the below filter information and click 'Search'.

- Provider name, Provider postcode, Provider service type and Location ID as described above.
- Care registration specialism – This can be selected from the drop down.
- CQC rating – This can be selected from the drop down.
- Provided and run by
 - All
 - Registered
 - Deregistered

Provider search

ICB library

CQC library

Provider name

Provider service type

Care registration specialism

Or

And

Provided and run by

Hide advanced filters

Provider postcode

Postcode match ☐

If you only enter part of a postcode, you must select 'Postcode match'. If you enter a full postcode, you can select a radius.

Location ID

CQC rating

Registration status

☒ All ☐ Registered ☐ Deregistered

Clear all

Search

List

Map

After you have entered your filters click ‘Search’ this will display the providers within the filter parameters and can be viewed as either a ‘List’ or ‘Map’ depending on the toggle you have selected.

ICB library

CQC library

Provider name

Provider postcode

Postcode match

If you only enter part of a postcode, you must select 'Postcode match'. If you enter a full postcode, you can select a radius.

Provider service type

Homecare agencies

X

Location ID

Care registration specialism

Caring for adults over 65

X

Or

And

CQC rating

Provided and run by

Registration status

All

Registered

Deregistered

Hide advanced filters

Clear all

Search

Displaying 19 providers

List

Map

A-Z provider name

Select all

Load providers

Create report

Angel Care Group Limited

Witney Business And Innovation Centre, Windrush House, Windrush Industrial Park, Witney, OX29 7DX

View on Google Maps

CQC rating

Good

Phone number

07496817762

Show more details

Select

Add to ICB library

View provider profile

ICB library

CQC library

Provider name

Provider postcode

Postcode match

If you only enter part of a postcode, you must select 'Postcode match'. If you enter a full postcode, you can select a radius.

Provider service type

Homecare agencies

X

Location ID

Care registration specialism

Caring for adults over 65

X

Or

And

CQC rating

Provided and run by

Registration status

All

Registered

Deregistered

Hide advanced filters

Clear all

Search

Displaying 19 providers

List

Map

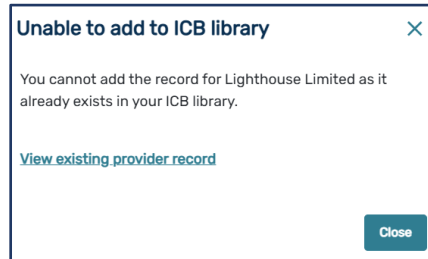
7.3 List View

Once the list of providers is showing you can:

1. **List providers** – this will change how the list is presented
 - A-Z provider name
 - CQC rating (overall) High-Low
2. **View provider profile** – this will open the provider Record. You can click 'Back to search results' to come out of the provider record.
3. **Load providers**
 - By clicking 'Select all' then 'Load providers' will show each provider side by side, you can navigate by using the left and right arrows
 - Alternatively, you can click 'Select' on the providers you wish to view before clicking 'Load Providers'.
 - You can click 'Back to search results' to come out of the provider record
4. **Create report** – this will download the information into Excel with the following tabs
 - **Description:** overview of report
 - **Provider ICB Library** – overview of provider including name, address, CQC rating, Care Products etc
 - **Tags** can be used to reference another provider e.g. if the provider is in a particular locality but has an overall company for instance Barchester Care Homes. It can also be used to highlight their specialism for instance dementia care.
 - **Contacts**
 - **Care Products**
 - **Group package rate types**
 - **Bed availability**

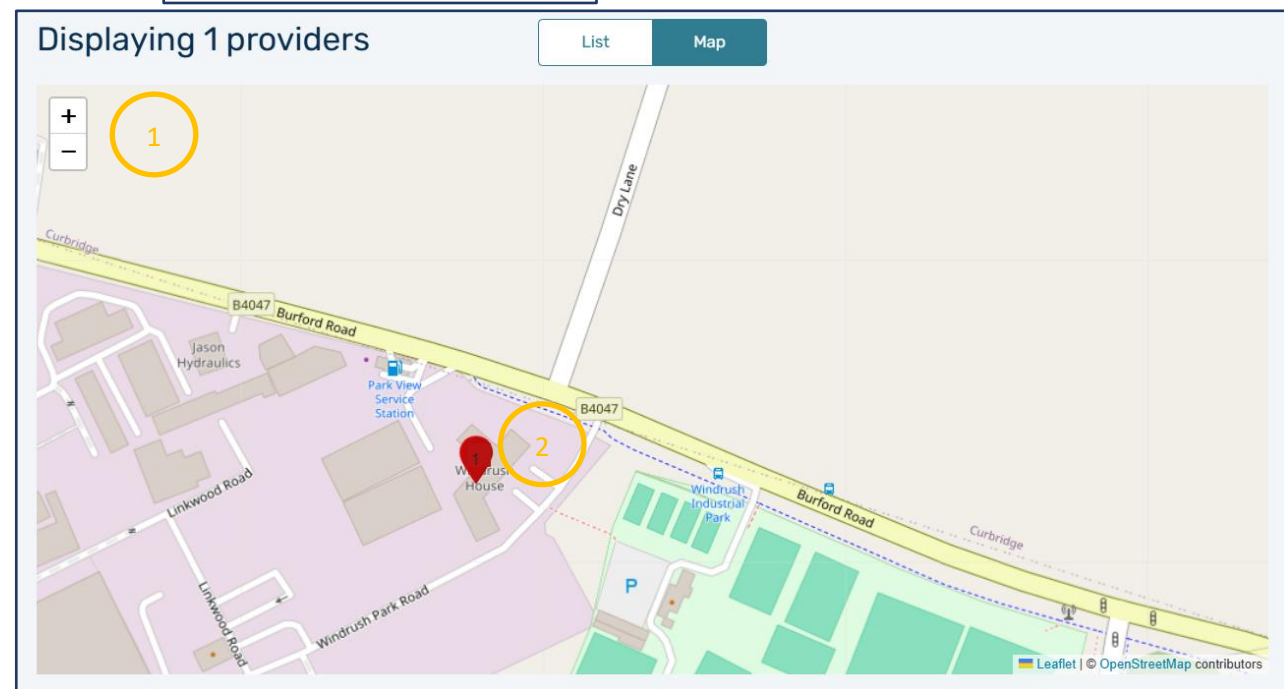
The screenshot shows the 'ICB library' tab selected. It features search filters for 'Provider name', 'Provider postcode' (with a 'Postcode match' dropdown), 'Provider service type' (set to 'Homecare agencies'), and 'Location ID'. There are 'Clear all' and 'Search' buttons. Below the filters, it says 'Displaying 19 providers' with 'List' and 'Map' tabs. A 'Select all' checkbox is present. Callout 1 points to the 'A-Z provider name' dropdown. Callout 2 points to the 'View provider profile' button. Callout 3 points to the 'Load providers' button. Callout 4 points to the 'Create report' button. Callout 5 points to the 'View on Google Maps' link. Callout 6 points to the 'Add to ICB library' button. The main card displays details for 'Angel Care Group Limited', including its address, CQC rating of 'Good', phone number, and a 'Select' checkbox.

5. **View on Google Maps** – this will take you to google Maps to view further information and get directions.
6. **Add to ICB Library** – By selecting this the provider will be added to the ICB Library. If the provider already exists you will be presented with the below where you can view the provider record.



7.4 Map View

1. Using the scroll button on your mouse will allow you to zoom in or out of the area you wish to look at. You can also zoom in or out by using the + and – buttons.
2. Clicking on the **red** pinpoints opens up the contact information for the provider.
3. Clicking on the provider name in **blue** will open the provider record. You can click 'Back to search results' to come out of the provider record.



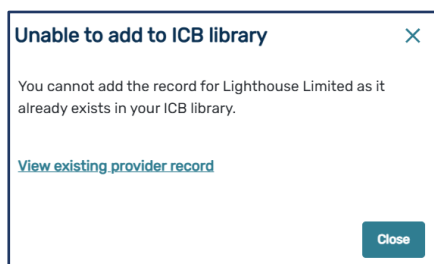
Angel Care Group Limited

Witney Business And Innovation Centre, Witney,
Mr Brian Dangarembwa, Registered Manager
07496817762

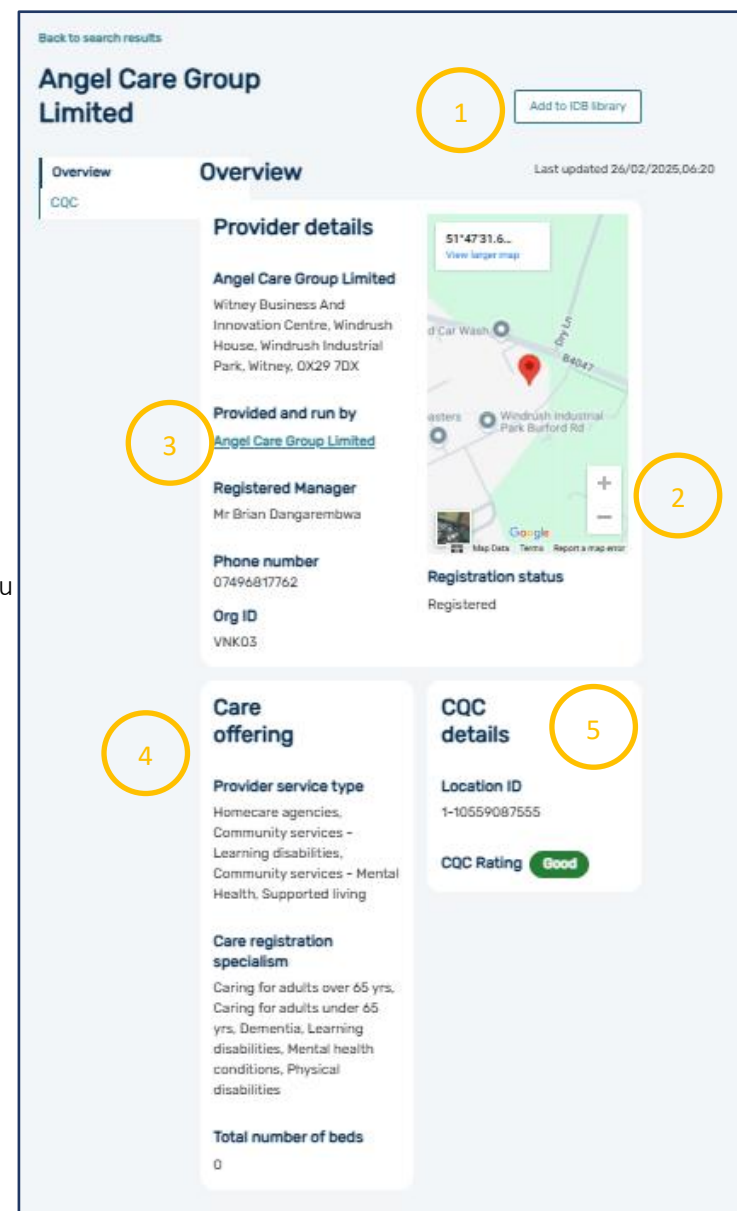
7.5 Provider record

1. **Add to ICB Library** – By selecting this the provider will be added to the ICB Library. If the provider already exists you will be presented with the below where you can view the provider record.

Please note that your access to the Provider Portal is determined by your permissions that have been set by the ICB.



2. Using the scroll button on your mouse will allow you to zoom in or out of the area you wish to look at. You can also zoom in or out by using the + and – buttons
3. **Provided and run by** – This will take you to the CQC record.
4. **Care offering** – This will provide an overview of what care can be provided.
5. **CQC details** – This provides the CQC rating



7.6 Adding a provider

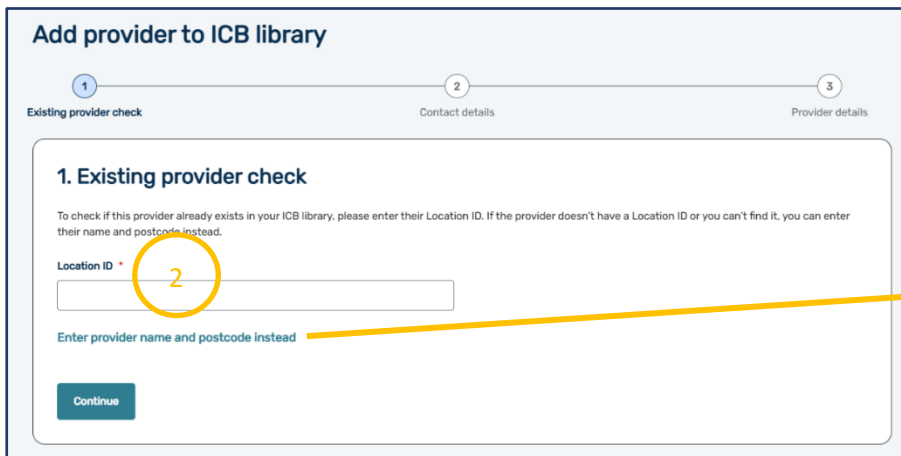
A provider can be in the CQC library and added to the ICB library as referenced in 5.2.

