Provider Portal

ICB User Guide

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1 Contents

2   Introduction

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

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

3   Logging in

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

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

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

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

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 you password before setting up MFA.
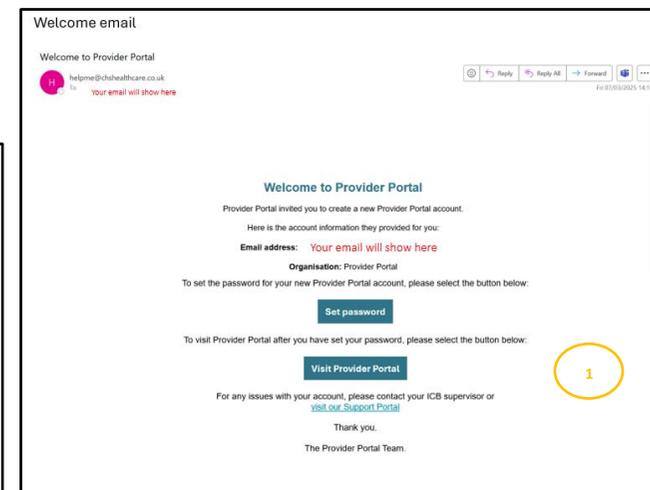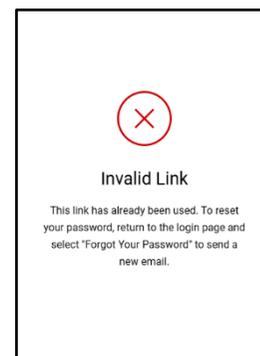
1. After you have set your password or if the 'Set password' link has expired click 'Visit Provider Portal' from your 'Welcome' email.
2. If your 'Set Password' link has expired, please click 'Forgot password?' and follow the instructions, once your password has been set click 'Visit Provider Portal' from the 'Welcome' email.
3. Enter your Email Address and Password and click 'Continue'.
4. Please select 'Google Authenticator or similar'.
   Currently ICB's use either the Google or Microsoft Authenticator App to log in to BroadCare as both are free to download are completely safe to use on your mobiles.
5. You will be presented with a QR code, open your Google or Microsoft Authenticator App and click 'Scan a QR code', this will open your camera from within your app.
6. Hover over the QR code displayed on screen, this will provide you with a One-time password code.
7. Enter the code provided into the box 'Enter your one-time code'.
8. This will link the Provider Portal with your Authenticator App.
9. Click on the Provider Portal line each time to retrieve your code, the countdown timer will reset every 30 seconds.
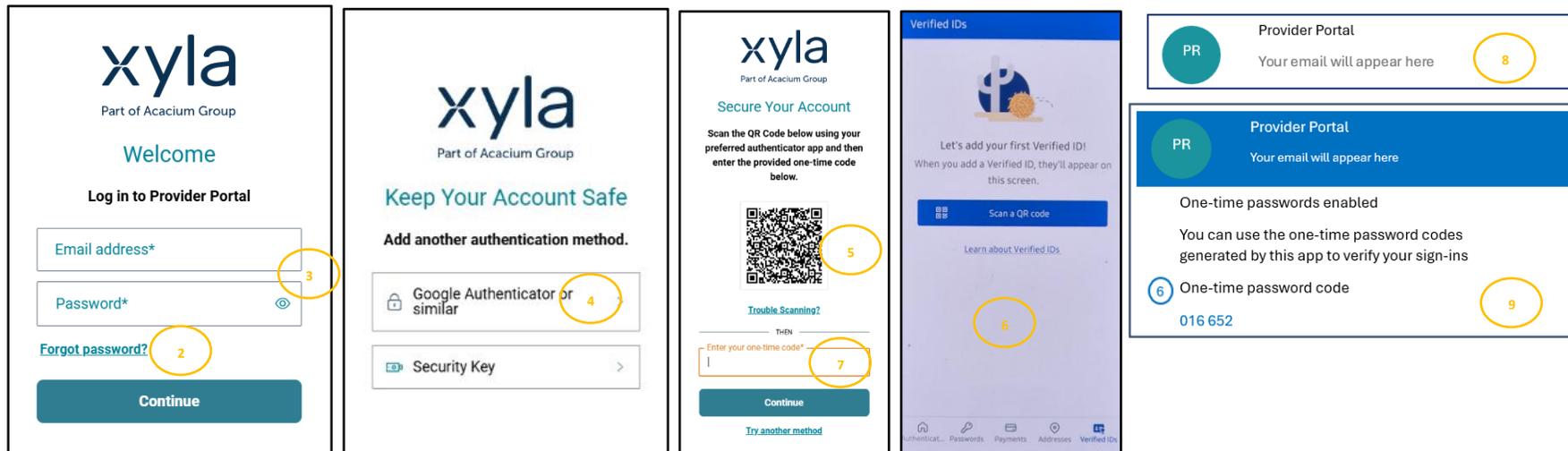
Microsoft Authenticator App

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

Google Authenticator App

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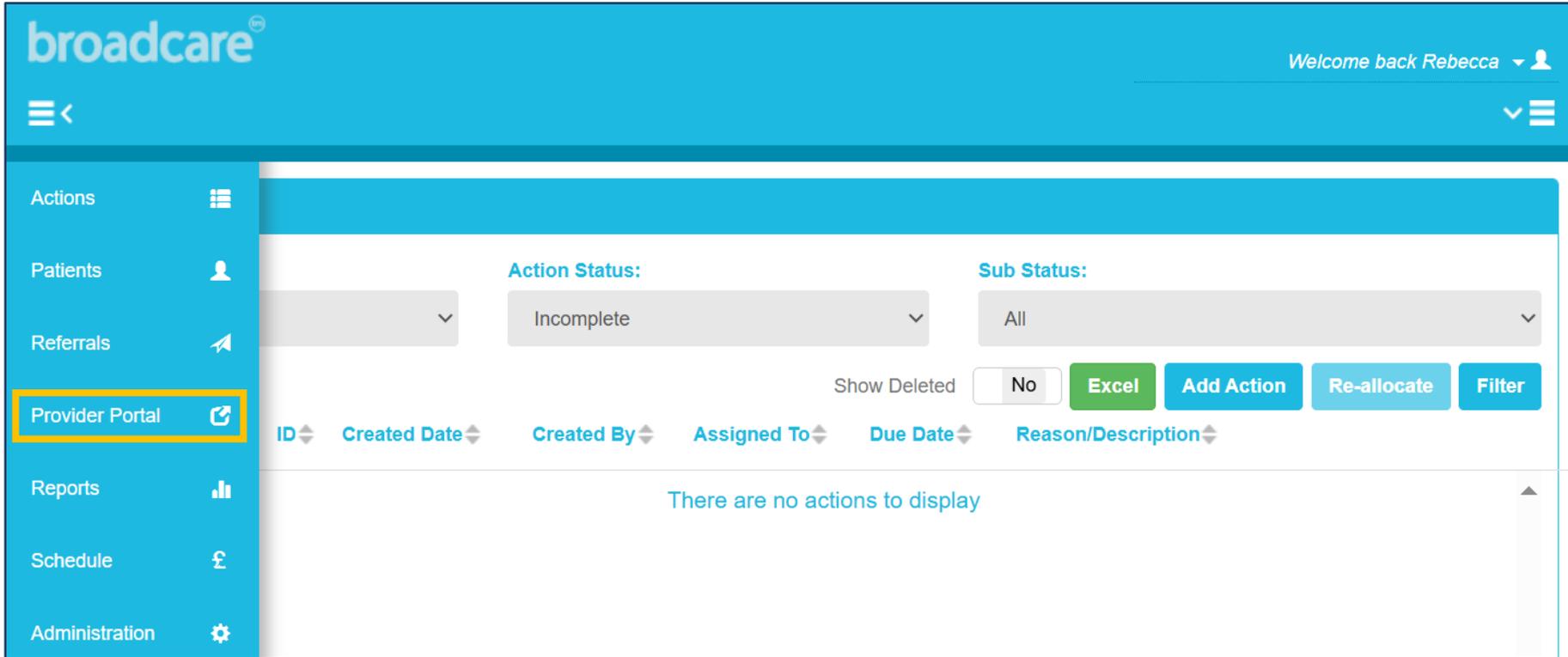9. You now have access

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

4   Navigation

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

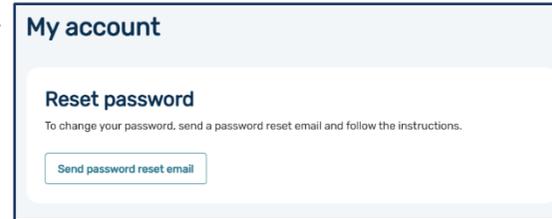The Provider Portal will replace the Provider section.

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

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 Need Help

The Need help link will provide you with next steps if you are struggling.
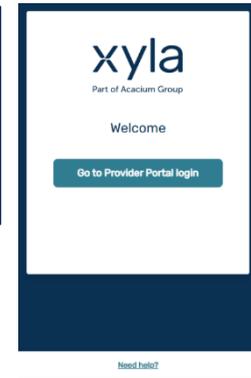
4.4 Exit Provider Portal

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

To re-enter click 'Return to Provider Portal'.
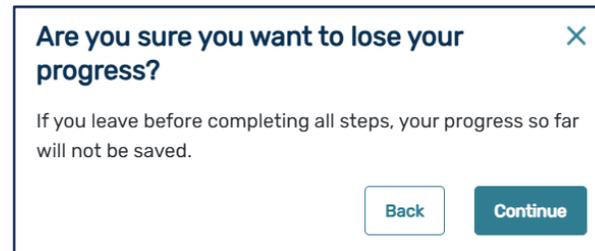
4.5 Log out of all platforms

This will log you out of all applications you have access too for instance the Provider Portal and BroadCare.

To re-enter click 'Return to Provider Portal' and enter your email address, password, and authentication method.
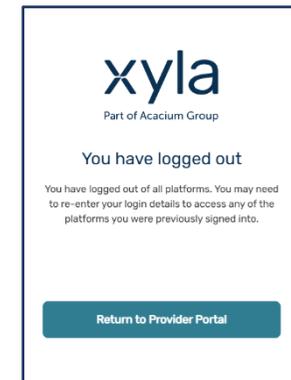
5 Provider Search

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

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

5.1 ICB Library

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

5.1.1 Standard Search

Enter the below filter information and click 'Search'.

- **Provider name**
- **Provider postcode**
- **BroadCare ID** is the unique Provider ID
- **Provider Service Type** for instance.
    - Homecare agencies
    - Hospice
    - Hospital
- **Provider Status** for instance.
    - Active
    - Inactive
    - On Advice
- **Tags**
  If these have been set up on a provider record you can select using the drop down, these can be used to reference

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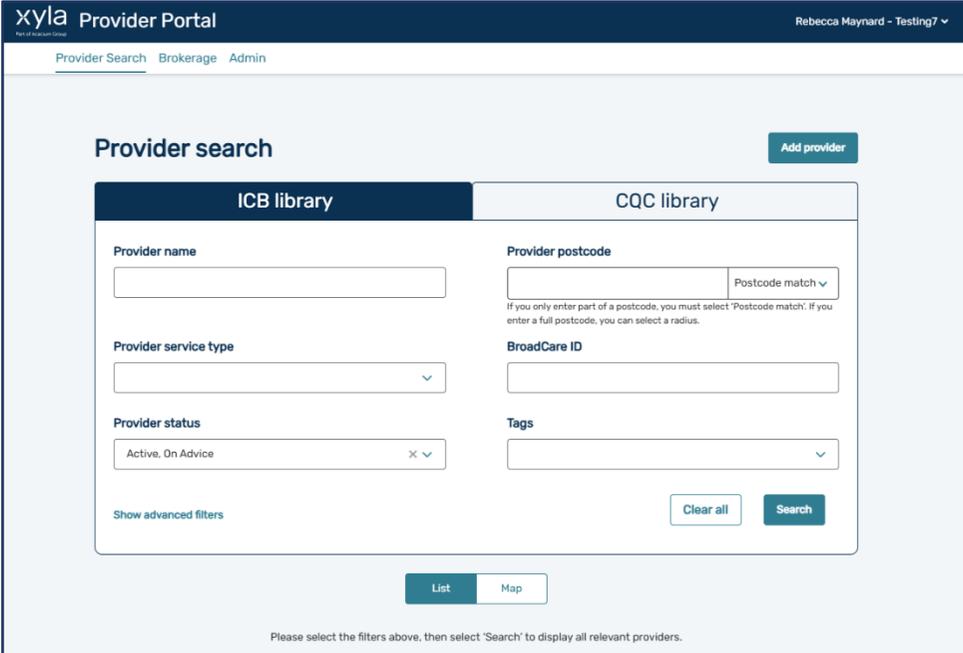
5.1.2   Advanced Search

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

Enter the filter below and click 'Search'.

- Provider name, Provider postcode, BroadCare ID, Provider service type, Provider status, and Tags can be used as described above, and will also include the below.
- **Location ID** which is provider specific and stored in the provider record and is used to link the provider to CQC
- **Care registration** for instance
    - Caring for adults over 65 yrs
    - Caring for adults under 65 yrs
    - Caring for children
- **Care Products** for instance
    - Care
    - Based on needs
- **CQC rating** for instance
    - Good
    - Inadequate
    - Outstanding
- **Provided and run by** is taken from the CQC register
- **Registration status**
- All
- Registered
- Deregistered
- **Alerts** which highlight a concern that you wish other users to be mindful of for instance
    - All
    - Safeguarding
    - General
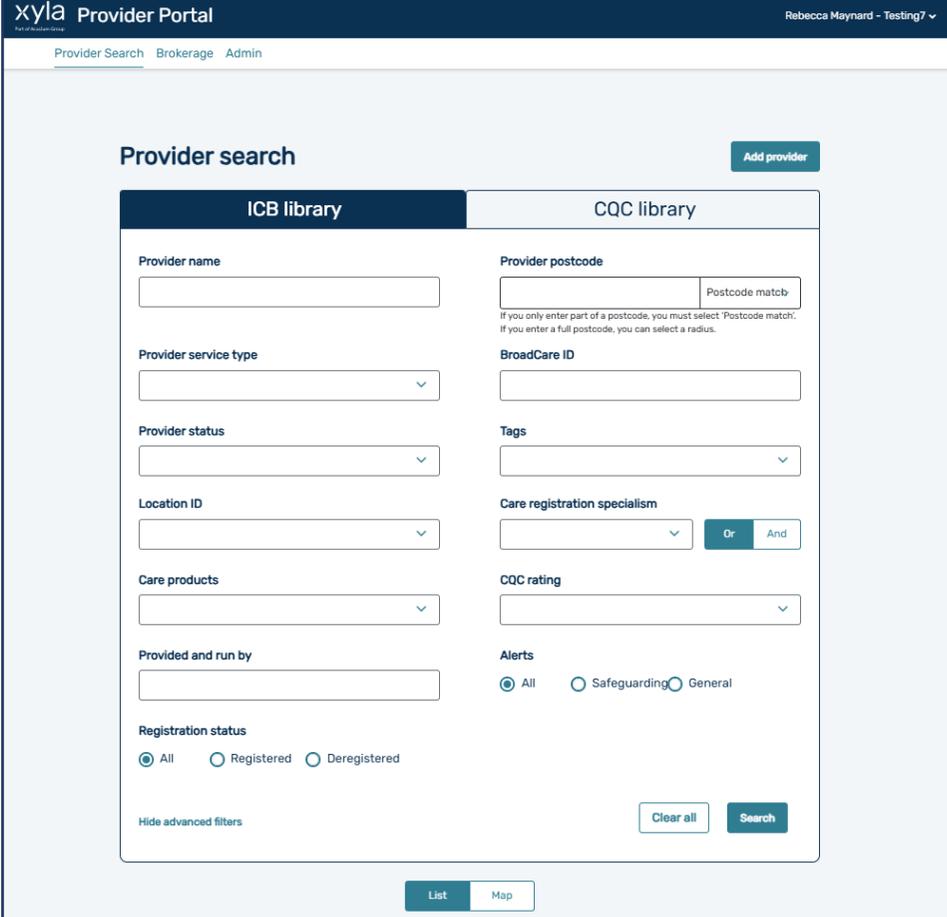
Please note the Alert options will only be available once they have been added to the Alert Type Lookups within BroadCare.

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

List View

Map View

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. **Create report –** this will download the information into Excel with the following tabs
- **Description**: overview of report
- **Provider ICB Library –** overview of provider including name, address, CQC rating, Care Products etc
- **Tags**
- **Contacts**
- **Care Products**
- **Group package rate types**
- **Bed availability**
5. **View on Google Maps** – this will take you to Google Maps to view further information and get directions

5.1.4   Map View

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

The Oaks

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

Back to search results

The Oaks

| Overview | **Overview** |
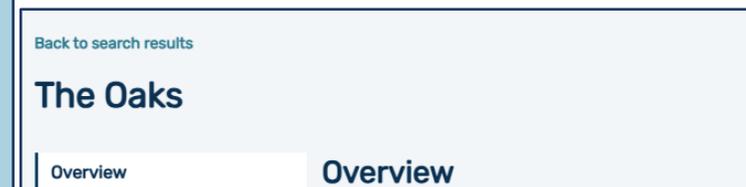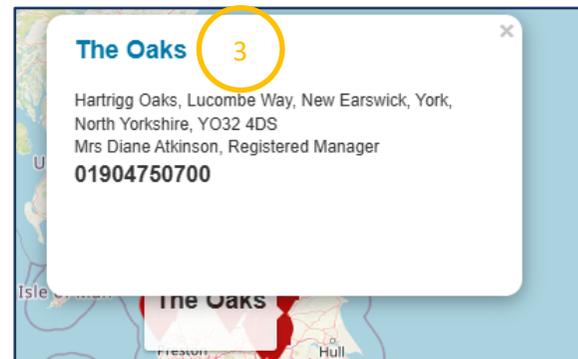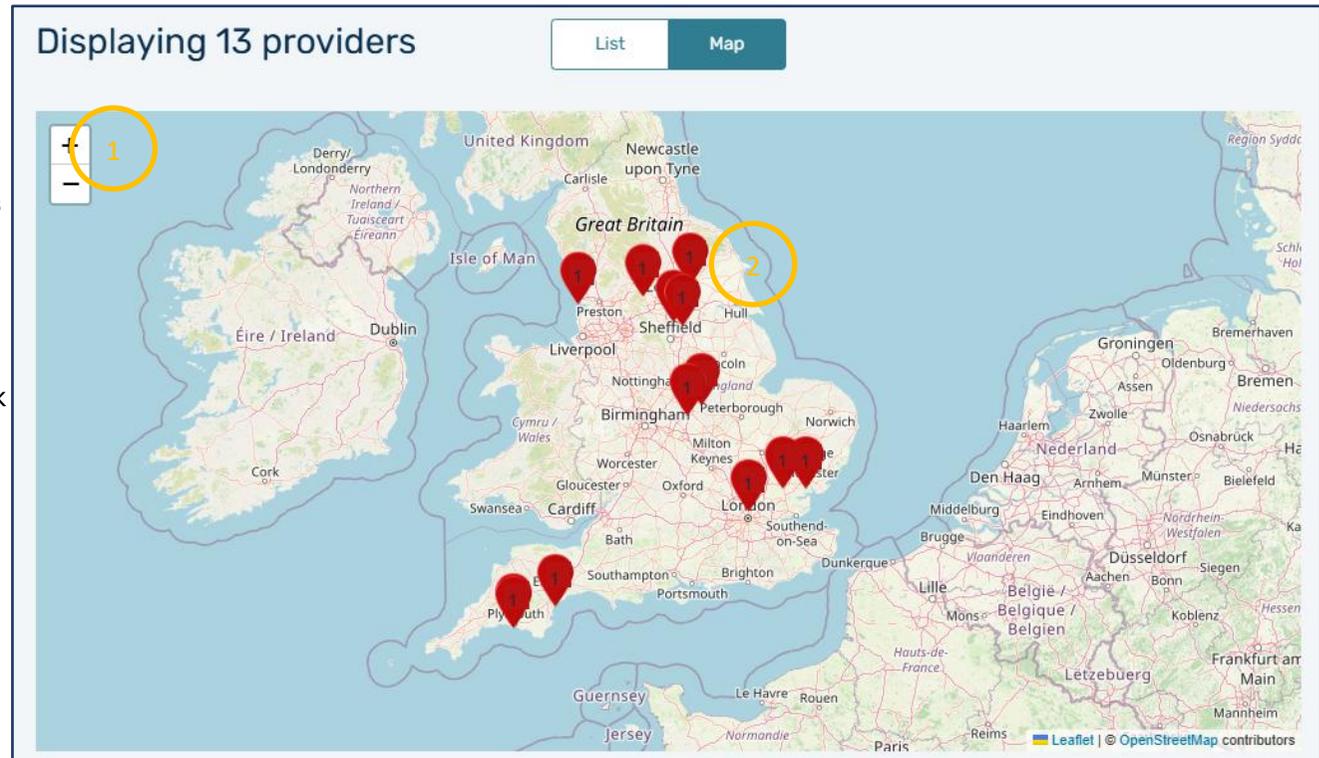
6 Provider Record

