

Provider Portal

Provider User Guide

Version 1 May 2025

xyla
Part of Acacium Group

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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

Multi Factor Authentication (MFA) is used when logging into the Provider Portal as it adds a layer of protection to the sign-in process. Please download either the Google, or Microsoft Authenticator app on to your mobile device and then follow the below steps to set up MFA and log in to the Provider Portal.

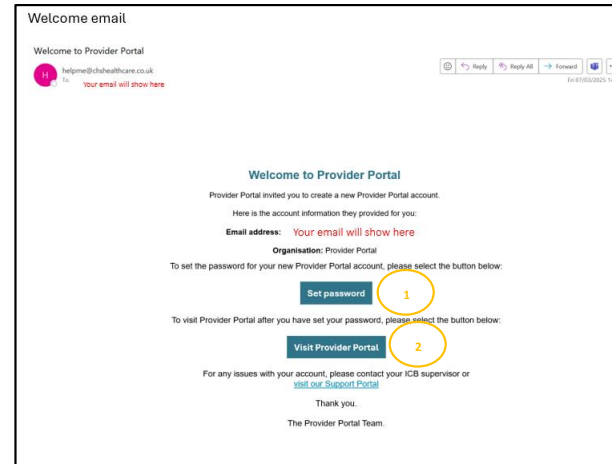


[Google Authenticator App](#)

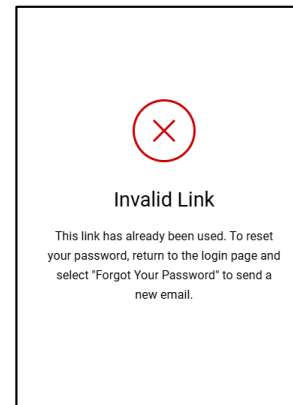


[Microsoft Authenticator App](#)

Once you have been provided with an account for the Provider Portal you will receive the below email.



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'.

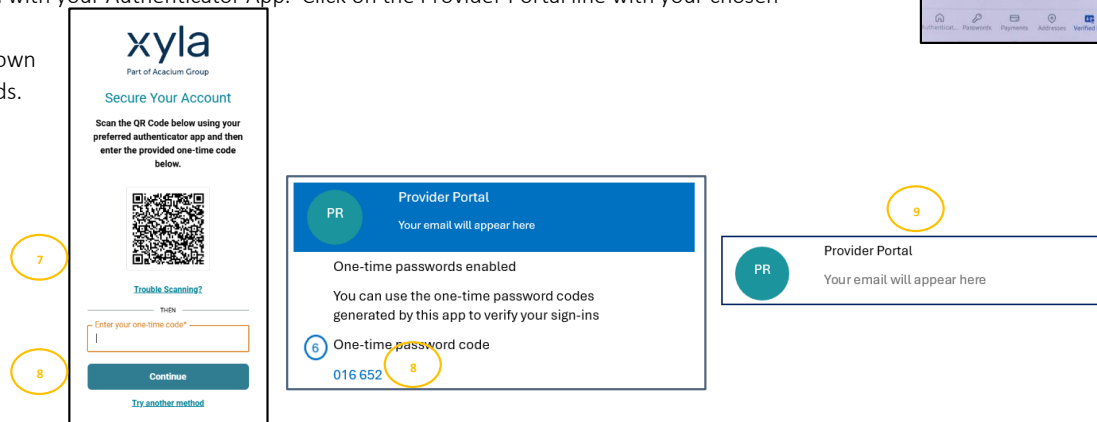
A screenshot of the xyla login page. The page has the xyla logo and "Part of Acacium Group" at the top. Below that is the word "Welcome" in teal. Then "Log in to Provider Portal" in bold. There are three input fields: "Email address*", "Password*", and "Forgot password?". The "Email address*" field has a yellow circle with the number "4" next to it. The "Forgot password?" link has a yellow circle with the number "3" next to it. The "Password*" field has a yellow circle with the number "4" next to it. At the bottom is a teal button labeled "Continue".

- Please select 'Google Authenticator or similar'.

Google or Microsoft Authenticator Apps are both free to download and are completely safe to use on your mobiles.

- 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.