The below outlines how to add a provider from the ICB library.

1. Click 'Add Provider'.

- Enter the Provider 'Location ID'. This is a code used to identify the geographic location where a provider's services were performed and can be located from the [Care Quality Commission](https://www.cqc.org.uk/location/1-123927323) website.

Once you have searched and located the provider the Location ID will appear in the address bar at the top left of your browser for instance <https://www.cqc.org.uk/location/1-123927323>. The last numbers are the Location ID 1-123927323. Alternatively, you can enter the provider name and postcode and press 'Continue'.



Add provider to ICB library

1 Existing provider check 2 Contact details 3 Provider details

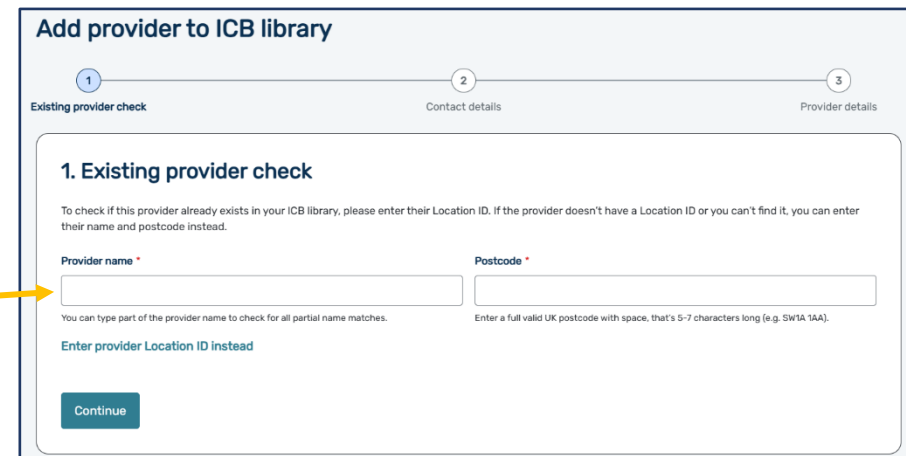
1. Existing provider check

To check if this provider already exists in your ICB library, please enter their Location ID. If the provider doesn't have a Location ID or you can't find it, you can enter their name and postcode instead.

Location ID *

Enter provider name and postcode instead

Continue



Add provider to ICB library

1 Existing provider check 2 Contact details 3 Provider details

1. Existing provider check

To check if this provider already exists in your ICB library, please enter their Location ID. If the provider doesn't have a Location ID or you can't find it, you can enter their name and postcode instead.

Provider name *

Postcode *

You can type part of the provider name to check for all partial name matches.

Enter a full valid UK postcode with space, that's 5-7 characters long (e.g. SW1A 1AA).

Enter provider Location ID instead

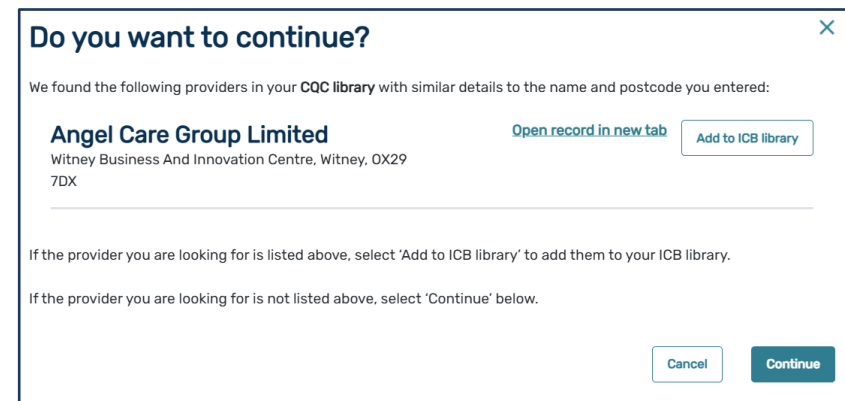
Continue

7.6.1 If the provider is found

Open record in new tab – This will open the provider record in a new browser window.

- Add to ICB library** – Before selecting please open and check the existing provider record.
- Continue** – If the provider is not listed this can be selected. You will then be directed to add the contact and provider details.

Please note if you search for the provider and it recognises more than one it will list all available options.



Do you want to continue?

We found the following providers in your CQC library with similar details to the name and postcode you entered:

Angel Care Group Limited [Open record in new tab](#) [Add to ICB library](#)

Witney Business And Innovation Centre, Witney, OX29 7DX

If the provider you are looking for is listed above, select 'Add to ICB library' to add them to your ICB library.

If the provider you are looking for is not listed above, select 'Continue' below.

[Cancel](#) [Continue](#)

7.6.2 If the provider is not found

You will be directed to enter the contact information and press 'Continue'.

Please note using part of the provider's name or post code will identify any providers which contain the search information, this will ensure that a duplicate provider is not added.

Add provider to ICB library

1

2

3

Existing provider checkContact detailsProvider details

2. Contact details

Provider name *

angel

Address

Address line 1 *

Address line 2 *

Town/City *

County *

Postcode *

ox29 7dx

Enter a full valid UK postcode with space, that's 5-7 characters long (e.g. SW1A 1AA)

Registered manager name

Phone number

Enter a valid UK landline or mobile number that is 11 digits long.

Email address

Back

Continue

Enter the provider's details and press 'Save'.

Add provider to ICB library

1

2

3

Existing provider checkContact detailsProvider details

3. Provider details

Org ID *

The NHS uses the Org ID to identify organisations. Search for an Org ID.

Registration status

Provider status *

Active

Reason

If the Provider status is 'Inactive' or 'On advice', please enter the reason for this status.

Care registration specialism

Provider service type *

Provided and run by

Total number of beds

Finance

Uses scheduling?

☒ No ☐ Yes

Vendor site reference

Day time start

00:00

Night time start

00:00

Back

Save

Once your provider has been added you will be taken to the Overview page of the provider record to add all relevant provider information as detailed in 5.1, page 14.

As the provider record does not have CQC details you will need to link it with the CQC database. By adding a provider specific Location ID it will sync the provider record with information directly from the CQC, including ratings and reports. Once this has been added the key information will automatically be updated every 24 hours.

The key information is highlighted with a diamond, for instance **Location ID** ♦

1. Click on 'Link with CQC database'
2. Enter the 'Location ID' and press 'Continue'
3. Once the provider is linked to the CQC database, the Location ID will show in the CQC details section and a new field called CQC will appear under Overview providing you with further CQC information

Link with CQC database

To link this record with the CQC database, enter the provider's Location ID.

Location ID ♦

[Cancel](#) [Continue](#)

Overview

CQC ♦ 3

Ratings ⓘ

Overall ♦	Good
Safe ♦	Good
Well-led ♦	Good
Caring ♦	Good
Responsive ♦	Good
Effective ♦	Good

Details

Report published ♦
26/05/2023
[View report](#)

Last inspection ♦
13/04/2023

Location ID ♦
1-119791925
[View on CQC website](#)

Provided and run by ♦
Ambient Support Limited
1-102643235
[View on CQC website](#)

Angel Care Home

Overview

Provider details [Edit](#)

Angel Care Home
1 Angel Road, Angel Town,
Angel City, United Kingdom,
AA0 0AA

Provided and run by

Registered Manager

Phone number

Email

BroadCare ID
1530

Org ID
123

Provider status
Active

Registration status
Deregistered

Care offering [Edit](#)

Provider service type
Homecare agencies

Care registration specialism

Care products

CQC details

This record does not have CQC details as it has not been linked with the CQC database. Add a Location ID to sync this record with information directly from the CQC, including ratings and reports.

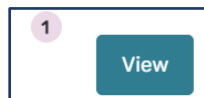
[Link with CQC database](#)

8 Brokerage

The brokerage section allows for an ICB to manage care.

This includes selecting providers, liaising with providers, preparing and managing the contract and setting up the package of care.

1. Entering the information will allow you to filter and search for brokerage episodes, these episodes follow the package of care journey.
2. **'Show advanced filters'** – This Allows for further information to be added.
3. **Active/Closed** – This will allow You to filter between current active brokerage episodes and closed episodes.
4. **Key** – This indicates any bids that are awaiting a review and those bids that are in query. The key will show next to 'View' if in one of these statuses.



xyla Provider Portal Rebecca Maynard - Testing7

Provider Search Brokerage Admin

Brokerage episodes

[Add new episode](#)

Patient BC ID

Patient name

NHSE stage

Client group

Care type

Episode stage

Local status

Assignee

[Show advanced filters](#)
[Clear all](#)
[Search](#)

Active

Closed

Key

- Bids for ICB review
- Query for provider review
- Query for ICB review

5. **Arrows** – This will show the episodes and allow you to navigate through the pages. By clicking on the headings, you can change the order of the episodes.

- 6. **Arrow** - This will open a summary of the brokerage episode.
- 7. **View** - This will open the episode.

Patient name BC ID	Episode ID ▾	Episode stage ▾	Start date ▾	Deadline ▾	Local status ▾	Care type ▾	Assignee ▾
<div><div>↑</div><div>6</div><div>B1 8281</div></div>	546	Review bids	25/09/2024	27/09/2024	Not CHC or...	Homecare agencies	<div><div>7</div><div>View</div></div>
Client group	Physical Disabilities			Created	25/09/2024, 11:08 by Joanna Smith		
NHS number	RES-TRI-CTED			Last updated	03/10/2024, 12:40 by Nicola Durham		
NHSE stage	None						
Local stage	CHC						
Classification	CHC/FNC						
Record owner	East Downs						

8.1 Brokerage - How to create a new brokerage episode

Please note if you search for the provider and it recognizes more than one it will list all available options.

- 1. Select 'Add new episode.

Brokerage episodes

1Add new episode

Patient BC ID

Patient name

NHSE stage

Client group

Care type

Episode stage

Local status

Assignee

Show advanced filters

Clear all

Search

- 2. Enter the 'Patient BroadCare ID.

Care requirements

To add a new brokerage episode, you must complete the required care requirements below.

Patient BroadCare ID*

2

Search

Enter a BroadCare ID to search for the client that relates to this brokerage episode.

- 3. If a Patient is located you will be presented with a match, you must complete the required care requirements to continue. Press 'Create'. Please note if you do not have PID turned on in BroadCare certain items, for instance NHS number will show as 'RESTRICTED'

Care requirements

To add a new brokerage episode, you must complete the required care requirements below.

Patient BroadCare ID*

Search

Enter a BroadCare ID to search for the client that relates to this brokerage episode.

Match found

Name	CB
BroadCare ID	1
Client group	Fast Track
NHS number	RES-TRI-CTED
Local stage	Joint Funded
NHSE stage	Fast Track

Care type*

Select the type of care the client requires from the list above.

Assignee*

Local status

Episode start date*

25/04/2025

The start date must be on or before the date providers are invited to bid for the episode.

Proposed start date of care

If you have a care start date planned in advance, you can propose this date to providers.

Anonymised care requirements document*

Please note: The care requirements document you upload must be anonymised. Upload a valid file that is up to 25MB in size. We do not accept .exe file.

Upload care requirements

Supporting documents

Upload supporting document

Additional information

Enter any additional notes about the care required for the client that is not detailed in the care requirements or supporting documents.

Cancel

Create

8.1.1 Brokerage – Care requirements

Please note that once a brokerage episode has been created a blue header bar will appear, providing you with an overview and the ability to view the patient within BroadCare and edit the Start date, Local status, and Assignee.

