

# Provider Portal

Provider User Guide

Version 1 May 2025

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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.

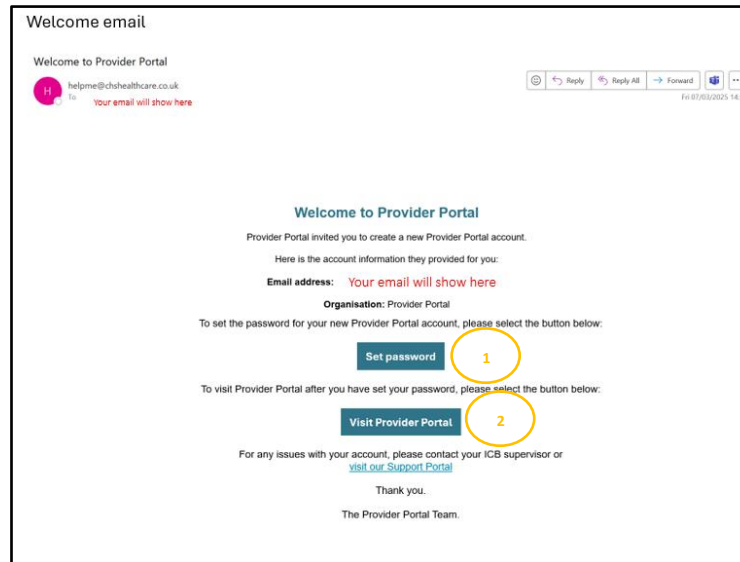


[Google Authenticator App](#)

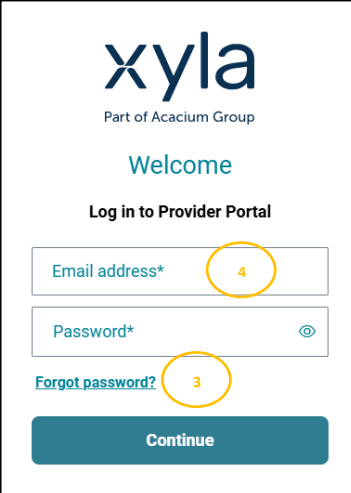
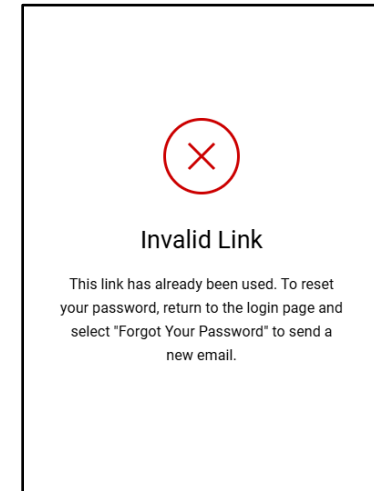


[Microsoft Authenticator App](#)

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

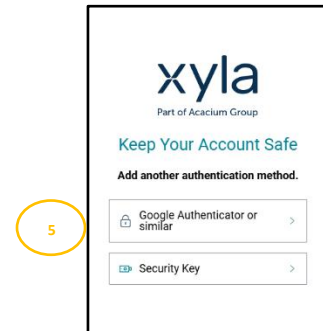


1. Click 'Set password'.
  - Please note the 'Set password' link will expire after 5 days. If you click 'Set password' after 5 days of receiving the 'Welcome' email the below message will appear, prompting you to select 'Forgot password' from your login page.
  - Please set your password before setting 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'.

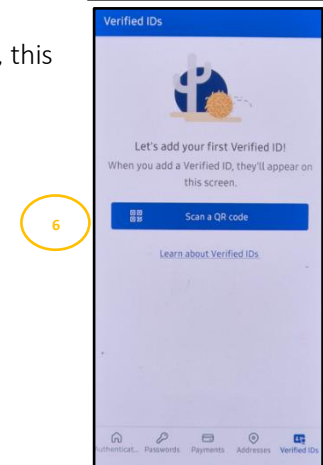
A screenshot of the xyla login page. At the top is the xyla logo and "Part of Acacium Group". Below that is the word "Welcome" in teal, followed by "Log in to Provider Portal". There are two input fields: "Email address\*" and "Password\*", both with yellow circles around them containing the numbers 4 and 3 respectively. Below the password field is a link "Forgot password?" with a yellow circle around it containing the number 3. At the bottom is a teal "Continue" button.