- Hover over the QR code displayed on screen, this will provide you with a One-time password code.
- Enter the code provided into the box 'Enter your one-time code' on your laptop.
- This will link the Provider Portal with your Authenticator App. Click on the Provider Portal line with your chosen authenticator app 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 logging into the Provider Portal, you will be presented with the below screen. The down arrow next to your name will open and present you with your own settings.

The screenshot displays the Xyla Provider Portal interface. At the top, the header includes the Xyla logo and the text 'Part of Acacium Group'. Below the header, there are two tabs: 'Provider Search' and 'Brokerage'. The main content area is titled 'Provider search' and contains a section labeled 'ICB library'. This section has four input fields: 'Provider name', 'Provider postcode' (with a 'Postcode match' dropdown), 'Provider service type' (with a dropdown arrow), and 'BroadCare ID'. There are also two buttons at the bottom: 'Clear all' and 'Search'. A dropdown menu is open next to the user's name 'Rebecca Maynard - Provider Portal...', showing options: 'My account', 'View user guides', 'Exit Provider Portal', and 'Log out of all platforms'.

xyla Provider Portal
Part of Acacium Group

Provider Search Brokerage

Provider search

ICB 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
 ▾

BroadCare ID

Show advanced filters

Clear all Search

Rebecca Maynard - Provider Portal... ▾
My account
View user guides
Exit Provider Portal
Log out of all platforms

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 Exit provider Portal

This will allow you to exit the Provider Portal.

Please note that if you try and exit whilst you are completing an activity the below popup will appear.

Are you sure you want to lose your progress?

If you leave before completing all steps, your progress so far will not be saved.

Back Continue

When you 'Exit Provider Portal' it will keep you logged in for 12 hours from the time you signed in using your chosen authentication method.

Commented [NT1]: Is this the correct screenshot, when I exit I don't get this message - assume this would come up if I was in the middle of something, i.e, a brokerage episode

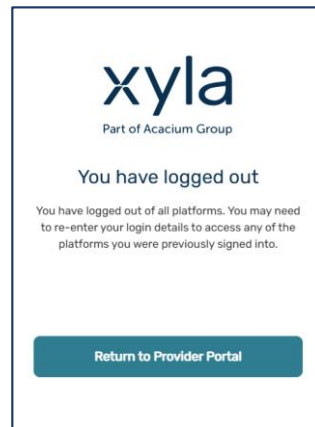
Commented [RM2R1]: A note re the screenshot has been added

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



4.4 Log out of all platforms

This will log you out of the Provider Portal and MFA, 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 will have the ability to search any providers you have access to.

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 filters below. You will only have permission to search for certain providers.

5.1.1 Standard Search

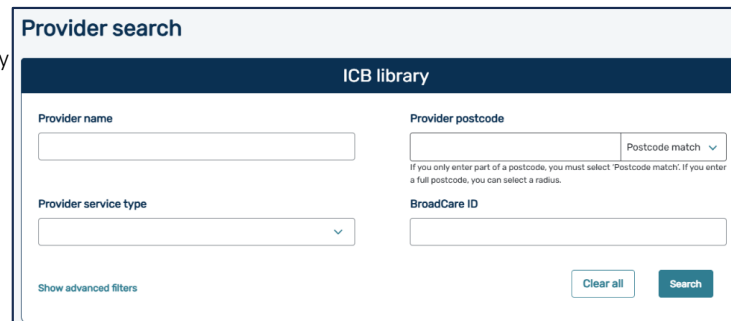
Enter the below filter information and click 'Search'.

- **Provider name**
- **Provider postcode**
- **Provider service type** for instance;
 - Homecare agencies
 - Hospice
 - Hospital
- **BroadCare ID** is the unique Provider ID

5.1.2 Advanced Search

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

- Provider name, Provider postcode, Provider service type, and BroadCare ID 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 children