Patient BC ID 1	NHS number 4486841824	Client group Fast Track	Care type Homecare agencies	Episode ID 1564
Start date 25/04/2025 Edit	Local status N/A Edit	Assignee RM Edit	Deadline N/A	

[< Back](#)

[View / Raise queries](#)[View documents](#)[Close episode](#)

1. Care requirements

Complete

View

2. Select providers

Not started

Start

3. Review bids

Start

4. Contract preparation

Start

5. Contract status

Start

6. Complete episode

Start

Episode event log

Log

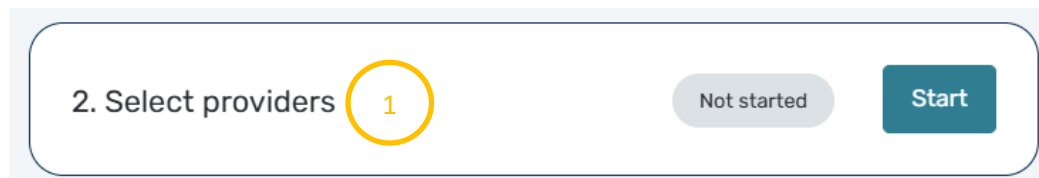
Brokerage episode created with care requirements (Episode ID: 1564)

RebeccaMaynard
25/04/2025 15:56

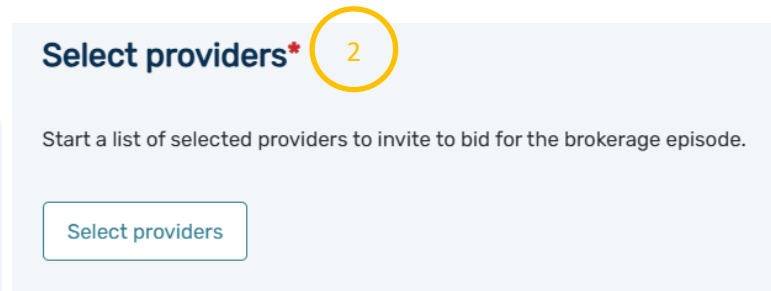
8.1.2 Brokerage - Select Providers

Select the providers you want to invite to bid for the brokerage episode.

1. Click start
2. Select the providers for this brokerage episode.



2. Select providers **1** Not started Start

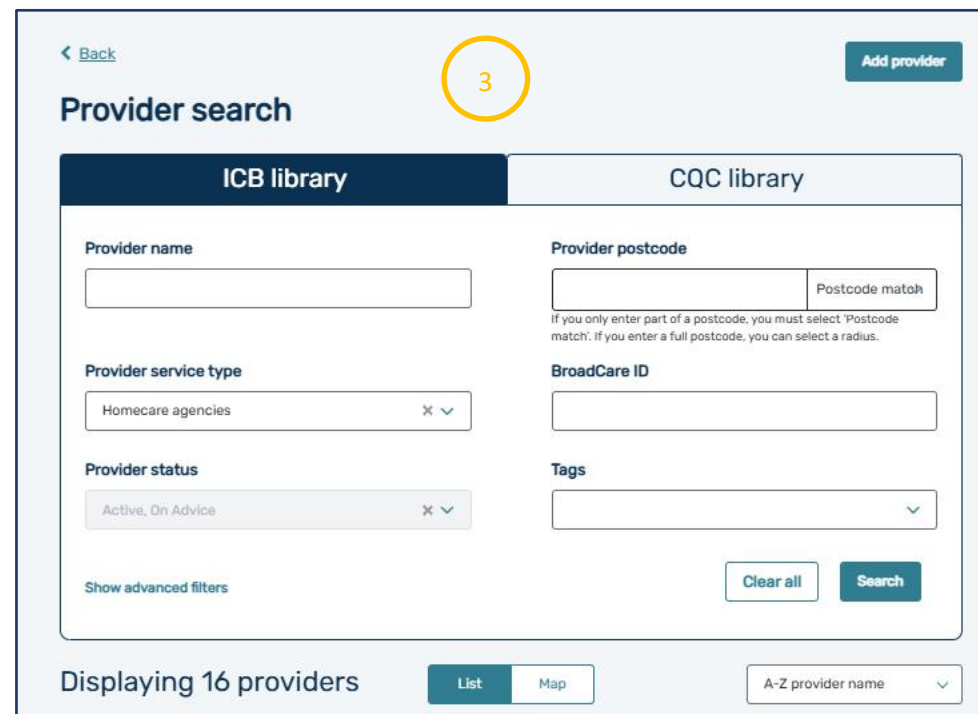


Select providers* **2**

Start a list of selected providers to invite to bid for the brokerage episode.

Select providers

3. You will be presented with 'Provider search', all providers will be displayed and you will have the option to search for specific providers in the ICB library, CQC library, and adding a new provider. Please reference Point 5 for more information on the 'Provider search' function.



< Back **3** Add provider

Provider search

ICB library	CQC library
<p>Provider name</p> <input type="text"/>	<p>Provider postcode</p> <input type="text"/> Postcode match
<p>Provider service type</p> <p>Homecare agencies x v</p>	<p>BroadCare ID</p> <input type="text"/>
<p>Provider status</p> <p>Active, On Advice x v</p>	<p>Tags</p> <input type="text"/>
<p>Show advanced filters</p>	<p>Clear all Search</p>

Displaying 16 providers List Map A-Z provider name v

4. Select the providers by clicking in the box,

**(IECC Care) Independent Excel
Care Consortium Limited**

CQC rating -
Alerts 1

Office 56, The Colchester Centre, Hawkins Road,
Colchester, Essex, CO2 8JX
[View on Google Maps](#)

Phone number
Email
test@email.com

Show more details

☒ Select 4

View provider profile

@PlymouthCare

CQC rating Requires improvement
Alerts 1 01

Windsor House, 215 Tavistock Road, Derriford, Plymouth,
PL6 5UF
[View on Google Maps](#)

Phone number
Email

Show more details

☒ Select

View provider profile

5. Once the providers have been selected the below will appear, click 'Continue'.

Expand ^

2 providers selected | Episode ID: 1564

5

Continue

6. Select the deadline you want the providers to respond to your bid invitation.
Once the deadline has been set, the 'Edit' button will appear allowing you to amend the details, once selected you can put the reason for the deadline change.

Set a deadline

Set a deadline for when you want the providers to respond to your bid invitation.

Deadline date

Time

29/04/2025

--:--

Edit

Enter in the format DD/MM/YYYY.

Edit deadline

Set a new deadline for when you want the providers to respond to your bid invitation. You can also choose to send an email to providers informing them of the new deadline.

Deadline date *

Time

29/04/2025

--:--

Enter in the format DD/MM/YYYY.

Reason for deadline change *

Cancel

Save

7. 'Send email' will send a bid invitation by email for the brokerage episode.
8. To view the provider details in a separate screen by clicking on the blue hyperlink.
9. To remove the provider from the bid invitation.
10. Select more providers.
11. Cancel the bid invitation.
12. Save as a draft if you wish to come back to the bid invitation. This will be saved as 'In progress'.
13. Confirm and send the email to the providers to bid for the brokerage episode.

2. Select providers

In progress

View

Set a deadline

Set a deadline for when you want the providers to respond to your bid invitation.

Deadline date

Time

Enter in the format DD/MM/YYYY.

6

Selected providers *

You can tick the checkboxes against specific providers listed below to send a bid invitation by email for the brokerage episode. You can also edit the list by adding and removing providers and save a draft of your current selections.

Provider name	Provider BC ID	Postcode	Provider Portal account	Valid email	Email sent	Send email	
(IECC Care) Independent Excel Care Consortium Limited	1481	CO2 8JX	Yes	Yes	No	<input checked="" type="checkbox"/>	<input type="button" value="Remove"/>
@PlymouthCare	1524	PL6 5UF	Yes	Yes	No	<input checked="" type="checkbox"/>	<input type="button" value="Remove"/>

7

9

8

12

13

10

11

Select more providers

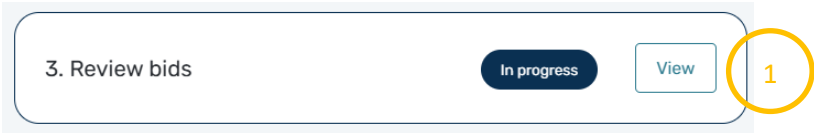
Cancel

Save as draft

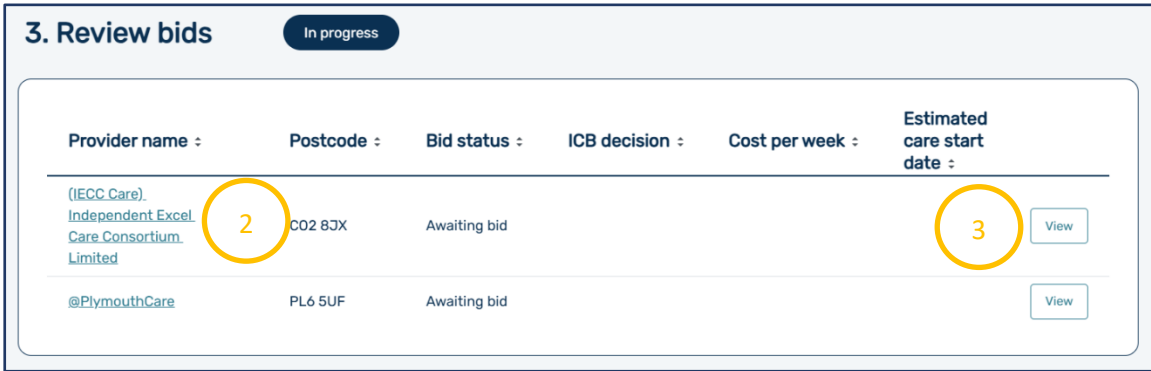
Confirm and send email

8.1.3 Brokerage - Review bids

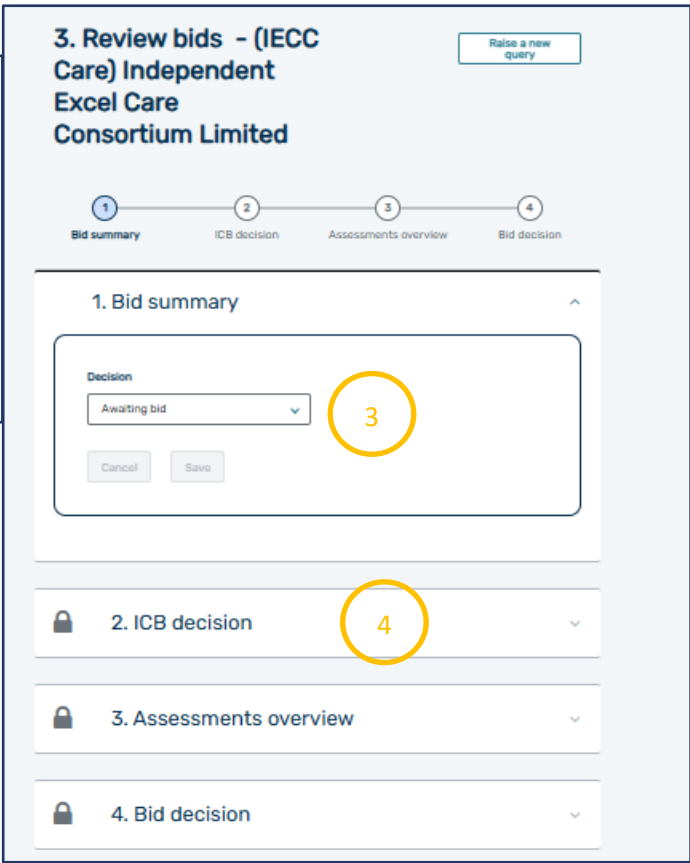
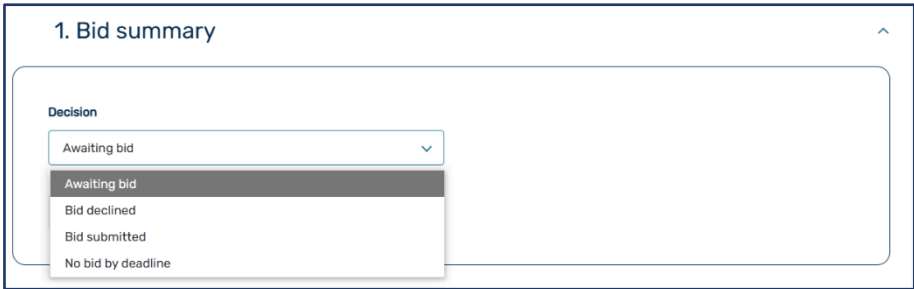
1. Click 'View'.