5. Please select 'Google Authenticator or similar'.

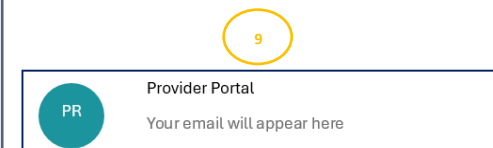
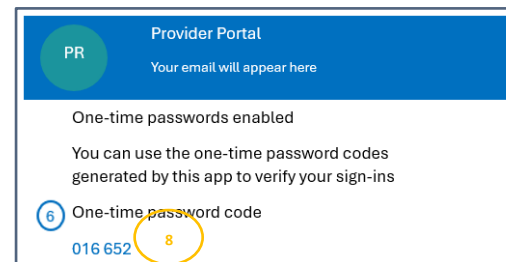
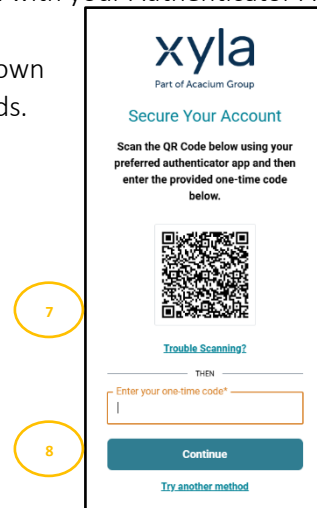
Google or Microsoft Authenticator Apps are both free to download and are completely safe to use on your mobiles.



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' on your laptop.
9. 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 xyla logo and 'Provider Portal' text are visible, along with the text 'Part of Acacium Group'. Below this, there are tabs for 'Provider Search' and 'Brokerage'. The main heading is 'Provider search'. A dark blue box titled 'ICB library' contains search filters: 'Provider name' (text input), 'Provider postcode' (text input with a 'Postcode match' dropdown), 'Provider service type' (dropdown menu), and 'BroadCare ID' (text input). A 'Show advanced filters' link is at the bottom left of the ICB library box. 'Clear all' and 'Search' buttons are at the bottom right. A user dropdown menu is open in the top right corner, showing the user's name 'Rebecca Maynard - Provider Portal...' and 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.

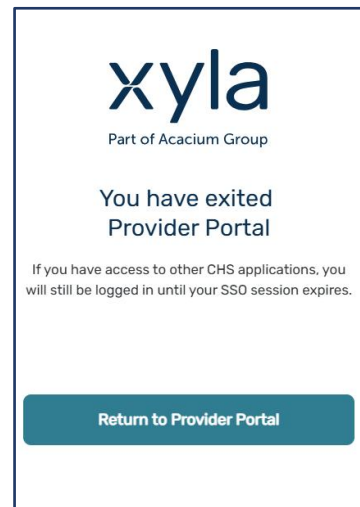
Back

Continue

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

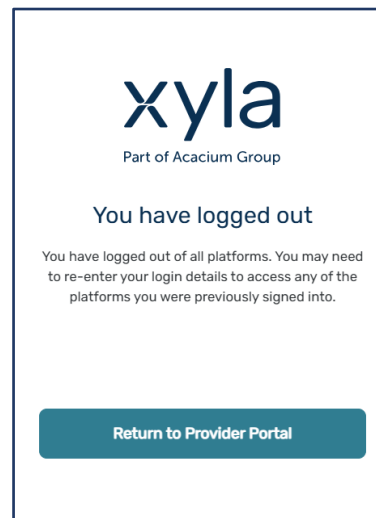


To re-enter click 'Return to Provider Portal'.



#### 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

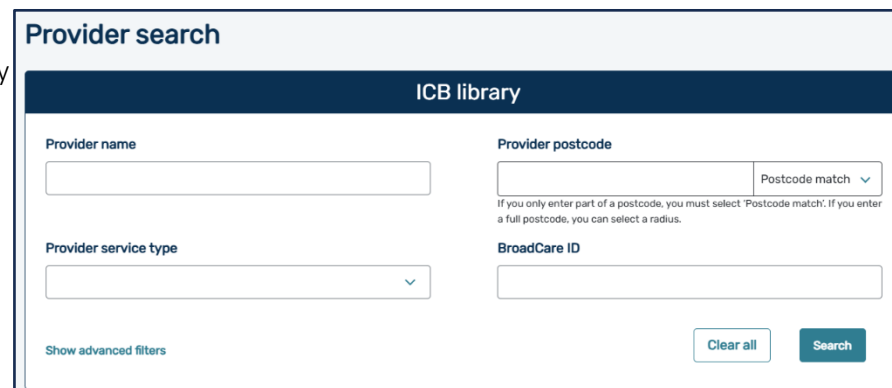
Enter the below filter information and click 'Search'.