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

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

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

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

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

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

- **Contacts** – View, Add, and Delete contact information.
- **Contracts** – View, Add, and Delete contract information.
- **Bed availability** – View and Edit the types of beds available. This is for domiciliary care providers.
- **Care Products** – View, Add, and Delete Care Products.
- **Grouped package rates** (known as Roles in BroadCare) View, Add, Delete, and Edit group package rate information.
- **Care Packages** (known as Packages in BroadCare) Provides information on any care packages.
- **Finance** (known as Finance in BroadCare) – View and create Invoices and create a report.
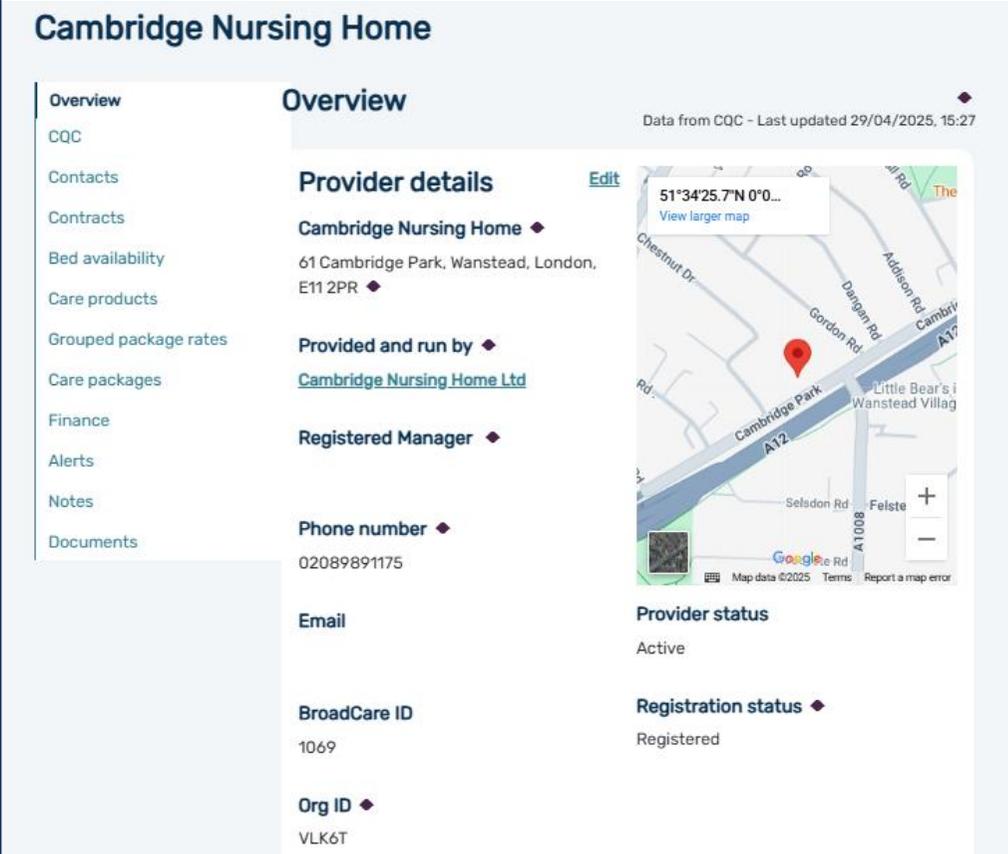
- **Alerts** (known as Case Management in BroadCare) - View, Add, Edit, Delete and filter Alerts. Add comments to an Alert. Please note the Alert options will only be available once they have been added to the Alert Type Lookups within BroadCare.
- **Notes** (known as Case Management in BroadCare) – View, Delete, Add Note, filter and Assign Action to another user.
- **Documents** (known as Case Management in BroadCare) – View, Add, Delete, filter and Download a Document.

6.1   Overview

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

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

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

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

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

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

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

6.2   CQC

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

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

1. **View Report**
    This allows you to view the CQC Report.

2. **View on CQC website blue hyperlink**
    The location ID is provider specific and is used to link the provider to CQC to update the key details which are indicated with a diamond for instance Location ID ◆ .

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

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

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

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

6.3 Contacts

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

1. **Current/Deleted** – This toggle allows you to toggle to view the current list of contacts and those that have been deleted.
2. **Add contact** – This allows you to add a new contact. First Name, Last Name and Job Role are mandatory fields.
3. Clicking on each contact will open the contact card.
4. After opening the contact card, you can Delete or Edit.

6.4   Contracts

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

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

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

Cambridge Nursing Home

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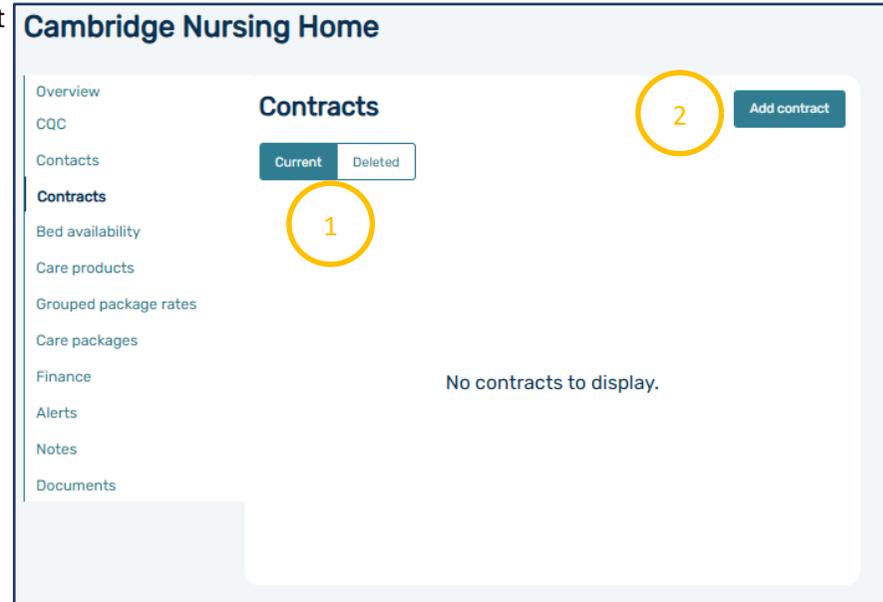Alerts
Notes
Documents

Contracts

Current | Deleted

Add contract

No contracts to display.

Add contract ×

Has the contract been signed? No

Sign with eSignature tool?

Yes | No

Contract type *

Contract reference *

Continue

Add contract ×

Has the contract been signed?

Yes | No

Sign with eSignature tool?

Yes | No

Contract type*

Contract reference *

Contract issued *

Enter in the format DD/MM/YYYY.

Contract received

Enter in the format DD/MM/YYYY.

Contract start

Enter in the format DD/MM/YYYY.

Contract review

Enter in the format DD/MM/YYYY.

Contract renewal

Enter in the format DD/MM/YYYY.

Indemnity insurance?

Yes | No

Save

New contract
*Mandatory Fields - Contract type, Contract reference, and Contract issued.
- **Has the contract been signed** – Allows you to toggle to Yes or No.
If Yes is selected, then Sign with eSignature tool will disappear.
- **Sign with eSignature tool** – This allows for the signature to be captured digitally and allows you to toggle to Yes or No.

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

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

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

6.4.1 Signing a contract with the eSignature too

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

1. Add the 'Contract type' and 'Contract reference' before clicking 'Continue'.
2. You can use an existing contract template, or you can upload a new document.

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

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

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

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

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

Choose how to prepare the document for signing

- ● Select an existing template
- ○ Upload a new document

Select an existing template *

[dropdown] — 2

Signers

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

[Parallel | Sequential] — 3

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

First name*	Last name*	Email address*

[Back] [Continue] — 4

Signers

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

[Parallel | Sequential] — 3

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

|	Order	First name*	Last name*	Email address*
⊙⊙	1.			
⊙⊙	2.			

[Back] [Continue] — 4

4. Once the name and email address of the signers have been added, click 'Continue'.
5. Depending on the bookmarks that have been added to the contract template certain information will automatically pull through, if the information is incorrect or missing you can manually enter the information before clicking 'Send document'.

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Add contract

BroadCare ID (Provider ID)

2175
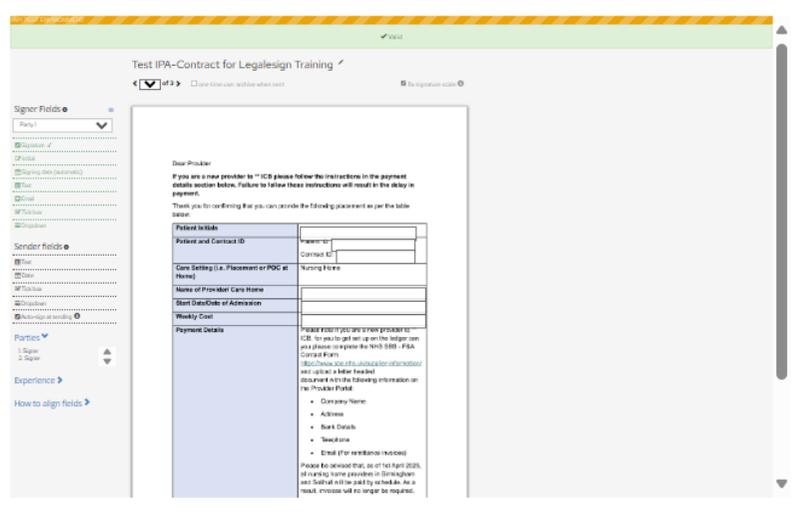
Provider name

Cherry Tree Care Centre

Patient BC ID

Initial

From

Total Cost

⑤

Back   Send document

6. A screen will pop up to ensure the details are correct before sending. If you are happy click 'Send document'.
7. When you receive the contract by email, please click the link to access the document from the email.
8. If the link does not work, you will be presented with the screen below, this is because your ICB/HB does not accept the URL.

Are you sure you want to send this document?

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

⑥

Back   Send document
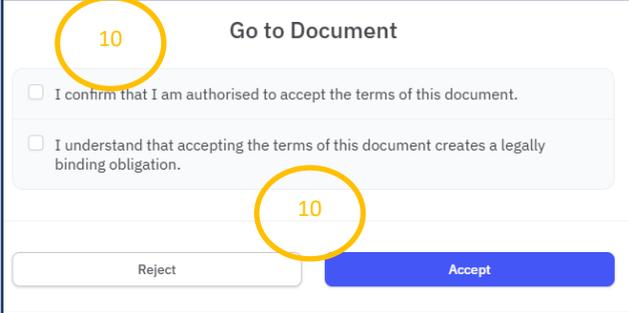
Refresh Your Link

The link to your document needs to be refreshed.
Please click the button below for a new one.

Email Me A New Link   ⑦

If links keep bringing you here please clear cookies, try a new brower, or click here to get a one time passcode.   ⑧
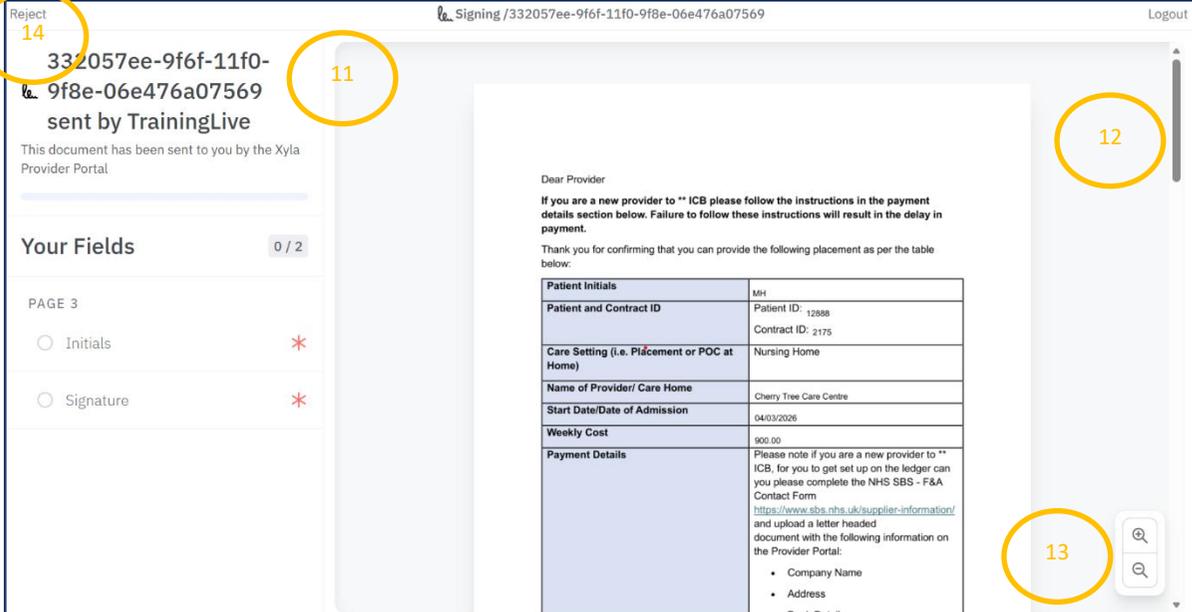
Please find a pdf draft copy attached to this email.

R M, click here to go to document

9. 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.**
10. 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**.

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

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.
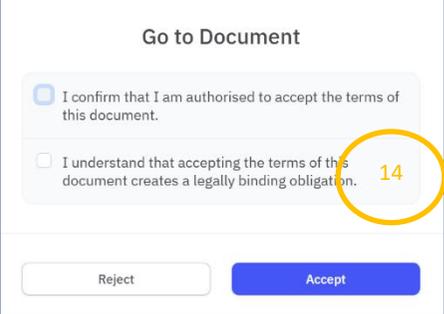
Reject   Accept
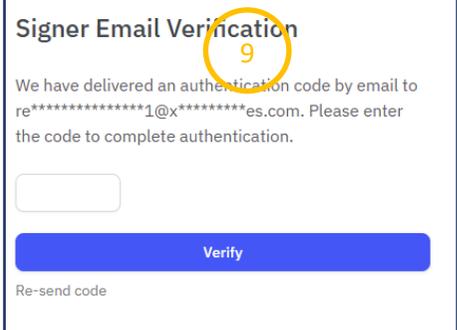
11. This will open the contract, the below is a test example, please note the document name will show on the top left, in the training environment this will show as a combination of letters and numbers.
12. You can use the scroll bar on the right to view all the contract.
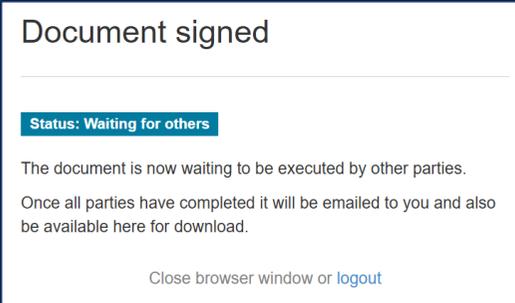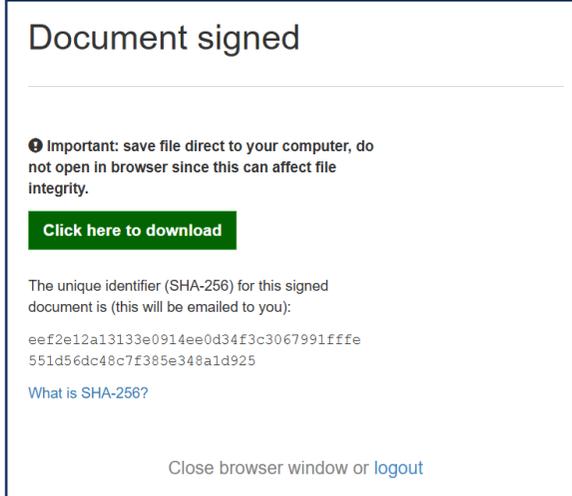13. The magnifying glass will allow you to enlarge the contract.

Reject   Signing /332057ee-9f6f-11f0-9f8e-06e476a07569   Logout

332057ee-9f6f-11f0-9f8e-06e476a07569 sent by TrainingLive

This document has been sent to you by the Xyla Provider Portal

Your Fields   0 / 2

PAGE 3

○ Initials   *

○ Signature   *

Dear Provider

If you are a new provider to ** ICB please follow the instructions in the payment details section below. Failure to follow these instructions will result in the delay in payment.

Thank you for confirming that you can provide the following placement as per the table below:

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: • Company Name • Address

14. 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.

15. 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.

16. Alternatively, you can scroll down, the **yellow boxes** indicate where you are required to add information. The **Date** will automatically populate.

17. 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 Provider record in the **Contracts** and **Documents** sections.

6.4.3 Contract preparation – Uploading a signed contract

1. If you have already received a signed contract rather than using as digital signature you can click 'Upload a signed contract'.
2. Drag and drop the file or browse to upload your contract.
3. Add a description of the document.
4. Click 'Upload', this will upload the document to the brokerage episode and also save on the Patient's BroadCare record in Case Management.
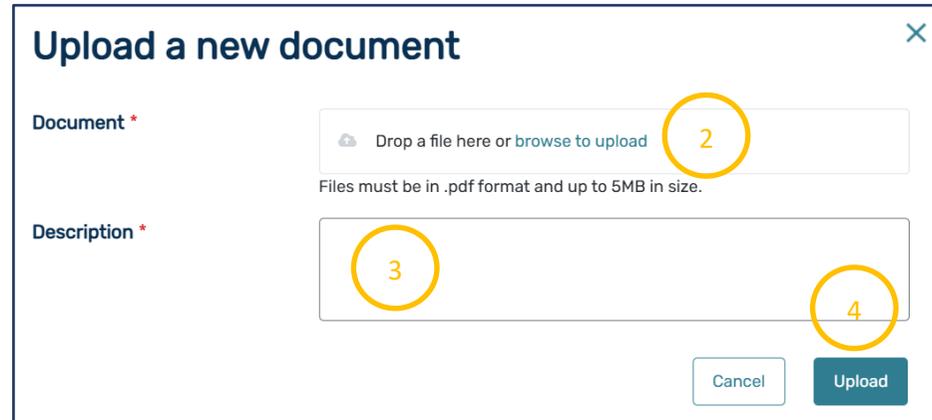

6.5 Bed availability

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

6.6   Care Products

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

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

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

1. **All/Deleted** – This toggle allows you to toggle to view All of the care products
   and those that have been deleted.
2. **Delete/Edit** - Once a care product has been added you can Edit or Delete the information.
3. **Add care product** – This allows you to add a care product to the provider.
   Care product type – This can be selected from the drop down.
   From date and To date – These are the dates the care product will be available to select when a package of care is added.

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

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

6.7 Grouped package rates

(known as Roles in BroadCare)
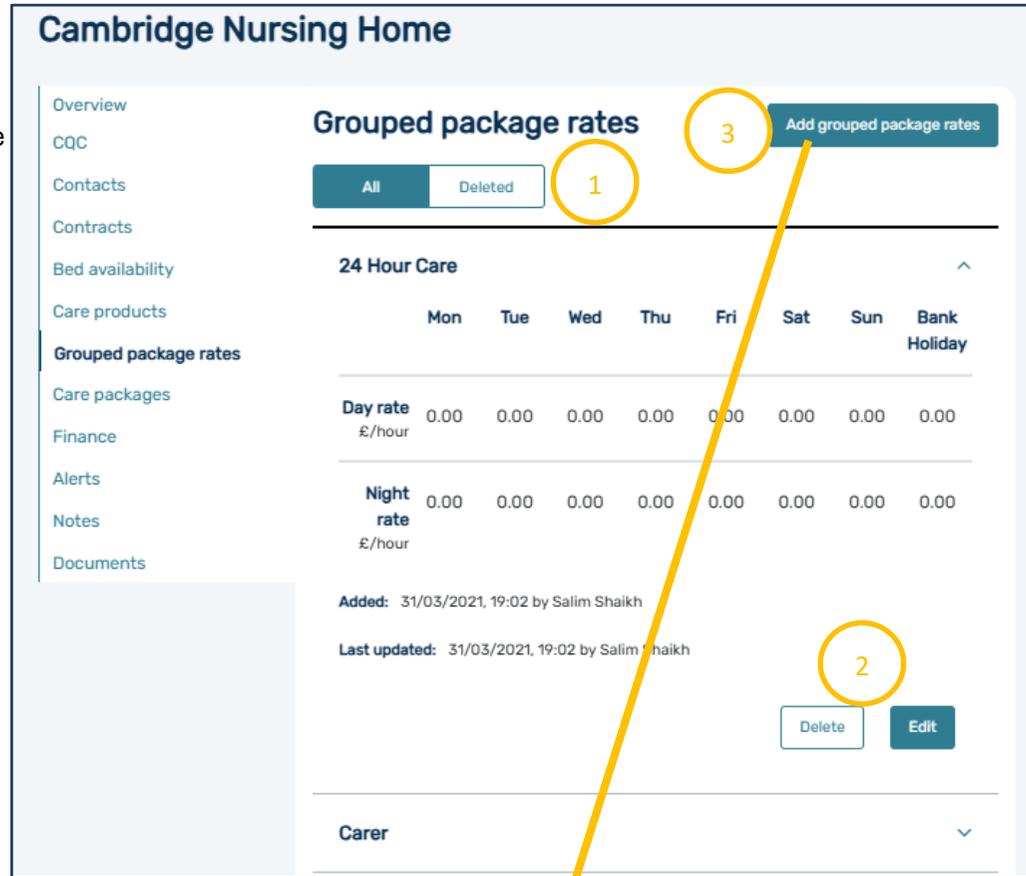View, add, delete, and edit group package rate information.
Please note you can only add the Grouped package rates to the provider if this has already been added to the Lookups.