2. This will allow you to view the bids and view the provider by clicking on the blue hyperlink.
3. 'View' will allow you to raise a query and view the decision.



4. If you are awaiting a bid, one has not been received, or if it has been declined then you will not be able to proceed to point 2-4.



8.1.3.1 Brokerage – Review bids - Bid declined

If a bid has been declined, you will be instructed to provide the reason and any comments before clicking ‘Save’.

Decision

Bid declined

Reason for declining *

Comments

Cancel

Save

8.1.3.2 Brokerage – Review bids - No bid by deadline

Once this ‘Decision’ has been entered press ‘Save’.

8.1.3.3 Brokerage – Review bids - Bid submitted

Once a bid has been submitted, the cost, start date of care, assessment date, additional comments and the ability to upload supporting documents will be available to view and amend if required.

Click Save when all required information has been completed.

Decision

Bid submitted

Cost per week *

£

If an agreed cost per week already exists, you must **enter this exact amount above.**

Estimated start date of care *

Planned assessment date

Enter in the format DD/MM/YYYY.

Upload supporting document

Upload a valid file that is up to 25MB in size. We do not accept .exe file.

Comments

Cancel

Save

8.1.3.4 Brokerage – Review bids - ICB decision

2. ICB decision

Decision

Awaiting decision

Awaiting decision

Bid progressed

Bid not progressed

8.1.3.5 Bid not progressed

This will allow you to record the reason it is not progressing and any additional comments before clicking ‘Save’.

Decision

Bid not progressed

Reason for not progressing *

Comments

Comments you enter will be saved and visible but they will not be sent to providers.

Cancel

Save

8.1.3.6 Bid progressed

This will allow you to record any comments.

Decision

Bid progressed

Comments

Comments you enter will be saved and visible but they will not be sent to providers.

Cancel

Save

8.1.3.7 Brokerage – Review bids - Assessments overview

Clicking ‘Add assessment’ will allow you to upload any relevant assessment or reviews.

This will allow you to schedule/complete assessments that either the provider, family, or ICB might want to undertake to ensure that the provider/patient fit is appropriate.

Often a provider will want to assess the patient themselves to ensure they are able to support them and understand their care needs better.

3. Assessments overview

Add and edit any relevant assessments and reviews. You can also update assessments after they have been added.

Add assessment

Please note the assessment overview section is not a mandatory requirement. You can progress to accepting the provider without filling in this section. However, if you do not complete it, you will have no data for this section in the Brokerage report.

8.1.3.8 Brokerage – Review bids - Bid decision

This will allow you to accept the bid.

4. Bid decision

Accept bid

Once 'Accept bid' has been clicked the below pop up will appear. Only select 'Accept bid' if you are satisfied you want to accept the bid as once accepted the bid has been completed and a contract will need to be set up.

Are you sure you want to accept this bid?

×

If you accept this bid, this step of the brokerage episode will be completed and you will need to prepare the contract for this provider.

Comments

Comments you enter will be saved and visible but they will not be sent to providers.

Cancel

Accept bid

8.1.3.9 Withdrawing a bid

Once a bid has been submitted, as long as the ICB has not progressed with the bid they have the ability to withdraw it.

1. Bid summary

Decision

Bid submitted

Last updated on 30/04/2025 14:15 by Rebecca Maynard

Withdraw bid

Edit

Cost per week

£ 1000

If an agreed cost per week already exists, you must enter this exact amount above.

Estimated start date of care

02/05/2025

Planned assessment date

Enter in the format DD/MM/YYYY.

Comments

Are you sure you want to withdraw this bid?

If you withdraw this bid, you will no longer be able to bid for this episode.

Reason for withdrawing

Comments

Comments you enter will be saved and visible but they will not be sent to providers.

Cancel

Withdraw bid

Once withdrawn the ICB can reopen the bid if required or if closed in error.

This bid has been withdrawn. To open it again, select 'Reopen withdrawn bid'.

Reopen withdrawn bid

8.1.4 Contract preparation

- 1. Click Start.

4. Contract preparation

Not started

Start

Please note before you start this section, please create a care package in BroadCare first. If you start this section without creating a care package, details will not be automatically added to the document to be signed via Legalsign.

If you wish to create a care package you can click on the hyperlink ‘create a care package’ which will take you to your BroadCare instance.

4. Contract preparation

In progress

Before you start this section, please **create a care package** in BroadCare first. If you start this section without creating a care package, details will not be automatically added to the document to be signed via Legalsign.

Add electronic signatures to a document or upload a signed contract

Legalsign is a secure, eIDAS compliant eSignature platform. It is the easiest way to add any signatures you require for a document. Alternatively, you can upload a contract that has already been signed.

Get started with eSignature

Upload a signed contract

- 2. Sign a digital contract using Legalsign.
- 3. If you would not like to sign a digital contract, then you can upload a signed contract by choosing the document or drag and drop the file, add a document description, and choose what folder you would like the signed document to be saved in. Clicking ‘Upload’ will upload the contract.

Please note the Folder names will only be available once they have been added to the Case Manager Folder Lookup within BroadCare.

Upload signed contract

Document *

Drop a file here or browse to upload

Description *

Folder *

General

Cancel

Upload

8.1.4.1 Contract Preparation - Signing with a digital signature

1. Click 'Get started with eSignature.'

4. Contract preparation In progress

i Before you start this section, please **create a care package** in BroadCare first. If you start this section without creating a care package, details will not be automatically added to the document to be signed via Legesign.

Add electronic signatures to a document or upload a signed contract

Legesign is a secure, eIDAS compliant eSignature platform. It is the easiest way to add any signatures you require for a document. Alternatively, you can upload a contract that has already been signed.

1 Get started with eSignature Upload a signed contract

2. You can use an existing contract template, or you can upload a new document.

4. Contract preparation In progress

i Before you start this section, please **create a care package** in BroadCare first. If you start this section without creating a care package, details will not be automatically added to the document to be signed via Legesign.

Choose how to prepare the document for signing

☐ Select an existing template

☒ Upload a new document **2**

8.1.4.2 Contract Preparation – Signing with a digital signature - Using an existing template

1. Once you have selected to use an existing template, a new drop down will be available to select the template you would like to use.

4. Contract preparation

In progress

Before you start this section, please **create a care package** in BroadCare first. If you start this section without creating a care package, details will not be automatically added to the document to be signed via Legalsign.

Add electronic signatures to a document or upload a signed contract

Legalsign is a secure, eIDAS compliant eSignature platform. It is the easiest way to add any signatures you require for a document. Alternatively, you can upload a contract that has already been signed.

1

Get started with eSignature

Upload a signed contract

The contract templates are stored within the Legalsign portal, only certain members of the ICB will have access to the portal. Legalsign uses an electronic signature (eSignature) as a digital replacement for a handwritten (wet) signature and is just as legally binding.

2. If you are unable to locate the template, you wish to use in the drop down then please contact your Legalsign colleague within your ICB to add the template for you.

Choose how to prepare the document for signing

☒ Select an existing template

☐ Upload a new document

Select an existing template *

2

77 | Page

3. Once the template has been selected you can choose who and how the signatures are captured.
- Parallel allows individuals to sign in any order
 - Sequential allows signatures in order of signers

Signers

Signing order *
Select 'Parallel' if signers can sign the document in any order. Select 'Sequential' if signers must sign the document in a specific order.

3 Parallel Sequential

Add signer *
Enter the full name and email address for each signer.

First name*	Last name*	Email address*
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>

Back Continue **4**

Signers

Signing order *
Select 'Parallel' if signers can sign the document in any order. Select 'Sequential' if signers must sign the document in a specific order.

Parallel **3** Sequential

Add signer *
Enter the full name and email address for each signer.

Order	First name*	Last name*	Email address*
1.	<input type="text"/>	<input type="text"/>	<input type="text"/>
2.	<input type="text"/>	<input type="text"/>	<input type="text"/>

Back Continue **4**

4. Once the name and email address of the signers have been added, click 'Continue'.
5. Enter the Registered Manager name and click 'Send document'.
6. A pop up will appear asking the user if they are sure they want to send the document. If happy click 'Send document'.

The document will be sent by email.



Document details

Registered Manager

Back Send document **5**

Are you sure you want to send this document?

You will not be able to make any changes to this document after you have sent it. Please make sure all details are correct before sending.

6 Back Send document

7. After the contract has been issued, the signers will receive an email, once opened they will be presented with the contract.

The user will need to tick to confirm they are authorised to accept the document and they understand the terms of the document. The signer can now select 'Get started' and they will be taken to the part of the contract that requires their signature, the date will be automatically set based on the date you have opened the contract and are ready to sign.

If they are rejecting the contract they can select 'Reject document'.

8. Add signature.
9. Clicking here will open up the below pop up. From here you can select the type of signature you wish to add.

10. Once the signature has been added you will receive a pop up to advise that signatures from other parties are required.

Once all signers have added a signature an email will be sent with a copy of the contract (PDF). At the end of the document there will be a document information page to show the date and time of the signatures.

The document will be saved in Case Management on the Patient's BroadCare record.

Document signed

Status: Waiting for others

The document is now waiting to be executed by other parties.

Once all parties have completed it will be emailed to you and also be available here for download.

Close browser window or [logout](#)

Document signed

Important: save file direct to your computer, do not open in browser since this can affect file integrity.

[Click here to download](#)

The unique identifier (SHA-256) for this signed document is (this will be emailed to you):

eef2e12a13133e0914ee0d34f3c3067991fffe
551d56dc48c7f385e348a1d925

[What is SHA-256?](#)

Close browser window or [logout](#)

8.1.4.3 Contract Preparation – Signing with a digital signature – Upload a new document

1. Select 'Get started with eSignature'.

4. Contract preparation In progress

i Before you start this section, please **create a care package** in BroadCare first. If you start this section without creating a care package, details will not be automatically added to the document to be signed via Legesign.

Add electronic signatures to a document or upload a signed contract

Legesign is a secure, eIDAS compliant eSignature platform. It is the easiest way to add any signatures you require for a document. Alternatively, you can upload a contract that has already been signed.

1 Get started with eSignature Upload a signed contract

2. Select 'Upload a new document'.

4. Contract preparation In progress

i Before you start this section, please **create a care package** in BroadCare first. If you start this section without creating a care package, details will not be automatically added to the document to be signed via Legesign.

Choose how to prepare the document for signing

☐ Select an existing template

☒ Upload a new document **2**

3. Drag and drop or browse and upload the document (please note this must be in PDF). Add a description of the document before clicking 'Upload'.

Upload a new document

Document *

Drop a file here or [browse to upload](#)

3

Files must be in .pdf format and up to 5MB in size.

Description *

Cancel

Upload

4. Press Continue.

Choose how to prepare the document for signing

☐ Select an existing template

☒ Upload a new document

Service_Agreement_letter (care home).pdf

Uploaded on 08/05/2025, 10:39 by rebecca maynard

[Download](#)

[Remove](#)


Cancel

Continue

4

- For instance, dragging the Signature box to the Signature section of the document.

PURCHASER ACCEPTANCE		PROVIDER ACCEPTANCE	
Print Name.....		Print Name.....	Signature, signer 1
Signature.....		Signature.....	
Position.....		Position.....	
Date.....		Date.....	



Signer Fields ⓘ

Party 1 ▼

- Signature ✓
- Initial
- Signing date (automatic)
- Text
- Email
- Tick box
- Dropdown

Once you are happy that you have captured the required fields click 'Continue'.

6. Select how you would like the signatures to appear, enter their details and click 'Send document'.
 - Parallel if signers can sign the document in any order.
 - Sequential if signers must sign the document in a specific order.

Signers

Signing order *

Select 'Parallel' if signers can sign the document in any order. Select 'Sequential' if signers must sign the document in a specific order.

☒ Parallel ☐ Sequential

Add signer *

Enter the full name and email address for each signer.

First name *	Last name *	Email address *
<input type="text"/>	<input type="text"/>	<input type="text"/>

[Back](#) [Send document](#)

6

4.