- **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**

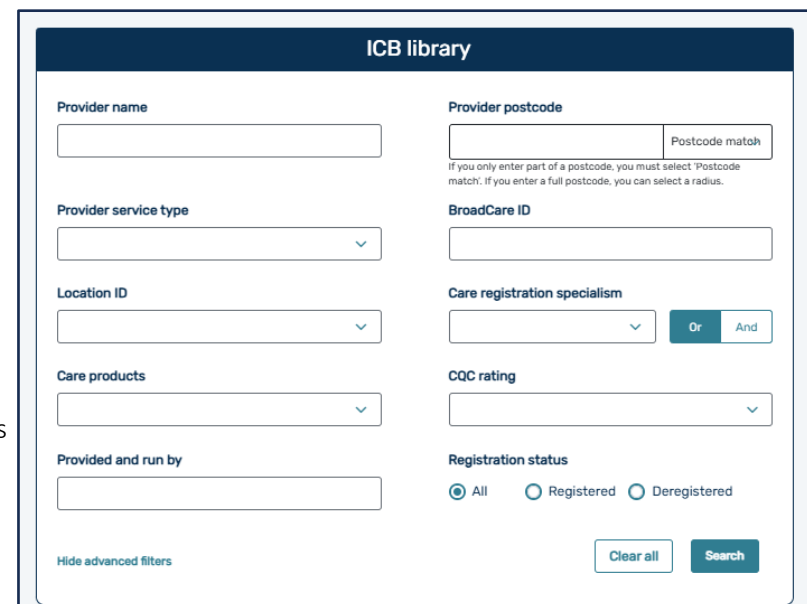
Provider name

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

Select all

Load providers

Cherry Tree Care Centre

South Road, Stockton-on-tees, TS20 2TB

[View on Google Maps](#)

Phone number

01642554257

Email

[test@email.com](mailto:test@email.com)