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

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

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

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

6.8   Care Packages

View care packages that are in place for the provider.

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

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

    From and To Date – Filter on the date range of the care package
    Contract ID – This is the unique Contract ID that the care package is linked to
    Patient BC ID – This is the unique Patient ID within BroadCare
    Record Owner – This is the record owner that has set up the care package
    Classification – This is the classification that the care package has been recorded against for instance CHC or Children
    Package type – How the package has been recorded for instance Grouped, Non-grouped, Unit
    Payment method – How the package will be paid for instance All, Schedule (paid automatically on a monthly schedule, non-schedule (paid by invoice)
    Status – All, Active, Closed
    Care package audit – Additional Xyla service whereby we can assist with your packages and invoice - All, Yes, No

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

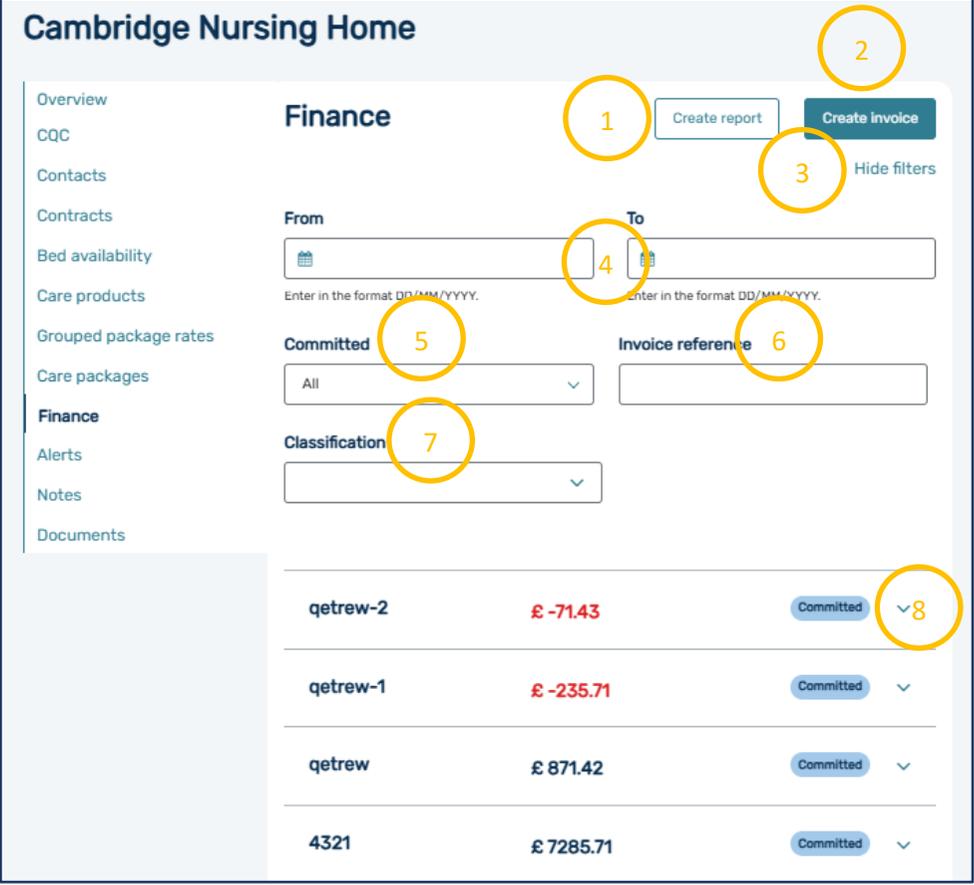This will provide you with more information on the type of care package, and its associated costs.

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

13308		Unit ⌃
Patient name jones 120	**Patient BC ID** 6947	
Record owner North Ridings CCG	**Classification** CHC/FNC	**PHB status** No
From 01/01/2024	**To**	**Care product** Mileage
Number of unit 1	**Cost per unit** £3000.00	
Total cost £3000.00	**Funding & paid by** Fully - Paid By NHS	
NHS percentage & cost 100% / £3000.00	**LA percentage & cost** 0% / £0.00	**ED percentage & cost** 0% / £0.00
Local authority	**School authority**	
By schedule No	**Care package audit** No	**Credit** No
Approved date	**Approved by**	

6.9 Finance

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

1. **Create report** provides the invoice information

2. **Create invoice** allows you to add a new invoice

3. **Show/Hide filters** allow you to filter the invoices

4. **From** and **To** Dates

5. **Committed** (All, No, Yes) If you want to commit to paying the invoice

6. **Invoice reference**

7. **Classification** (CHC/FNC, Children)

8. **Arrow** expands the invoice to view and add information

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

- **Add note**

- **Add document**

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

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

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

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

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- **Add custom invoice**

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

6.10 Alerts

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

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

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

1. **All/Deleted** – This toggle allows you to toggle to view All of the Alerts and those that have been deleted.
2. **Delete alert/Edit alert** - Once an Alerts has been added you can Edit or Delete the information.
3. The **arrow** will allow you to open the Alert to view more information.
4. **Show filters** – This allows you to apply filters when searching for a particular Alert that has been added to the provider record.
5. If the Alert is open, it will show as **Current**.
6. **Add alert** – This allows you to add an alert to the provider record.
   Alert type - This can be selected from the drop down for instance a Safeguarding
   Alert subtype – This can be selected from the drop down for instance physical abuse
   From date and To date – These are the dates the alert will be active on the provider records. The To date can be left blank when it is ongoing.
   Notes – Any key information relating to the alert can be added.

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6.11 Notes

(known as Case Management in BroadCare)
View, delete, add, filter and assign and action to another user.

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

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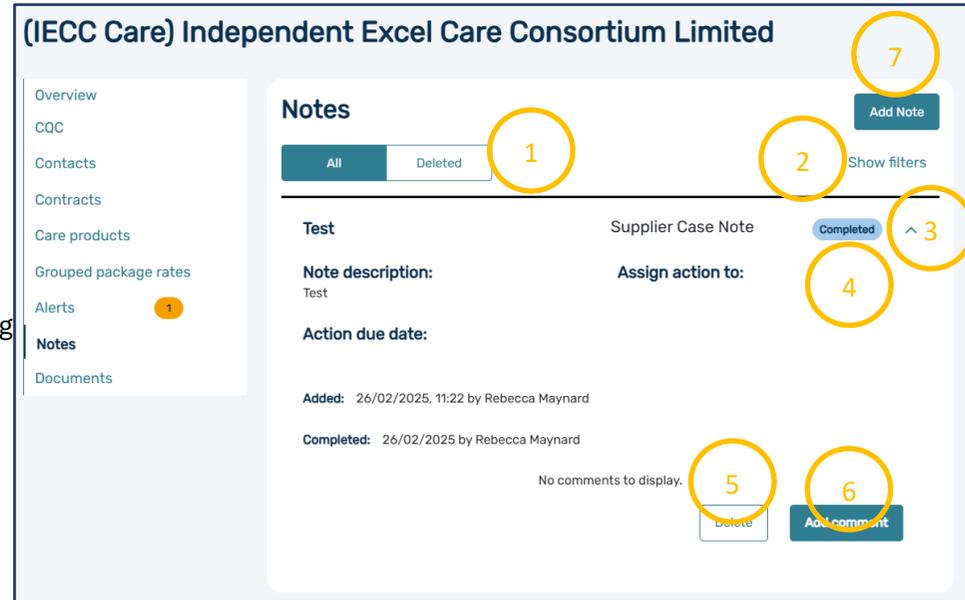
7. **Add Note –** This allows you to add notes to the provider record.

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

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

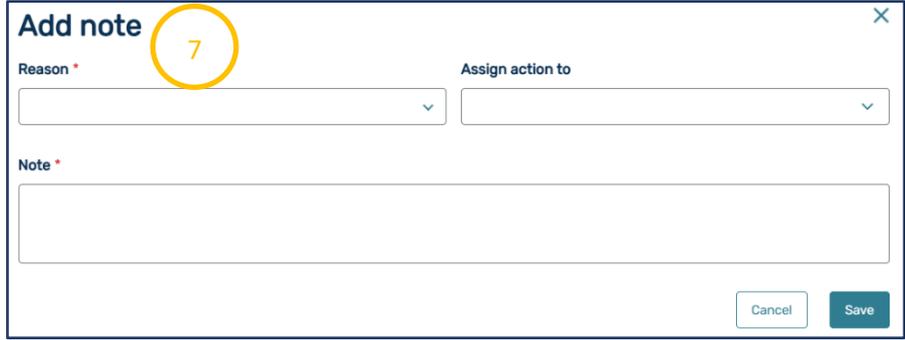   **Note** – Add additional information to support the reason for the note.

6.12 Documents

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

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

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

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

Please note the Folder names will only be available once they have been added to the Case Management Folder lookup in BroadCare.

(IECC Care) Independent Excel Care Consortium Limited

Back to search results

Overview
CQC
Contacts
Contracts
Care products
Grouped package rates
Alerts 1
Notes
Documents

Documents   Move documents   Add document

Current Deleted

Show filters

☐ Care requirement document .docx   **Folder:** Salim_PettyCash

Description
care

Added: 16/09/2024, 13:55 by Paria Motiee

Last updated: 16/09/2024, 13:56 by Paria Motiee

Download   Delete

Move document

File	Folder
Care requirement document .docx	Salim_PettyCash

Save   Close

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

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

   Document – Upload the document

   Description – Provide information on what the document is

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

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

Add document ✕

Document *   ☁ Drop a file here or browse to upload

Description *

Folder *   General ⌄

Cancel   Upload

7 CQC Library

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

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

7.1   Standard Search

Enter the below filter information and click 'Search'.

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

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

Provider search

ICB library	CQC library

Provider name

Provider 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

Location ID

Show advanced filters

Clear all | Search

List | Map

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

7.2 Advanced Search

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

Enter the below filter information and click 'Search'.

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

Provider search

ICB library	CQC library

Provider name

Provider postcode

Postcode match ⌄

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

Provider service type

Location ID

Care registration specialism

Or And

CQC rating

Provided and run by

Registration status

◉ All   ○ Registered   ○ Deregistered

Hide advanced filters

Clear all   Search

List   Map

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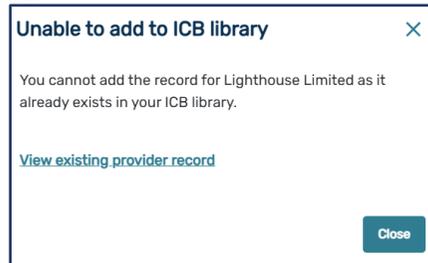
7.3 List View

Once the list of providers is showing you can:

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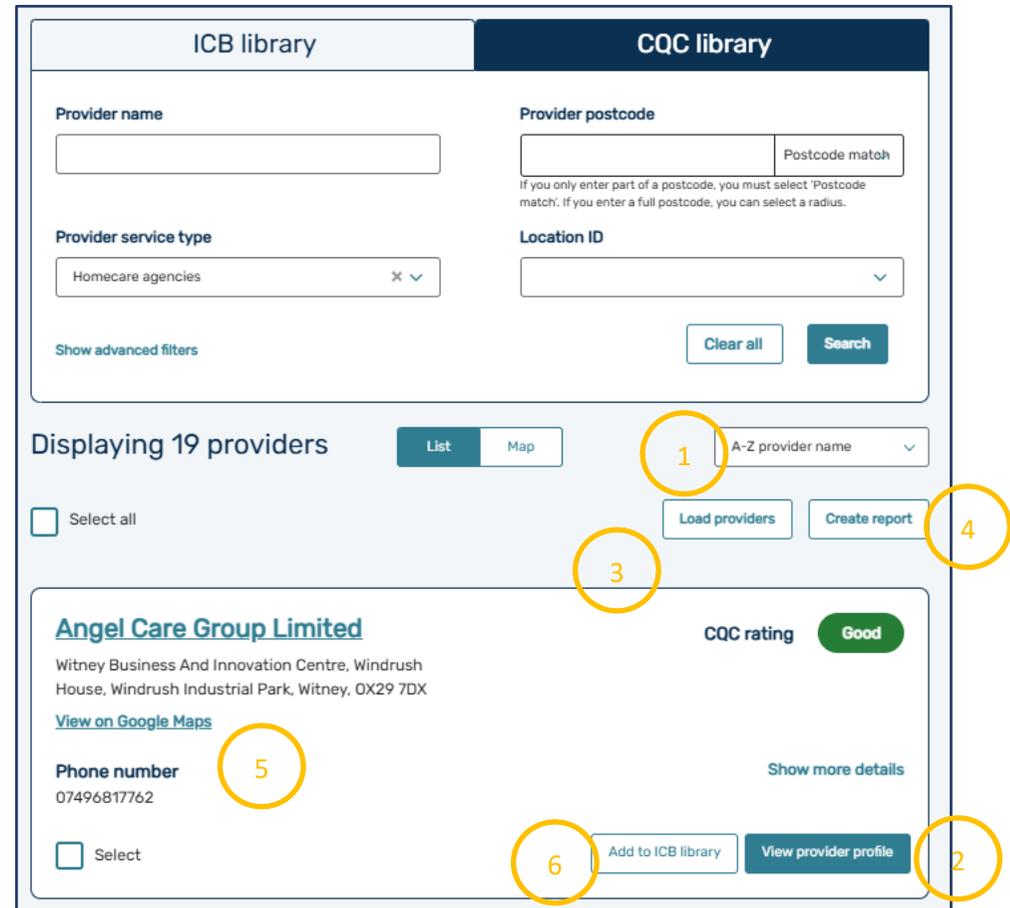
5. **View on Google Maps** – this will take you to google maps to view further information and get directions.
6. **Add to ICB Library** – By selecting this the provider will be added to the ICB Library. If the provider already exists you will be presented with the below where you can view the provider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

Unable to add to ICB library ✕

You cannot add the record for Lighthouse Limited as it already exists in your ICB library.

View existing provider record

Close

7.4 Map View

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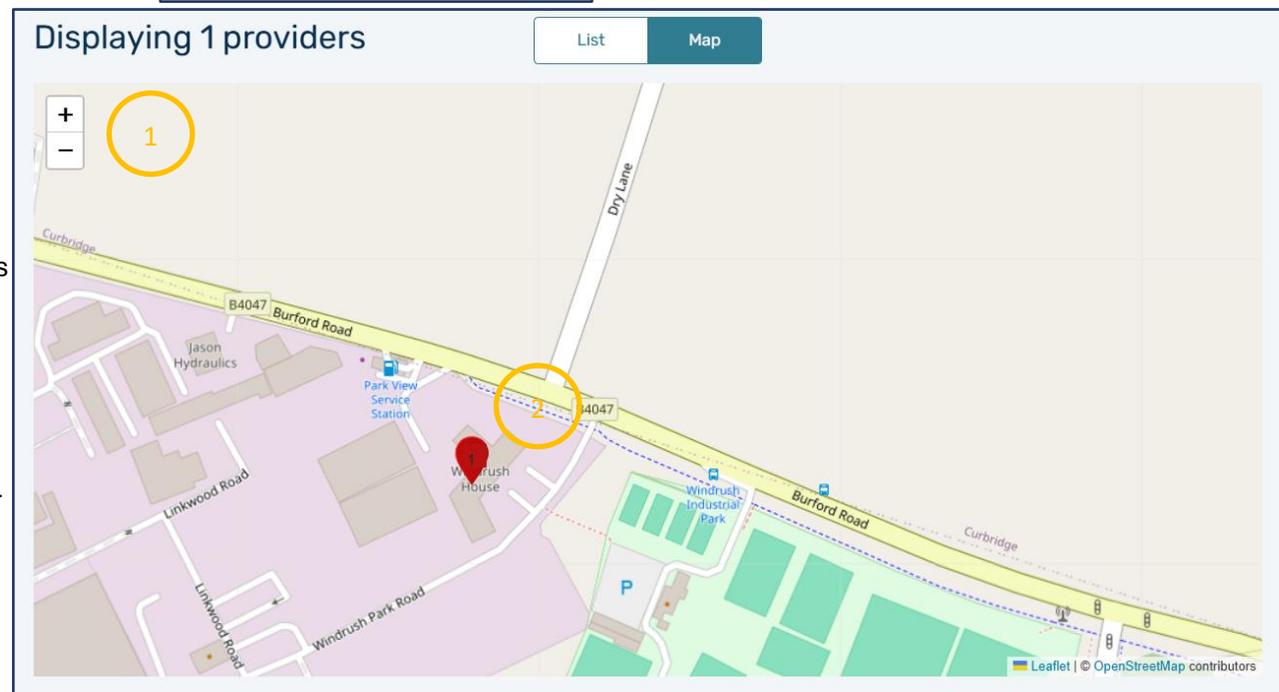
Angel Care Group Limited

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

Displaying 1 providers

List | Map

7.5 Provider record

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

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

> **Unable to add to ICB library** ✕
>
> You cannot add the record for Lighthouse Limited as it already exists in your ICB library.
>
> View existing provider record
>
> Close