Contract preparation

In progress

5

Before you start this section, please create a case package in SmartCare first. If you start this section without creating a care package, details will not be automatically added to the document to be signed via Legisign.

Check and edit the document prepared for Legisign below; then select 'Continue' to move on to the next step.

To get started look down left to "Signer Fields" and drag onto the page Signature

Signature

Signature

Sender fields

Name

Title

Work Email

Mobile

Knowledge at service

Parties

Add a signature field to get started

Experience

How to align fields

INPROGRESS-

Agreement Letter (care home).pdf

SERVICE AGREE

PURCHASER:	Default CD
PROVIDER & CONTRACT NUMBER:	Contract 3134137
SERVICE USER:	User 3
NHS No:	23456789
CONTACT:	Default NHS
TELEPHONE No:	90234 567
AGREED SERVICE PROVISION:	RMC 24x7
AGREED WEEKLY RATE:	£220.00
JOINT FUNDED BREAKDOWN:	NHS Cost
AGREED BANK HOLIDAY / BREAKING RATE:	As Part Time
COMMENCEMENT DATE:	21/04/2024
CDC DATE:	CPD
PURCHASER REFERENCE NUMBER:	175077 39

Back

Continue

- 7. Once the signature has been added you will receive a pop up to advise that signatures from other parties are required.

Once all signers have added a signature an email will be sent with a copy of the contract (PDF). At the end of the document there will be a document information page to show the date and time of the signatures.

The document will be saved in Case Management on the Patient’s BroadCare record.

Document signed

Status: Waiting for others

The document is now waiting to be executed by other parties.

Once all parties have completed it will be emailed to you and also be available here for download.

Close browser window or [logout](#)

Document signed

ⓘ Important: save file direct to your computer, do not open in browser since this can affect file integrity.

Click here to download

The unique identifier (SHA-256) for this signed document is (this will be emailed to you):

eef2e12a13133e0914ee0d34f3c3067991fffe
551d56dc48c7f385e348a1d925

[What is SHA-256?](#)

Close browser window or [logout](#)

8.1.4.4 Contract preparation – Uploading a signed contract

1. If you have already received a signed contract rather than using as digital signature as described in 6.1.4.1.1 you can click 'Upload a signed contract'.

4. Contract preparation In progress

Before you start this section, please create a care package in BroadCare first. If you start this section without creating a care package, details will not be automatically added to the document to be signed via Legesign.

Add electronic signatures to a document or upload a signed contract

Legesign is a secure, eIDAS compliant eSignature platform. It is the easiest way to add any signatures you require for a document. Alternatively, you can upload a contract that has already been signed.

[Get started with eSignature](#) [Upload a signed contract](#) **1**

2. Drag and drop the file or browse to upload your contract.
3. Add a description of the document.
4. Chose the name of the folder you wish to save the document in. Please note the Folder names will only be available once they have been added to the Case Manager Folder Lookup within BroadCare.
5. Click 'Upload', this will upload the document to the brokerage episode and also save in Case Management in BroadCare.

Upload signed contract ×

Document * Drop a file here or browse to upload **2**

Description * **3**

Folder * **4** General ▼

[Cancel](#) [Upload](#) **5**

8.1.5 Contract status

This shows the status of the contract, for instance if the email has been sent or the contract is signed.

The contract can also be viewed by clicking ‘View contract’.

The document will be saved in Case Management on the Patient’s BroadCare record.

5. Contract status

In progress

Signer status

Check the current status of each signer who has been sent the document.

Document status: Signed, 28/04/2025, 15:04

Reference ID: dbc969d7-4399-4bbf-b0f5-4483af1a8058

	First name	Last name	Email address	Status
1.	Rebecca	Maynard	rebecca.maynard@xylaservices.com	Signed
2.	Rebecca	Maynard	rebecca.maynard@chshealthcare.co.uk	Signed

Back

View contract

8.1.6 Complete episode

Once all previous steps have been completed as required the user can complete the episode and add any further comments.

1. Completed date, completed outcome, and care start date are mandatory fields.
2. Add any further comments.
3. Click 'Complete episode' when you are happy no further changes or updates are required.

A pop up will appear to confirm the completion of the episode as once Completed you cannot change or edit it.

Are you sure you want to complete this episode? ×

if you complete this episode, you will no longer be able to change or edit it.

Cancel Complete episode

6. Complete episode In progress

Complete this episode
Once all previous steps have been completed as required, you can complete this episode and add any further comments.

Completed date *

Enter in the format DD/MM/YYYY.

Completed outcome *

Care start date *

Enter in the format DD/MM/YYYY.

Comments

Comments you enter will be saved and visible but they will not be sent to providers.

Before you select 'Complete episode', the relevant care package must be created in BroadCare first. If needed, please [create a care package](#) in BroadCare now.

Cancel Complete episode

1

2

3

8.2 Viewing a brokerage episode

B1

Patient BC ID 8281	NHS number RES-TRI-CTED	Client group Physical Disabilities	Care type Homecare agencies	Episode ID 546
Start date 25/09/2024 Edit	Local status Not CHC or... Edit	Assignee N/A Edit	Deadline 27/09/2024 16:00 (153 days past)	

[< Back](#)

1. Care requirements

2. Select providers

3. Review bids

4. Contract preparation

5. Contract status

6. Complete episode

View / Raise queries

View documents

Close episode

Episode event log

Log

Providers confirmed

Joanna Smith

25/09/2024 11:15

Log

Brokerage episode created with care requirements

Joanna

25/09/2024 11:09

1. This hyperlink will take you to the patient in BroadCare.
2. If PID is not turned on in BroadCare, PID will show in restricted mode in Provider Portal.
3. **Edit** - This will allow you to edit the start date.
4. **Edit** - This will allow you to edit the local status.
5. **Edit** - This will allow you to edit the assignee.
6. **Back** - This will allow you to go back to the brokerage section.
7. **View/Raise queries** – Reference 6.1.1
8. **View documents** – This will allow you to view and download documents.
9. **Close episode** – This will allow you to close the episode along with the reason and any comments.
10. **Episode event log** - This will provide an overview of actions completed.
11. **View** - This will allow you to view each section.

8.2.1 How to view a brokerage query

To view or raise queries please select 'View/Raise queries' from the brokerage episode.

You will be able to view any existing queries, add comments and raise new queries.

< [Back](#)

Queries

[Raise a new query](#)

General query

Note
test

Assignee
ICB

Action due date
27/02/2025

Added: 27/02/2025 , 15:03 by Rebecca Maynard

Query for ICB review

1

2

3

Edit

Add comment

1. **Arrow** – This will open up the query to provide more information.
2. **Edit** – This will allow you to edit the saved information.
 - **Action due date** – This can be amended.
 - **Completed** – This can be toggled to Yes when the query has been actioned, and no further actions need to have for this query.
 - **Upload document** – This will allow you to add supporting documents. These documents will also be added to Case Management in BroadCare.

Edit query

Assignee *

ICB

Provider *

Action due date

27/02/2025

Enter in the format DD/MM/YYYY.

Completed *

Yes

No

Supporting documents

Upload document

Upload a valid file that is up to 25MB in size. We do not accept .exe file.

Cancel

Save

3. **Add comment** – This will allow you to add additional comments to the query.

Add comment

Add a comment to this query.

Comments *

Enter your comment to the query. If the provider has a Provider Portal account, they will be notified about this query comment. If the provider does not have a Provider Portal account, they will not directly receive this query comment as it will only be saved and visible in the Provider Portal.

Cancel

Save

8.3 How to raise a new brokerage query

Filter for the episode you wish to view.

1. Click 'View'.
2. This will open the brokerage episode.
3. Click 'View/Raise queries

Patient name BC ID	Episode ID	Episode stage	Start date	Deadline	Local status	Care type	Assignee
<div>^</div> B1 8281	546	Review bids	25/09/2024	27/09/2024	Not CHC or...	Homecare agencies	<div>1</div> <div>View</div>
Client group	Physical Disabilities			Created	25/09/2024, 11:08 by Joanna Smith		
NHS number	RES-TRI-CTED			Last updated	03/10/2024, 12:40 by Nicola Durham		
NHSE stage	None						
Local stage	CHC						
Classification	CHC/FNC						
Record owner	East Downs						

B1

Patient BC ID 8281	NHS number RES-TRI-CTED	Client group Physical Disabilities	Care type Homecare agencies	Episode ID 546
Start date 25/09/2024 Edit	Local status Not CHC or... Edit	Assignee N/A Edit	Deadline 27/09/2024 16:00 (153 days past)	

[< Back](#)
1 query for ICB review
View / Raise queries
View documents
Close episode

4. Select 'Raise a new query'.

[Back](#)

Queries

4

Raise a new query

General query

Query for ICB review

Note

test

Assignee

ICB

Action due date

27/02/2025

Added:

27/02/2025 , 15:03 by Rebecca Maynard

Edit

Add comment

5. Complete the information. Assignee, Provider, Completed, and Notes are mandatory fields.

The screenshot shows a web form titled "Raise a new query" with a close button (X) in the top right corner. The form contains several fields and sections:

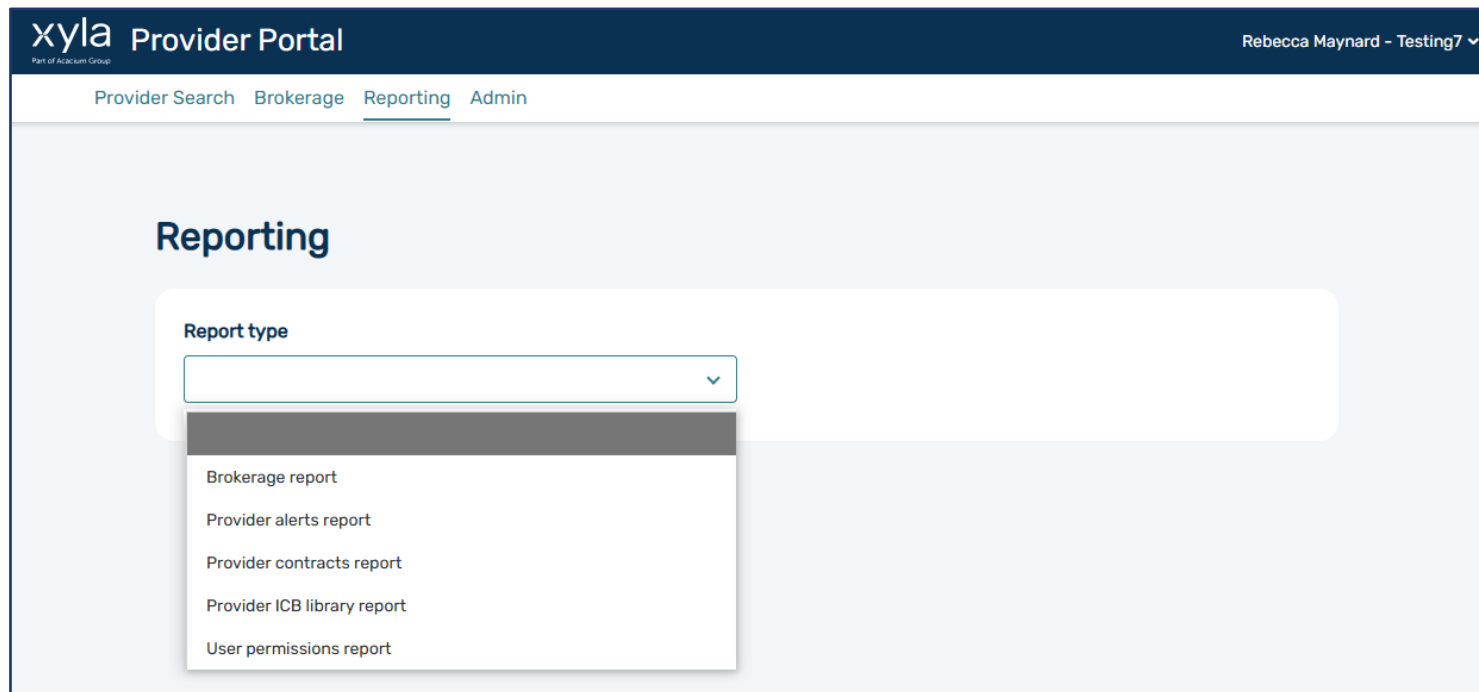
- Assignee ***: A button group with "ICB" and "Provider". The "Provider" button is highlighted in dark teal.
- Provider ***: A dropdown menu with a downward arrow.
- Action due date**: A date input field with a calendar icon. Below it, a small text says "Enter in the format DD/MM/YYYY".
- Completed ***: A button group with "Yes" and "No". The "No" button is highlighted in dark teal.
- Note ***: A large text area for entering a note.
- Supporting documents**: A section with an "Upload document" button. Below it, a small text says "Upload a valid file that is up to 25MB in size. We do not accept .exe file."
- At the bottom right, there are "Cancel" and "Save" buttons. The "Save" button is highlighted in dark teal.