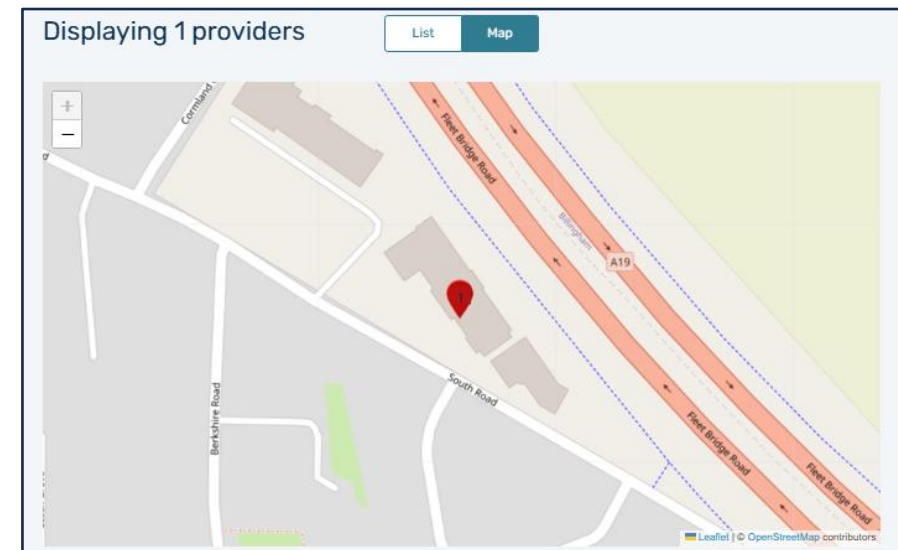
Show more details

CQC rating

Good

Select

View provider profile



### 5.1.3 List View

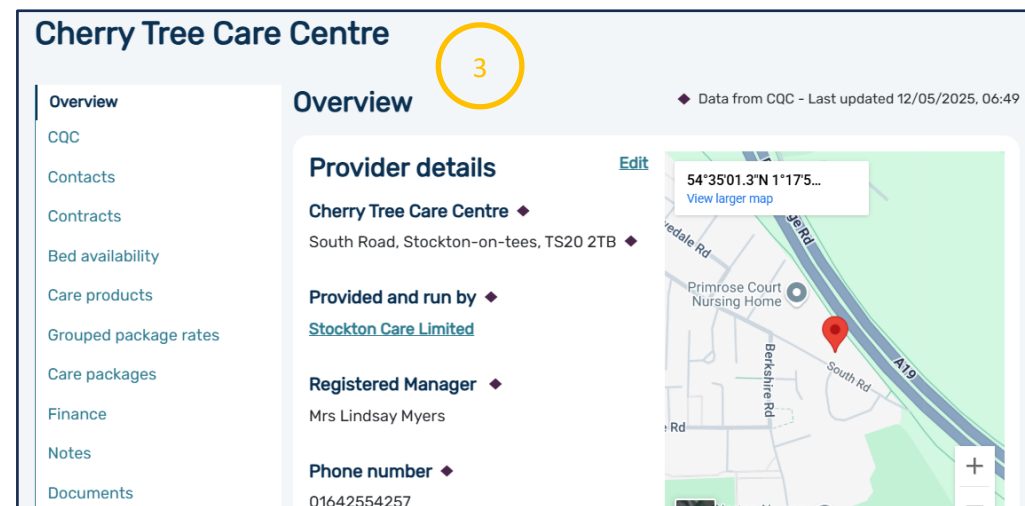
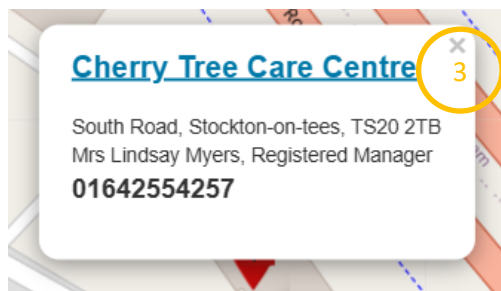
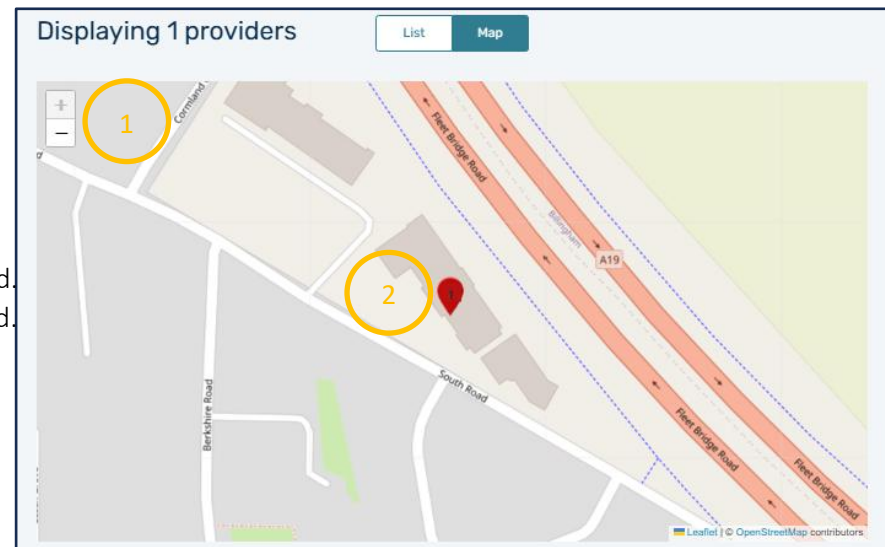
Once the list of providers is showing you can:

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 Provider Portal interface. The top section, titled 'Displaying 1 providers', includes a 'List' tab and a 'Map' tab. A dropdown menu (1) shows 'A-Z provider name'. A 'Load providers' button (3) is visible. Below this, a provider card for 'Cherry Tree Care Centre' is shown. The card includes the address 'South Road, Stockton-on-tees, TS20 2TB', a 'View on Google Maps' link (4), a 'CQC rating' of 'Good', a 'Phone number' (01642554257), an 'Email' (test@email.com), and a 'View provider profile' button (2). A 'Select all' checkbox is also present. The bottom section shows the 'Cherry Tree Care Centre' profile, featuring a sidebar with navigation links (Overview, CQC, Contacts, Contracts, Bed availability, Care products, Grouped package rates, Care packages, Finance, Notes, Documents) and a main 'Overview' area with 'Provider details' (Cherry Tree Care Centre, South Road, Stockton-on-tees, TS20 2TB), 'Provided and run by' (Stockton Care Limited), 'Registered Manager' (Mrs Lindsay Myers), and 'Phone number' (01642554257). A map (3) shows the location with coordinates 54°35'01.3"N 1°17'5... and a 'View larger map' link.