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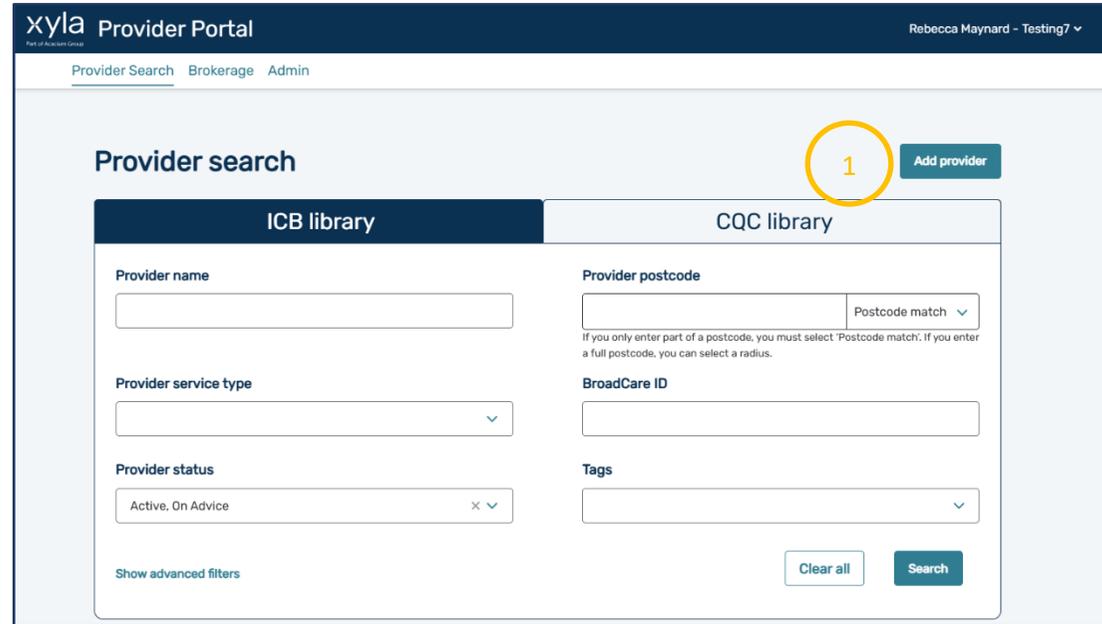5. **CQC details** – This provides the CQC rating.
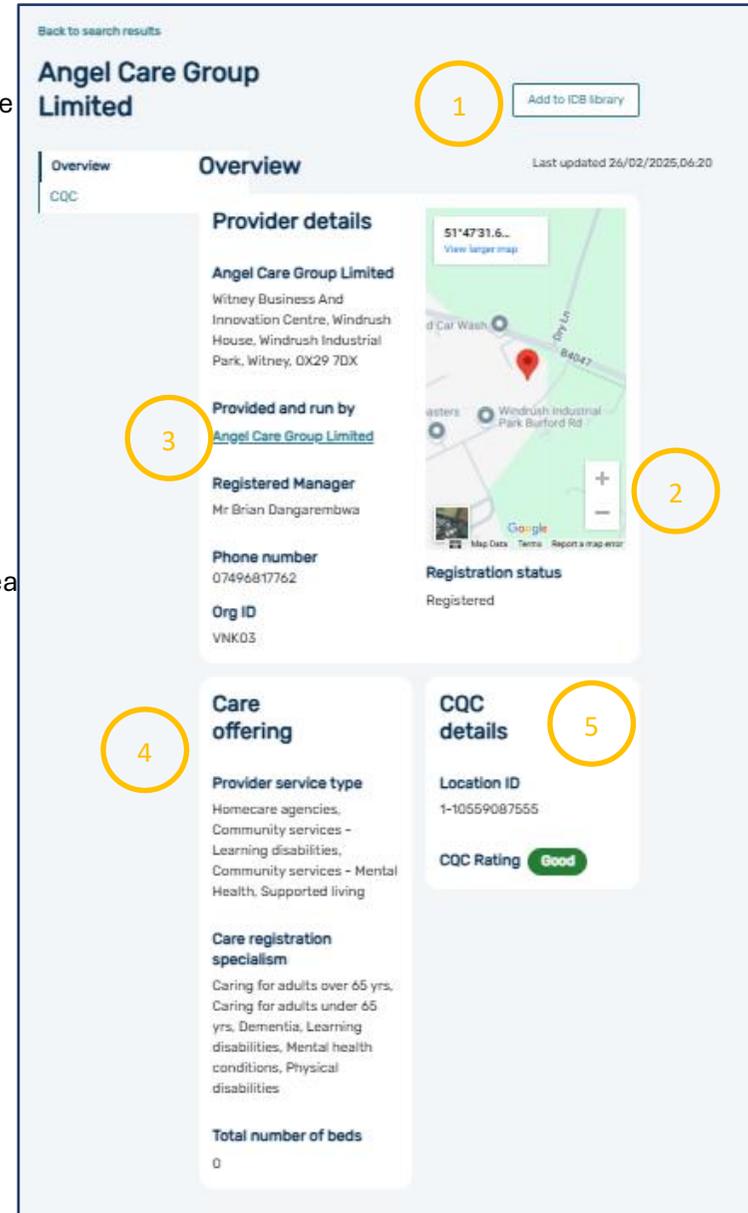
7.6   Adding a provider

A provider can be in the CQC library and added to the ICB library as referenced in 5.2.
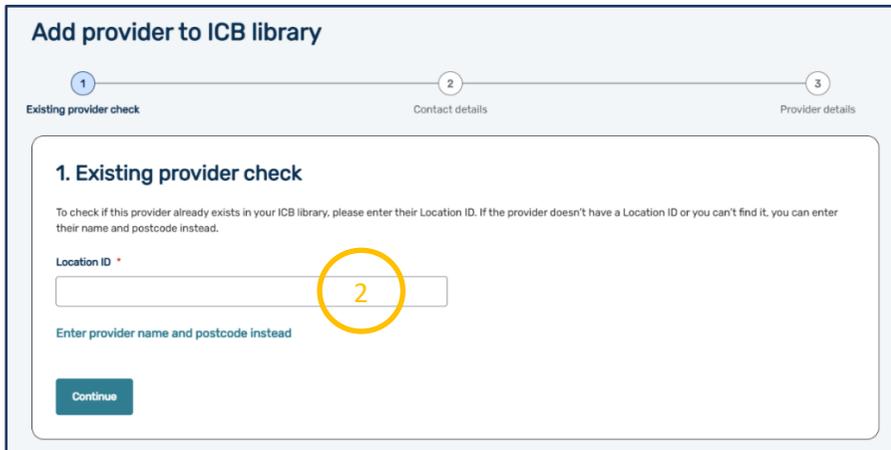
The below outlines how to add a provider from the ICB library.

1. Click 'Add Provider'.
2. Enter the Provider 'Location ID'. This is a code used to identify the geographic location where a provider's services were performed and can be located from the Care Quality Commission website.
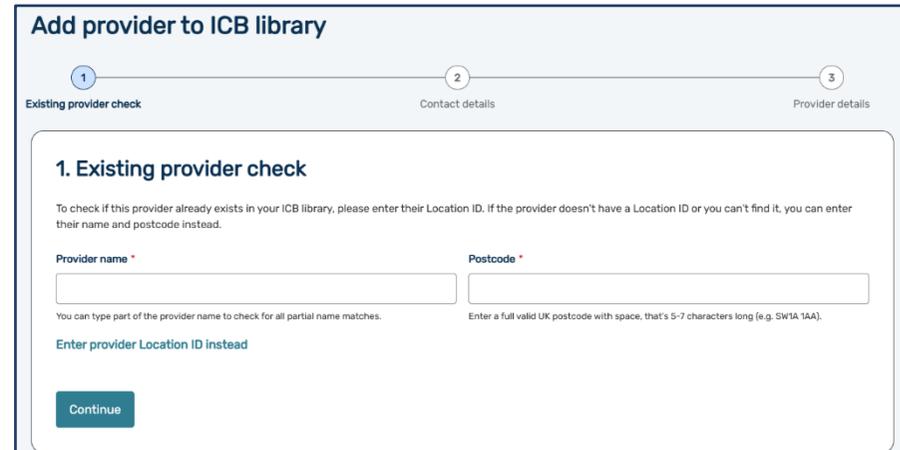
Once you have searched and located the provider the Location ID will appear in the address bar at the top left of your browser for instance https://www.cqc.org.uk/location/1-123927323. The last numbers are the Location ID 1-123927323. Alternatively, you can enter the provider name and postcode and press 'Continue'.

7.6.1 If the provider is found

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

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

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

Do you want to continue?   ✕

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

Angel Care Group Limited   Open record in new tab   Add to ICB library
Witney Business And Innovation Centre, Witney, OX29 7DX

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

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

Cancel   Continue
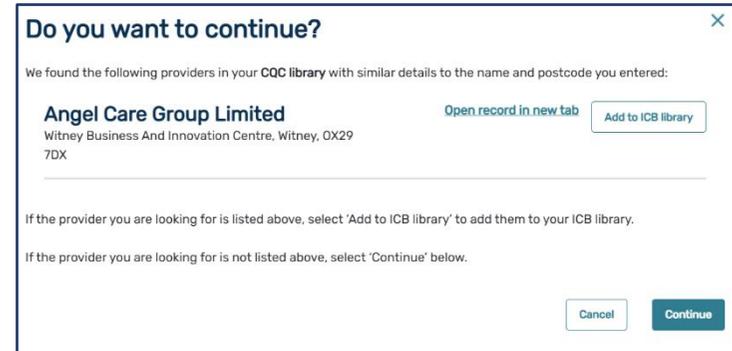
7.6.2 If the provider is not found

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

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

Add provider to ICB library

①————————②————————③
Existing provider check   Contact details   Provider details

2. Contact details

Provider name *
[angel]

Address

Address line 1 *   Address line 2 *
[   ]   [   ]

Town/City *   County *
[   ]   [   ]

Postcode *
[ox29 7dx]
Enter a full valid UK postcode with space, that's 5-7 characters long (e.g. SW1A 1AA)

Registered manager name   Phone number
[   ]   [   ]
                                          Enter a valid UK landline or mobile number that is 11 digits long.

Email address
[   ]

Back   Continue

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

Add provider to ICB library

① Existing provider check ——— ② Contact details ——— ③ Provider details

3. Provider details

Org ID *

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

Registration status

Provider status *

Active

Reason

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

Care registration specialism

Provider service type *

Provided and run by

Total number of beds

Finance

Uses scheduling?

◉ No   ○ Yes

Vendor site reference

Day time start

00:00

Night time start

00:00

Back   **Save**

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

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

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

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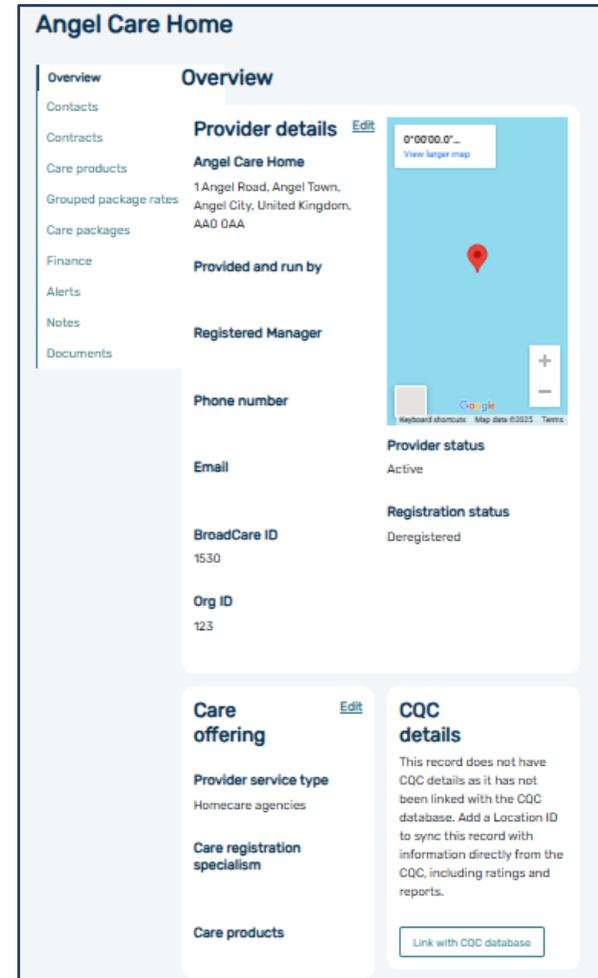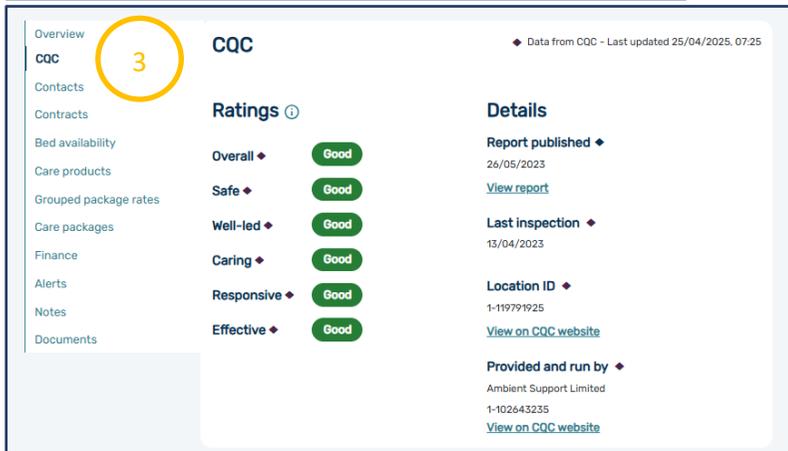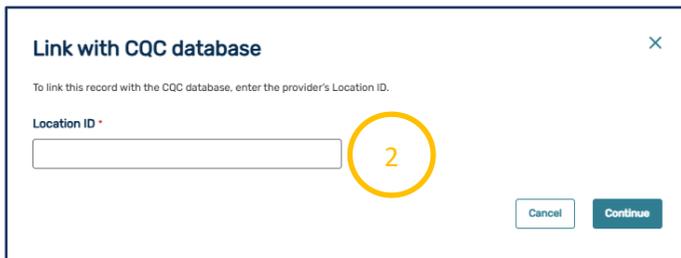
8   Brokerage

The brokerage section allows for an ICB to manage care.

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

1. Entering the information will allow you to filter and search for brokerage episodes, these episodes follow the package of care journey.
2. **'Show advanced filters'** – This Allows for further information to be added.
3. **Active/Closed** – This will allow You to filter between current active brokerage episodes and closed episodes.
4. **Key** – This indicates any bids that are awaiting a review and those bids that are in query. The key will show next to 'View' if in one of these statuses.
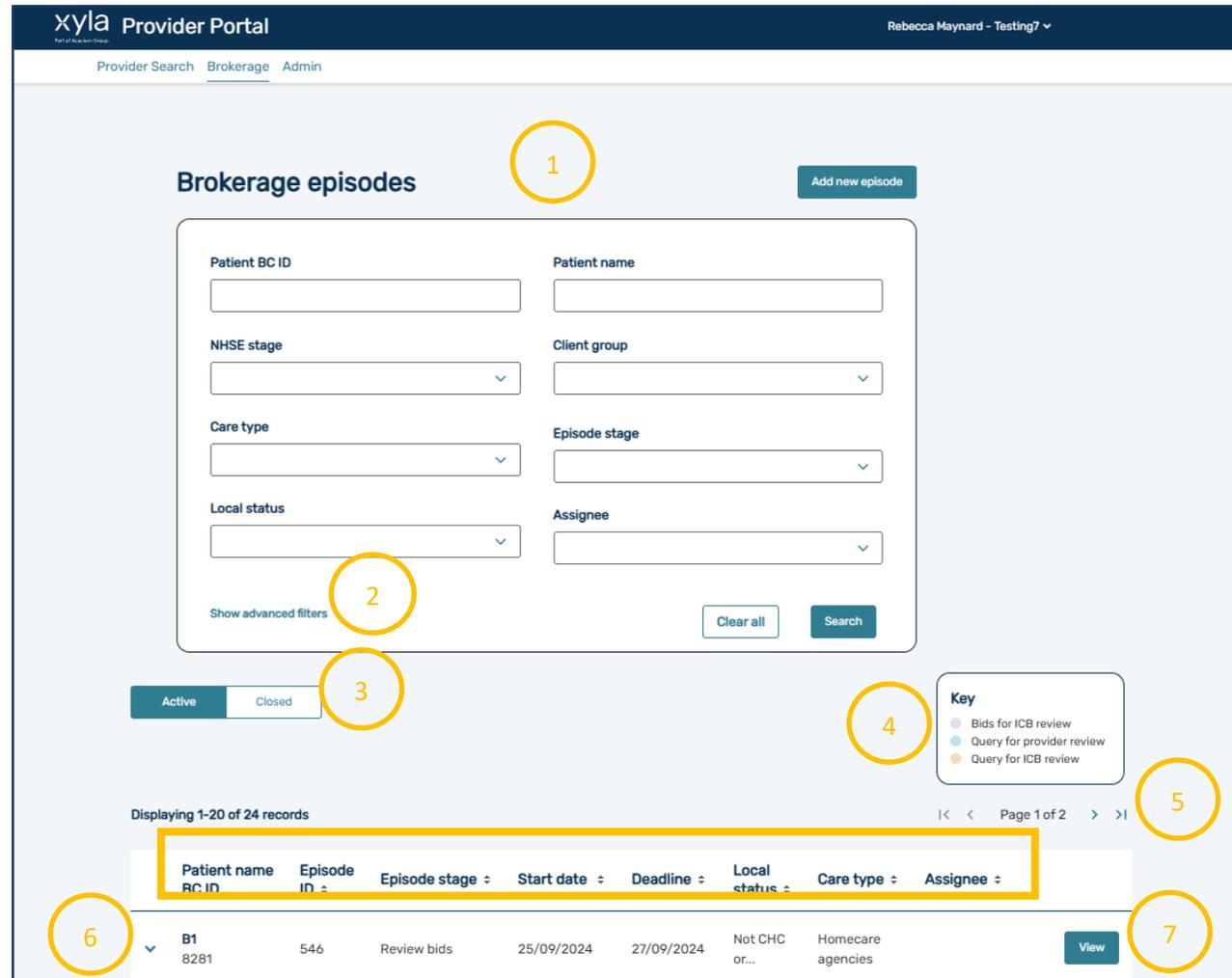
5. **Arrows** – This will show the episodes and allow you to navigate through the pages. By clicking on the headings, you can change the order of the episodes.
6. **Arrow** - This will open a summary of the brokerage episode.
7. **View** - This will open the episode.

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Patient name BC ID	Episode ID ⇅	Episode stage ⇅	Start date ⇅	Deadline ⇅	Local status ⇅	Care type ⇅	Assignee ⇅	
B1 8281	546	Review bids	25/09/2024	27/09/2024	Not CHC or...	Homecare agencies		View

Client group	Physical Disabilities	**Created**	25/09/2024, 11:08 by Joanna Smith
NHS number	RES-TRI-CTED	**Last updated**	03/10/2024, 12:40 by Nicola Durham
NHSE stage	None		
Local stage	CHC		
Classification	CHC/FNC		
Record owner	East Downs		

8.1 Brokerage - How to create a new brokerage episode

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

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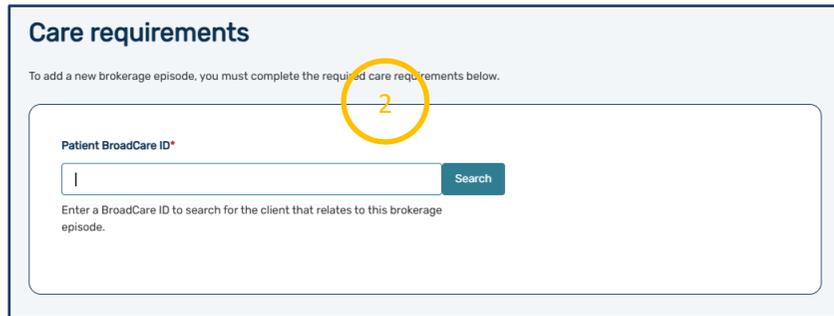
3. If a Patient is located you will be presented with a match, you must complete the required care requirements to continue. Press 'Create'. Please note if you do not have PID turned on in BroadCare certain items, for instance NHS number will show as 'RESTRICTED'

Once the Brokerage Episode has been created you will be presented with the below. You will not be able to move through the sections 1-6 without completing the section before.

Care type*

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

Assignee*

Local status

Episode start date*

📅 25/04/2025

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

Proposed start date of care

📅

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

Anonymised care requirements document*

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

Upload care requirements

Supporting documents

Upload supporting document

Additional information

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

Cancel   Create

8.1.1 Brokerage – Care requirements

This is completed whilst setting up a new Brokerage Episode.

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

At any stage during the brokerage process you can view or raise any queries, any related documents, and close the episode.

8.1.2 Brokerage - Select Providers

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

1. Click start.
2. Select the providers for this brokerage episode.
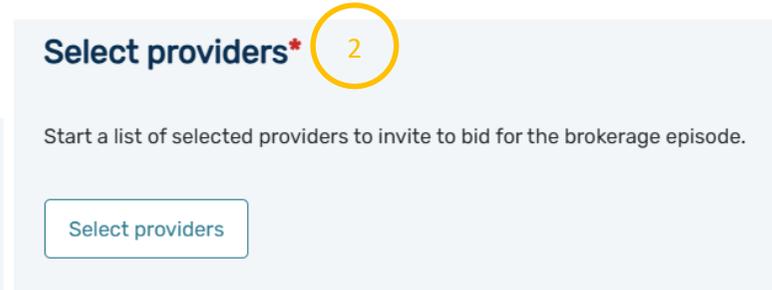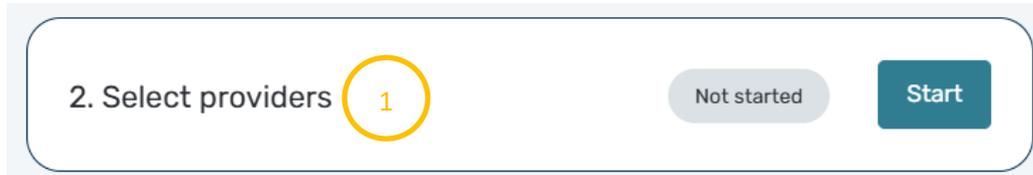
3. You will be presented with 'Provider search', all providers will be displayed, and you will have the option to search for specific providers in the ICB library, CQC library, and adding a new provider. Please reference Point 5 for more information on the 'Provider search' function.
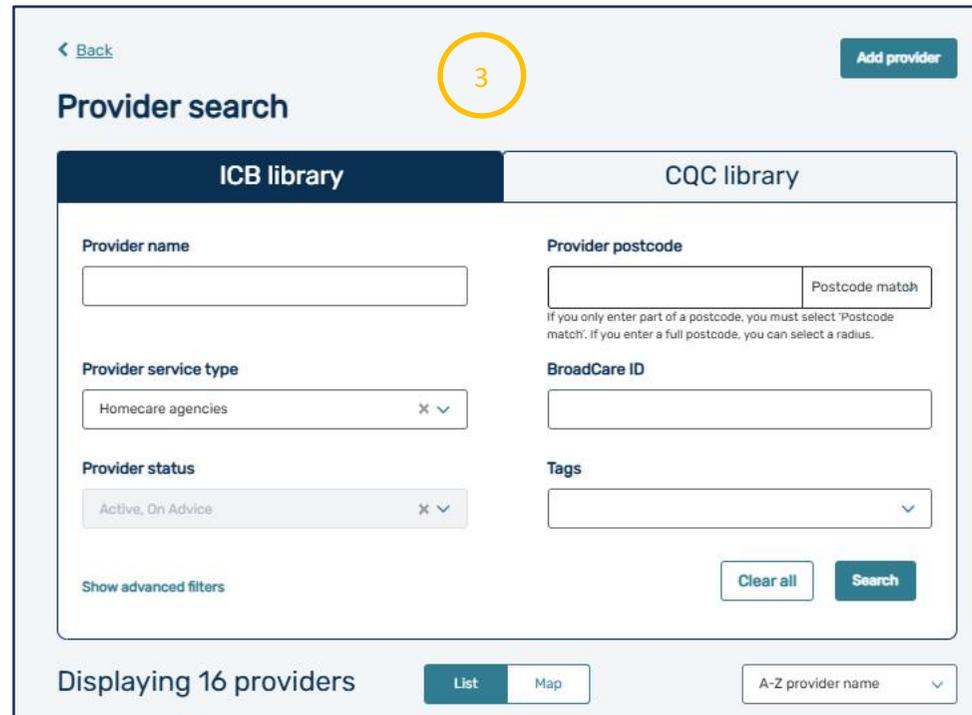
4. Select the providers by clicking in the box,

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

Expand ∧   2 providers selected | Episode ID: 1564   (5) Continue

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

Set a deadline

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

Deadline date   **Time**   (6)

📅 29/04/2025   🕐 --:--   Edit

Enter in the format DD/MM/YYYY.