Provider search

ICB library

Provider name

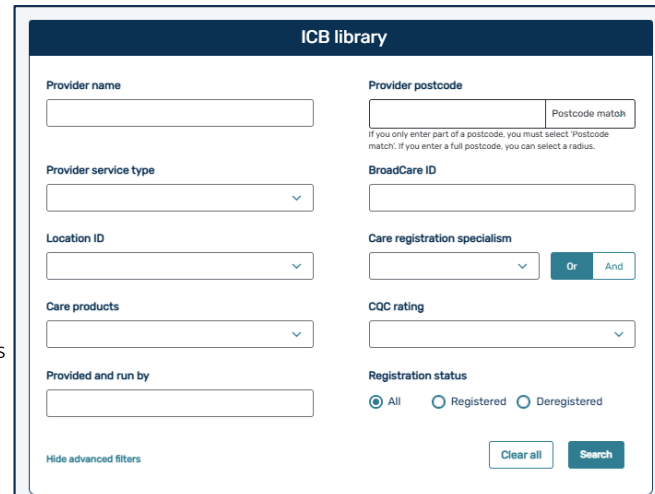
Provider postcode Postcode match

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

BroadCare ID

Show advanced filters



ICB 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

BroadCare ID

Location ID

Care products

Provided and run by

Care registration specialism

CQC rating

Registration status ☒ All ☐ Registered ☐ Deregistered

Hide advanced filters

- **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

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.

Displaying 1 providers

List Map

A-Z provider name

Load providers

☐ Select all

Cherry Tree Care Centre
 South Road, Stockton-on-tees, TS20 2TB
[View on Google Maps](#)

CQC rating Good

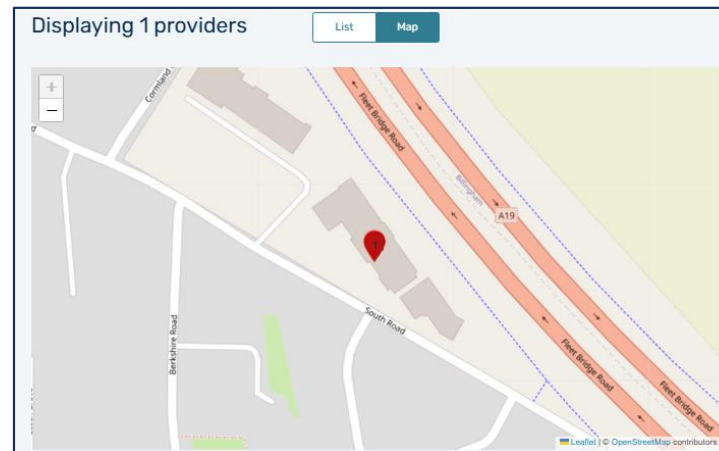
Phone number
 01642554257

Email
test@email.com

☐ Select

Show more details

View provider profile



5.1.3 List View

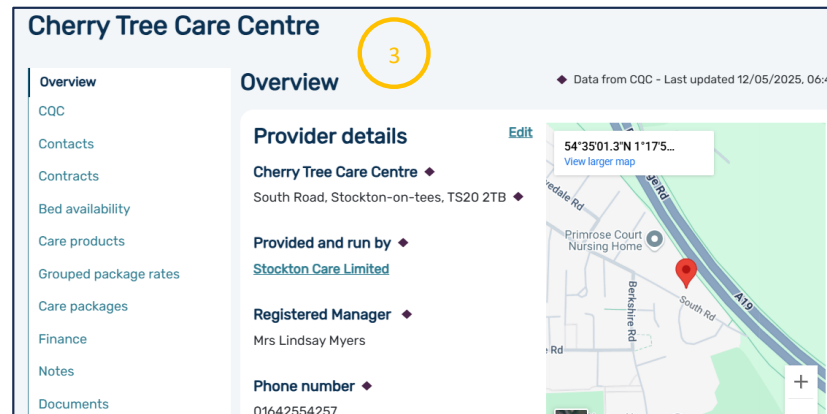
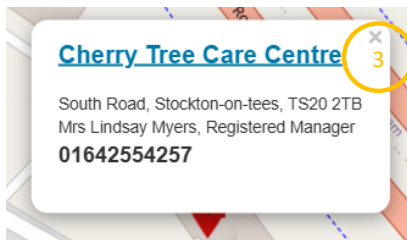
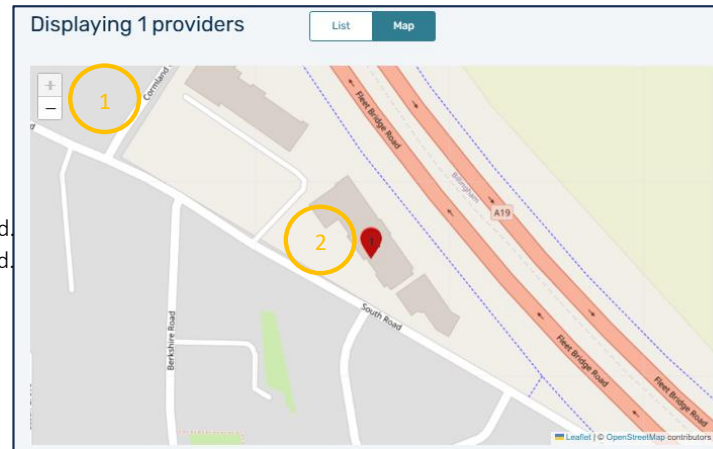
Once the list of providers is showing you can:

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 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. **View on Google Maps** – this will take you to google Maps to view further information and get directions.

The screenshot displays the 'Displaying 1 providers' interface. At the top, there are tabs for 'List' and 'Map'. A dropdown menu labeled 'A-Z provider name' is highlighted with a yellow circle and the number 1. Below this, there is a 'Select all' checkbox and a 'Load providers' button, with the latter highlighted by a yellow circle and the number 3. The main content area shows the details for 'Cherry Tree Care Centre', including its address, CQC rating (Good), phone number, and email. A 'View on Google Maps' link is highlighted with a yellow circle and the number 4. A 'View provider profile' button is highlighted with a yellow circle and the number 2. Below the list view, the 'Cherry Tree Care Centre' profile is shown, featuring a sidebar with navigation links (Overview, CQC, Contacts, etc.) and a main section with provider details and a map. The map section is highlighted with a yellow circle and the number 3.


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 the contact information for the provider
3. Clicking on the provider's name in **blue** will open up the provider record. You can click 'Back to search results' to come out of the provider record.



5.1.5 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'.

 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.

Care Products – View, add, and delete care products.

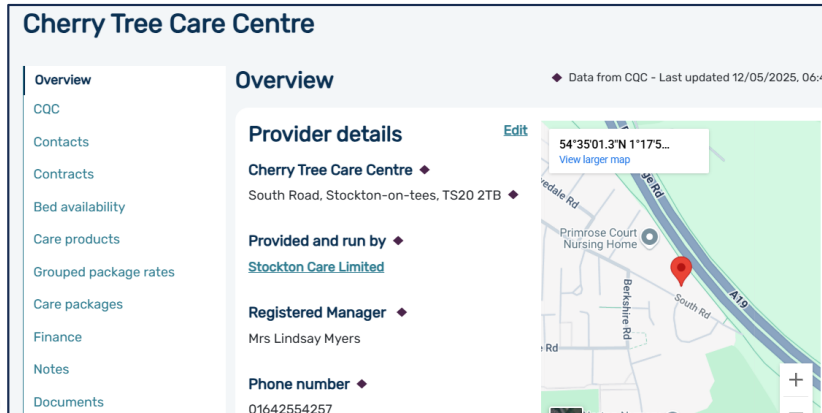
Grouped package rates – View, add, delete, and edit group package rate information.

Care Packages – Provides information on any care packages.

Finance – View and create Invoices and create a report.

Notes – 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.



Commented [NT3]: Is it worth mentioning this is only for Dom Care Providers?

Commented [NT4R3]: Only small but on the titles in this section, some are sentence case and some are capital first letter

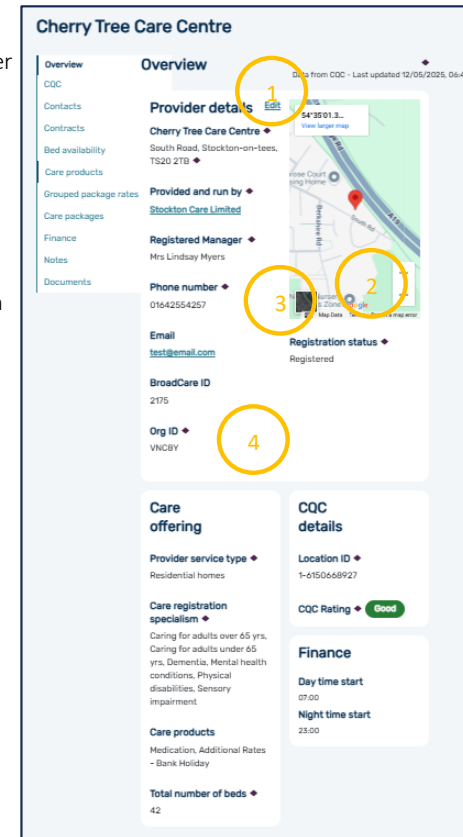
Commented [RM5R3]: This has been added

5.1.5.1 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.
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.