### 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.

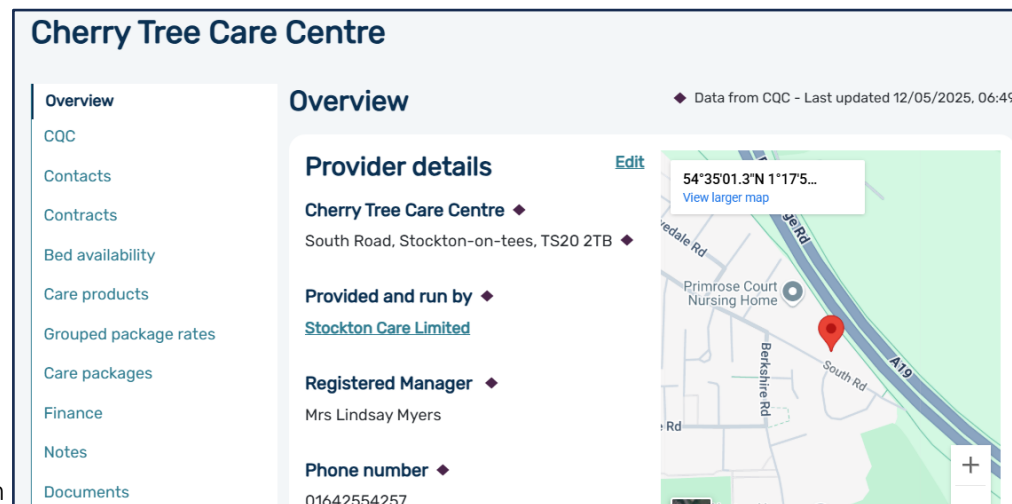
**Grouped package rates** – View, add, delete, and edit group package rate information.

**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.



### 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.

**Cherry Tree Care Centre**

**Overview**

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

**Provider details** [Edit](#)

**Cherry Tree Care Centre**

South Road, Stockton-on-tees, TS20 2TB

**Provided and run by**

[Stockton Care Limited](#)

**Registered Manager**

Mrs Lindsay Myers

**Phone number**

01642554257

**Email**

[test@email.com](mailto:test@email.com)

**Registration status**

Registered

**BroadCare ID**

2175

**Org ID**

VNCBY

**Care offering**

**Provider service type**

Residential homes

**Care registration specialism**

Caring for adults over 65 yrs, Caring for adults under 65 yrs, Dementia, Mental health conditions, Physical disabilities, Sensory impairment

**Care products**

Medication, Additional Rates - Bank Holiday

**Total number of beds**

42

**CQC details**

**Location ID**

1-6150668927

**CQC Rating** [Good](#)

**Finance**

**Day time start**

07.00

**Night time start**

23.00

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

**Provided and run by** ◆  
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

Mobile

Email address

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

Edit

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 start

Contract review

Contract renewal

Contract signed?

Sign with eSignature tool?

Contract reference

Indemnity insurance?

No

Yes

IN6637492

No

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

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

View eSignature status

2

WCC Care Home

Contract Issued 13/01/2025

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.

Cherry Tree Care Centre

Overview

QOC

Contracts

Contracts

**Bed availability**

Care products

Grouped package rates

Care packages

Finance

Notes

Documents

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.