Edit deadline

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

Deadline date *   **Time**

📅 29/04/2025   🕐 --:--

Enter in the format DD/MM/YYYY.

Reason for deadline change *

[∨]

Cancel   Save

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

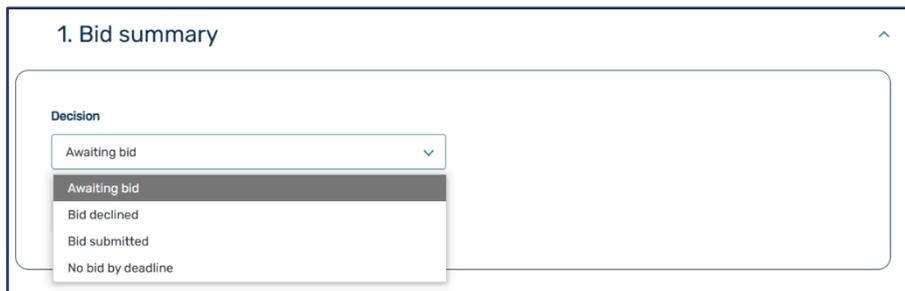### 8.1.3 Brokerage - Review bids

1. Click 'View'.

2. This will allow you to view the bids and view the provider by clicking on the blue hyperlink.
3. 'View' will allow you to raise a query and view the decision.
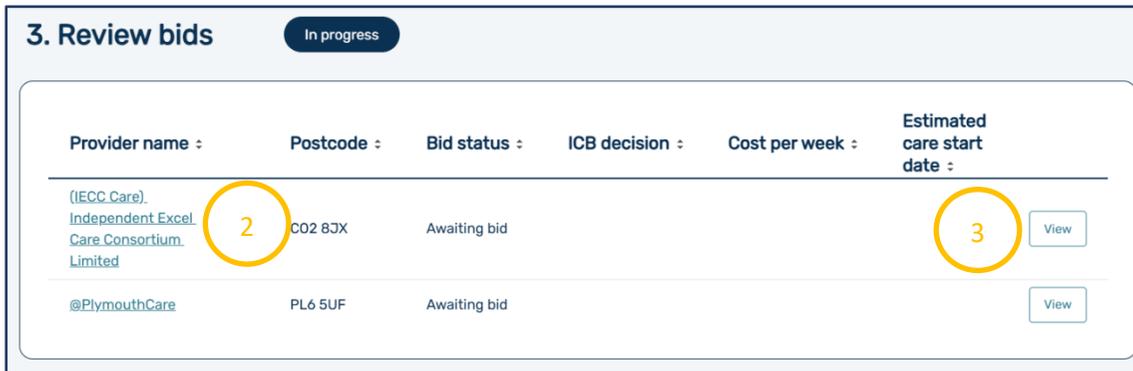
4. If you are awaiting a bid, one has not been received, or if it has been rejected then you will not be able to proceed to point 2-4.
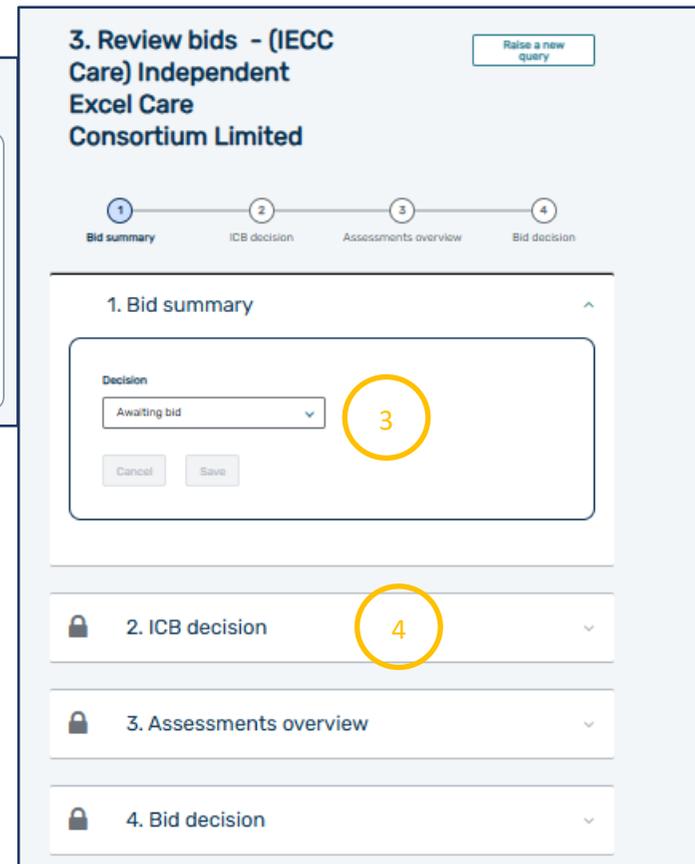
8.1.3.1 Brokerage – Review bids - Bid declined

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

Decision

Bid declined	⌄

Reason for declining *

	⌄

Comments

Cancel	**Save**

8.1.3.2 Brokerage – Review bids - No bid by deadline

Once this 'Decision' has been entered press 'Save'.

8.1.3.3   Brokerage – Review bids - Bid submitted

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

Click Save when all required information has been completed.

Decision

Bid submitted

Cost per week *

£

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

Estimated start date of care *

Planned assessment date

Enter in the format DD/MM/YYYY.

Upload supporting document

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

Comments

Cancel   Save

8.1.3.4 Brokerage – Review bids - ICB decision

8.1.3.5 Bid not progressed

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

8.1.3.6 Bid progressed

This will allow you to record any comments.

8.1.3.7 Brokerage – Review bids - Assessments overview

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

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

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

3. Assessments overview

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

Add assessment

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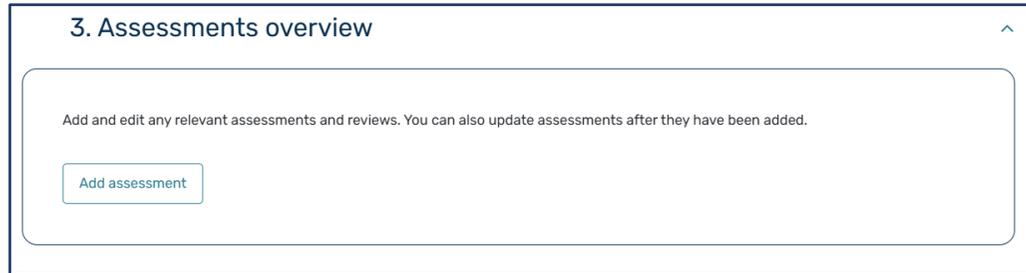
8.1.3.8 Brokerage – Review bids - Bid decision

This will allow you to accept the bid.

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

4. Bid decision   Accept bid

Are you sure you want to accept this bid?

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

Comments

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

Cancel   Accept bid
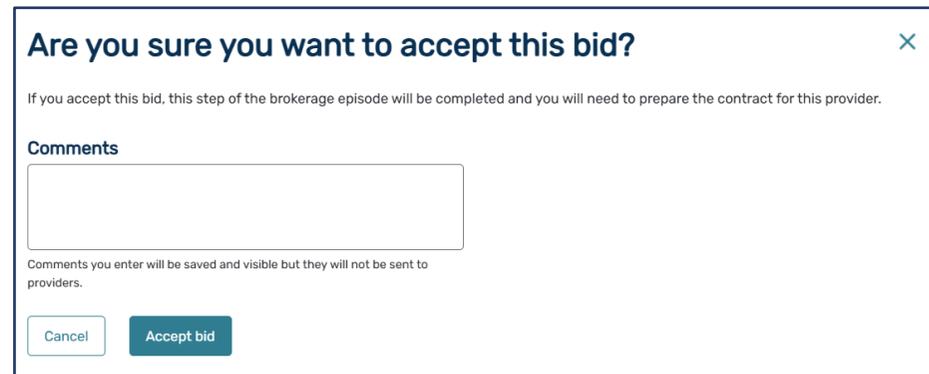
8.1.3.9 Withdrawing a bid

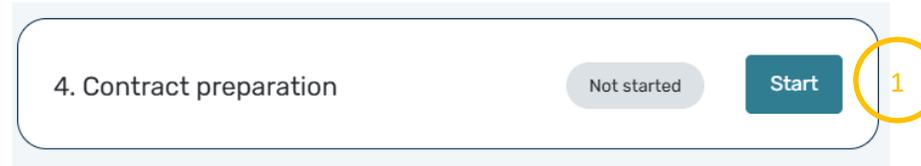Once a bid has been submitted, if the ICB has not progressed with the bid they have the ability to withdraw it.
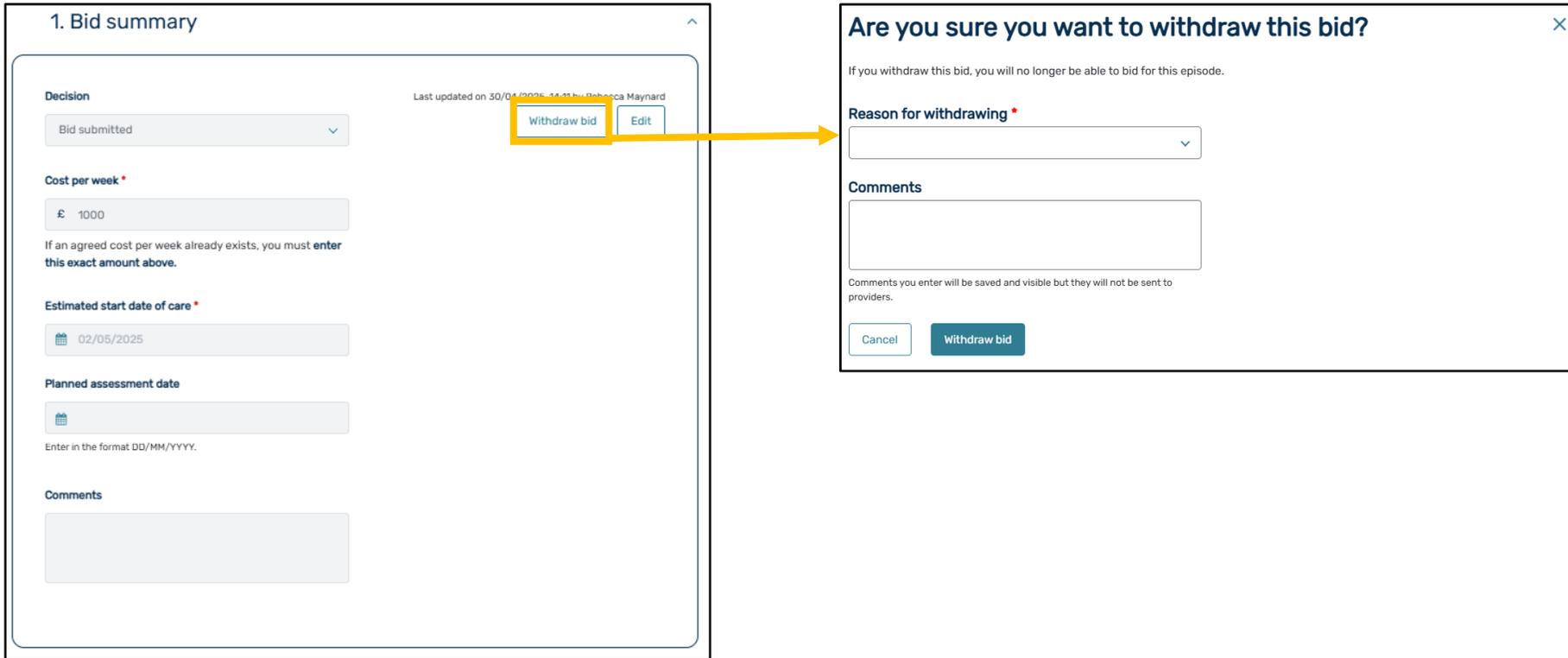
Once withdrawn the ICB can reopen the bid if required or if closed in error.

8.1.4   Contract preparation
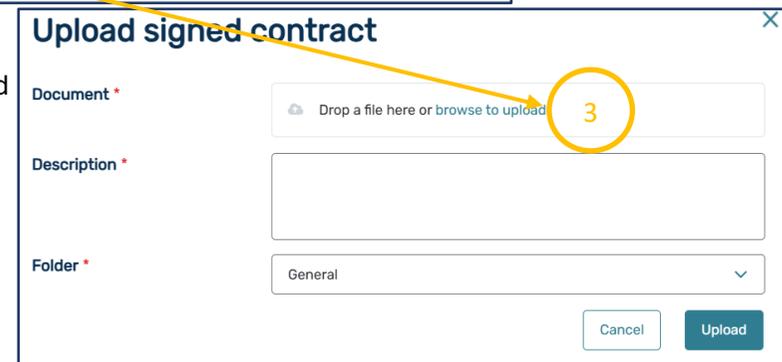
1.   Click Start.

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

If you wish to create a care package you can click on the hyperlink 'create a care package' which will take you to your BroadCare instance.
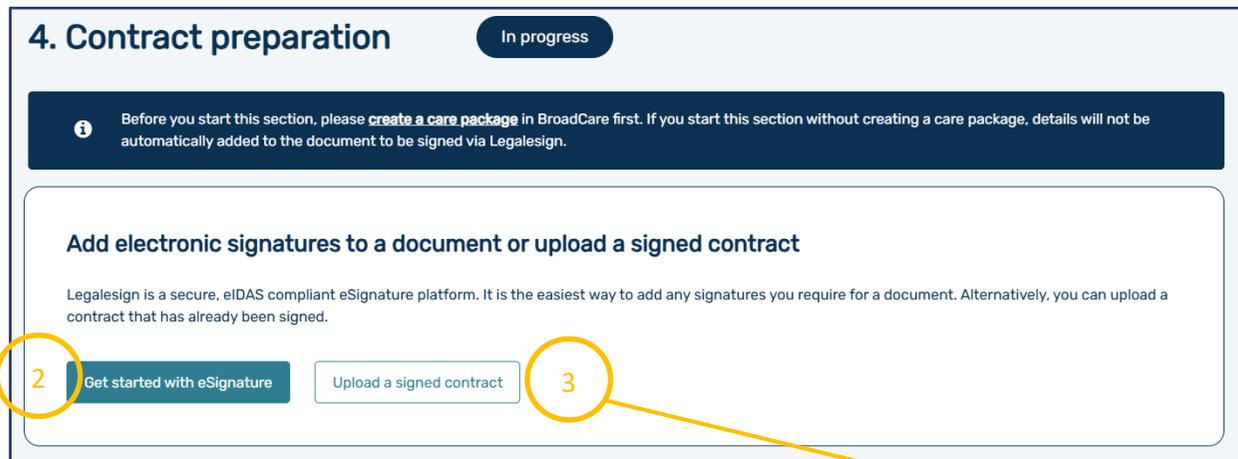
2.   Sign a digital contract using Legalesign.
3.   If you would not like to sign a digital contract, then you can upload a signed contract by choosing the document or drag and drop the file, add a document description, and choose what folder you would like the signed document to be saved in. Clicking 'Upload' will upload the contract.

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

8.1.4.1 Contract Preparation - Signing with a digital signature

1. Click 'Get started with eSignature.
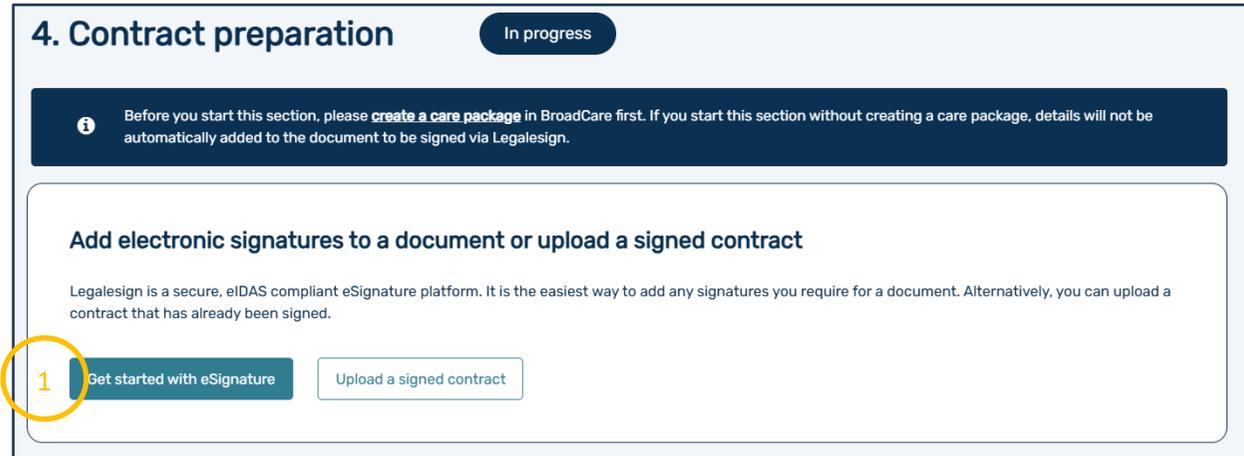
2. You can use an existing contract template, or you can upload a new document.

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

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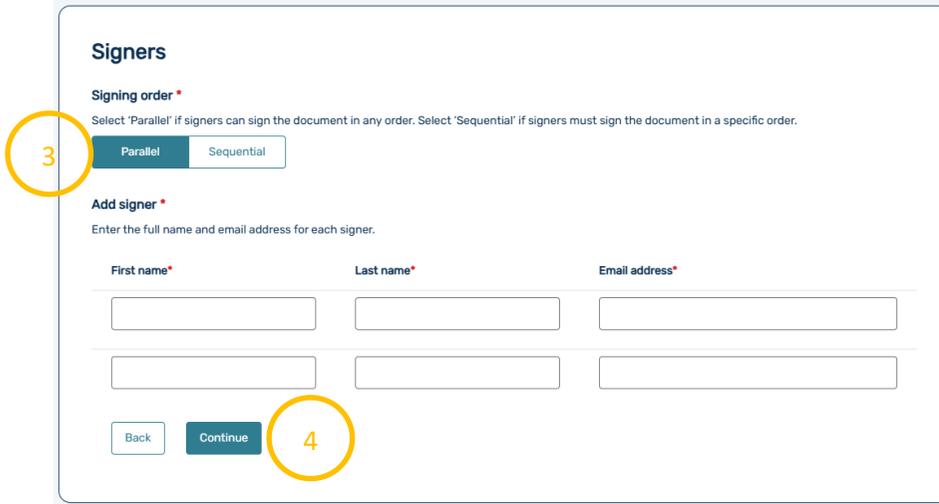

The contract templates are stored within the Legalesign portal, only certain members of the ICB will have access to the portal. Legalesign uses an electronic signature (eSignature) as a digital replacement for a handwritten (wet) signature and is just as legally binding.

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

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

4. Once selecting the signers and pressing 'Continue' you will be directed to the contract, depending on the bookmarks used on the template will determine what information is pulled through on to the contract.

5. After creating the care package, you can select the 'Contract ID' from the drop down, check all other information and update where required.

