

Provider Portal

Provider User Guide

Version 1.2 March 2026

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2 Introduction

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

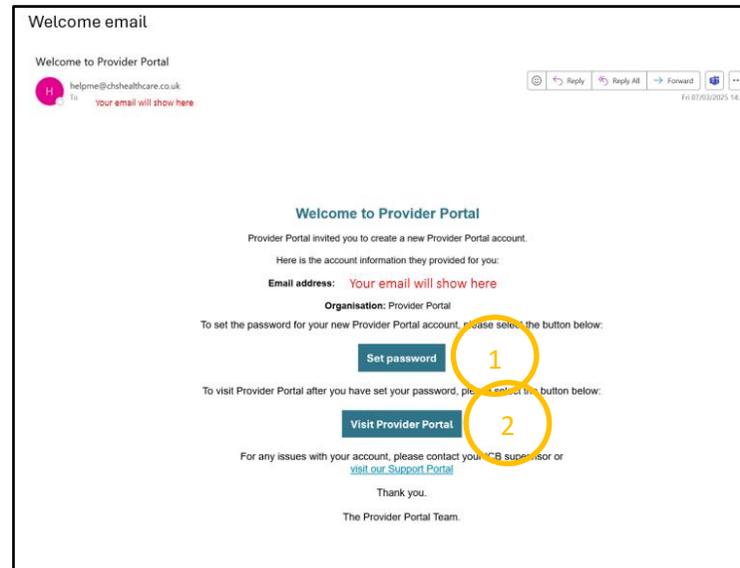
Our customers will have a more robust way of managing their providers, monitoring bed availability, improving financial governance and allow for improved document storage.

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.

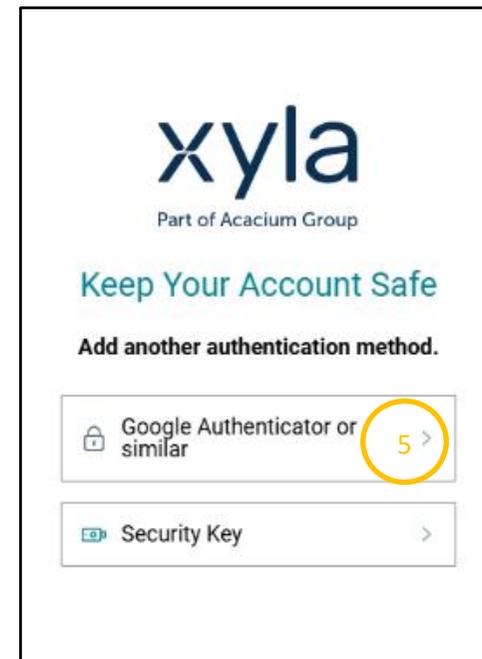
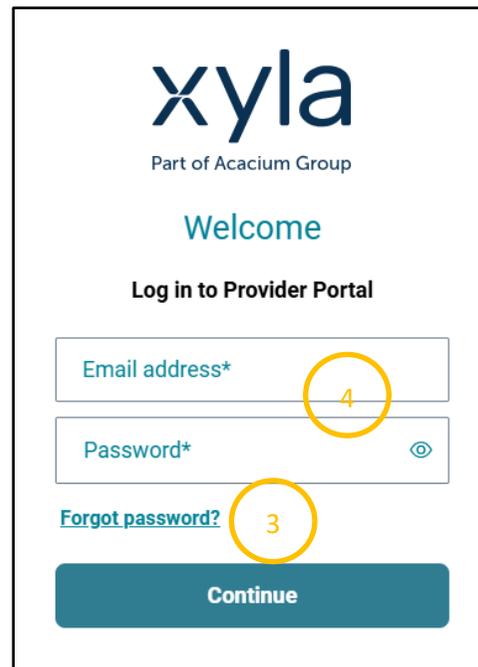
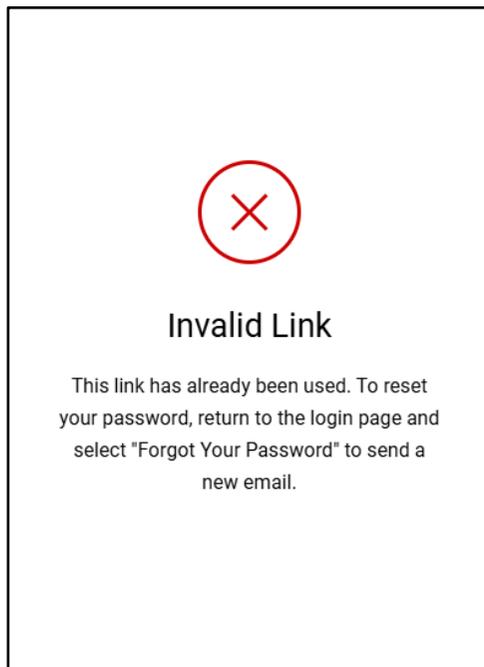


Once you have been provided with an account for the Provider Portal you will receive the below email.

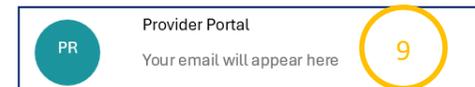
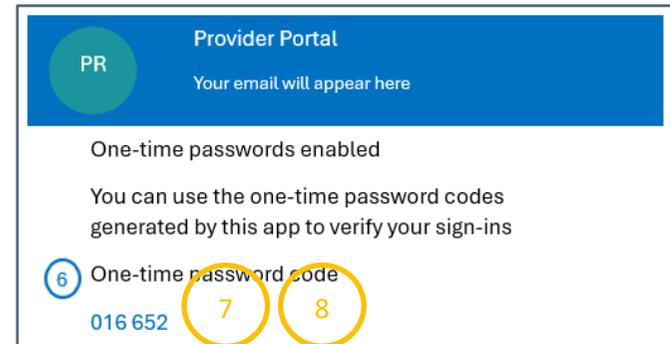
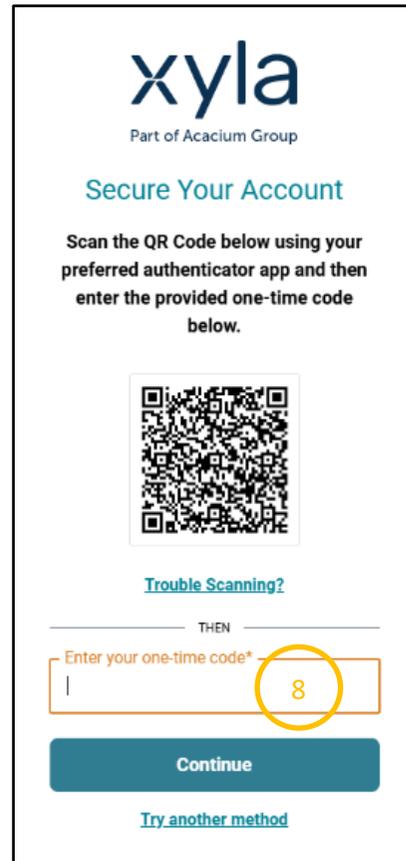
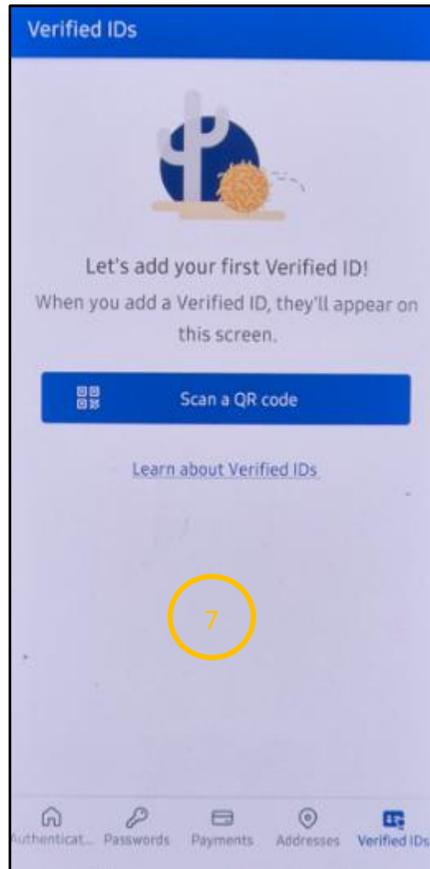


1. Click 'Set password'.
 - Please note the 'Set password' link will expire after 5 days. If you click 'Set password' after 5 days of receiving the 'Welcome' email the below message will appear, prompting you to select 'Forgot password' from your login page.
 - Please set your password before setting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