Overview

CQC

Contacts

Contracts

Bed availability

Care products

Grouped package rates

Care packages

Finance

Notes

Documents

Care products

AllDeleted1

Additional Rates - Bank Holiday£435.00/Day

Medication£9009.00/Week2

Overview

CQC

Contacts

Contracts

Bed availability

Care products

Grouped package rates

Care packages

Finance

Notes

Documents

Care products

AllDeleted

Additional Rates - Bank Holiday£435.00/Day

Available from : 17/04/2025Available to : 28/06/20252

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

Medication£9009.00/Week

Available from : 08/12/2024Available 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

### 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.

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

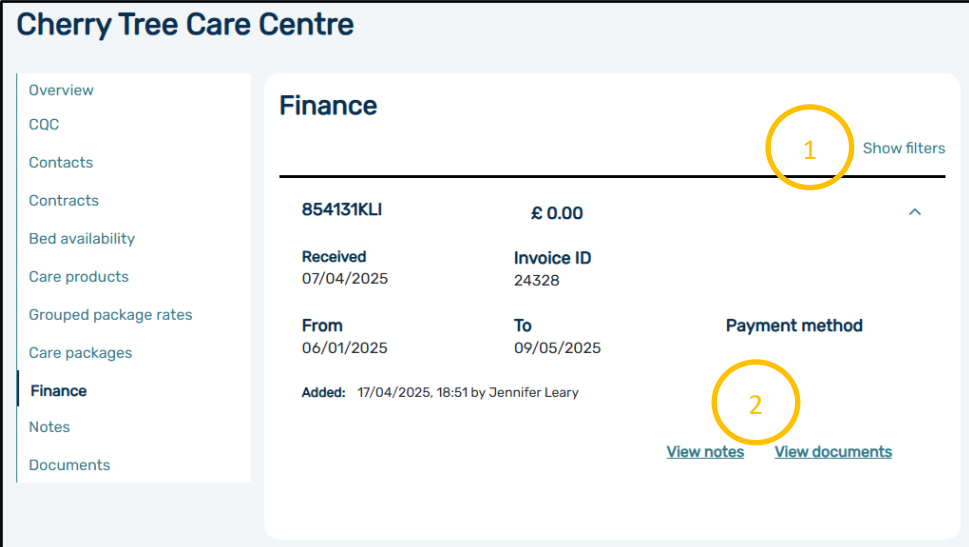
2. **Down arrow** opens the care package information

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

### 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



**Cherry Tree Care Centre**

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

### Finance

1 Show filters

---

**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

2 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

AllDeleted

1

Show filters

Phone Call In

Supplier Case Note

Completed

2

3

Note description:  
Received phone call to clarify package information

Assign action to:

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.

4

Add comment

24 | Page



### 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.

The screenshot shows the 'Cherry Tree Care Centre' interface. On the left is a sidebar menu with items: Overview, CQC, Contacts, Contracts, Bed availability, Care products, Grouped package rates, Care packages, Finance, Notes, and Documents (highlighted). The main area is titled 'Documents' and has two tabs: 'Current' (selected) and 'Deleted'. Callout 1 points to the 'Deleted' tab. Callout 2 points to the 'Show filters' button. Callout 3 points to an upward arrow icon next to a document entry. Callout 4 points to the 'Download' button. The document entry shown is 'template test 1 - all provider and patient fields.pdf' with a folder of 'General'. It includes a description 'upload from Broadcare', an 'Added' date of 17/04/2025, and a 'Last updated' date of 17/04/2025. A 'Download history (1 downloads)' link is at the bottom.

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.

The 'Add document' modal form has a title bar with a close button (X). It contains three required fields: 'Document \*' with a file upload area (cloud icon and text 'Drop a file here or browse to upload'), 'Description \*' with a text input field, and 'Folder \*' with a dropdown menu currently set to 'General'. At the bottom right are 'Cancel' and 'Upload' buttons.

## 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

Clear all

Search

ActiveClosed

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	<div>1</div> <div>View</div>

## 6.1 Viewing a brokerage episode

MH				
<b>Patient BC ID</b> 12888	<b>NHS number</b> RES-TRI-CTED	<b>Client group</b> Mental Health	<b>Care type</b> Homecare agencies	<b>Episode ID</b> 3
<b>Start date</b> 22/04/2025	<b>Assignee</b> John Smith	<b>Deadline</b> 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.