6. Once all information has been checked and updated press 'Send document'.

7. This will generate a pop-up advising you to ensure that all details are correct before sending.

8. An email containing the contract will be sent to the chosen Provider and you as the ICB/HB and will depend on if you have selected
    - **Parallel** allows individuals to sign in any order
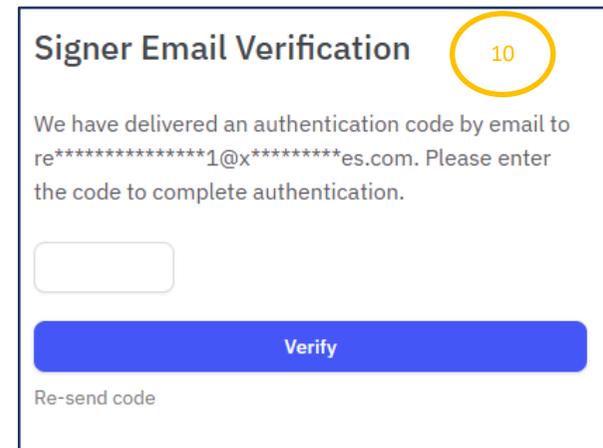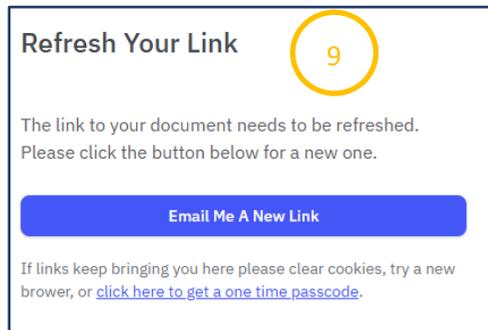   - **Sequential** allows signatures in order of signers

When you receive the contract by email, please click the link to access the document from the email.

Please find a pdf draft copy attached to this email.

R M, click here to go to document   8
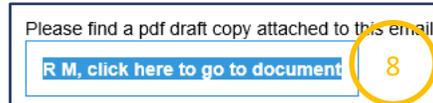
9. If the link does not work, you will be presented with the screen below, this is because your organisation does not accept the URL.

Please click on **click here to get a one-time passcode,** this will send you a code to your email address.

10. Please pop this code in the box and click **Verify.**

Refresh Your Link   9

The link to your document needs to be refreshed. Please click the button below for a new one.

Email Me A New Link

If links keep bringing you here please clear cookies, try a new brower, or click here to get a one time passcode.

Signer Email Verification   10

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

11. 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**.
12. 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.
13. You can use the scroll bar on the right to view all the contract. The magnifying glass will allow you to enlarge the contract.
14. 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.
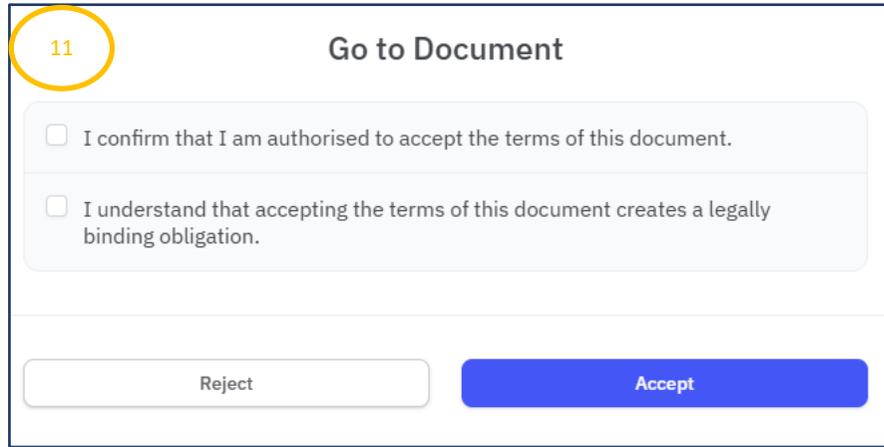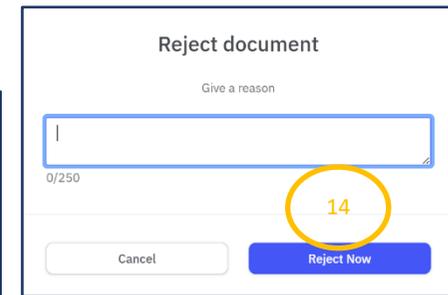
Go to Document

- ☐ 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.
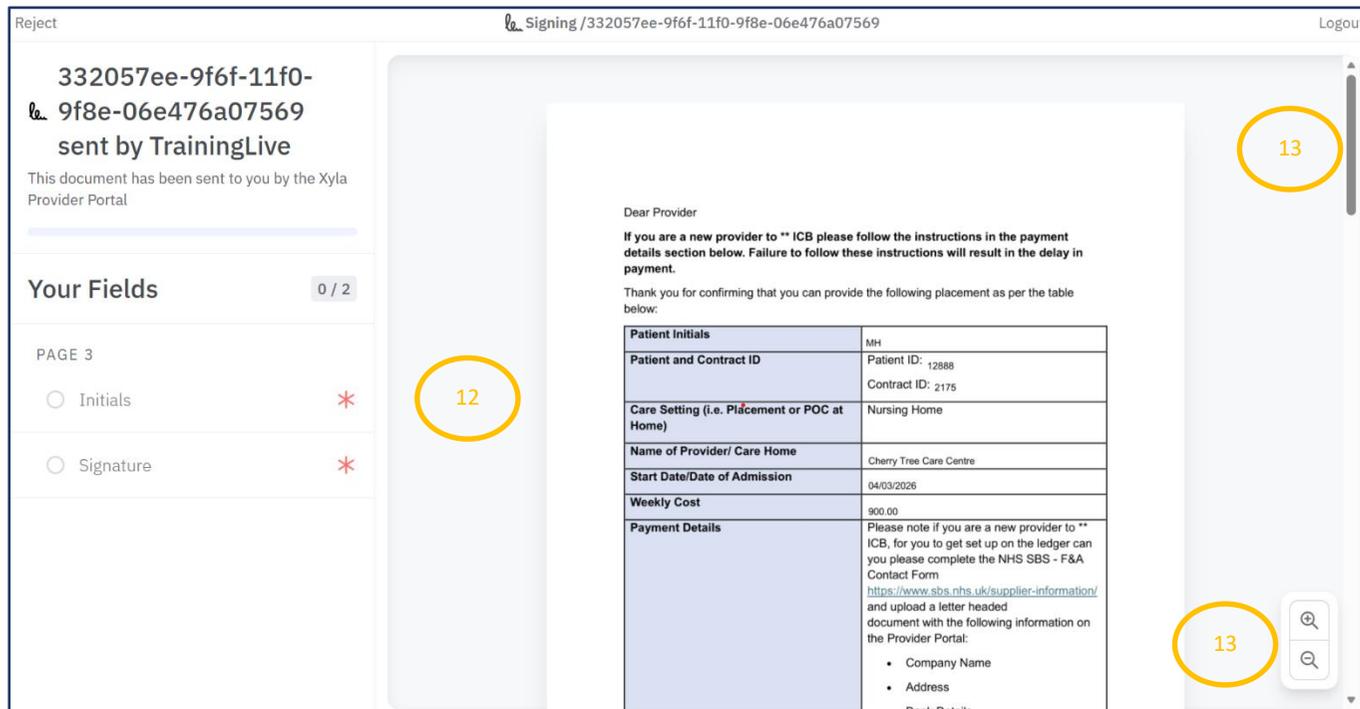
| Reject | Accept |

Reject document

Give a reason

0/250

| Cancel | Reject Now |

Reject   Signing /332057ee-9f6f-11f0-9f8e-06e476a07569   Logout

332057ee-9f6f-11f0-9f8e-06e476a07569 sent by TrainingLive

This document has been sent to you by the Xyla Provider Portal

Your Fields   0 / 2

PAGE 3

○ Initials ✳

○ Signature ✳

Dear Provider

If you are a new provider to ** ICB please follow the instructions in the payment details section below. Failure to follow these instructions will result in the delay in payment.
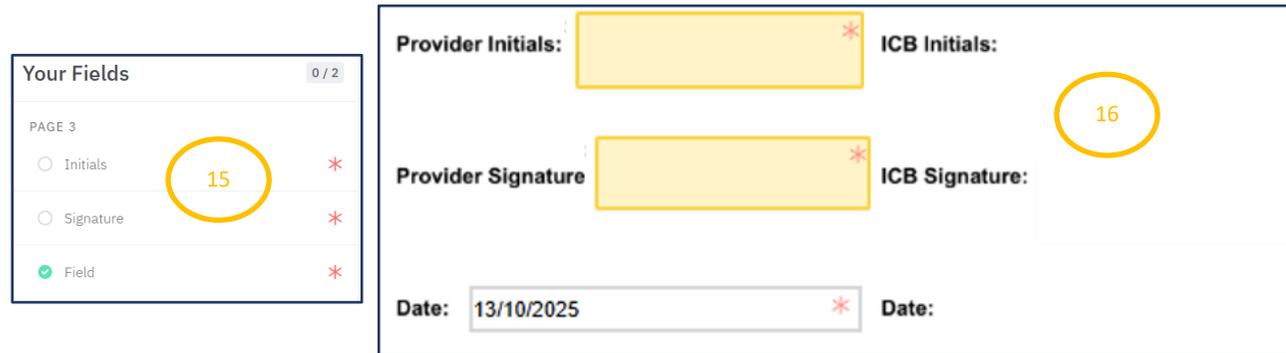
Thank you for confirming that you can provide the following placement as per the table below:

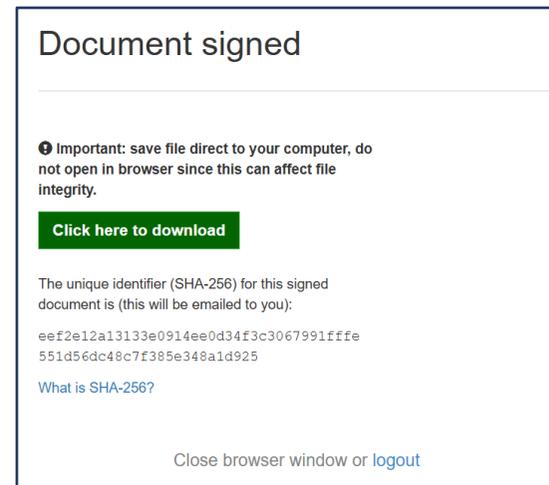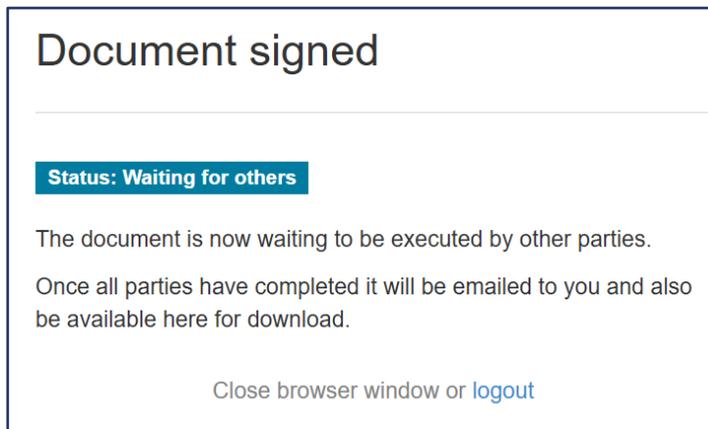| Patient Initials	MH
Patient and Contract ID	Patient ID: 12888 Contract ID: 2175
Care Setting (i.e. Placement or POC at Home)	Nursing Home
Name of Provider/ Care Home	Cherry Tree Care Centre
Start Date/Date of Admission	04/03/2026
Weekly Cost	900.00
Payment Details	Please note if you are a new provider 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: • Company Name • Address

15. 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.

16. Alternatively, you can scroll down, the **yellow boxes** indicate where you are required to add information. The **Date** will automatically populate.

17. 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.

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

1. Select 'Get started with eSignature and select 'Upload a new document'.
2. Drag and drop or browse and upload the document (please note this must be in PDF). Add a description of the document before clicking 'Upload'.
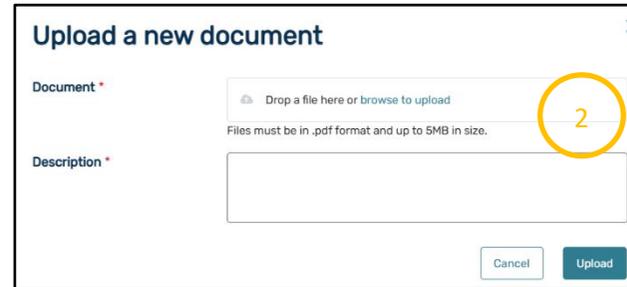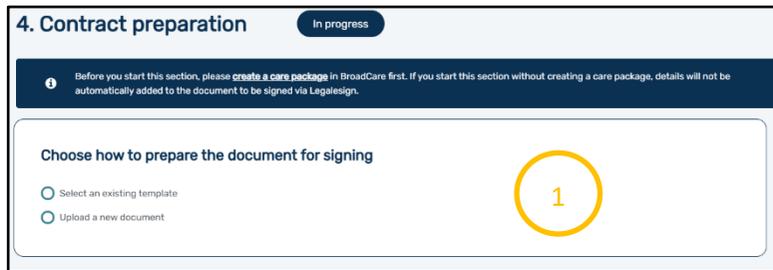
3. Press Continue.
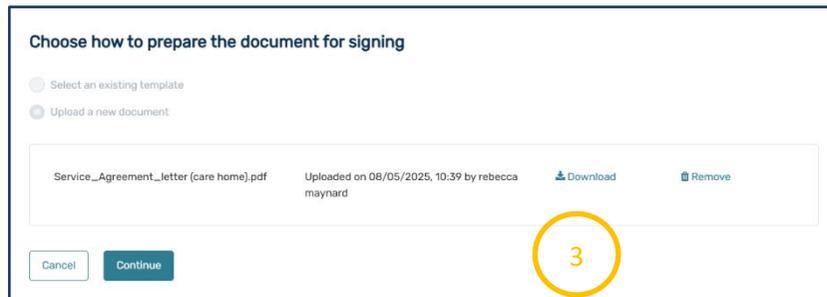
4. You will be presented with the option to add initials, signature and date, and text fields to the contract to capture all the necessary information for both the signer(s) and the sender (ICB) by dragging the required field to the area you would like the information to be captured.

For instance, dragging the Signature box to the Signature section of the document.
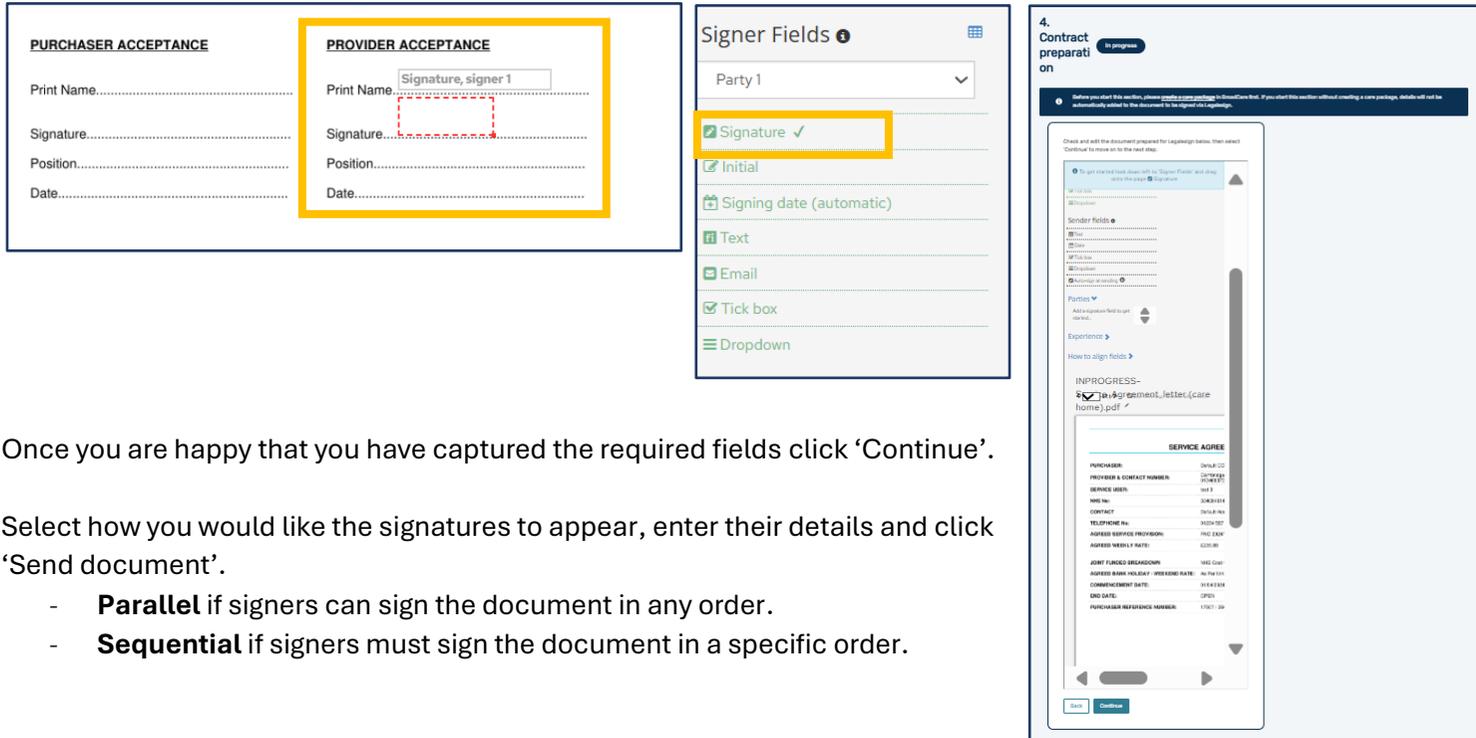
Once you are happy that you have captured the required fields click 'Continue'.

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

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

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

The document will be saved in the Brokerage episode and in Case Management on the Patient's BroadCare record.
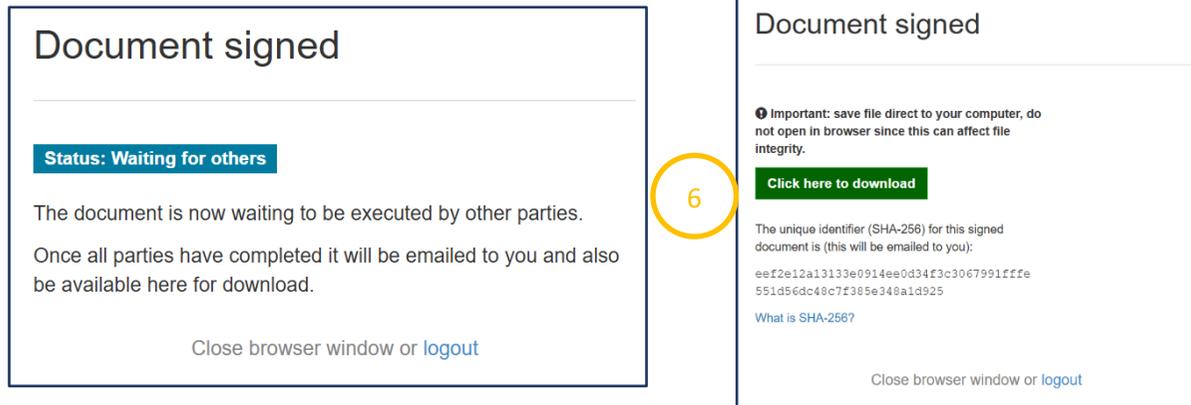
8.1.4.4   Contract preparation – Uploading a signed contract

1. If you have already received a signed contract rather than using as digital signature you can click 'Upload a signed contract'.
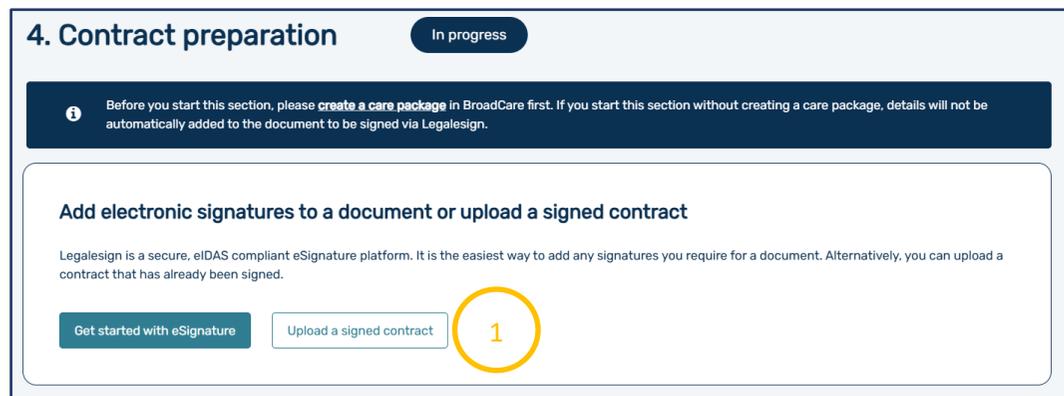
2. Drag and drop the file or browse to upload your contract.
3. Add a description of the document.
4. Choose the name of the folder you wish to save the document in. Please note the Folder names will only be available once they have been added to the Case Manager Folder Lookup within BroadCare.
5. Click 'Upload', this will upload the document to the brokerage episode and save in Case Management in BroadCare.