5.1.5.2 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** – This takes you directly to the CQC register.

Cherry Tree Care Centre

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

CQC ◆ Data from CQC - Last updated 12/05/2025, 06:49

Ratings ⓘ

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

Details

Report published ◆
01/10/2024
[View report](#)

Last inspection ◆
04/07/2024

Location ID ◆ 1
1-6150668927
[View on CQC website](#)

Provided and run by ◆ 2
Stockton Care Limited
1-5989813361
[View on CQC website](#)

5.1.5.3 Contacts

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

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 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 and edit.

Cherry Tree Care Centre

Overview

CQC

Contacts

Contracts

Bed availability

Care products

Grouped package rates

Care packages

Finance

Notes

Documents

Contacts

Current

Deleted

Mrs Lyndsey Myers

Contracts Lead

Phone

Comments

Mobile

Email address

Added: 12/05/2025, 13:33 by Rebecca Maynard

Edit

Commented [NT6]: Whilst “contacts” is obvious can we add more detail here to advise what it can be used for? i.e to record the Safeguarding lead, or Finance Manager or Invoice Clerk etc

Commented [NT7R6]: This will all be permission led by the ICB as to what the Provider can and can't do in all these sections.

Commented [RM8R6]: added

17 | Page

5.1.5.4 Contract

View 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** will allow you to toggle to view the current list of contracts and those that have been deleted.
2. **View eSignature status** allows you to view who and when the contract was signed.

Signer status

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

Document status: sent, 16/04/2025, 17:09

Reference ID: 44f0f38c-1257-4453-a8bd-4b26b73084cc

	First name	Last name	Email address	Status
1.	jennifer	leary	jennifer.leary@acaciumgroup.com	Email opened
2.	jeremy	baker	jeremy.baker@acaciumgroup.com	Visited

2
Back
View contract

Cherry Tree Care Centre

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

Contracts

Current
Deleted
1

CCC Dom Care

Contract issued 16/04/2025

Contract received

Contract review

Contract signed?

Contract reference

Added: 16/04/2025, 17:08 by Jennifer Leary

Last updated: 16/04/2025, 17:09 by Jennifer Leary

Contract start

Contract renewal

Sign with eSignature tool?

Indemnity insurance?

View eSignature status

2

WCC Care Home

Contract issued 13/01/2025

Commented [NT9]: As above

Commented [RM10R9]: added

5.1.5.5 Bed availability

This allows you to view and edit the bed availability.

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

Overview

CDC

Contracts

Contracts

Bed availability

Care products

Grouped package rates

Care packages

Finance

Notes

Documents

Cherry Tree Care Centre

Bed availability

Edit

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	-

Update bed availability

Single

Personal Care

Available beds

Single

Nursing

Available beds

Single

Personal Care, Dementia

Available beds

Cancel

Save

5.1.5.6 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.

1. **All/Deleted** allows you to toggle to view All of the care products and those that have been deleted.
2. **Down arrow** allows you to open the care product to view additional information.

Cherry Tree Care Centre

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

Care products

All Deleted 1

Additional Rates - Bank Holiday £435.00/Day ▾

Medication £9009.00/Week ▾ 2

Commented [NT11]: As above

Commented [RM12R11]: added

Cherry Tree Care Centre

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

Care products

All Deleted

Additional Rates - Bank Holiday £435.00/Day ^

Available from : 17/04/2025 Available to : 28/06/2025

Added: 17/04/2025, 09:29 by Jennifer Leary

Medication £9009.00/Week ^ 2

Available from : 08/12/2024 Available to : 29/08/2025

Added: 17/04/2025, 08:29 by Jennifer Leary

Last updated: 17/04/2025, 08:29 by Jennifer Leary

5.1.5.7 Grouped package rates

View group package rate information for domiciliary providers.

- 1. **All/Deleted** allows you to toggle to view all the grouped package rates and those that have been deleted.