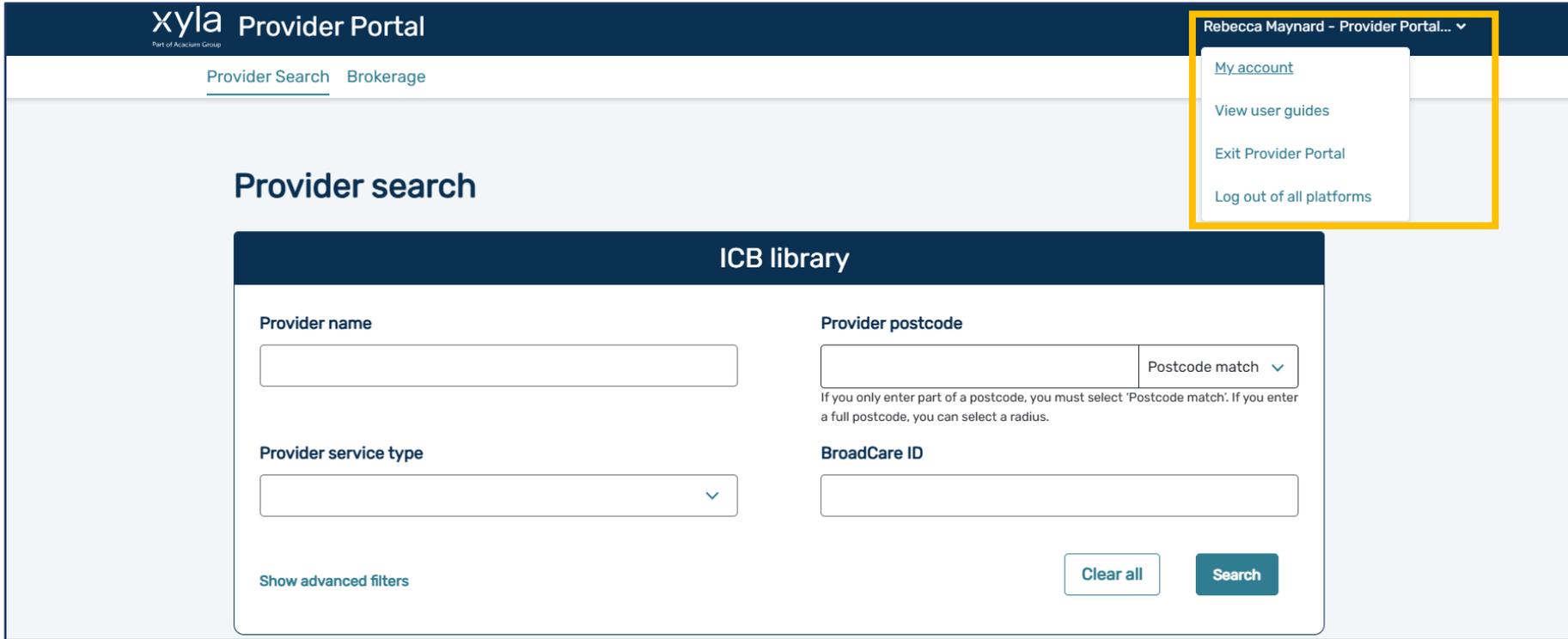
Google Authenticator App

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

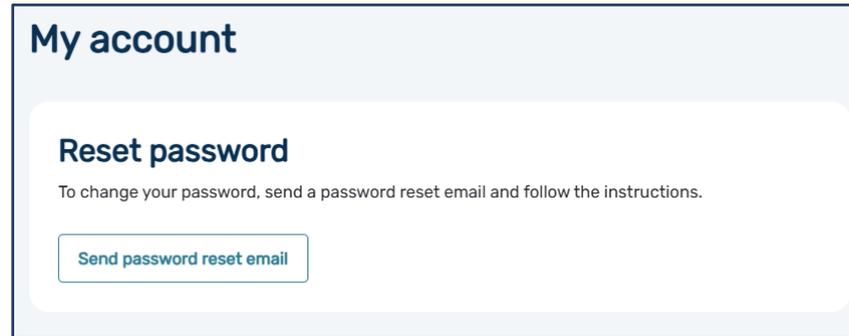
After logging into the Provider Portal, you will be presented with the below screen. The down arrow next to your name will open and present you with your own settings.



The screenshot displays the xyla Provider Portal interface. At the top left, the xyla logo and 'Provider Portal' text are visible. Below this, there are links for 'Provider Search' and 'Brokerage'. The main heading is 'Provider search'. A central 'ICB library' form contains several input fields: 'Provider name', 'Provider postcode' (with a 'Postcode match' dropdown), 'Provider service type' (with a dropdown arrow), and 'BroadCare ID'. There are also 'Clear all' and 'Search' buttons. A user profile dropdown menu is open in the top right corner, showing the user's name 'Rebecca Maynard - Provider Portal...' and options for 'My account', 'View user guides', 'Exit Provider Portal', and 'Log out of all platforms'.

4.1 My Account

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



4.2 View user guides

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

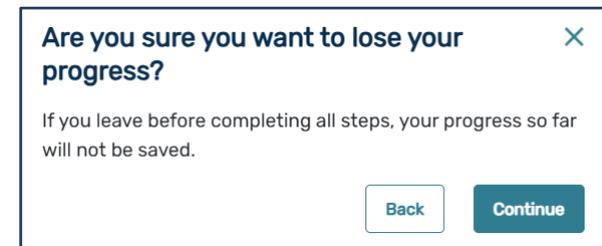
4.3 Exit provider Portal

This will allow you to exit the Provider Portal.

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

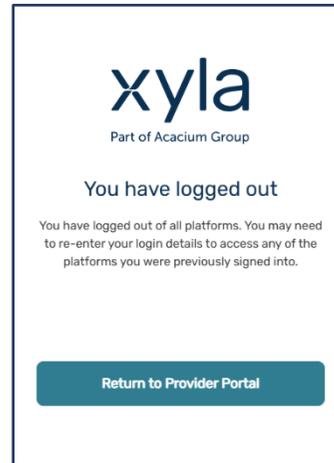
When you 'Exit Provider Portal' it will keep you logged in for 12 hours from the time you signed in using your chosen authentication method.

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’.

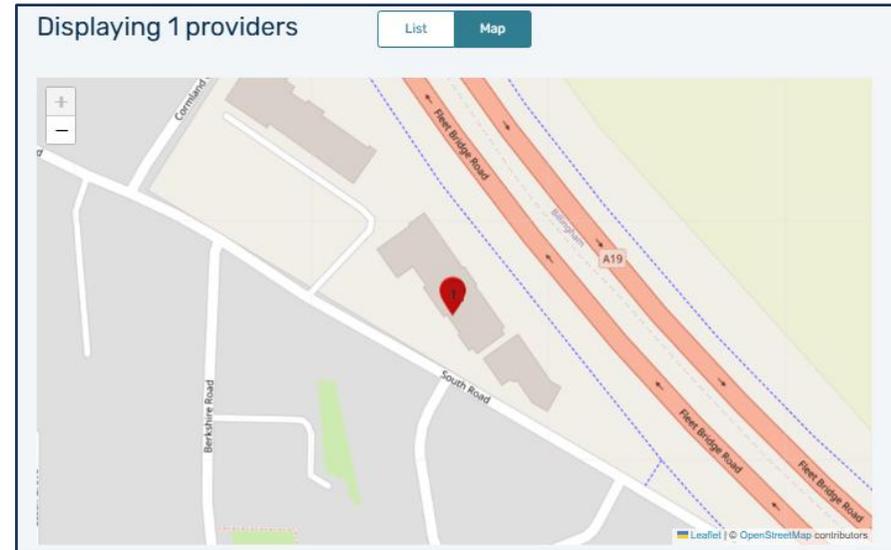
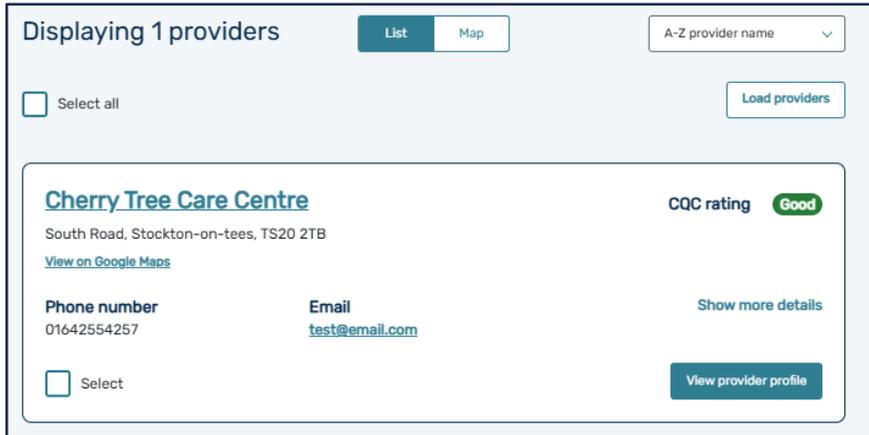
- **Provider name**
- **Provider postcode**
- **Provider service type** for instance.
 - Homecare agencies
 - Hospice
 - Hospital
- **BroadCare ID** is the unique Provider ID

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
- **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

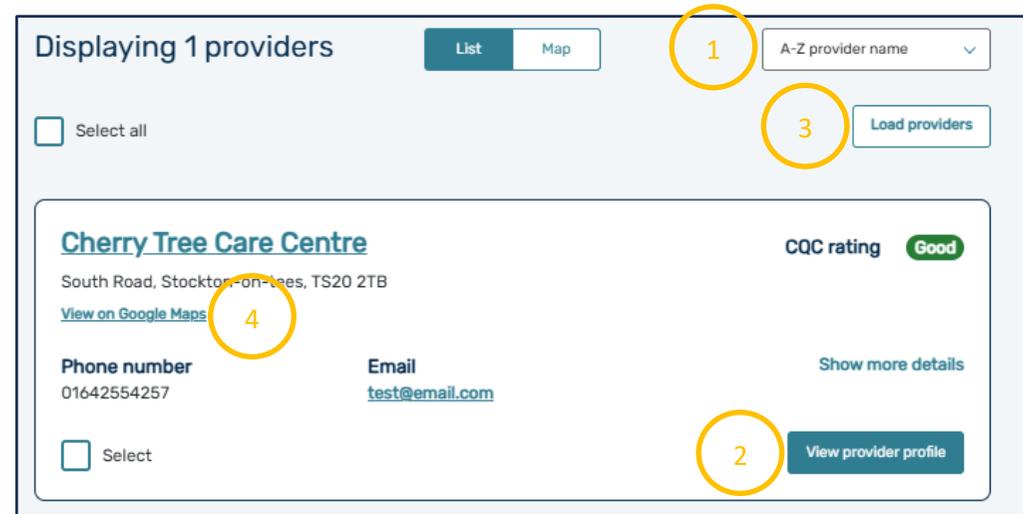
After you have entered your filters click ‘Search’ this will display the providers within the filter parameters and can be viewed as either a ‘List’ or ‘Map’ depending on the toggle you have selected.



5.1.3 List View

Once the list of providers is showing you can:

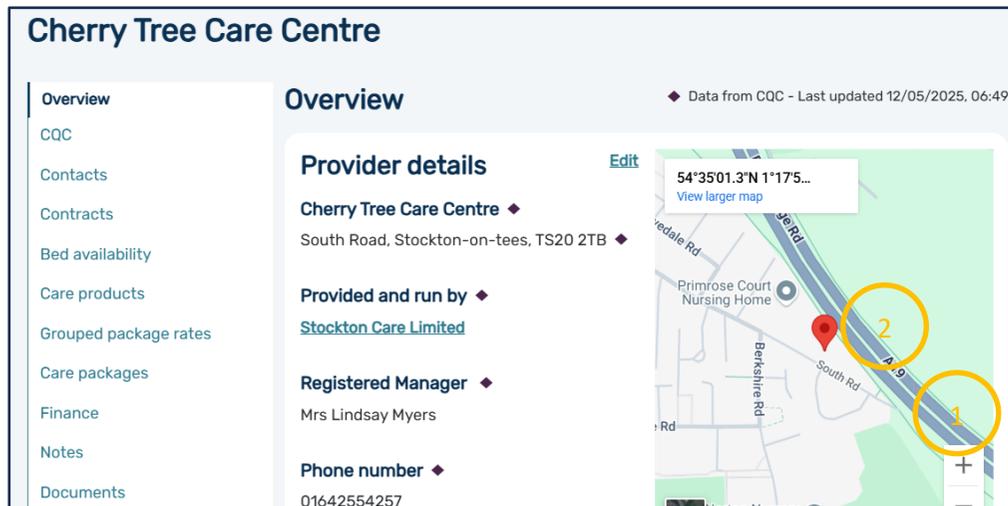
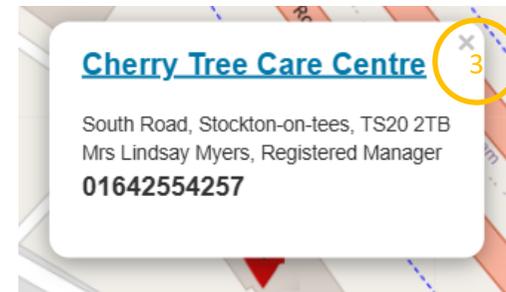
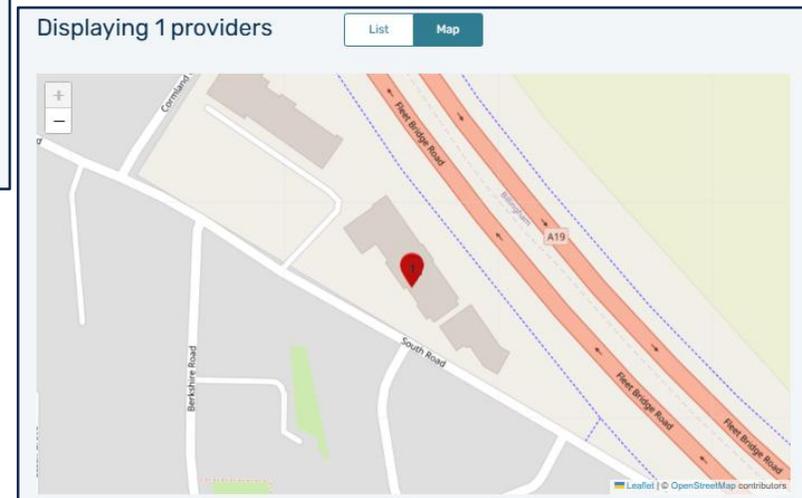
1. **List providers** – this will change how the list is presented
 - A-Z provider name
 - CQC rating (overall) High-Low
2. **View provider profile** – this will open the provider Record. You can click ‘Back to search results’ to come out of the provider record
3. **Load providers**
 - By clicking ‘**Select 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.

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 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 are 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.

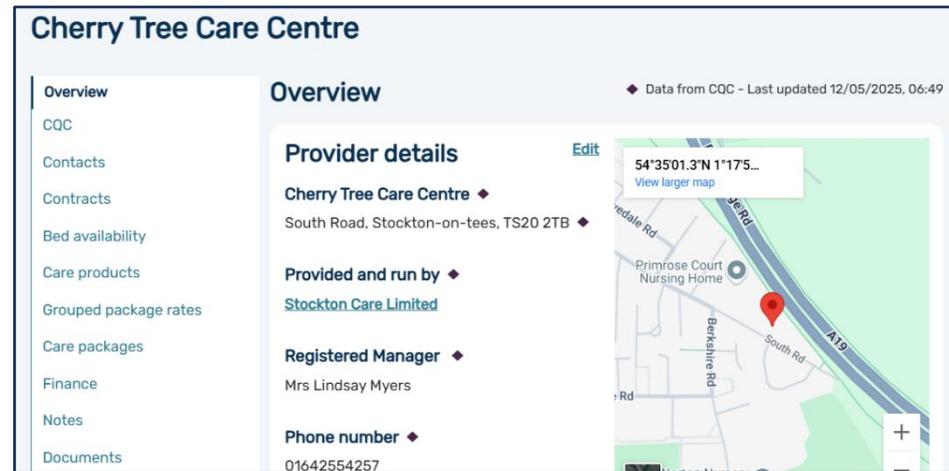
Contracts – View, add, and delete contract information.

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.

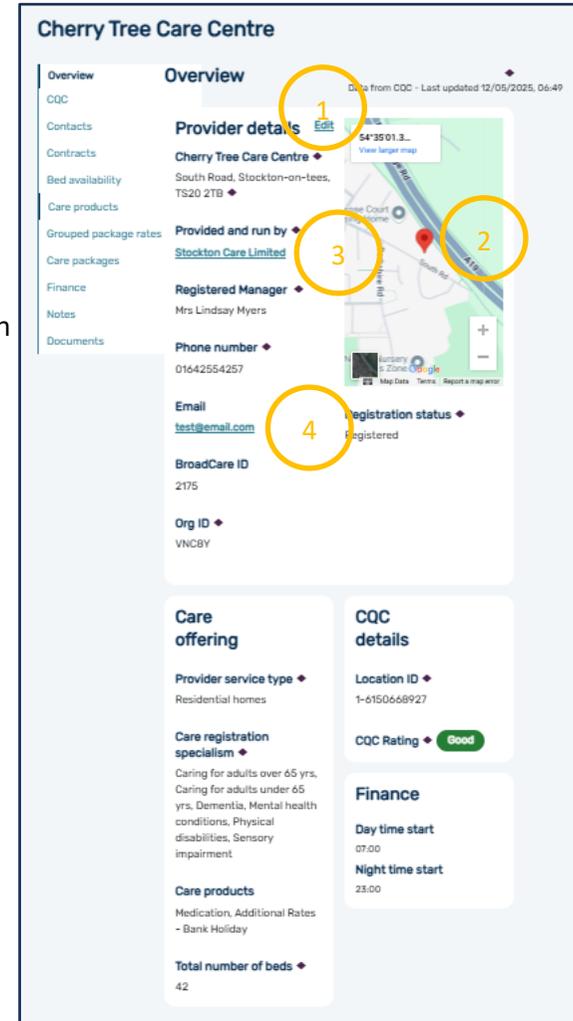
Documents (known as Case Management in BroadCare) – View, add, delete, filter and download a document.

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.



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.

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

Contracts

Contracts

Bed availability

Care products

Grouped package rates

Care packages

Finance

Notes

Documents

CQC

Ratings ⓘ

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

Details

Report published ◆
01/10/2024
[View report](#) **1**

Last inspection ◆
04/07/2024

Location ID ◆
1-6150668927
[View on CQC website](#) **2**

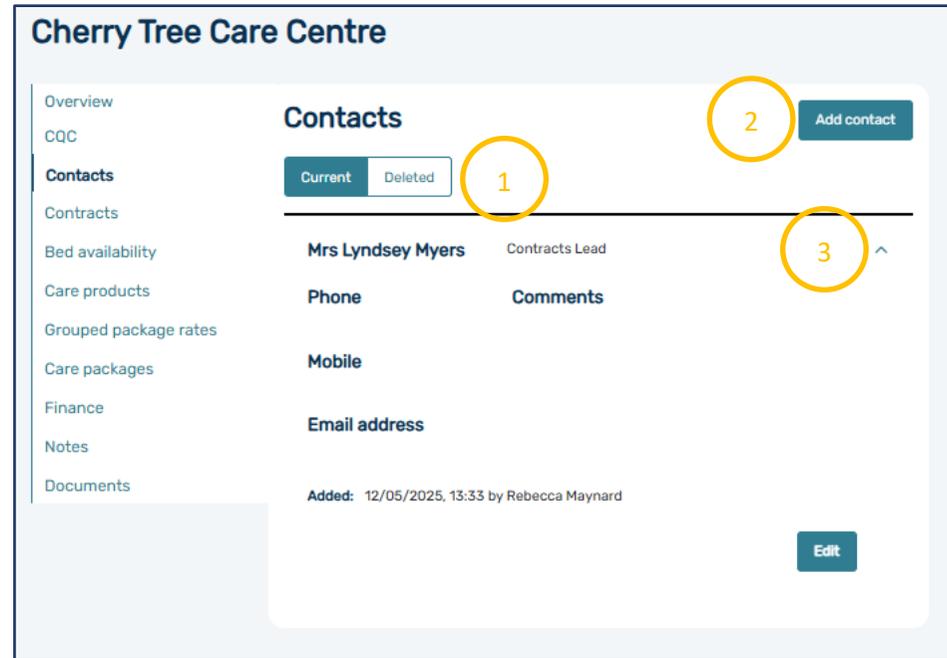
Provided and run by ◆
Stockton Care Limited
1-5989813361
[View on CQC website](#)

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
3. Clicking on each contact will open the contact card and edit.

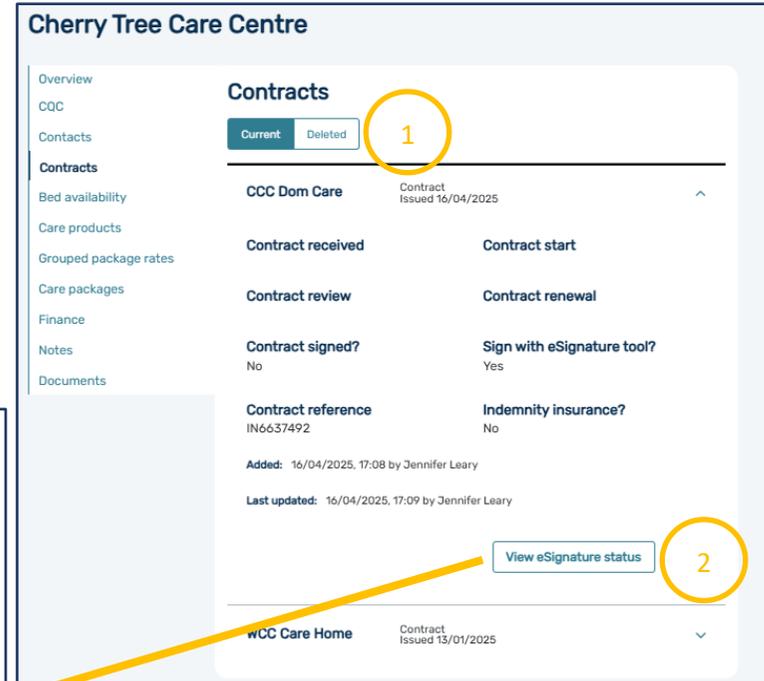


5.1.5.4 Contract

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.