8.1.4.5 Declining a contract

If a contract is rejected and you need to reissue the contract after amendments have been made to the contract, then you will need to revert the bid to progressed to start the contract process again.

Please note that if the contract has been signed and then it is noticed that the contract is incorrect you will need to create a new 'Brokerage episode' as 'Revert to bid' will only work whilst there is no signed contract.

1. Click on 'View' within Review bids.

2. Within Review bids click 'Revert bid to progressed'.
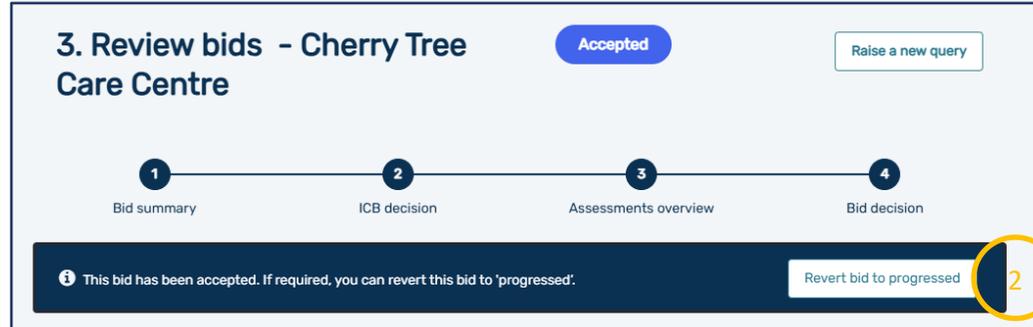
3. Add the reason for the bid being reverted to progressed in the 'Comments' box for instance 'Cost is showing incorrect amount' and click 'Revert bid to progressed'.
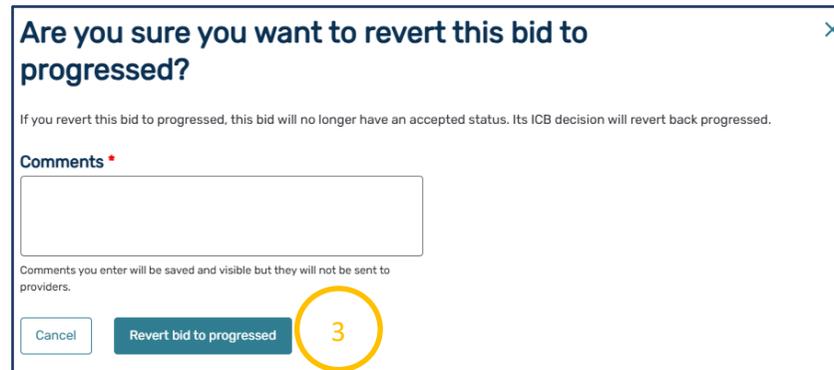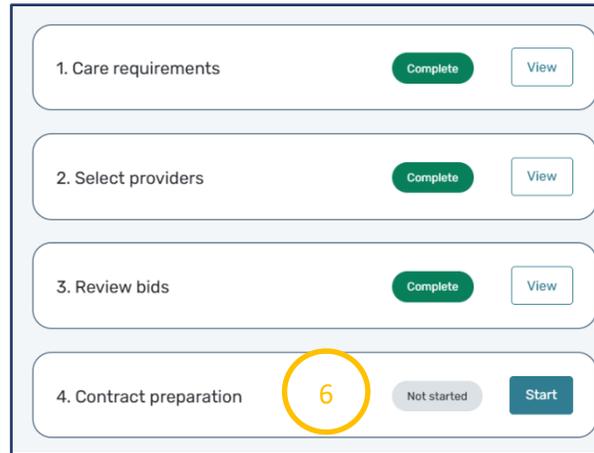

4. Click back to refresh and click on 'Review bids' again, within Review Bids scroll to the bottom and within 'Bid decision' select 'Accept bid'.

5. Enter the reason for accepting and click 'Accept bid'.
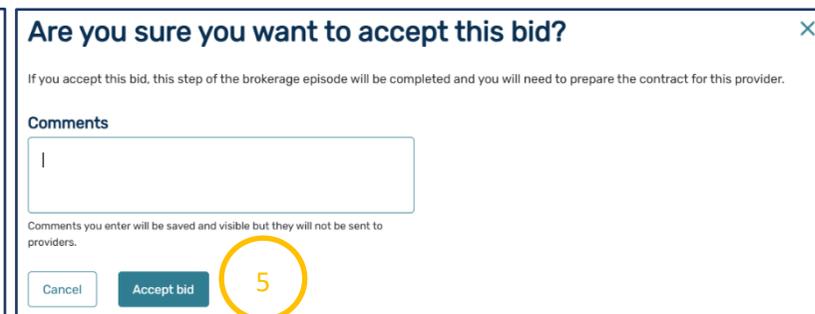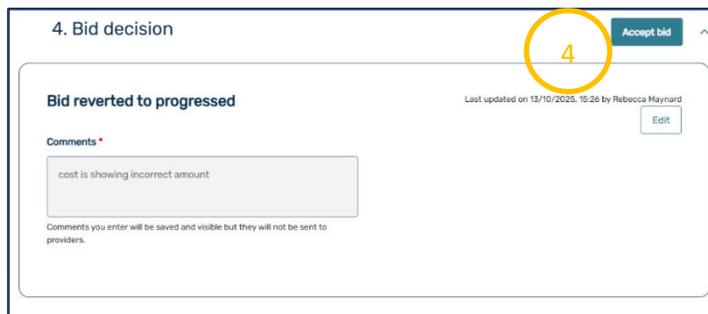
6. This will now allow you to start the 'Contract preparation' stage again.

8.1.5   Contract status

This shows the status of the contract, for instance if the email has been sent or the contract is signed. The contract can also be viewed by clicking 'View contract'. The document will be saved in Case Management on the Patient's BroadCare record.
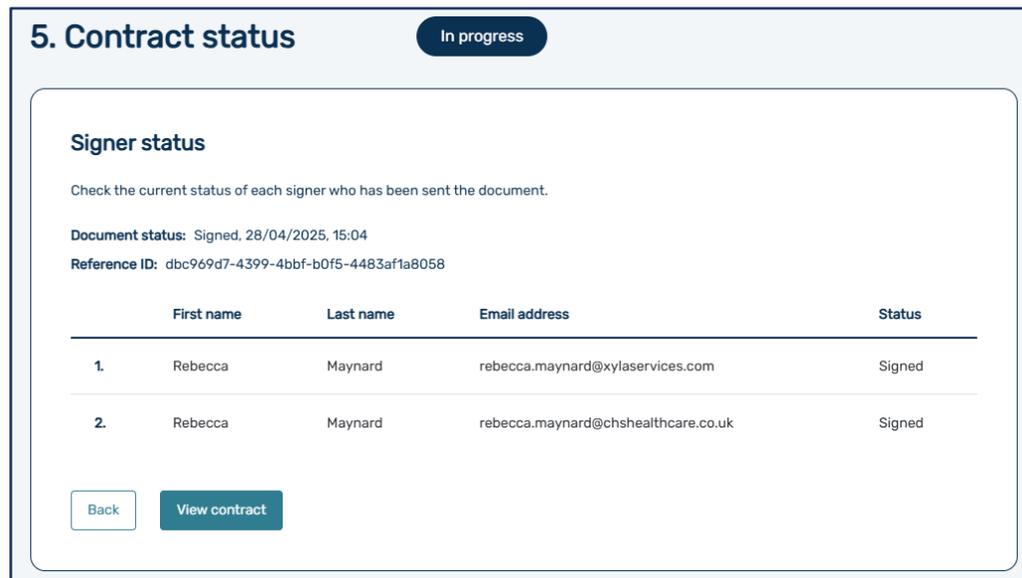
8.1.6 Complete episode

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

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

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

Are you sure you want to complete this episode? ✕

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

Cancel   Complete episode

8.2   Viewing a brokerage episode

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

8.2.1   How to view a brokerage query

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

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

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

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

8.3 How to raise a new brokerage query

Filter for the episode you wish to view.

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

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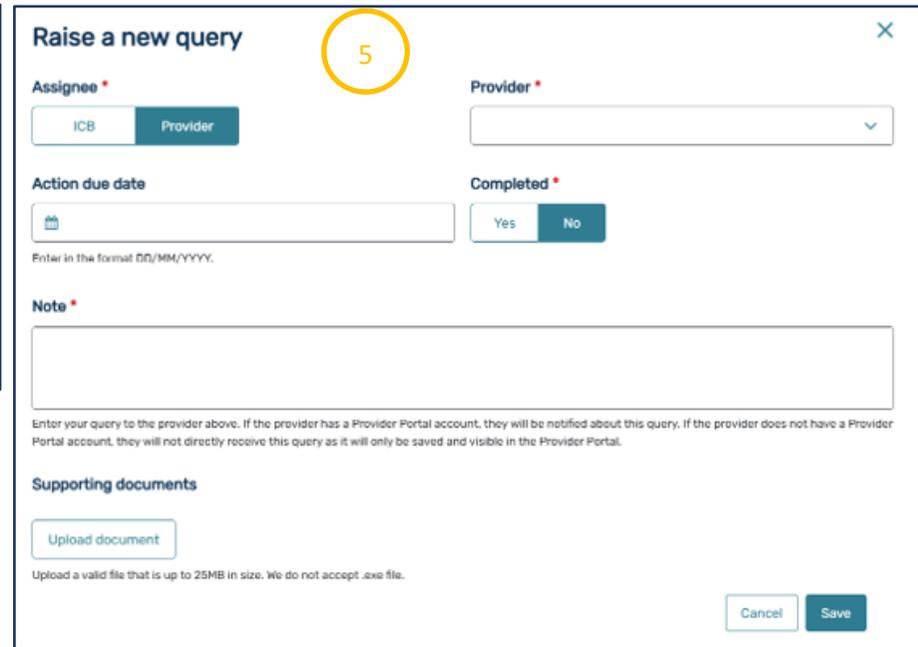
9   Reporting

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

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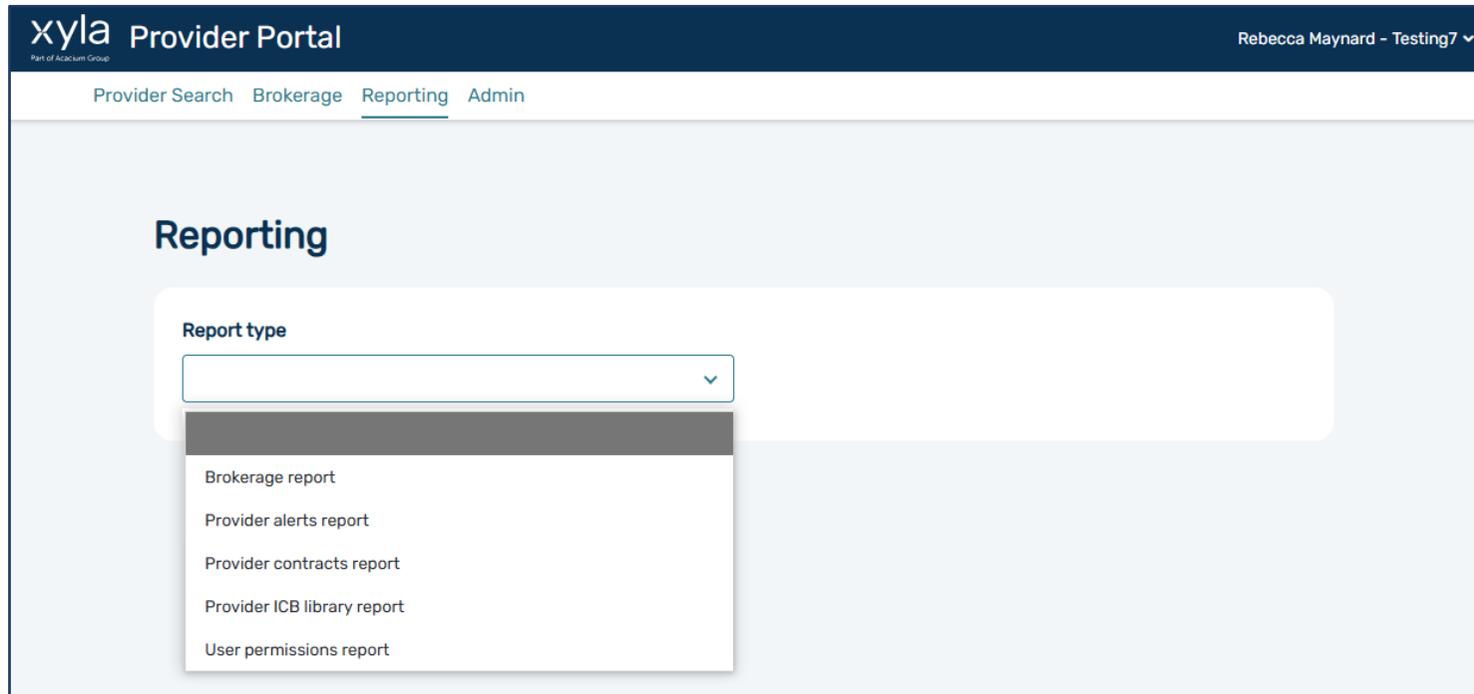
9.1 Brokerage report

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

9.1.1 Standard filters

Patient BC ID

Patient Name

NHSE Stage for instance CHC, Closed, Fast Track

Client Group for instance Autism, Fast Track, Mental Health

Care Type for instance Homecare agencies, Nursing homes

Episode stage for instance Completed, Contract preparation

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

Assignee which is the person responsible for the brokerage episode
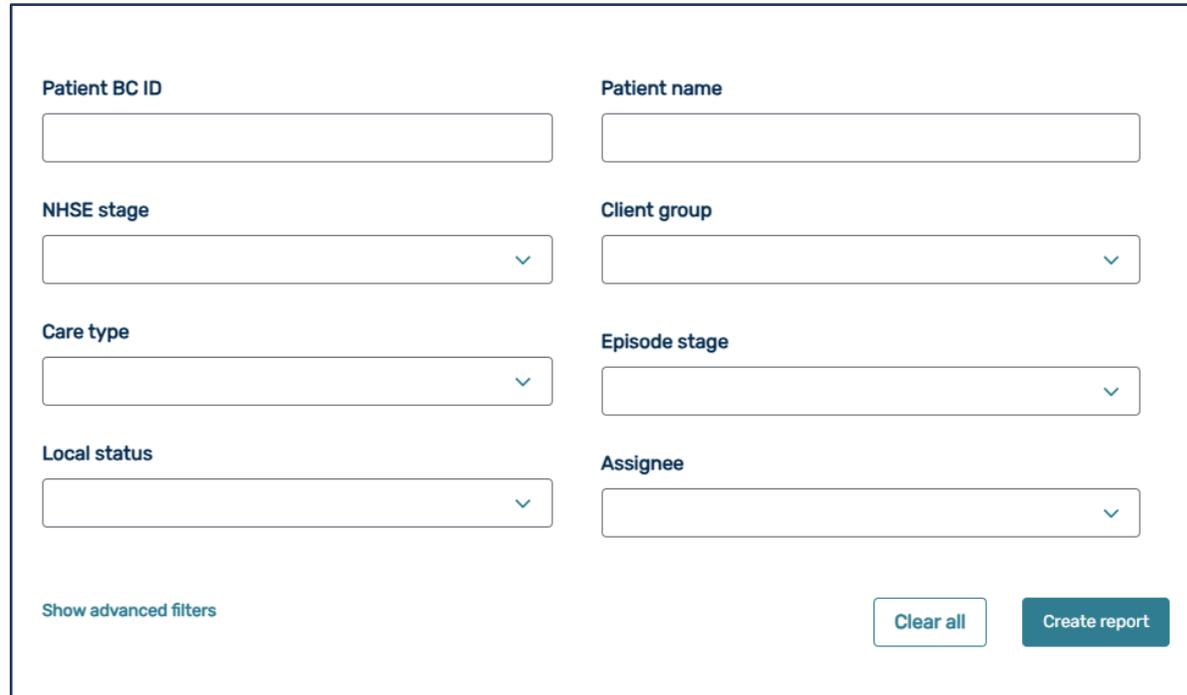
Patient BC ID	Patient name
NHSE stage	Client group
Care type	Episode stage
Local status	Assignee

Show advanced filters   Clear all   Create report

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

9.1.2 Advance filters

Click 'Show advanced filters' for additional filter options and 'Hide advanced filters' to remove.

Additional filters that can be applied.

Classification for instance CHC/FNC, Children.

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

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

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

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

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

Episode status for instance Active, Closed.

Outstanding bid / queries for instance bids for ICB review.

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

Example of how the Brokerage Report downloads into excel.

9.2 Provider alerts report

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

Alert type for instance General Alert, Safeguarding

Alert subtype, this will be available to select once the **Alert Type** has been added for instance domestic violence

From date and **To date** of the Alert
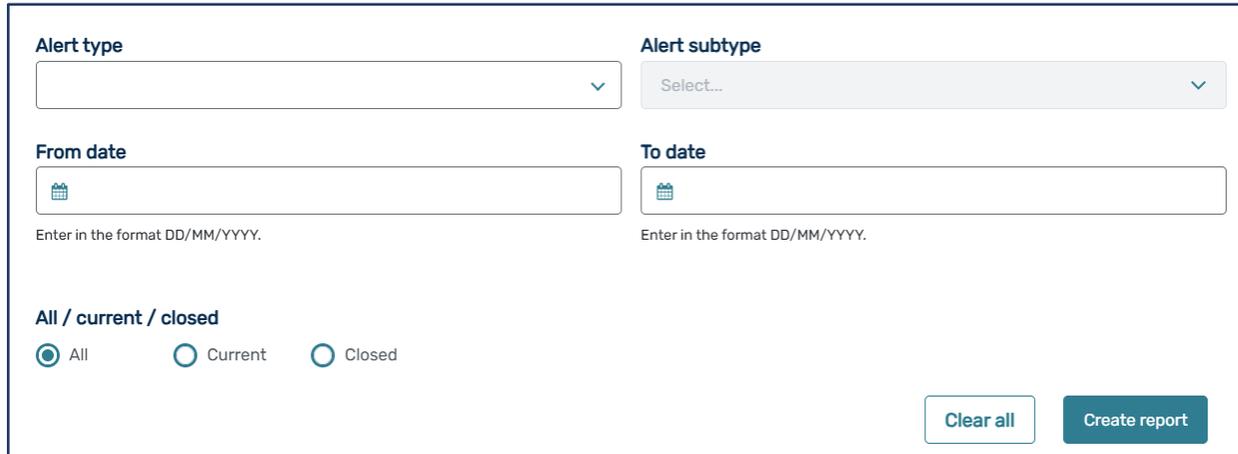
All / current / closed

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

Example of how the Provider Alerts Report downloads into excel.

9.3   Provider contracts report

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

Contract type

Signed, Yes or No

Issue date from and **Issue date to**

Start date from and **Start date to**

Renewal date from and **Renewal date to**

Review date from and **Review date to**

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

Example of how the Provider Contracts Report downloads into excel.