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

Cherry Tree Care Centre

Overview

CQC

Contacts

Contracts

Bed availability

Care products

Grouped package rates

Care packages

Finance

Notes

Documents

Grouped package rates

All

Deleted

1

24 Hour Call Out

Mon

Tue

Wed

Thu

Fri

Sat

Sun

Bank Holiday

Day rate

£/hour

55.00

55.00

55.00

55.00

55.00

55.00

55.00

86.00

Night rate

£/hour

68.00

68.00

68.00

68.00

68.00

68.00

68.00

106.00

Added:

25/04/2025, 06:46 by Jennifer Leary

21 | Page

5.1.5.8 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.

Commented [NT13]: As above, an intro to this section. This is where the provider will see all the Care Packages that are in place for them

Commented [RM14R13]: added

Cherry Tree Care Centre

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

Care packages

Show filters

26301

Patient name: Patient BC ID: PHB status
FO 12887 No

From To Care product
03/11/2024 Medication

Grouped package rate type
24 Hour Call Out

Total cost (weekly)
£7120.00

Funding & paid by
Fully - Paid By NHS

NHS percentage & cost
100% / £7120.00

LA percentage & cost
0% / £0.00

ED percentage & cost
0% / £0.00

Local authority School authority Credit
No

Approved date
25/04/2025

Approved by
Jennifer Leary

Added: 25/04/2025, 06:48 by Jennifer Leary

Last updated: 25/04/2025, 06:48 by Jennifer Leary

View cost summary

26299 Non-grouped

26298 Non-grouped

26296 Non-grouped

26293 Non-grouped

Cherry Tree Care Centre

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

Care packages

Hide filters

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

Contract ID Patient BC ID

Status
☐ All ☒ Active ☐ Closed

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

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

3. **View cost summary** allows you view the cost information for this care package

View cost summary

Contract ID: 26299

Day	Time	Total
Monday	00:00 - 00:00 [E]	Total: £ 1424.00 (2400 Hours)
Tuesday	00:00 - 00:00 [E]	Total: £ 1424.00 (2400 Hours)
Wednesday	00:00 - 00:00 [E]	Total: £ 1424.00 (2400 Hours)
Thursday	00:00 - 00:00 [E]	Total: £ 1424.00 (2400 Hours)

Total cost: £ 5700 | Total hours: 100 hours

Close

5.1.5.9 Finance

The ability to view the invoice information and any saved notes or Documents relating to the invoice.

- 1. **Show/Hide filters** allow you to filter the invoices
- 2. **Arrow** expands the invoice to view and add information
 - View notes
 - View documents

Overview

CQC

Contacts

Contracts

Bed availability

Care products

Grouped package rates

Care packages

Finance

Notes

Documents

Cherry Tree Care Centre

Finance

854131KLI

£ 0.00

Received

07/04/2025

Invoice ID

24328

From

06/01/2025

To

09/05/2025

Payment method

Added: 17/04/2025, 18:51 by Jennifer Leary

View notes

View documents

5.1.5.10 Notes

View, Add Note, filter and Assign 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** allows you to toggle to view All of the notes and those that have been deleted.
2. **Show filters** allow you to apply filters when searching for a particular Note.
3. The **arrow** will allow you to open the note to view more Information.
4. **Add comments** allow you to add additional comments to the note.
5. **Add Note** – This allows you to add notes to the provider record

Add note

Reason *

▼

Case Management Reason Test 1
Communication In / Out (exc. Phone Calls)
Contract Discussion
Contract Received Date
LA Approval
Phone Call In
Phone Call Out
QC - Assessment Completed - Ready for QC
QC - Passed QC - Advisories Only
QC - Passed QC - No Advisories
QC - Ready for Verification
QC - Rework Required - Outcome Agreed
QC - Rework Required - Outcome Disagreed
Rates

Assign action to

▼

Cancel

Save

Cherry Tree Care Centre

Overview

CQC

Contacts

Contracts

Bed availability

Care products

Grouped package rates

Care packages

Finance

Notes

Documents

Notes

All

Deleted

Show filters

Phone Call In

Supplier Case Note

Completed

Note description:

Received phone call to clarify package information

Action due date:

Added: 12/05/2025, 13:18 by Rebecca Maynard

Completed: 12/05/2025, 01:00 by Rebecca Maynard

No comments to display.