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Overview
CQC
Contacts
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Contracts

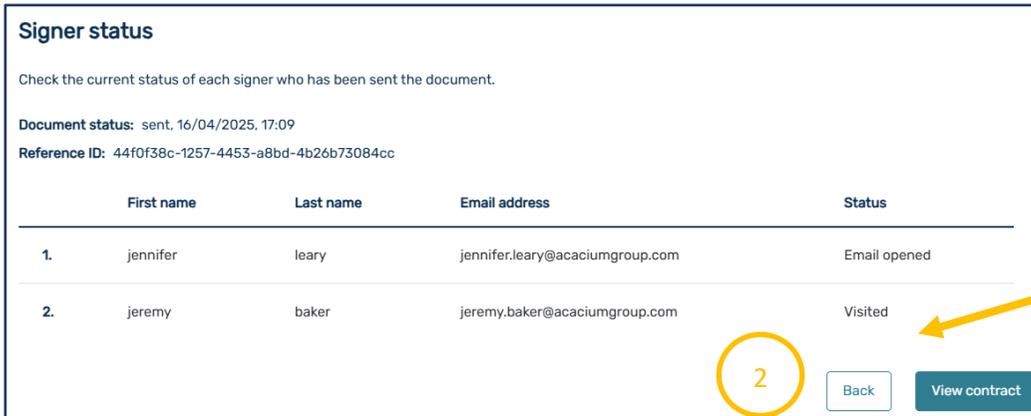
Current Deleted **1**

CCC Dom Care Contract Issued 16/04/2025

Contract received Contract start
Contract review Contract renewal
Contract signed? No Sign with eSignature tool? Yes
Contract reference IN6657492 Indemnity insurance? No
Added: 16/04/2025, 17:08 by Jennifer Leary
Last updated: 16/04/2025, 17:09 by Jennifer Leary

WCC Care Home Contract Issued 13/01/2025

View eSignature status **2**



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

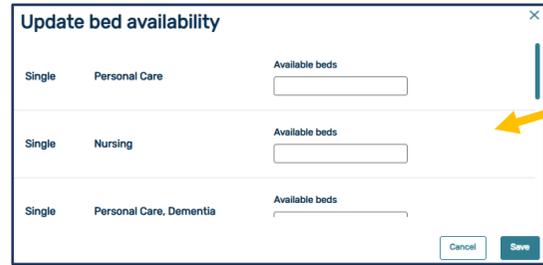
	First name	Last name	Email address	Status
1.	jennifer	leary	jennifer.leary@acaciumgroup.com	Email opened
2.	jeremy	baker	jeremy.baker@acaciumgroup.com	Visited

2 Back View contract

5.1.5.5 Bed availability

This allows you to view and edit the bed availability.

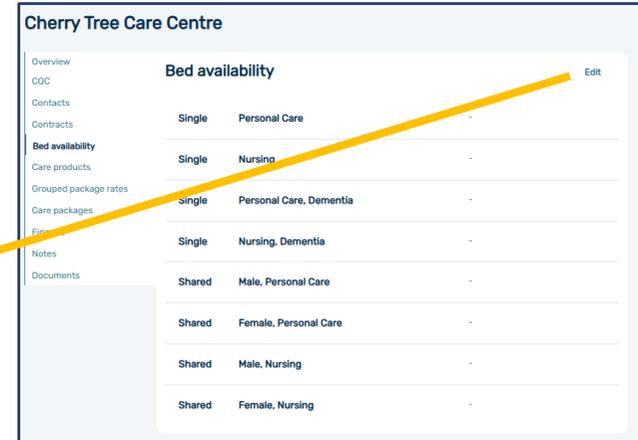
Please note that your access to the Provider Portal is determined by your permissions that have been set by the ICB.



Update bed availability

Single	Personal Care	Available beds	<input type="text"/>
Single	Nursing	Available beds	<input type="text"/>
Single	Personal Care, Dementia	Available beds	<input type="text"/>

Cancel Save



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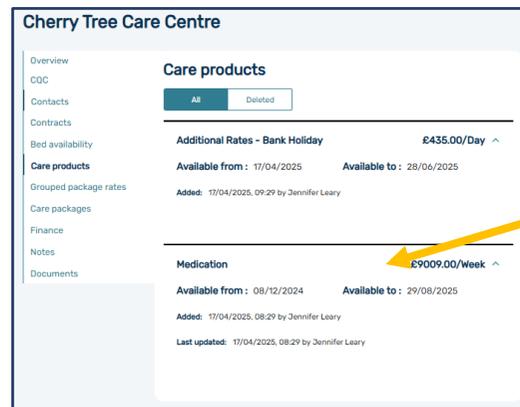
Overview	Bed availability		Edit
CQC	Single	Personal Care	-
Contracts	Single	Nursing	-
Contracts	Single	Personal Care, Dementia	-
Bed availability	Single	Nursing, Dementia	-
Care products	Shared	Male, Personal Care	-
Grouped package rates	Shared	Female, Personal Care	-
Care packages	Shared	Male, Nursing	-
Finance	Shared	Female, Nursing	-
Notes			
Documents			

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.

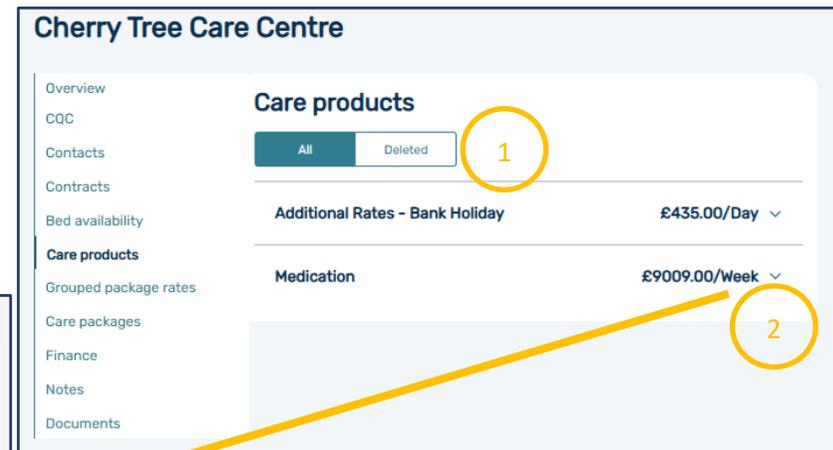
Please note that your access to the Provider Portal is determined by your permissions that have been set by the ICB.

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.



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Overview	Care products	
CQC	All	Deleted
Contracts	Additional Rates - Bank Holiday £435.00/Day ^	
Contracts	Available from : 17/04/2025 Available to : 28/06/2025	
Bed availability	Added: 17/04/2025, 09:29 by Jennifer Leary	
Care products	Medication £9009.00/Week ^	
Grouped package rates	Available from : 08/12/2024 Available to : 29/08/2025	
Care packages	Added: 17/04/2025, 08:29 by Jennifer Leary	
Finance	Last updated: 17/04/2025, 08:29 by Jennifer Leary	
Notes		
Documents		



Cherry Tree Care Centre

Overview	Care products	
CQC	All	Deleted
Contracts	Additional Rates - Bank Holiday £435.00/Day ^	
Contracts	Medication £9009.00/Week ^	
Bed availability		
Care products		
Grouped package rates		
Care packages		
Finance		
Notes		
Documents		

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

Grouped package rates

All
Deleted
1

24 Hour Call Out ^

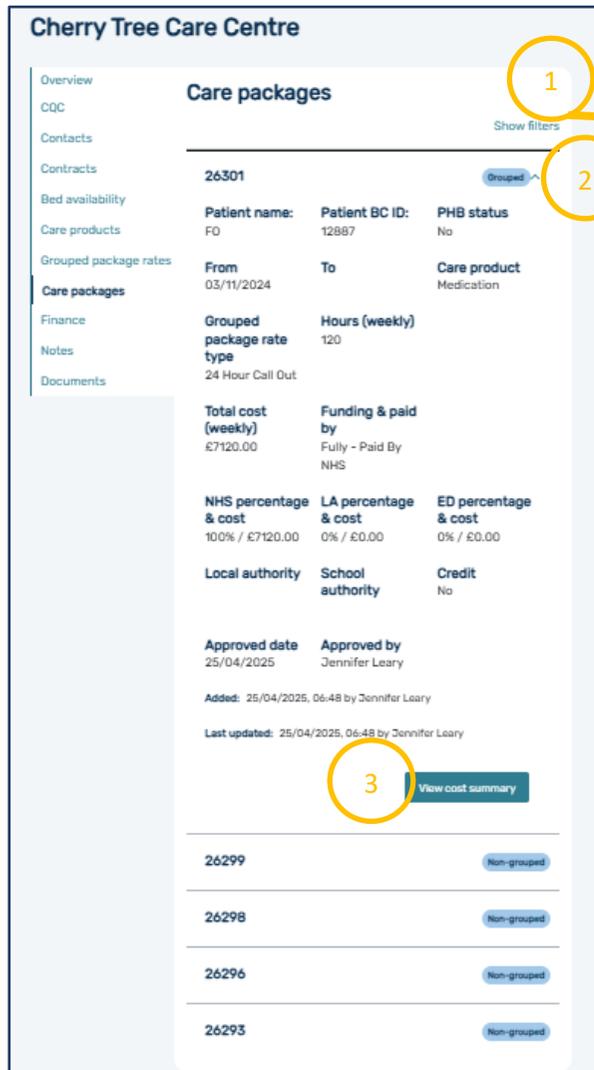
	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Bank Holiday
Day rate £/hour	55.00	55.00	55.00	55.00	55.00	55.00	55.00	86.00
Night rate £/hour	68.00	68.00	68.00	68.00	68.00	68.00	68.00	106.00

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.