9.4 Provider ICB library report

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

Provider name

Provider postcode

Provider service type for instance Homecare agencies, Nursing Homes

BroadCare ID which is the unique Provider ID

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

Tags, if these have been set up on a provider record you can select using the drop down for instance to highlight their specialism for instance dementia care
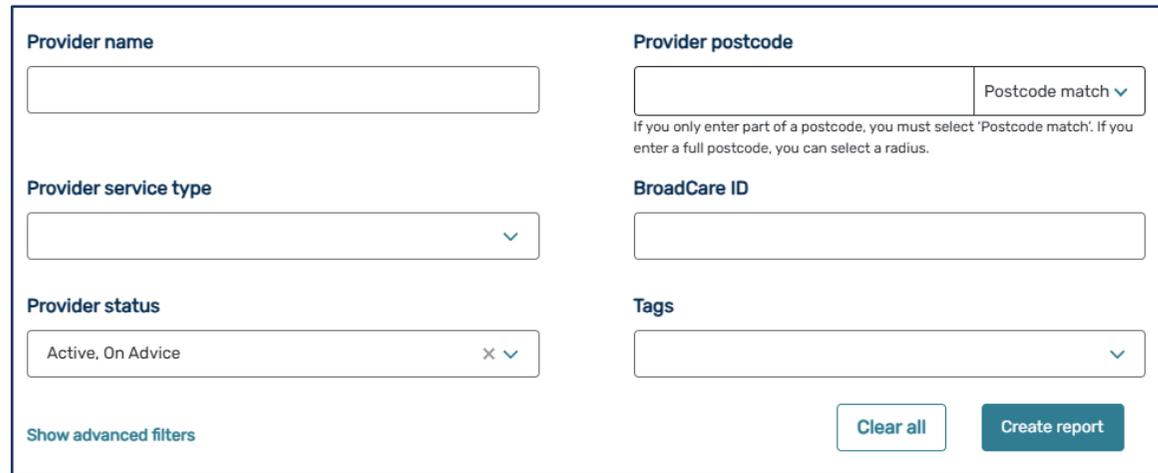
Once the filters have been applied click **'Create report'.** It will provide you with a Description tab providing an overview of the information, and further tabs providing more detail including Provider ICB library, Tags, Contacts, Care products, Grouped package rate types, and Bed availability.

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

9.5 User permissions report

This report lists all users and their permission templates.

User type for instance ICB or Provider

Status for instance, Authenticated, Deactivated

ICB name

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

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

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

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

Example of how the User Permissions Report downloads into excel.

10 Admin

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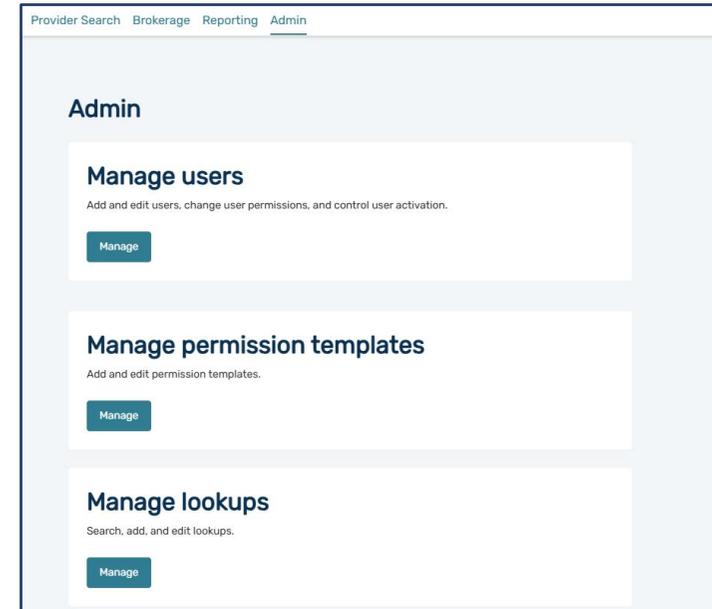
10.1 Manage users

Add and edit users, change user permissions, and control user activation. From the 'Admin' tab select 'Manage users'.

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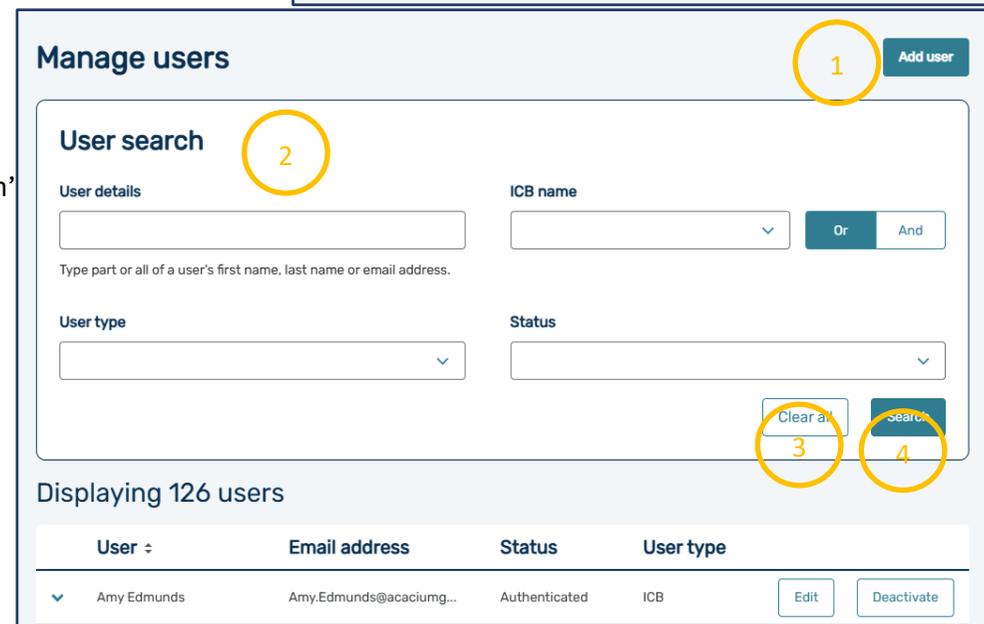
4. **Deactivate** – If a user is deactivated, they will no longer be able to access the Provider Portal.

Are you sure you want to deactivate this user?

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

Back   Deactivate user

10.1.1 How to add a new user
From the Admin tab:

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

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

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

Manage users   Add user

User search

User details   ICB name
Type part or all of a user's first name, last name or email address.   Or   And

User type   Status

Clear all   Search

Add user

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

Step 1
User details

First name *   Last name *

Email address *   User type *
                                    ○ CHS   ○ ICB   ○ Provider

Continue

ICB Access

- If All ICB's that are available in the list are required, then click 'All'.
- To select a particular ICB, this can be filtered by entering the ICB name. Please note the ICB list is not showing in this screenshot.
- Select 'Continue'.

Add user

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

Step 2
ICB access

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

All ☐ [   ]

Start typing the ICB name to filter the list below.

[Back] [Continue]

Permissions

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

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

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

- Once selected, click 'Continue'.

Add user

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

Step 3
Permissions

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

ICB	Permission template
Testing7	[▾]

[Back] [Continue]

Review

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

10.1.2 How to edit a user's profile

From the Admin tab:

Select 'Manage users'.

1. Search for the user you wish to edit by applying the filters and click 'Search'.

2. The arrow will provide a summary of the users permissions (ICB, Permission Template, Providers).

3. Click 'Edit' on the selected user.

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

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

Edit user access and permissions

| ① ICB access | ② Permissions | ③ Providers | ④ Review |

Step 1
ICB Access

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

All ☑ [   ]
Start typing the ICB name to filter the list below.

☑ TestDB11

☑ TestDB14

☑ TestDB6

[Cancel] [Continue]

Permissions

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

- Click 'Continue'.

Edit user access and permissions

1. ICB access
2. Permissions
3. Providers
4. Review

Step 2
Permissions

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

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

Back   Continue

Providers

- Click 'Edit providers' next to the Provider name. This will open up the below provider search.

- Show/Hide advanced filters will open or remove the additional search fields.

- Search for the providers and add/remove as required.

- Click 'Save'.

- Click 'Continue'.

Edit user access and permissions

1 — ICB access
2 — Permissions
3 — Providers
4 — Review

Step 3

Providers

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

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

Back   Continue

Edit providers   ✕

Provider search

Provider name

Type part or all of the provider name.

Provider postcode

Type part or all of the provider postcode.

BroadCare ID

Location ID

Hide advanced filters   Clear all   Search

	Name	Postcode	Location ID	BroadCare ID
☐	1 Lufkin Road	W1P 1HQ		2679
☐	1 Lufkin Road	CR2 6XH		2680

Cancel   Save

Review

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

- Back – This will take you back through the sections to allow you to amend any of the information.

- Click 'Save' to save the amendments.

Step 4
Review

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

User details

User	RebeccaProvider Maynard
Email address	rebeccaProvidermaynard@email.com
User type	Provider

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

Back   Save

10.2 Manage permission templates

This allows you to add and edit permission templates.

Within the Admin section click 'Manage permission templates'.

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

The templates displayed will depend on the filters selected.

5. Clicking on one of the headings will change how the information is viewed, for instance clicking on Template will change the order from A-Z to Z-A.
6. **Deactivate** – This will allow you deactivate the template, if it is greyed out it has already been deactivated.

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

Permissions

Template details

User type	ICB
ICB	Testing7
Template name	addddd

*

Select which permissions to enable for this template.

Admin

	View	Add	Edit	Deactivate
Manage users Enable viewing and searching users, as well as adding, editing or deactivating them.	☐	☐	☐	☐
Manage permission templates Enable viewing and searching templates, as well as adding, editing or deactivating them.	☐	☐	☐	☐
Manage lookups Enable viewing Lookups, as well as adding and editing.	☐	☐	☐	

Reporting

	View	
Provider ICB library report Enable reporting provider records in provider ICB library to Excel.	◉ No	○ Yes
Provider alerts report Enable reporting alerts details for provider records in provider ICB library to Excel.	◉ No	○ Yes
Provider contracts report Enable reporting contracts details for provider records in provider ICB library to Excel.	◉ No	○ Yes
Brokerage report Enable reporting brokerage episodes details to Excel.	◉ No	○ Yes
User permissions report Enable reporting user permissions to Excel.	◉ No	○ Yes

Brokerage episodes

	View	Add	Edit	Deactivate
Manage brokerage episodes Enable viewing and searching brokerage episodes, as well as adding and editing them.	☐	☐	☐	

Provider library

	View	Add	Edit	Deactivate
CQC library Access to the CQC library to search and view full provider records.	☑			
ICB library Control access to the ICB library, to search and view, add or edit provider records.	☑	☐	☐	
Contacts Enable viewing contacts for providers, as well as adding, editing and deactivating them.	☐	☐	☐	☐
Contracts Enable viewing provider contracts, as well as adding, editing and deactivating them.	☐	☐	☐	☐
Bed availability Enable viewing bed availability for providers, as well as editing to update bed availability.	☐		☐	
Care products Enable viewing care products for providers, as well as adding, editing and deactivating them.	☐	☐	☐	☐
Grouped package rates Enable viewing grouped package rates for providers, as well as adding, editing and deactivating them.	☐	☐	☐	☐
Finance Enable viewing invoices for providers, as well as adding and editing them.	☐	☐	☐	
Care packages Enable viewing care packages for providers.	☐			
Alerts Enable viewing provider alerts, as well as adding, editing and deactivating them.	☐	☐	☐	☐
Notes Enable viewing notes for providers, as well as adding, editing and deactivating them.	☐	☐	☐	☐
Documents Enable viewing provider documents, as well as adding, moving and deactivating them.	☐	☐	☐	☐
Tags Enable viewing tags for providers, as well as adding and deactivating them.	☐	☐		☐

Report to Excel
 Enable exporting copies of provider records in provider libraries to Excel.   ◉ No   ○ Yes

[Cancel] [Save]

10.2.1 Add template

Within the Admin section click 'Manage permission templates'.

Click 'Add template'.

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

Provider Search   Brokerage   Admin

Manage permission templates

Add template

Template search

Template

Type part or all of a template's name.

ICB name

User type

Status

● All   ○ Active   ○ Inactive

Clear all   Search
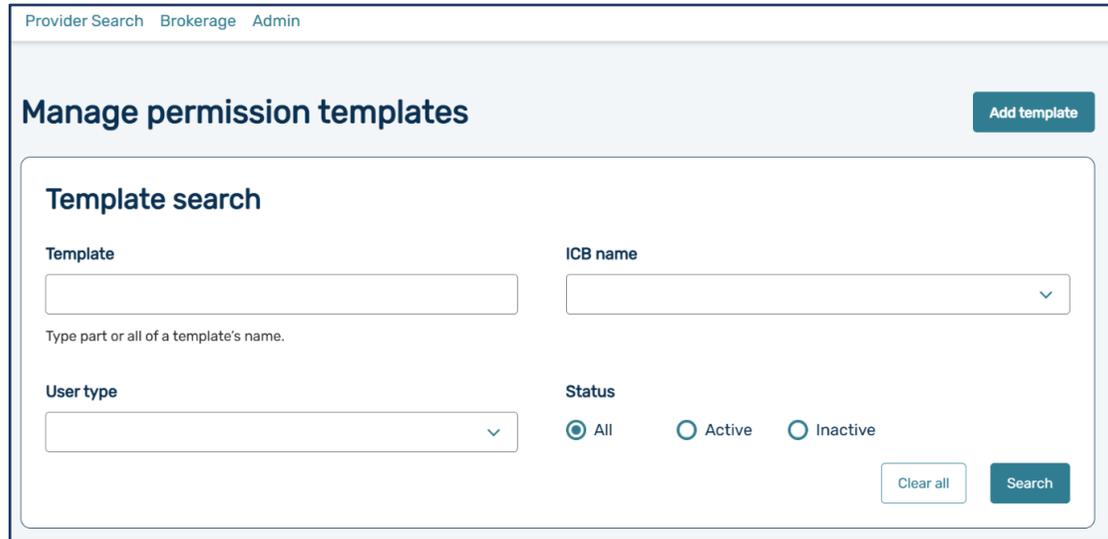
Template details

1. Select if this template is for an ICB or a Provider.

2. Give the Template a unique name.

3. Click 'Continue'.

Add template

① Template details ──────────────── ② Permissions

Step 1
Template details

User type *

○ ICB   ○ Provider   ①

Template name *

②

Continue   ③

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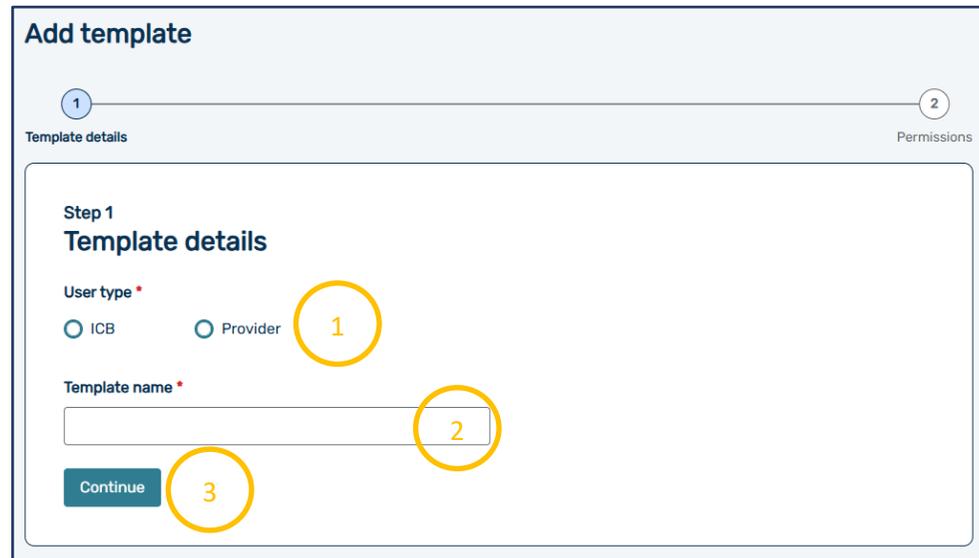
Permissions

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

Permissions

Template details

User type	ICB
ICB	Testing7
Template name	addddd

Select which permissions to enable for this template.

Admin

	View	Add	Edit	Deactivate
Manage users Enable viewing and searching users, as well as adding, editing or deactivating them.	☐	☐	☐	☐
Manage permission templates Enable viewing and searching templates, as well as adding, editing or deactivating them.	☐	☐	☐	☐
Manage lookups Enable viewing Lookups, as well as adding and editing.	☐	☐	☐	

Reporting

	View	
Provider ICB library report Enable reporting provider records in provider ICB library to Excel.	◉ No	○ Yes
Provider alerts report Enable reporting alerts details for provider records in provider ICB library to Excel.	◉ No	○ Yes
Provider contracts report Enable reporting contracts details for provider records in provider ICB library to Excel.	◉ No	○ Yes
Brokerage report Enable reporting brokerage episodes details to Excel.	◉ No	○ Yes
User permissions report Enable reporting user permissions to Excel.	◉ No	○ Yes

Brokerage episodes

	View	Add	Edit	Deactivate
Manage brokerage episodes Enable viewing and searching brokerage episodes, as well as adding and editing them.	☐	☐	☐	

Provider library

	View	Add	Edit	Deactivate
CQC library Access to the CQC library to search and view full provider records.	☑			
ICB library Control access to the ICB library, to search and view, add or edit provider records.	☑	☐	☐	
Contacts Enable viewing contacts for providers, as well as adding, editing and deactivating them.	☐	☐	☐	☐
Contracts Enable viewing provider contracts, as well as adding, editing and deactivating them.	☐	☐	☐	☐
Bed availability Enable viewing bed availability for providers, as well as editing to update bed availability.	☐		☐	
Care products Enable viewing care products for providers, as well as adding, editing and deactivating them.	☐	☐	☐	☐
Grouped package rates Enable viewing grouped package rates for providers, as well as adding, editing and deactivating them.	☐	☐	☐	☐
Finance Enable viewing invoices for providers, as well as adding and editing them.	☐	☐	☐	
Care packages Enable viewing care packages for providers.	☐			
Alerts Enable viewing provider alerts, as well as adding, editing and deactivating them.	☐	☐	☐	☐
Notes Enable viewing notes for providers, as well as adding, editing and deactivating them.	☐	☐	☐	☐
Documents Enable viewing provider documents, as well as adding, moving and deactivating them.	☐	☐	☐	☐

	View	Add	Deactivate
Tags Enable viewing tags for providers, as well as adding and deactivating them.	☐	☐	☐

Report to Excel Enable exporting copies of provider records in provider libraries to Excel.	◉ No	○ Yes

Back Save

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10.3 Manage Lookups

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


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

6. Once you have searched for a particular Lookup category, if the Lookup value does not exist you can click **'Add new value'**. Example below is for Assessment outcomes.
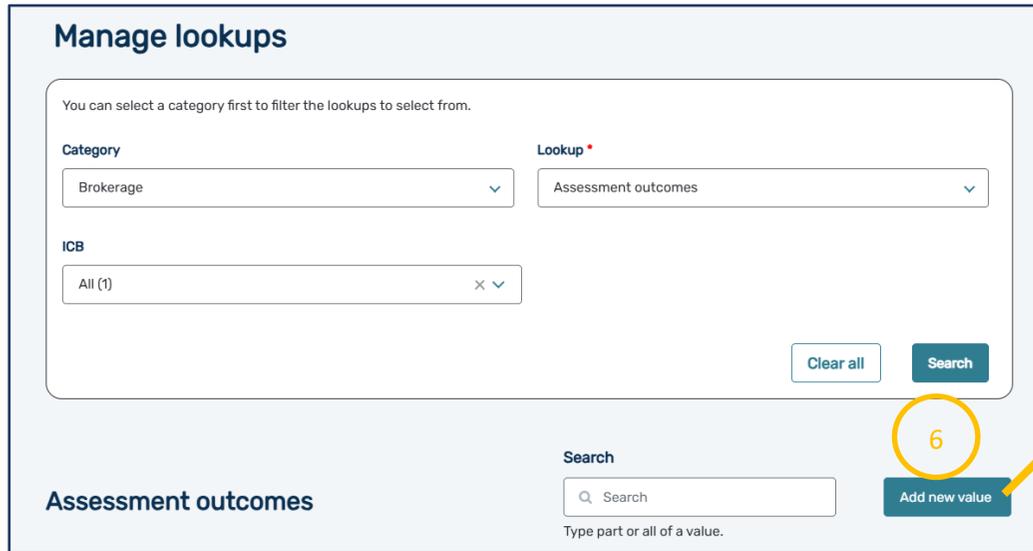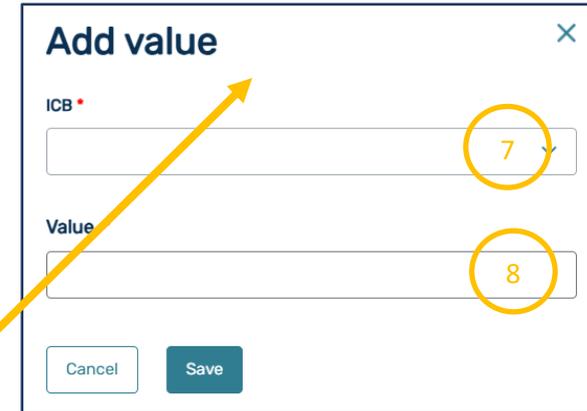
7. Select the **ICB** from the dropdown.
8. Add the **'Value'** which is the name you would like to give the Lookup and click **'Save'**.
9. Once the Lookup has been added it will allow you to **'Edit'** the information.
10. Edit value will allow you to amend the name or make it inactive by clicking the **'Active'** button to remove the tick.