Add comment

Add Note

Commented [NT15]: As above, might be good to examples of types of notes, however I am not 100% sure that providers should be uploading docs - I guess this is around permissions the ICB set, if so maybe need to say with a lot of these sections that they are driven by permissions set by the ICB

Commented [RM16R15]: added

5.1.5.11 Documents

View, 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** allows you to toggle to view the current documents and those that have been deleted.
2. **Show filters** allow 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 up the Alert to view more information.
4. **Download** allows you to download the document.

5. **Add documents** allow you to add a new document.

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.

6 Brokerage

The brokerage section allows you to view the brokerage episode you have received and are bidding on.

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

1. Entering the information will allow you to filter and search for brokerage episodes.
2. **'Show advanced filters'** allows for further filtering information to be added.
3. **Active/Closed** will allow you to filter between Current active brokerage episodes and closed episodes.
4. **Key** 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.



5. **Arrow** will open a summary of the brokerage episode.
6. **View** will open the episode.

Brokerage episodes

Patient BC ID

Patient name

Care type

Client group

Assignee

Episode stage

Show advanced filters **2**

Active Closed **3**

Key
● Bids for ICB review
● Query for provider review
● Query for ICB review

Displaying 1 records

Patient name BC ID	Episode ID	Episode stage	Start date	Deadline	Care type	Assignee	
▼ MH 12888	3	Contract status	22/04/2025	30/04/2025	Homecare agencies	John Smith	1 <input type="button" value="View"/> 6

6.1 Viewing a brokerage episode

MH

Patient BC ID 12888	NHS number RES-TRI-CTED	Client group Mental Health	Care type Homecare agencies	Episode ID 3
Start date 22/04/2025	Assignee John Smith	Deadline 30/04/2025 00:00 (12 days past)		

1. **View/Raise queries**

2. **View documents** will allow you to view and download documents.

3. **Episode event log** - This will provide an overview of actions completed.

4. **View** - This will allow you to view each section.

[< Back](#)

1 query for provider review

View / Raise queries

View documents

1. Care requirements

Complete

View

2. Select providers

Complete

3. Review bids

Complete

View

4. Contract preparation

Complete

View

5. Contract status

In progress

6. Complete episode

Episode event log

Log

Brokerage episode created with care requirements (Episode ID: 3)

Jennifer Leary
22/04/2025 14:31

6.1.1 How to view queries on a brokerage episode

Please note that your access to the Provider Portal is determined by your permissions that have been set by the ICB. To view or raise queries please select 'View/Raise queries' from the brokerage episode.

If there are any queries these will be presented to you, if not then to raise a query click 'Raise a new query'.

< [Back](#)

Queries

[Raise a new query](#)

General query - Cherry Tree Care Centre

Note
query about care home facilities

Assignee
Provider

Action due date
29/04/2025

Added: 25/04/2025, 17:45 by Jennifer Leary

[Query for provider review](#) ^ 1

2 [Edit](#)

3 [Add comment](#)

1. **Arrow** will open the query to provide more information.
2. **Edit** will allow you to edit the saved information.
 - **Action due date**
 - **Upload document**
3. **Add comment** will allow you to add additional comments.

Add comment ×

Add a comment to this query.

Comments *

[Cancel](#) [Save](#)

6.1.2 How to raise a new query on a brokerage episode

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

Filter for the episode you wish to view.

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

Brokerage episodes

Filter form: Patient BC ID, Patient name, Care type, Client group, Assignee, Episode stage. Buttons: Show advanced filters, Clear all, Search.

Active Closed

Key:

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

Displaying 1 records

Patient name BC ID	Episode ID	Episode stage	Start date	Deadline	Care type	Assignee	
MH 12888	3	Contract status	22/04/2025	30/04/2025	Homecare agencies	John Smith	View

1

Episode stages

- 1. Care requirements (Complete, View)
- 2. Select providers (Complete)
- 3. Review bids (Complete, View)
- 4. Contract preparation (Complete, View)
- 5. Contract status (In progress)
- 6. Complete episode (Lock icon)

Episode event log

2

Log
Jennifer Leary
22/04/2025 14:31
Brokerage episode created with care requirements (Episode ID: 3)

Queries

3

Raise a new query

General query - Cherry Tree Care Centre

Query for provider review

4. Complete the action due date, add a note, and upload any supporting documents before clicking 'Save'.

Raise a new query

Assignee *
ICB

Provider *
Cherry Tree Care Centre

Action due date

Enter in the format DD/MM/YYYY.