- **Assignee** – If ICB is selected the 'Provider' box will disappear.
- **Action Due Date** – This is the date the action requires attention.
- **Completed** – This will automatically default to 'No', 'Yes' can be selected when no further actions/notes are required.
- **Note** – Any information that is prevalent to the query.
- **Upload document** – Documents can be uploaded to support the query. These will also be saved in Case Management in BroadCare.

9 Reporting

Within the Reporting tab there are 5 reports you can choose from.

Please note that your access to the Provider Portal is determined by your permissions that have been set by the ICB.



9.1 Brokerage report

This report provides full details of brokerage episodes, including start and end dates, types of care, the parties involved, and any associate costs, and will only show data for the Record Owners and Classifications you have access to.

9.1.1 Standard filters

Patient BC ID

Patient Name

NHSE Stage for instance CHC, Closed, Fast Track

Client Group for instance Autism, Fast Track, Mental Health

Care Type for instance Homecare agencies, Nursing homes

Episode stage for instance Completed, Contract preparation

Local status which is bespoke to the ICB for instance awaiting signed contract

Assignee which is the person responsible for the brokerage episode

Patient BC ID

Patient name

NHSE stage

Client group

Care type

Episode stage

Local status

Assignee

Show advanced filters

Clear all

Create report

Once you have input your filters press ‘Create report’, this will download the data into Excel. It will provide you with a description and summary tab, a brokerage episodes tab which provides more detail, and a provider bids tab which provides more detail.

9.1.2 Advance filters

Click 'Show advanced filters' for additional filter options and 'Hide advanced filters' to remove. Additional filters that can be applied.

Classification for instance CHC/FNC, Children.

Record owner, if you have access to other Record Owners, they will be able to select.

Start date from and **Start date to** of the brokerage episode.

Deadline date from and **Deadline date to** of when the bids for the brokerage episode need to be returned.

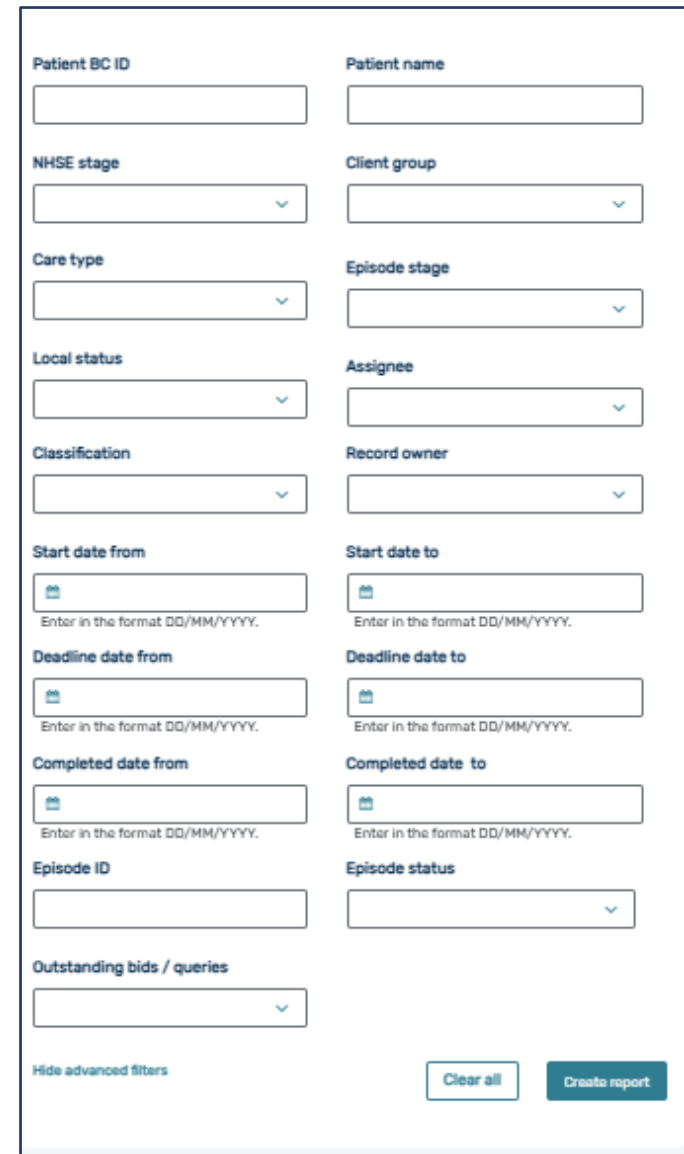
Completed date from and **Completed date to** of the brokerage episode.

Episode ID which is the unique ID that was given when the brokerage episode was created.

Episode status for instance Active, Closed.


Outstanding bid / queries for instance bids for ICB review.

Once you have input your filters press '**Create report**', this will download the data into Excel. It will provide you with a Description and Summary tab providing an overview, a Brokerage Episodes tab which provides more detail, and a Provider Bids tab which provides more detail.



Patient BC ID <input type="text"/>	Patient name <input type="text"/>
NHSE stage <input type="text"/>	Client group <input type="text"/>
Care type <input type="text"/>	Episode stage <input type="text"/>
Local status <input type="text"/>	Assignee <input type="text"/>
Classification <input type="text"/>	Record owner <input type="text"/>
Start date from <input type="text"/> <small>Enter in the format DD/MM/YYYY.</small>	Start date to <input type="text"/> <small>Enter in the format DD/MM/YYYY.</small>
Deadline date from <input type="text"/> <small>Enter in the format DD/MM/YYYY.</small>	Deadline date to <input type="text"/> <small>Enter in the format DD/MM/YYYY.</small>
Completed date from <input type="text"/> <small>Enter in the format DD/MM/YYYY.</small>	Completed date to <input type="text"/> <small>Enter in the format DD/MM/YYYY.</small>
Episode ID <input type="text"/>	Episode status <input type="text"/>
Outstanding bids / queries <input type="text"/>	
Hide advanced filters <input type="button" value="Clear all"/> <input type="button" value="Create report"/> 	

Example of how the Brokerage Report downloads into excel.

	A	B
1	Brokerage Report	 Part of Acacium Group
2		
3	ICB	Testing7
4	Generated by	Rebecca Maynard
5	Generated on (UTC)	06/05/2025 09:59
6	Total records	1
7	This report provides full details of brokerage episodes, including start and end dates, types of care, the involved parties, and any associated costs.	
8	Please note: This report will only show data for the Record Owners and Classifications you have access to.	
9		
10	Filters	
11	Patient BC ID	1
12		
13	Episodes summary:	
	<div><div>< ></div><div>Description & Summary</div><div>Brokerage Episodes</div><div>Provider Bids</div></div>	

This report lists all alerts related to providers, including the alert type, date issued, provider name, and an alert description.

All / current / closed

Alert type

▼

Alert subtype

Select...

▼

From date

Enter in the format DD/MM/YYYY.

To date

Enter in the format DD/MM/YYYY.

All / current / closed

All


Current

Closed

Clear all

Create report

Example of how the Provider Alerts Report downloads into excel.

	A	B
1	Provider Alerts Report	 Part of Acacium Group
2		
3	ICB	Testing7
4	Generated by	Rebecca Maynard
5	Generated on (UTC)	06/05/2025 10:29
6	Total records	9
7	Total number of unique providers	8
8	This report lists all alerts related to providers, including the alert type, date issued, provider name, and an alert description.	
9		
10		
11	Filters	
12	Alert type	Safeguarding
13	All / Current / Closed	All
14		
15		
16		
17		

9.3 Provider contracts report

This report provides detailed information on contracts between ICB’s and care providers, sourced from the ICB library. It includes contract start and end dates, terms and conditions, services covered, and any amendments.

Contract type

Signed, Yes or No

Issue date from and Issue date to

Start date from and Start date to

Renewal date from and Renewal date to

Review date from and Review date to

Contract type

Signed?

Issue date from

Enter in the format DD/MM/YYYY.

Issue date to

Enter in the format DD/MM/YYYY.

Start date from

Enter in the format DD/MM/YYYY.

Start date to

Enter in the format DD/MM/YYYY.

Renewal date from

Enter in the format DD/MM/YYYY.

Renewal date to

Enter in the format DD/MM/YYYY.

Review date from

Enter in the format DD/MM/YYYY.

Review date to


Enter in the format DD/MM/YYYY.

Clear all

Create report

Once the filters have been applied click **‘Create report’**. It will provide you with a Description tab providing an overview of the information, and a Provider Provider Contract tab for more detail.

Example of how the Provider Contracts Report downloads into excel.

	A	B
1	Provider Contracts Report	 Part of Acacium Group
2		
3	ICB	Testing7
4	Generated by	Rebecca Maynard
5	Generated on (UTC)	06/05/2025 10:38
6	Total records	1
7	Total number of unique providers	1
8	This report provides detailed information on contracts between ICBs and care providers, sourced from the ICB library. It includes contract start and end dates, terms and conditions, services covered, and any amendments.	
9		
10		
11		
12		
13		
14		
15		
	< > Description Provider Contracts +	

9.4 Provider ICB library report

This report provides a comprehensive overview of providers and their details, sourced from the ICB library. It includes provider details tags, contact information, care products offered, grouped package rates, and bed availability.

Provider name

Provider postcode

Provider service type for instance Homecare agencies, Nursing Homes

BroadCare ID which is the unique Provider ID

Provider status for instance, Active, Inactive, or On Advice

Tags, if these have been set up on a provider record you can select using the drop down for instance to highlight their specialism for instance dementia care

Once the filters have been applied click **‘Create report’**. It will provide you with a Description tab providing an overview of the information, and further tabs providing more detail including Provider ICB library, Tags, Contacts, Care products, Grouped package rate types, and Bed availability.

Provider name

Provider service type

Provider status

Active, On Advice

Provider postcode

Postcode match

BroadCare ID


Tags

Show advanced filters

Clear all

Create report

Example of how the Provider ICB Library Report downloads into excel.

	A	B	C	D
1	Provider ICB Library Report	 Part of Acacium Group		
2				
3	ICB	Testing7		
4	Generated by	Rebecca Maynard		
5	Generated on (UTC)	06/05/2025 10:44		
6	Total provider records	434		
7	This report provides a comprehensive overview of providers and their details, sourced from the ICB library. It includes provider details tags, contact information, care products offered, grouped package rates, and bed availability.			
8				
9				
10	Filters			
11	Provider status	Active,On Advice		
12	Alerts	All		
13	Registration status	All		
14				
15				
	<div><div>< ></div><div>Description</div><div>Provider ICB library</div><div>Tags</div><div>Contacts</div><div>Care products</div><div>Grouped pac</div></div>			

9.5 User permissions report

This report lists all users and their permission templates.

User type for instance ICB or Provider

Status for instance, Authenticated, Deactivated

ICB name

Template name, this is the name of the user permission template

Last login date from and **Last Login date to**

User added date from and **User added date to**

User type

Status

ICB name

Template name

Type part or all of template name

Last login date from

Enter in the format DD/MM/YYYY.

Last login date to

Enter in the format DD/MM/YYYY.

User added date from

Enter in the format DD/MM/YYYY.

User added date to

Enter in the format DD/MM/YYYY.


Clear all

Create report

Once the filters have been applied click **‘Create report’**. It will provide you with a Description tab providing an overview of the information, and a User Permissions tab for more detail.