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Care packages

Show filters

26301 Grouped

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

From: 03/11/2024 **To:** **Care product:** Medication

Grouped package rate type: 120
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

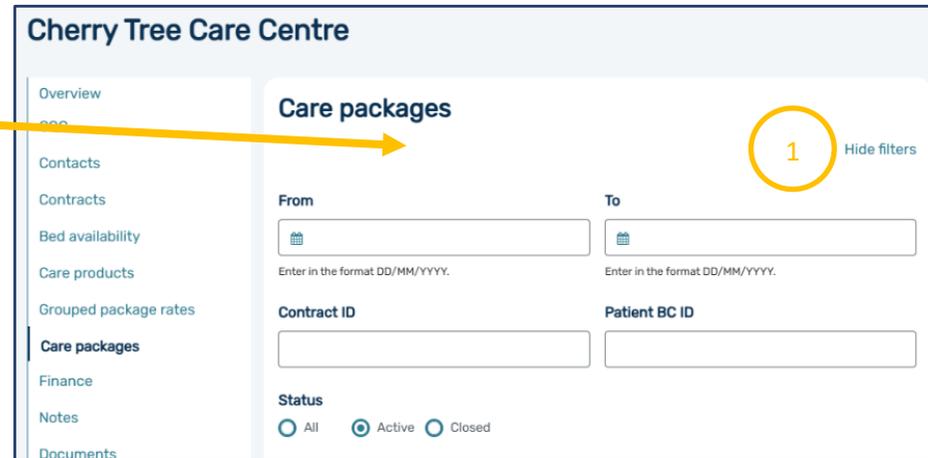
View cost summary

26299 Non-grouped

26298 Non-grouped

26296 Non-grouped

26293 Non-grouped



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Hide filters

From: **To:**

Enter in the format DD/MM/YYYY. 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: 36201

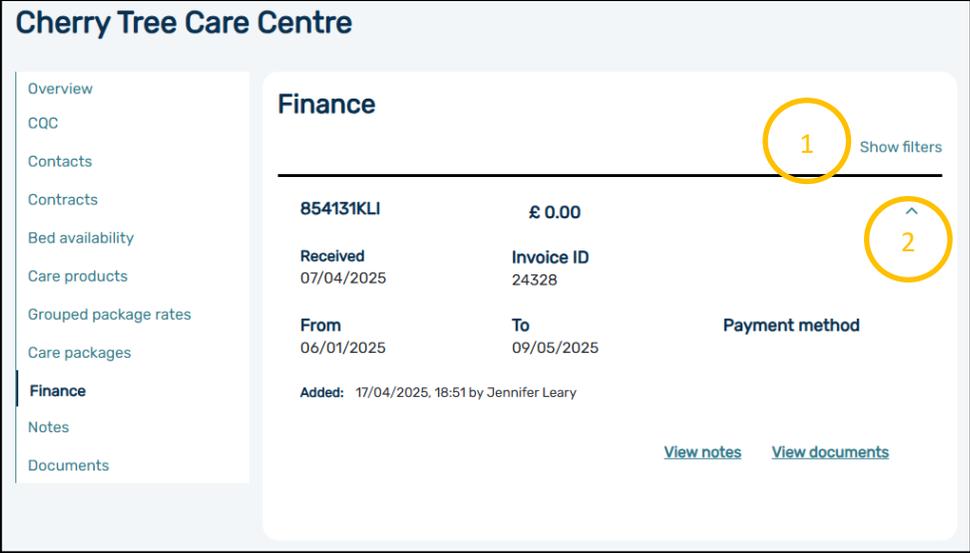
Monday	00:00 - 00:00 [1]	Total: € 1624.00 (24.00 hours)
Tuesday	00:00 - 00:00 [1]	Total: € 1624.00 (24.00 hours)
Wednesday	00:00 - 00:00 [1]	Total: € 1624.00 (24.00 hours)
Thursday	00:00 - 00:00 [1]	Total: € 1624.00 (24.00 hours)
Total		Total cost: € 7120 Total hours: 120 hours

View cost summary

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

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Bed availability
Care products
Grouped package rates
Care packages
Finance
Notes
Documents

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

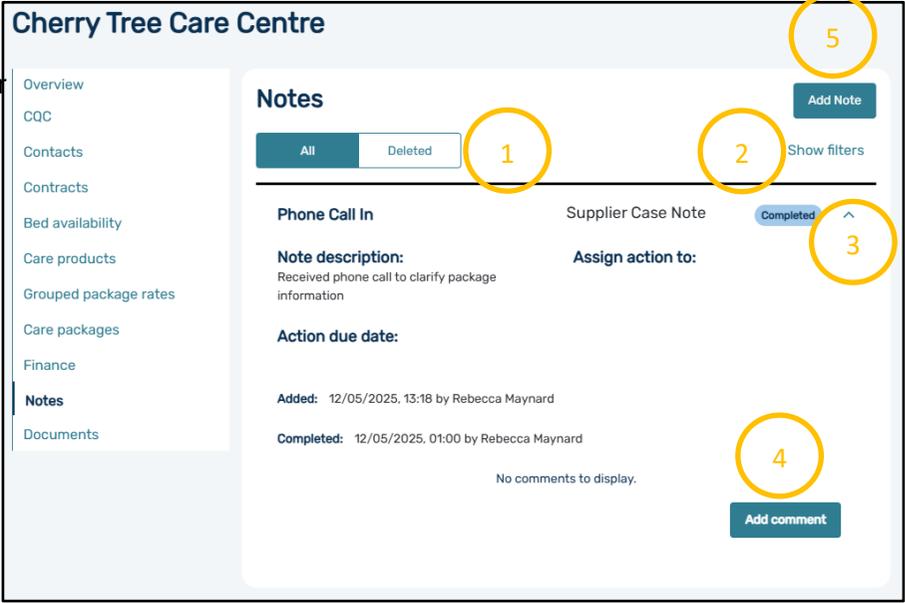
[View notes](#) [View documents](#)

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 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.



Cherry Tree Care Centre

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

Notes

All Deleted

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.

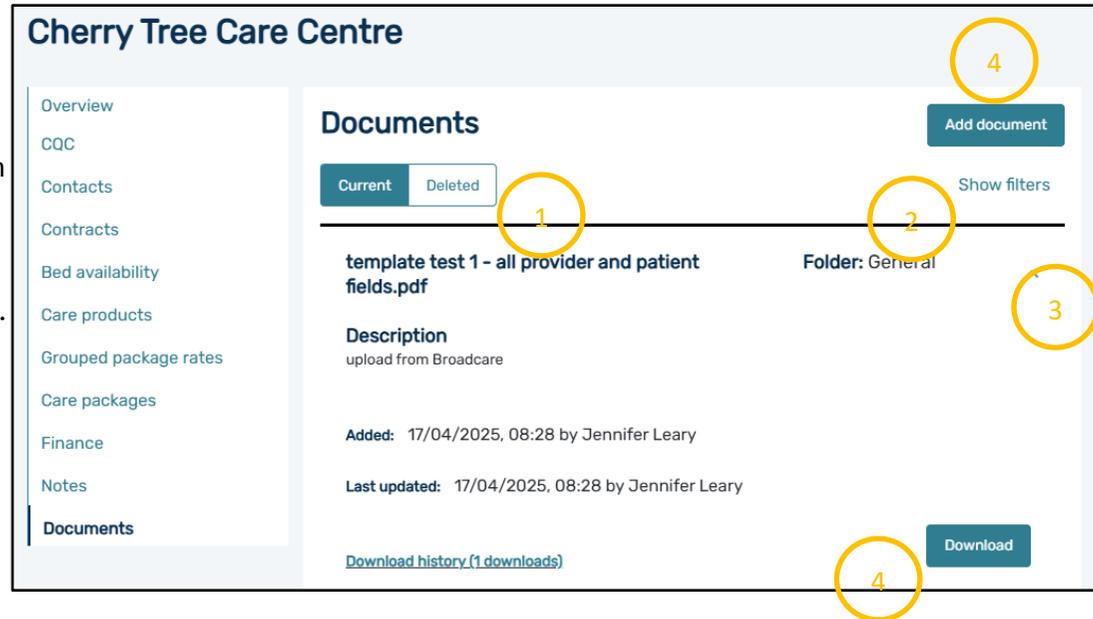
[Add comment](#)

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 the Alert to view more information.
4. **Download** allows you to download the document.

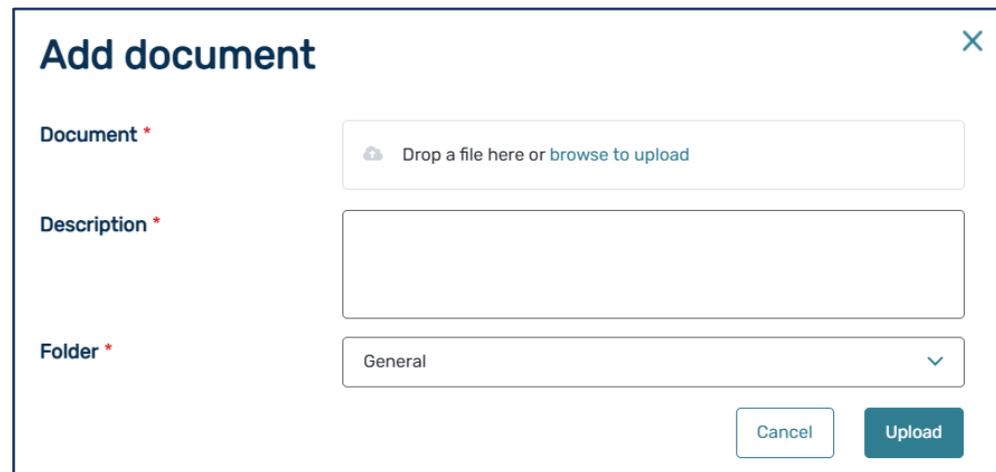


5. **Add documents** allow you to add a new document.

Document – Upload the document.

Description – Document information.

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

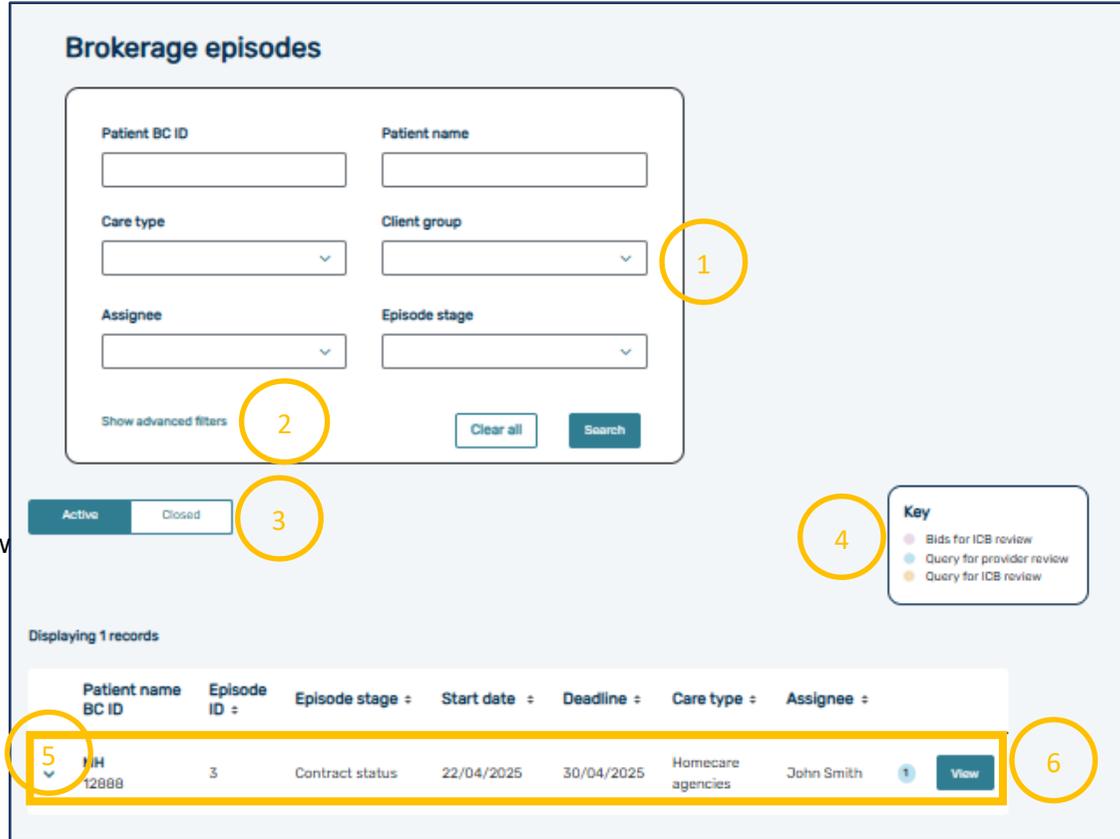


6 Brokerage

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

Search filters:

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

Buttons: Show advanced filters (2), Clear all, Search

Filters: Active (3), Closed

Key (4):

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

Displaying 1 records

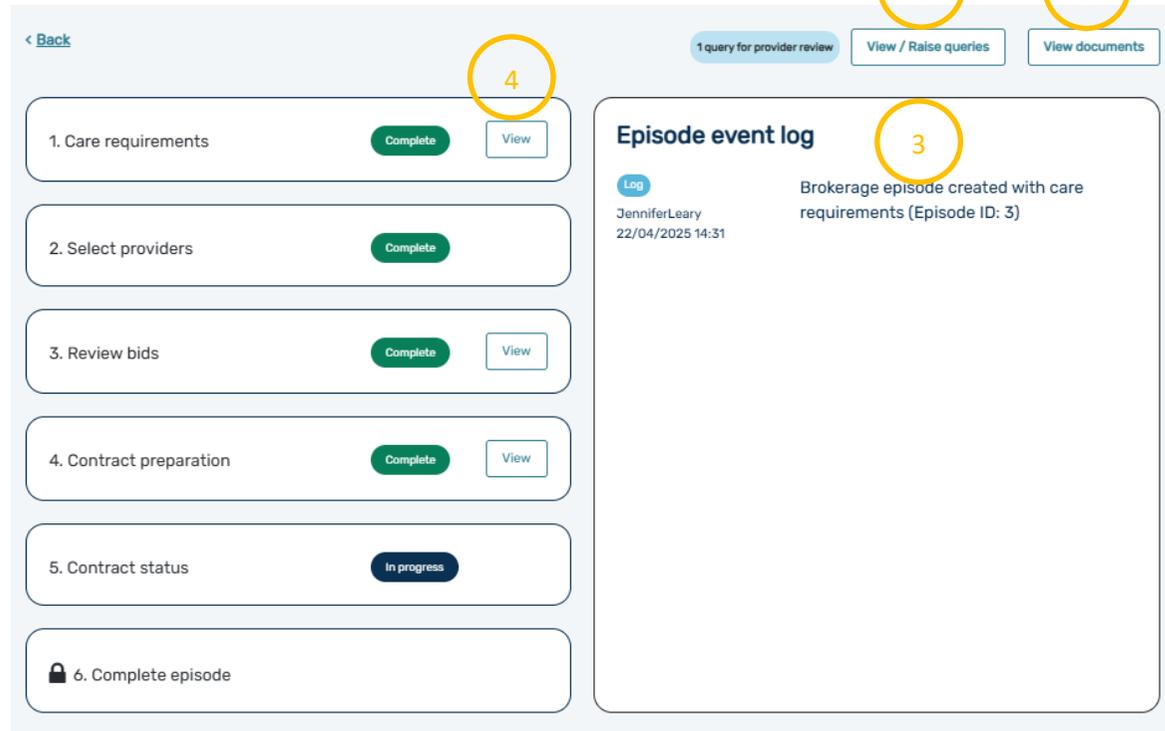
Patient name BC ID	Episode ID	Episode stage	Start date	Deadline	Care type	Assignee	
NH 12888	3	Contract status	22/04/2025	30/04/2025	Homecare agencies	John Smith	1 View (6)

Callouts: 1 (Search filters), 2 (Show advanced filters), 3 (Active/Closed filters), 4 (Key), 5 (Arrow icon), 6 (View button)

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.



The screenshot shows the 'View / Raise queries' page for a brokerage episode. At the top right, there are three buttons: 'View / Raise queries' (circled 1), 'View documents' (circled 2), and '1 query for provider review'. Below these is a list of tasks:

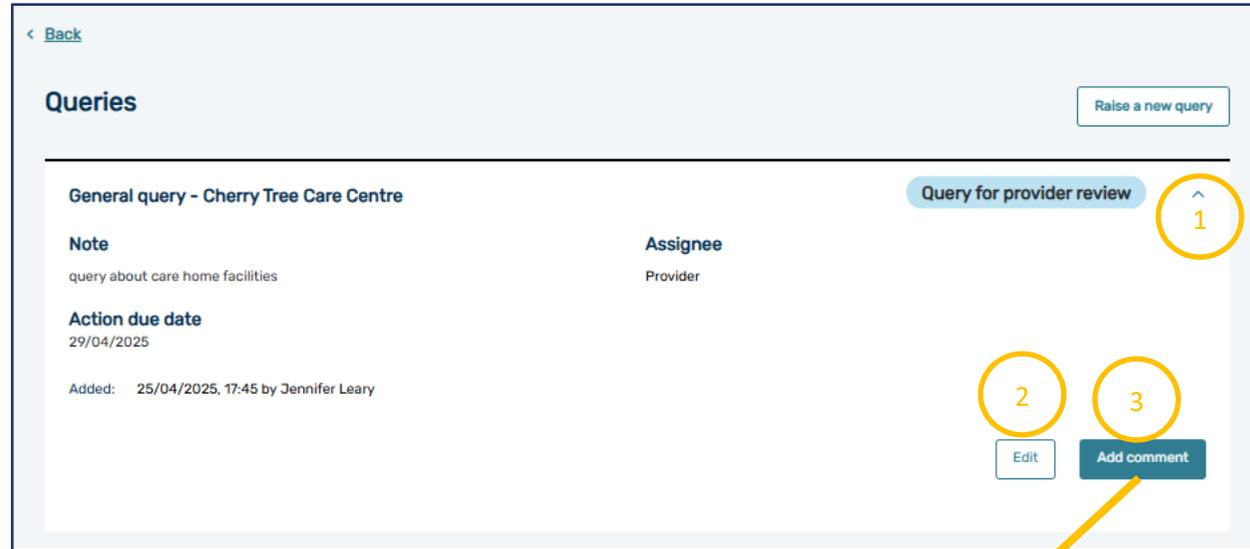
- 1. Care requirements: Complete (circled 4), View
- 2. Select providers: Complete
- 3. Review bids: Complete, View
- 4. Contract preparation: Complete, View
- 5. Contract status: In progress
- 6. Complete episode: Locked

On the right, the 'Episode event log' shows a log entry: 'JenniferLeary 22/04/2025 14:31' with the text 'Brokerage episode created with care requirements (Episode ID: 3)' (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'.

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.

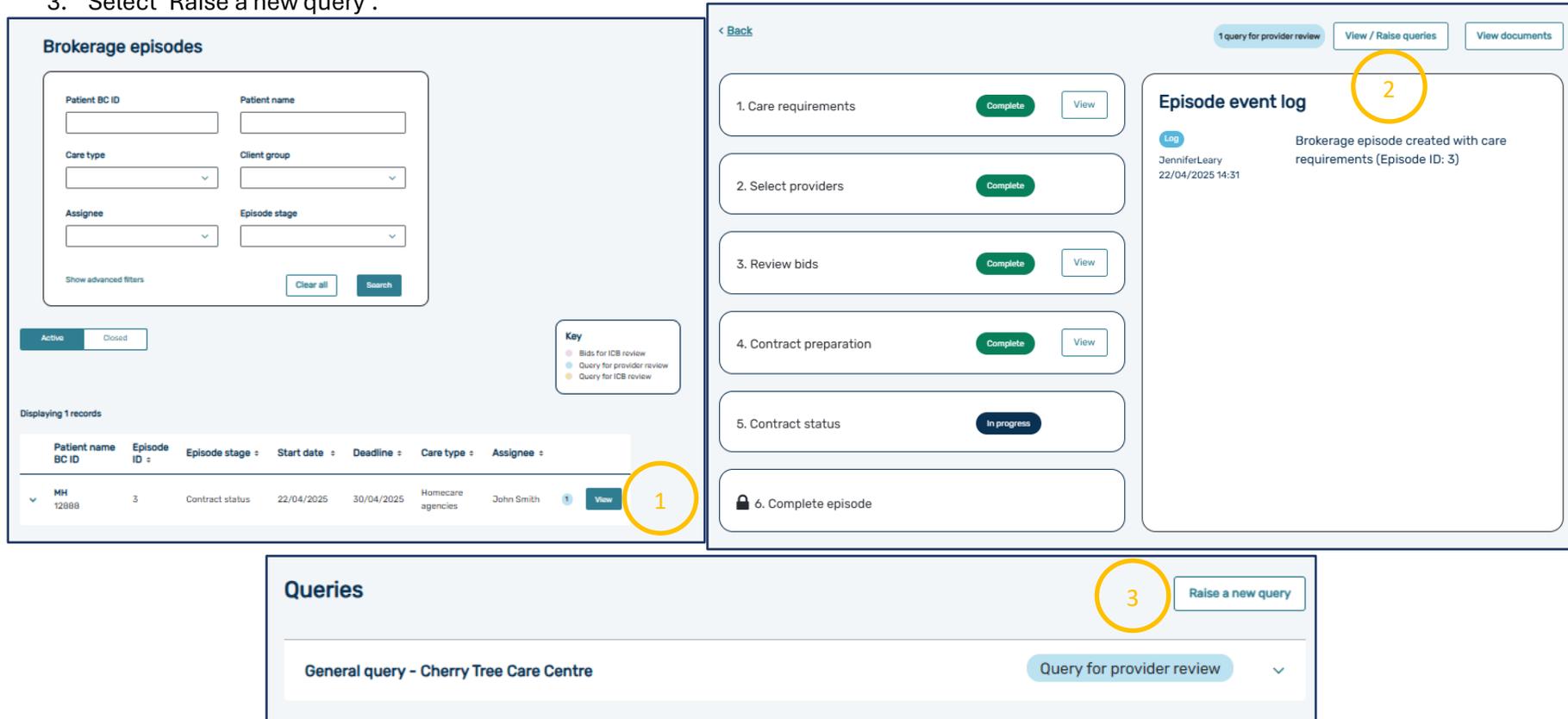


6.1.2 How to raise a new query on a brokerage episode

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

Search filters: Patient BC ID, Patient name, Care type, Client group, Assignee, Episode stage.