The screenshot displays the 'Viewing a brokerage episode' interface. At the top, a light blue header contains the episode details: Patient BC ID (12888), NHS number (RES-TRI-CTED), Client group (Mental Health), Care type (Homecare agencies), and Episode ID (3). Below this, a table lists the start date (22/04/2025), assignee (John Smith), and deadline (30/04/2025 00:00, marked as 12 days past). The main content area is divided into two columns. The left column lists six tasks: 1. Care requirements (Complete, View), 2. Select providers (Complete), 3. Review bids (Complete, View), 4. Contract preparation (Complete, View), 5. Contract status (In progress), and 6. Complete episode (locked). The right column shows the 'Episode event log' with a log entry for Jennifer Leary on 22/04/2025 at 14:31, stating 'Brokerage episode created with care requirements (Episode ID: 3)'. Navigation buttons at the top right include '< Back', '1 query for provider review', 'View / Raise queries' (circled 1), and 'View documents' (circled 2). The 'View' button for the first task is circled 4, and the 'Episode event log' section is circled 3.

### 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

Query for provider review ^ 1

**Note**  
query about care home facilities

**Action due date**  
29/04/2025

**Assignee**  
Provider

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

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'.

Patient BC ID

Patient name

Care type

Client group

Assignee

Episode stage

Show advanced filters

Clear all

Search

Active

Closed

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	<div>1</div> <div>View</div>

< 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

JenniferLeary  
22/04/2025 14:31

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

Queries

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 filters for Patient BC ID, Patient name, Care type, Client group, Assignee, and Episode stage. Below these are buttons for 'Show advanced filters', 'Clear all', and 'Search'. A 'Key' section indicates that pink dots represent 'Bids for ICB review', blue dots represent 'Query for provider review', and orange dots represent 'Query for ICB review'. A table displays 2 records, with the first record highlighted in orange. An arrow points from the 'View' button of this record to the detailed view on the right.

**Brokerage episodes**

Filters:

- Patient BC ID:
- Patient name:
- Care type:
- Client group:
- Assignee:
- Episode stage:

Buttons: Show advanced filters, Clear all, Search

Active Closed

Displaying 2 records

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	<a href="#">View</a>

**Key**

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

**Episode details:**

- 1. Care requirements: Complete View
- 2. Select providers: Complete
- 3. Review bids: In progress View
- 4. Contract preparation: Locked
- 5. Contract status: Locked
- 6. Complete episode: Locked

**Episode event log**

Log: rebeccamaynard 12/05/2025 16:02

Brokerage episode created with care requirements (Episode ID: 19)

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' section. It has a header with '3. Review bids' and 'In progress'. Below is a table with columns: Provider name, Postcode, Bid status, ICB decision, Cost per week, and Estimated care start date. The table contains one row for 'Cherry Tree Care Centre' with postcode 'TS20 2TB' and bid status 'Awaiting bid'. A 'View' button is next to the row.

**3. Review bids** In progress

Provider name	Postcode	Bid status	ICB decision	Cost per week	Estimated care start date	
<a href="#">Cherry Tree Care Centre</a>	TS20 2TB	Awaiting bid				<a href="#">View</a>

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.

3. Review bids - Cherry Tree Care Centre

1

2

3

4

Bid summary

ICB decision

Assessments overview

Bid decision

1. Bid summary

Decision

Awaiting bid

Awaiting bid

Bid declined

Bid submitted

No bid by deadline

Last updated on 12/05/2025, 16:04 by Rebecca Maynard

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.

1. Bid summary

Decision

Bid submitted

Last updated on 12/05/2025, 16:20 by Rebecca Maynard

Withdraw bid

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

1. Bid summary

Decision

Bid submitted

Last updated on 12/05/2025, 16:04 by Rebecca Maynard

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

32 | Page



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	<button>View</button>

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'.

☒ I confirm that I am authorised to accept the terms of this document.

☒ I understand that accepting the terms of this document creates a legally binding obligation.

Get started

Reject document

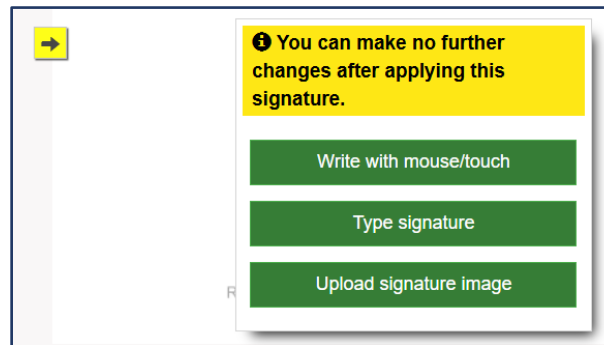
→

28/04/2025

1

2

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.

## 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](#)