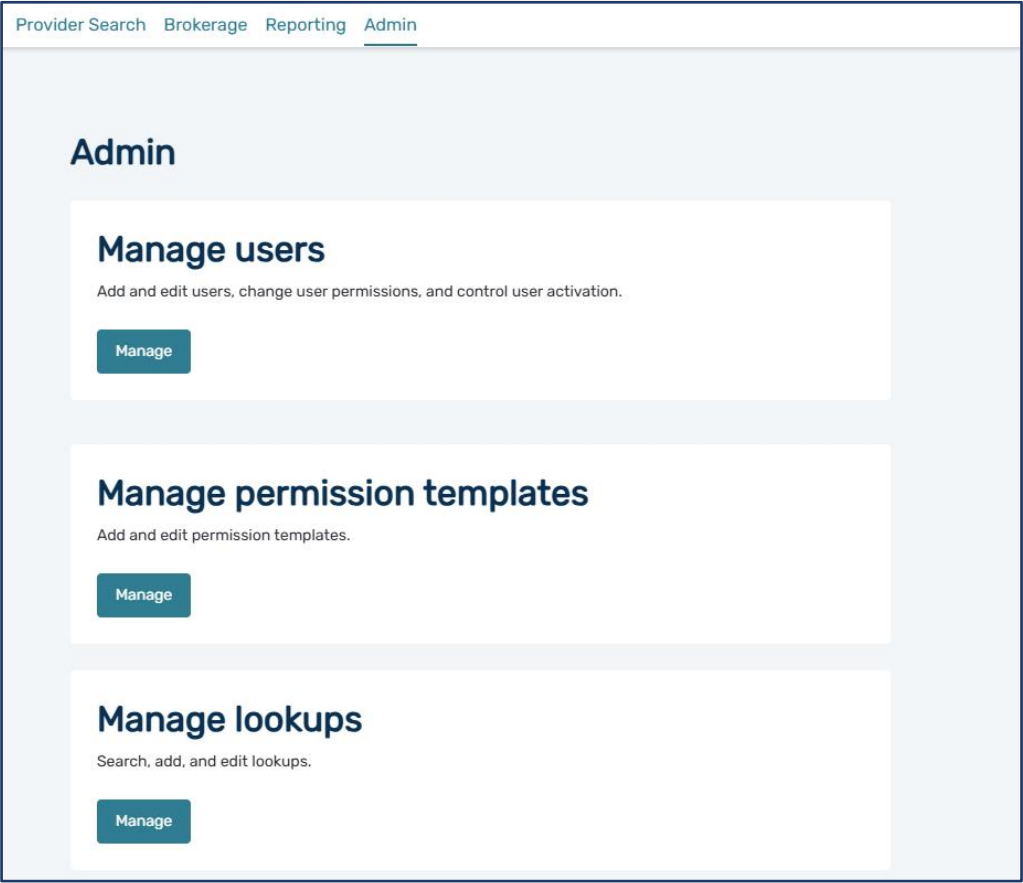
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Example of how the User Permissions Report downloads into excel.

A		B	
User Permissions Report		 Part of Acacium Group	
1			
2			
3	ICB	Testing7	
4	Generated by	Rebecca Maynard	
5	Generated on (UTC)	06/05/2025 10:51	
6	Total records	19	
7	Total number of unique users	19	
8			
9	This report lists all users and their permission templates.		
10			
11			
12			
13			
14			
15			
16			
17			
< >		Description	User Permissions +

10 Admin

The admin tab allows for a user who has permissions to view, add, or amend user information, permission templates which outline what a user can and cannot see, and manage lookups to ensure users can select items from the drop downs for instance when creating a brokerage episode.



10.1 Manage users

Add and edit users, change user permissions, and control user activation.

From the 'Admin' tab select 'Manage users'.

1. **Add user**
2. **User search** – Enter the user information and click 'Search'.
Any user displaying the information in the search criteria will display below.
 - **User details**
 - **ICB name**
 - **User type** for instance ICB or Provider
 - **Status** for instance Authenticated or Deactivated
3. **Edit** – This will allow you to edit the users ICB access and Permissions.
4. **Deactivate** – If a user is deactivated they will no longer be able to access the Provider Portal.

Manage users
1
Add user

User search
2

User details

ICB name

Type part or all of a user's first name, last name or email address.

User type

Status

Or And

Clear all Search

Displaying 126 users

User ↕	Email address	Status	User type	3	4
<input type="checkbox"/> Amy Edmunds		Authenticated	ICB	Edit	Deactivate

Are you sure you want to deactivate this user? ✕

If you deactivate this user, they will no longer be able to log in and access the Provider Portal.

Back

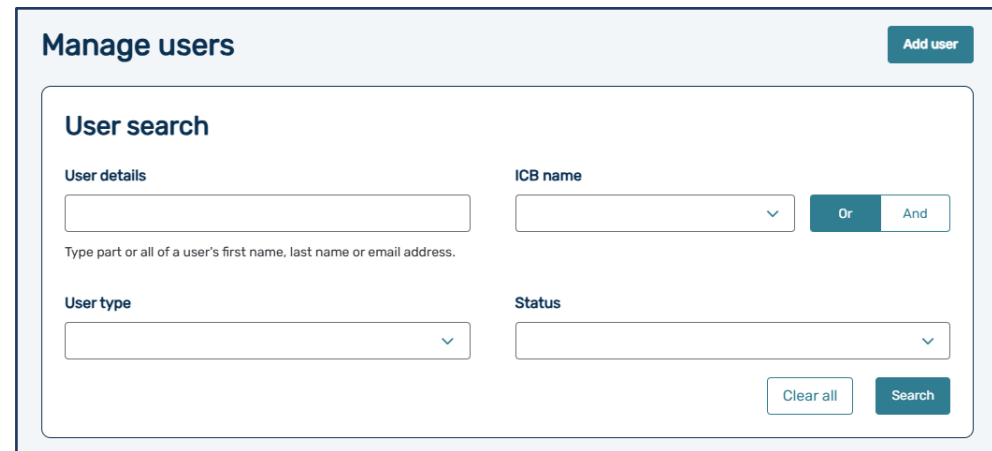
Deactivate user

106 | Page

10.1.1 How to add a new user

From the Admin tab:

- Select 'Manage users'.
- Select 'Add user'.

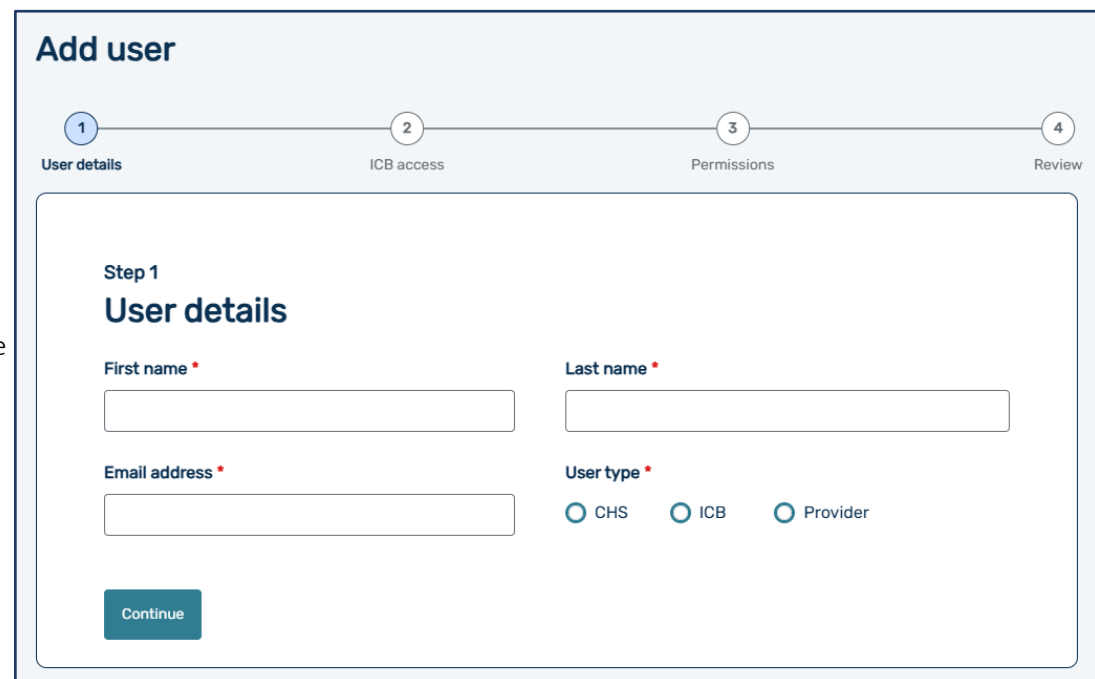


The 'Manage users' interface features a header with the title 'Manage users' and an 'Add user' button. Below the header is a 'User search' section containing four search criteria: 'User details' (a text input field), 'ICB name' (a dropdown menu), 'User type' (a dropdown menu), and 'Status' (a dropdown menu). There are 'Or' and 'And' buttons between the 'ICB name' and 'User type' fields. A 'Clear all' button and a 'Search' button are located at the bottom right of the search section. A small instructional text below the 'User details' field reads: 'Type part or all of a user's first name, last name or email address.'

You cannot skip a step; you need to follow each step by clicking 'Continue' to fully set up a user.

User Details

- Enter the user details.
- If you select 'ICB' then a user will require a BroadCare account added first.
- Select 'Continue'.



The 'Add user' interface shows a four-step process: 1. User details, 2. ICB access, 3. Permissions, and 4. Review. The first step, 'User details', is highlighted. It includes a 'Step 1 User details' section with four required fields: 'First name', 'Last name', 'Email address', and 'User type'. The 'User type' field has three radio button options: 'CHS', 'ICB', and 'Provider'. A 'Continue' button is located at the bottom left of the form.

ICB Access

- If All ICB's that are available in the list are required then click 'All'.
- To select a particular ICB, this can be filtered by entering the ICB name.

Please note the ICB list is not showing in this screenshot.

- Select 'Continue'.

Add user

1 User details 2 **ICB access** 3 Permissions 4 Review

Step 2
ICB access

Select which ICBs the user can access from the list below.

All ☐

Start typing the ICB name to filter the list below.

Back Continue

Permissions

- Select the 'Permission template' from the drop down.

These templates outline what the user can and cannot view, edit Or add within the Provider Portal.

The 'Permission template' is set up from the 'Manage permission Template' area within the 'Admin' section.

- Once selected, click 'Continue'.

Add user

1 User details 2 ICB access 3 **Permissions** 4 Review

Step 3
Permissions

Select the permission template for the user for each ICB listed below.

ICB	Permission template
Testing7	<input type="text"/>

Review

- Review the user information.
- 'Back' will allow you to go back and edit the information.
- 'Save' will save the information and add the new user.

Add user

1

User details

2

ICB access

3

Permissions

4

Review

Step 4
Review

Please check all of the following details. Select 'Save' to add the user or go back if you need to make changes.

User details

User

Test Test

Email address

test@email.com

User type

ICB

ICB

Testing7

Permissions template

Care package read and add access

Back

Save

10.1.2 How to edit a user's profile

From the Admin tab:

Select 'Manage users'.

1. Search for the user you wish to edit by applying the filters and click 'Search'.
2. The arrow will provide a summary of the users permissions (ICB, Permission Template, Providers).
3. Click 'Edit' on the selected user.

The screenshot shows the 'Manage users' interface. At the top right is an 'Add user' button. The main section is titled 'User search' (annotated with a yellow circle and the number 1). It contains several filters: 'User details' with a text input containing 'rebecca' and a dropdown arrow; 'ICB name' with a dropdown menu; 'User type' with a dropdown menu; and 'Status' with a dropdown menu. There are 'Or' and 'And' buttons between the ICB name and User type filters, and a 'Search' button at the bottom right of the filter section. Below the filters, it says 'Displaying 1 users'. Below this is a table with columns: 'User' (annotated with a yellow circle and the number 2), 'Email address', 'Status', and 'User type' (annotated with a yellow circle and the number 3). The table has one row for 'RebeccaProvider Mayn...'. To the right of the 'User type' cell in this row are 'Edit' and 'Deactivate' buttons.

User	Email address	Status	User type
RebeccaProvider Mayn...	rebeccaProvidermayna...	Unauthenticated	Provider

You must work through each section before moving to the next.

ICB

- To add or remove an ICB click in the box and click 'Continue'.

Edit user access and permissions

1

2

3

4

ICB accessPermissionsProvidersReview

Step 1

ICB Access

You can tick and untick the boxes below to change which ICBs the user can access.

All

☒

Start typing the ICB name to filter the list below.