Active | Closed

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

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 View

Episode event log

1 query for provider review | View / Raise queries | View documents

- Care requirements (Complete) [View]
- Select providers (Complete)
- Review bids (Complete) [View]
- Contract preparation (Complete) [View]
- Contract status (In progress)
- Complete episode (Locked)

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

Queries

1 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 *

Note *

Supporting documents

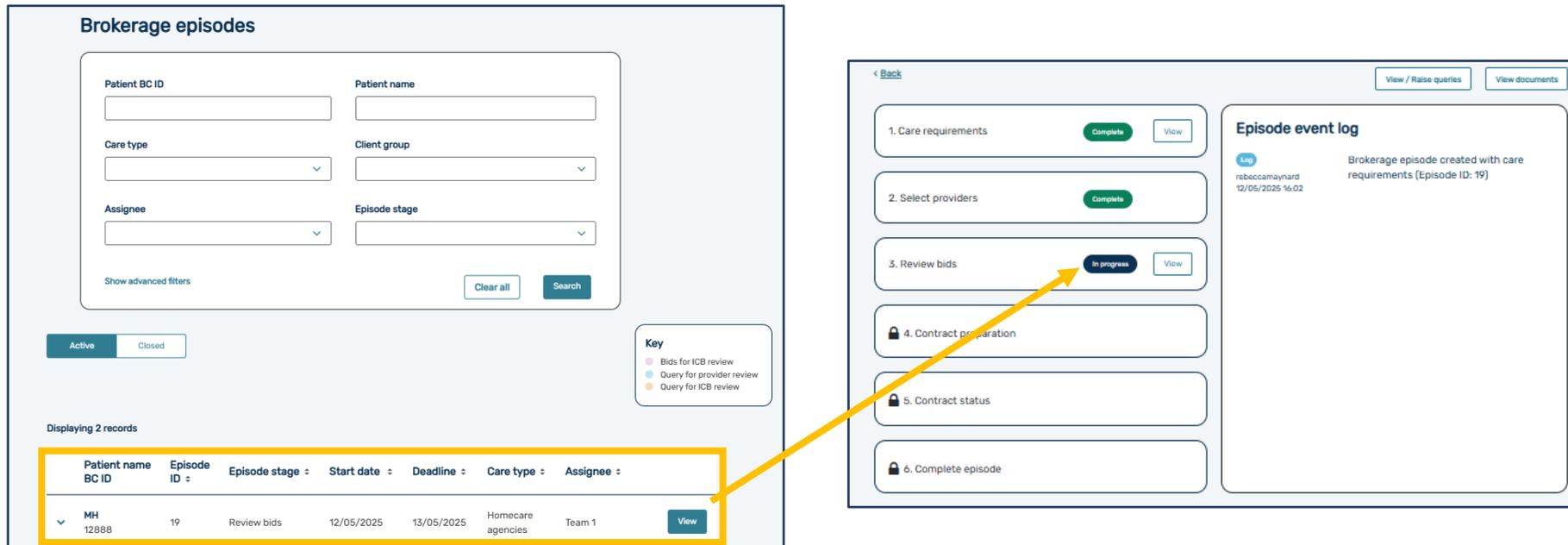
Upload a valid file that is up to 25MB in size. We do not accept .exe file.



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.



Brokerage episodes

Search filters: 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 2 records

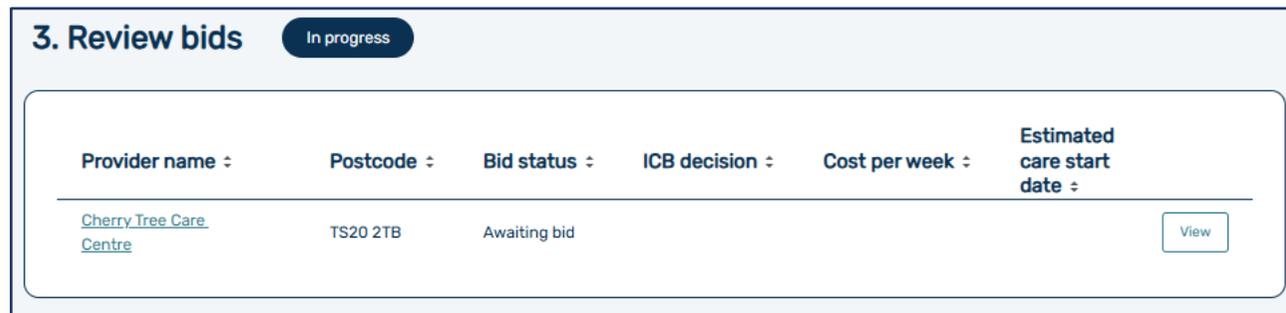
Patient name BC ID	Episode ID	Episode stage	Start date	Deadline	Care type	Assignee	
MH 12888	19	Review bids	12/05/2025	13/05/2025	Homecare agencies	Team 1	View

Episode details view:

- 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: Brokerage episode created with care requirements (Episode ID: 19) by rebeccamaynard on 12/05/2025 16:02.

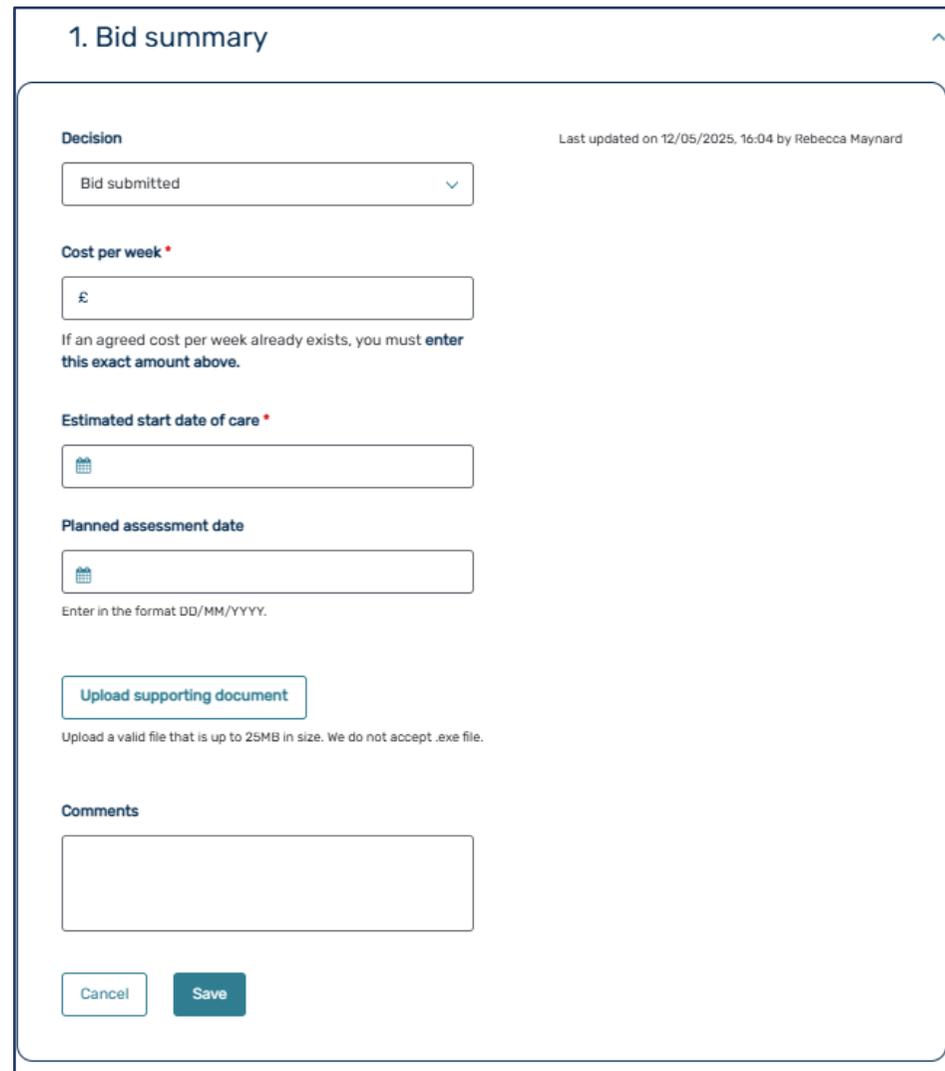
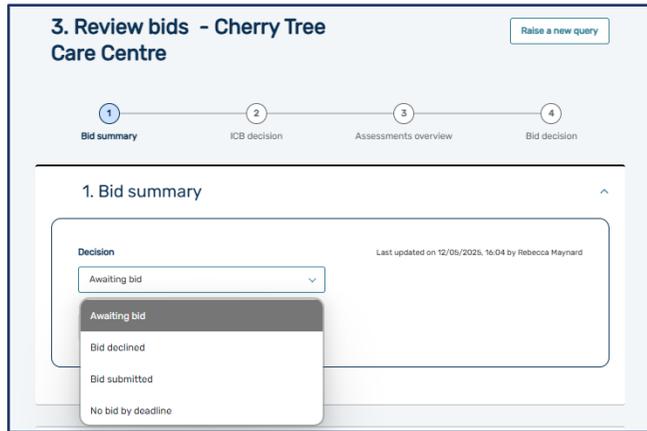
Within the brokerage episode select '3. Review bids' and 'View', this will show you the information that the ICB would like you to bid for.



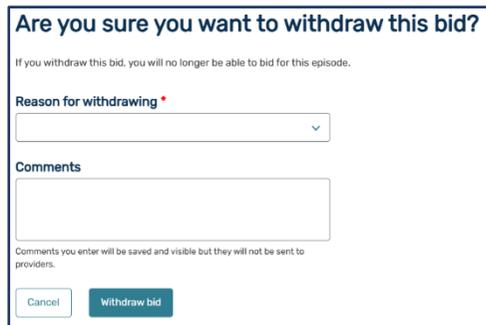
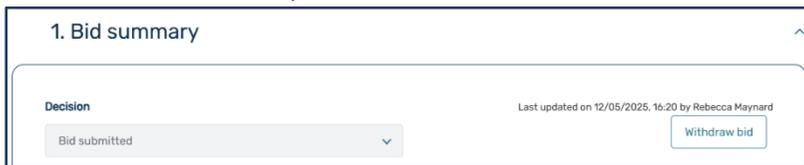
3. Review bids In progress

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

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.

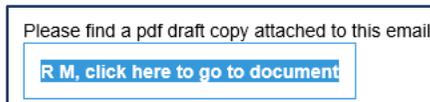
Once a bid has been submitted, the ICB will be able to make their decision, you will be updated within the brokerage episode of the brokerage section.