Completed *

Yes No

Note *

Supporting documents

Upload document

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

Cancel

Save

6.1.3 How to review, submit, and withdraw a bid

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

Navigate to the Brokerage section, this will allow you to view any brokerage episodes and the episode stage they are at.

The screenshot shows the 'Brokerage episodes' interface. On the left, there are filter fields for Patient BC ID, Patient name, Care type, Client group, Assignee, and Episode stage. Below these are 'Show advanced filters', 'Clear all', and 'Search' buttons. A table at the bottom displays 2 records. The first record is highlighted with a yellow box and an arrow pointing to the 'View' button. The right side of the interface shows a detailed view of a brokerage episode, including a progress bar with stages: 1. Care requirements (Complete), 2. Select providers (Complete), 3. Review bids (In progress), 4. Contract preparation, 5. Contract status, and 6. Complete episode. An 'Episode event log' is also visible on the right.

Patient name BC ID	Episode ID	Episode stage	Start date	Deadline	Care type	Assignee
MH 12888	19	Review bids	12/05/2025	13/05/2025	Homecare agencies	Team 1

Within the brokerage episode select '3. Review bids' and 'View', this will show you the information that the ICB would like you to bid for.

The screenshot shows the '3. Review bids' interface. It features a table with columns: Provider name, Postcode, Bid status, ICB decision, Cost per week, and Estimated care start date. The first row of data is visible, and a 'View' button is located at the end of the row.

Provider name	Postcode	Bid status	ICB decision	Cost per week	Estimated care start date
Cherry Tree Care Centre	TS20 2TB	Awaiting bid			

You will be able to input your decision, depending on your decision will determine what additional information will be required for instance 'Bid submitted' will require the cost of care and the estimated start date of care, you can also upload supporting documentation and when you will be completing your assessment to confirm you are able to deliver the care required.

Once you have clicked 'Save', if after you have completed the assessment and you need to withdraw your bid for instance the bed is no longer available you will have the opportunity to click 'Withdraw' bid and input the reason.

6.1.4 Contract preparation

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

Once a bid has been submitted, the ICB will be able to make their decision, you will be updated within the brokerage episode of the brokerage section.

Patient name BC ID	Episode ID	Episode stage	Start date	Deadline	Local status	Care type	Assignee	
▼ Monika Hill 12888	19	Contract preparation	12/05/2025	13/05/2025		Homecare agencies	Team 1	View

Once the bid has been accepted the ICB will create the contract, and upload this to the brokerage episode, or they will create using eSignature as a digital replacement for a handwritten (wet) signature and is just as legally binding.

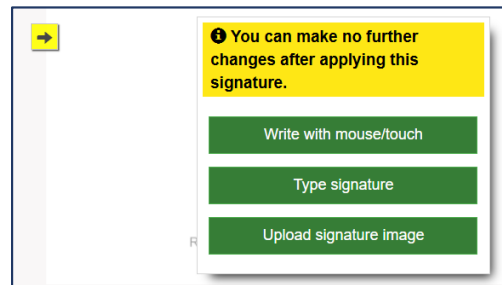
If the contract is to be signed using eSignature you will receive the contract by email so you can digitally enter any additional information and sign the contract, once this has been signed you will receive a PDF of the document containing all signatures, this can also be viewed and downloaded within the brokerage episode.

When you receive the contract firstly confirm you are authorised to accept the document, and you understand the terms of the document. You can now select 'Get started' and you will be taken to the part of the contract that requires additional information (if required) and your signature, the date will be automatically set based on the date you have signed the contract.

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

The diagram illustrates the workflow for accepting a contract. On the left, a form contains two checked checkboxes: "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 is a green "Get started" button and a grey "Reject document" button. A yellow arrow points from the "Get started" button to the right-hand screen. The right-hand screen shows a signature field (a red-outlined rectangle) with a yellow circle containing the number "1" next to it. Below the signature field is the date "28/04/2025" and a yellow rectangular box with a yellow circle containing the number "2" next to it.

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



3. Once the signature has been added, depending on the order of the signatures you may 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 also be saved in the brokerage episode.