☒

TestDB11

☒

TestDB14

☒

TestDB6

Cancel

Continue

Permissions

- To amend the user’s permissions, select the required template from the drop down next to each ICB the user has access to.
- Click ‘Continue’.

Edit user access and permissions

1

2

3

4

ICB accessPermissionsProvidersReview

Step 2

Permissions

Select the permission template for the user for each ICB listed below.

ICB	Permission template
TestDB11	Provider template
TestDB14	Provider Access
TestDB6	Provider Access
Testing7	Admin Access

Back

Continue

Providers

- Click ‘Edit providers’ next to the Provider name. This will open up the below provider search.
- Show/Hide advanced filters will open or remove the additional search fields.
- Search for the providers and add/remove as required.
- Click ‘Save’.
- Click ‘Continue’.

✕

Edit providers

Provider search

Provider name

Type part or all of the provider name.

Provider postcode

Type part or all of the provider postcode.

BroadCare ID

Location ID

▼

Hide advanced filters

Clear all

Search

	Name	Postcode	Location ID	BroadCare ID
<input type="checkbox"/>	1 Lufkin Road	W1P 1HQ		2679
<input type="checkbox"/>	1 Lufkin Road	CR2 6XH		2680

Cancel

Save

1

ICB access

2

Permissions

3

Providers

4

Review

Step 3

Providers

Add and edit the providers in the ICB library the user can access.

ICB	Permission template	Provider	
TestDB11	Provider template	Good Oaks Home Care [Cambridge]	<div>Edit providers</div>
TestDB6	Provider Access	Caremark (South Cambridgeshire)	<div>Edit providers</div>
TestDB14	Provider Access	1 Diamond Home Care Limited	<div>Edit providers</div>
Testing7	Admin Access	Cambridge & Nursing Home(1)	<div>Edit providers</div>

Back

Continue

Review

This provides you with the opportunity to confirm your chosen selections.

- Back – This will take you back through the sections to allow you to amend any of the information.
- Click ‘Save’ to save the amendments.

Step 4

Review

Please check all of the following details. Select 'Save' to add the user or go back if you need to make changes.

User details

User

RebeccaProvider Maynard

Email address

rebeccaProvidermaynard@email.com

User type

Provider

ICB	Permission template	Provider
TestDB11	Provider template	Good Oaks Home Care [Cambridge]
TestDB14	Provider Access	1 Diamond Home Care Limited
TestDB6	Provider Access	Caremark (South Cambridgeshire)
Testing7	Admin Access	Cambridge & Nursing Home(1)

Back

Save

10.2 Manage permission templates

This allows you to add and edit permission templates.

Within the Admin section click 'Manage permission templates'.

1. **Template** – This allows you to search for part or all of a template.
2. **ICB name** – This allows you to search for a template that has been created for an ICB.
3. **User type** – This allows you to view a template that is set up as part of an ICB or a Provider.
4. **Status** – This allows you to view a template that is 'Active' and 'Inactive' or you can select 'All' to view both.

The screenshot shows the 'Manage permission templates' page within the 'Admin' section. The page has a header with 'Provider Search', 'Brokerage', and 'Admin' links. A dark blue 'Add template' button is in the top right. The main content area is titled 'Manage permission templates' and contains a 'Template search' section. This section has four numbered callouts: 1. A text input field labeled 'Template' with the placeholder 'Type part or all of a template's name.' 2. A dropdown menu labeled 'ICB name'. 3. A dropdown menu labeled 'User type'. 4. Radio buttons for 'Status', with 'All' selected, and 'Active' and 'Inactive' options. At the bottom right of the search section are 'Clear all' and 'Search' buttons.

The templates displayed will depend on the filters selected.

Manage permission templates

Add template

Template search

Template

ICB name

Testing7

Type part or all of a template's name.

User type

ICB

Status

All

Active

Inactive

Clear all

Search

Displaying 5 templates

5	Template	ICB name	User type	Active users	Status	
	addddd	Testing7	ICB	0 users	Active	7 Edit Deactivate 6
	Alerts tem sep-22	Testing7	ICB	0 users	Active	Edit Deactivate

5. Clicking on one of the headings will change how the information is viewed for instance clicking on Template will change the order from A-Z to Z-A.

6. **Deactivate** – This will allow you deactivate the template, if it is greyed out it has already been deactivated.

Deactivate template

Are you sure you wish to deactivate Alerts tem sep-22 from your templates?

Back

Deactivate template

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7. **Edit** – This allows you to edit the template.

Permissions

Template details

User type

ICB

ICB

Testing7

Template name

addddd

Select which permissions to enable for this template.

Admin

View

Add

Edit

Deactivate

Manage users

Enable viewing and searching users, as well as adding, editing or deactivating them.

☐

☐

☐

☐

Manage permission templates

Enable viewing and searching templates, as well as adding, editing or deactivating them.

☐

☐

☐

☐

Manage lookups

Enable viewing Lookups, as well as adding and editing.

☐

☐

☐

Reporting

View

Provider ICB library report

Enable reporting provider records in provider ICB library to Excel.

☒ No

☐ Yes

Provider alerts report

Enable reporting alerts details for provider records in provider ICB library to Excel.

☒ No

☐ Yes

Provider contracts report

Enable reporting contracts details for provider records in provider ICB library to Excel.

☒ No

☐ Yes

Brokerage report

Enable reporting brokerage episodes details to Excel.

☒ No

☐ Yes

User permissions report

Enable reporting user permissions to Excel.

☒ No

☐ Yes

Brokerage episodes

View

Add

Edit

Deactivate

Manage brokerage episodes

Enable viewing and searching brokerage episodes, as well as adding and editing them.

☐

☐

☐

Provider library

View

Add

Edit

Deactivate

CQC library

Access to the CQC library to search and view full provider records.

☒

ICB library

Control access to the ICB library, to search and view, add or edit provider records.

☒

☐

☐

Contacts

Enable viewing contacts for providers, as well as adding, editing and deactivating them.

☐

☐

☐

☐

Contracts

Enable viewing provider contracts, as well as adding, editing and deactivating them.

☐

☐

☐

☐

Bed availability

Enable viewing bed availability for providers, as well as editing to update bed availability.

☐

☐

Care products

Enable viewing care products for providers, as well as adding, editing and deactivating them.

☐

☐

☐

☐

Grouped package rates

Enable viewing grouped package rates for providers, as well as adding, editing and deactivating them.

☐

☐

☐

☐

Finance

Enable viewing invoices for providers, as well as adding and editing them.

☐

☐

☐

Care packages

Enable viewing care packages for providers.

☐

Alerts

Enable viewing provider alerts, as well as adding, editing and deactivating them.

☐

☐

☐

☐

Notes

Enable viewing notes for providers, as well as adding, editing and deactivating them.

☐

☐

☐

☐

Documents

Enable viewing provider documents, as well as adding, moving and deactivating them.

☐

☐

☐

☐

Tags

Enable viewing tags for providers, as well as adding and deactivating them.

☐

☐

☐

Report to Excel

Enable exporting copies of provider records in provider libraries to Excel.

☒ No

☐ Yes

Cancel

Save

10.2.1 Add template

Within the Admin section click 'Manage permission templates'.

Click 'Add template'.

Provider Search Brokerage Admin

Manage permission templates

Add template

Template search

Template

Type part or all of a template's name.

ICB name

User type

Status
☒ All ☐ Active ☐ Inactive

You will be unable to move through the template pages without clicking Continue.

Template details

1. Select if this template is for an ICB or a Provider
2. Give the Template a unique name
3. Click 'Continue'

Add template

1 2

Template details Permissions

Step 1
Template details

User type *

☐ ICB ☐ Provider

Template name *

Continue

Permissions

Click on the checkbox to add the requirements for the Template and click ‘Save’.

Permissions

Template details

User type

ICB

ICB

Testing7

Template name

adddd

Select which permissions to enable for this template.

Admin

View

Add

Edit

Deactivate

Manage users

Enable viewing and searching users, as well as adding, editing or deactivating them.

☐

☐

☐

☐

Manage permission templates

Enable viewing and searching templates, as well as adding, editing or deactivating them.

☐

☐

☐

☐

Manage lookups

Enable viewing Lookups, as well as adding and editing.

☐

☐

☐

Reporting

View

Provider ICB library report

Enable reporting provider records in provider ICB library to Excel.

☒ No

☐ Yes

Provider alerts report

Enable reporting alerts details for provider records in provider ICB library to Excel.

☒ No

☐ Yes

Provider contracts report

Enable reporting contracts details for provider records in provider ICB library to Excel.

☒ No

☐ Yes

Brokerage report

Enable reporting brokerage episodes details to Excel.

☒ No

☐ Yes

User permissions report

Enable reporting user permissions to Excel.

☒ No

☐ Yes

Brokerage episodes

View

Add

Edit

Deactivate

Manage brokerage episodes

Enable viewing and searching brokerage episodes, as well as adding and editing them.

☐

☐

☐

Provider library

View

Add

Edit

Deactivate

CQC library

Access to the CQC library to search and view full provider records.

☒

ICB library

Control access to the ICB library, to search and view, add or edit provider records.

☒

☐

☐

Contacts

Enable viewing contacts for providers, as well as adding, editing and deactivating them.

☐

☐

☐

☐

Contracts

Enable viewing provider contracts, as well as adding, editing and deactivating them.

☐

☐

☐

☐

Bed availability

Enable viewing bed availability for providers, as well as editing to update bed availability.

☐

☐

Care products

Enable viewing care products for providers, as well as adding, editing and deactivating them.

☐

☐

☐

☐

Grouped package rates

Enable viewing grouped package rates for providers, as well as adding, editing and deactivating them.

☐

☐

☐

☐

Finance

Enable viewing invoices for providers, as well as adding and editing them.

☐

☐

☐

Care packages

Enable viewing care packages for providers.

☐

Alerts

Enable viewing provider alerts, as well as adding, editing and deactivating them.

☐

☐

☐

☐

Notes

Enable viewing notes for providers, as well as adding, editing and deactivating them.

☐

☐

☐

☐

Documents

Enable viewing provider documents, as well as adding, moving and deactivating them.

☐

☐

☐

☐

Tags

Enable viewing tags for providers, as well as adding and deactivating them.

☐

☐

☐

Report to Excel

Enable exporting copies of provider records in provider libraries to Excel.

☒ No

☐ Yes

Back

Save

10.3 Manage Lookups

The Lookups will allow you to set certain information, so it fits with your own ICB process, like how you use Lookups in BroadCare.

Manage lookups

You can select a category first to filter the lookups to select from.

Category
 1 ▼

ICB
 2 ▼

Lookup ^{*}
 3 ▼

5 Clear all

4 Search

1. **Category** for instance Brokerage or Provider.
2. **ICB** will allow you to select the ICB Lookup you wish to view, edit, or add. This is useful if you have access to multiple ICB's.
3. **Lookup** will allow you to select the category of Lookup you wish to view for instance Assessment Outcomes.
4. Once the filters have been added click '**Search**'. This will provide a list of Lookup values for you to add, amend, or delete.
5. **Clear all** will remove all the filters.

6. Once you have searched for a particular Lookup category, if the Lookup value does not exist you can click **‘Add new value’**. Example below is for Assessment outcomes.

Manage lookups

You can select a category first to filter the lookups to select from.

Category

Brokerage

Lookup *

Assessment outcomes

ICB

All (1)

Clear all

Search

Assessment outcomes

Search

Q Search

Type part or all of a value.

Add new value

- 7. Select the **ICB** from the dropdown.
- 8. Add the **‘Value’** which is the name you would like to give the Lookup and click **‘Save’**.
- 9. Once the Lookup has been added it will allow you to **‘Edit’** the information.
- 10. Edit value will allow you to amend the name or make it inactive by clicking the **‘Active’** button to remove the tick.

Edit value

ICB

Testing7

Value *

Provider assessed - happy to deliver care

Active

☒

Cancel

Save

Add value

ICB *

Value

Cancel

Save

Manage lookups

You can select a category first to filter the lookups to select from.

Category

Brokerage

Lookup *

Assessment outcomes

ICB

All (1)

Clear all

Search

Assessment outcomes

Search

Q Search

Type part or all of a value.

Add new value

Displaying 1 record

Value	ICB	Updated on	Updated by	Active
Provider assessed -	Testing7	06/05/2025, 14:10	Rebecca Maynard	<input checked="" type="checkbox"/>