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

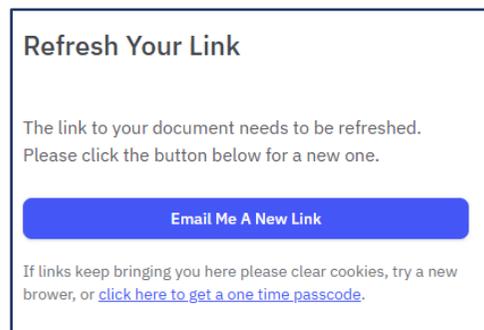
Once the bid has been accepted the ICB will create the contract, and upload this to the brokerage episode, or they will create using eSignature as a digital replacement for a handwritten (wet) signature and is just as legally binding.

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 by email, please click the link to access the document from the email.



If the link does not work, you will be presented with the screen below, this is because your organisation does not accept the URL.



Please click on **click here to get a one-time passcode**, this will send you a code to your email address. Please pop this code in the box and click **Verify**.

Signer Email Verification

We have delivered an authentication code by email to re*****1@x*****es.com. Please enter the code to complete authentication.

Verify

Re-send code

You will be asked to confirm you are authorised to accept the document, and you understand the terms of the document. If you are happy to continue, click on the check boxes and click, **Accept**.

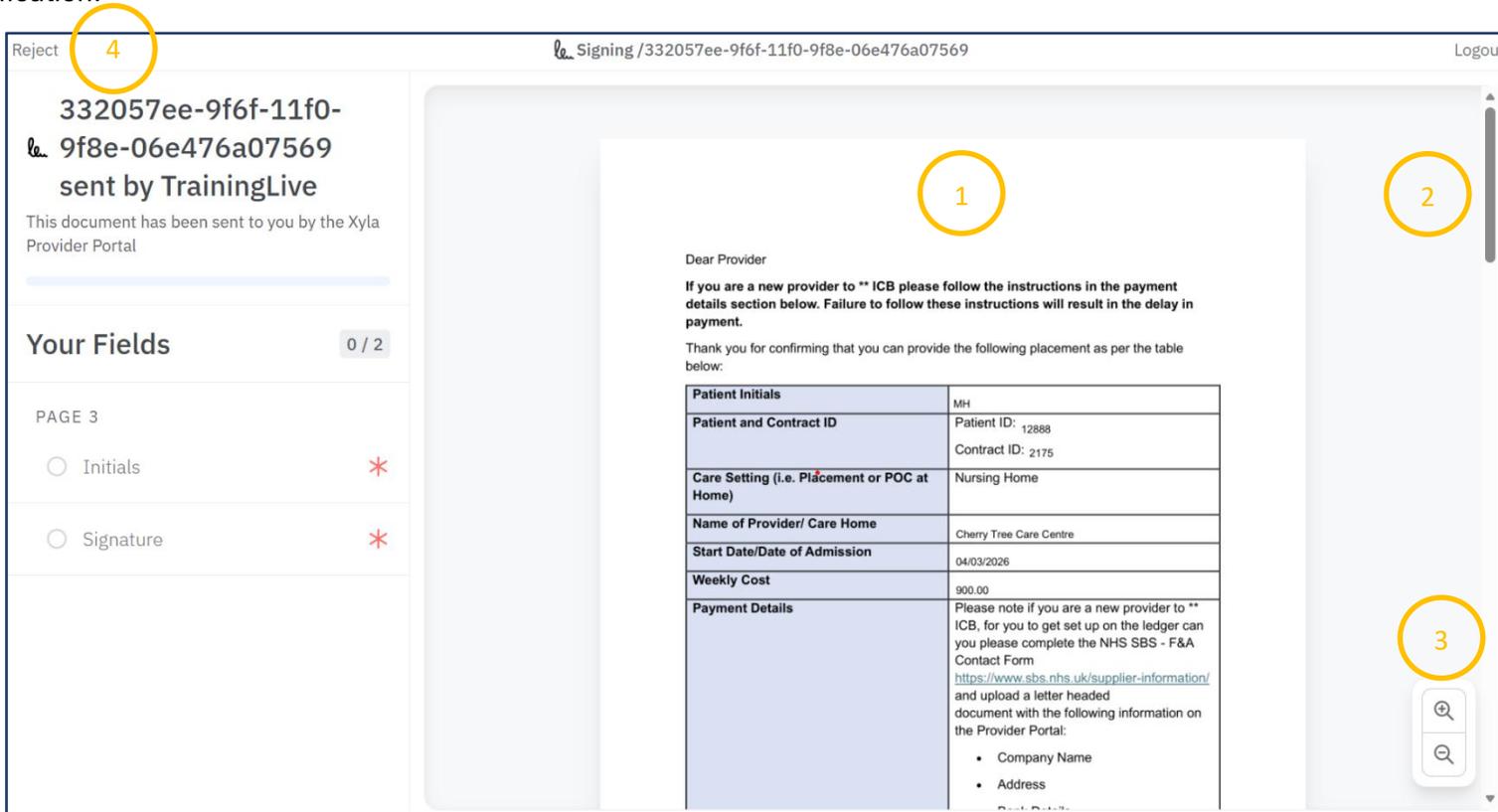
Go to Document

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.

Reject **Accept**

1. This will open the contract, the below is a test example, please note the document name will show on the top left, in the training environment this will show as a combination of letters and numbers.
2. You can use the scroll bar on the right to view all the contract.
3. The magnifying glass will allow you to enlarge the contract.
4. Clicking **Reject** will open a box where you can give a reason why you do not wish to sign the contract, for instance the details are incorrect, i.e. the cost. Press Cancel or Reject Now if you wish to reject the contract, if you reject the contract, you will receive an email notification.



The screenshot shows the Xyla Provider Portal interface. At the top left, there is a 'Reject' button circled in yellow with the number 4. The document title is '332057ee-9f6f-11f0-9f8e-06e476a07569 sent by TrainingLive'. Below the title, it says 'This document has been sent to you by the Xyla Provider Portal'. On the left side, there is a 'Your Fields' section with '0 / 2' fields. Below this, it says 'PAGE 3' and lists 'Initials' and 'Signature' with red asterisks next to them. The main content area shows a document with a scroll bar on the right circled in yellow with the number 2. The document text includes 'Dear Provider', instructions for new providers, and a table with the following data:

Patient Initials	MH
Patient and Contract ID	Patient ID: 12888 Contract ID: 2175
Care Setting (i.e. Placement or POC at Home)	Nursing Home
Name of Provider/ Care Home	Cherry Tree Care Centre
Start Date/Date of Admission	04/03/2026
Weekly Cost	900.00
Payment Details	Please note if you are a new provider to ** ICB, for you to get set up on the ledger can you please complete the NHS SBS - F&A Contact Form https://www.sbs.nhs.uk/supplier-information/ and upload a letter headed document with the following information on the Provider Portal: <ul style="list-style-type: none"> • Company Name • Address

At the bottom right of the document area, there is a magnifying glass icon circled in yellow with the number 3. The top right corner of the interface has a 'Logout' button.

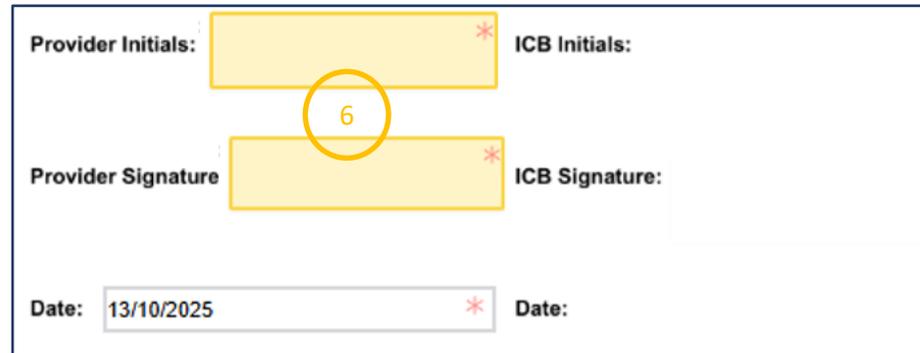
- Clicking on the **Fields** will take you to the area you need to add information for instance your **Initials** and **Signature**, once these have been added a green tick will appear.
- Alternatively, you can scroll down, the **yellow boxes** indicate where you are required to add information. The **Date** will automatically populate.



Your Fields 0 / 2

PAGE 3

- Initials *
- Signature *
- Field *



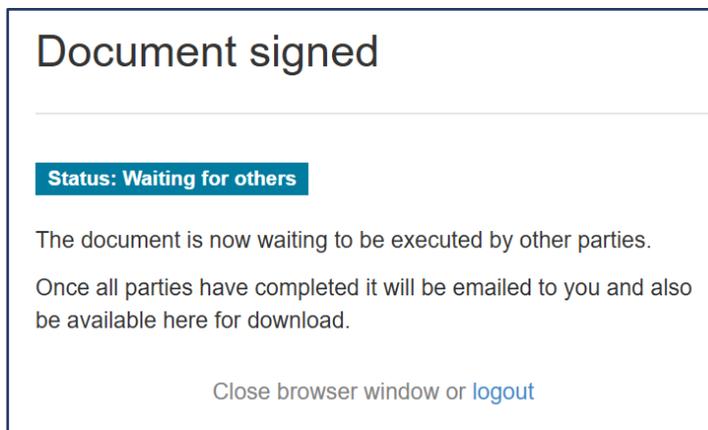
Provider Initials: * **ICB Initials:**

Provider Signature: * **ICB Signature:**

Date: 13/10/2025 * **Date:**

- 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.



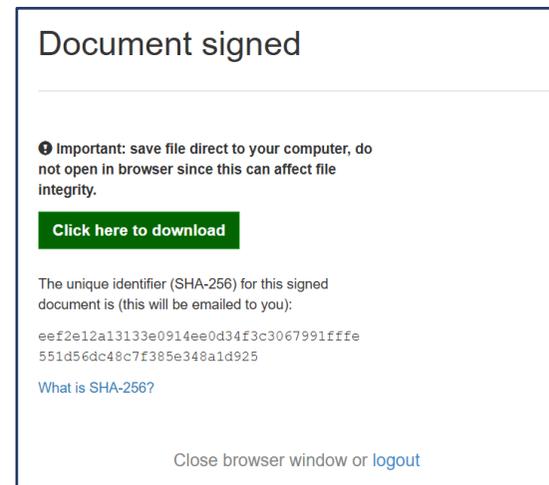
Document signed

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](#)