

# Provider Portal

ICB User Guide

Version 1.2 March 2026

**xyla**

Part of Acacium Group

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## 2 Introduction

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

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

## 3 Logging in

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.

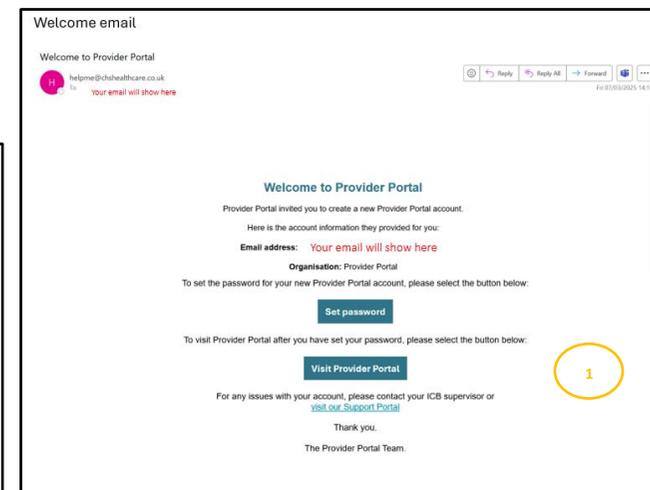
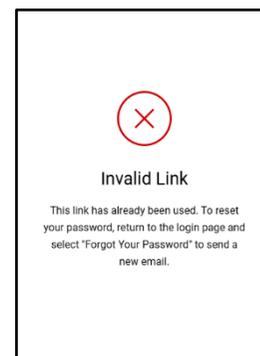
This will allow you to log in once using your preferred authenticator method for 12 hours for both the Provider Portal and BroadCare. Once you have authenticated using MFA on one browser you will need to use the same browser for SSO to work.

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’.

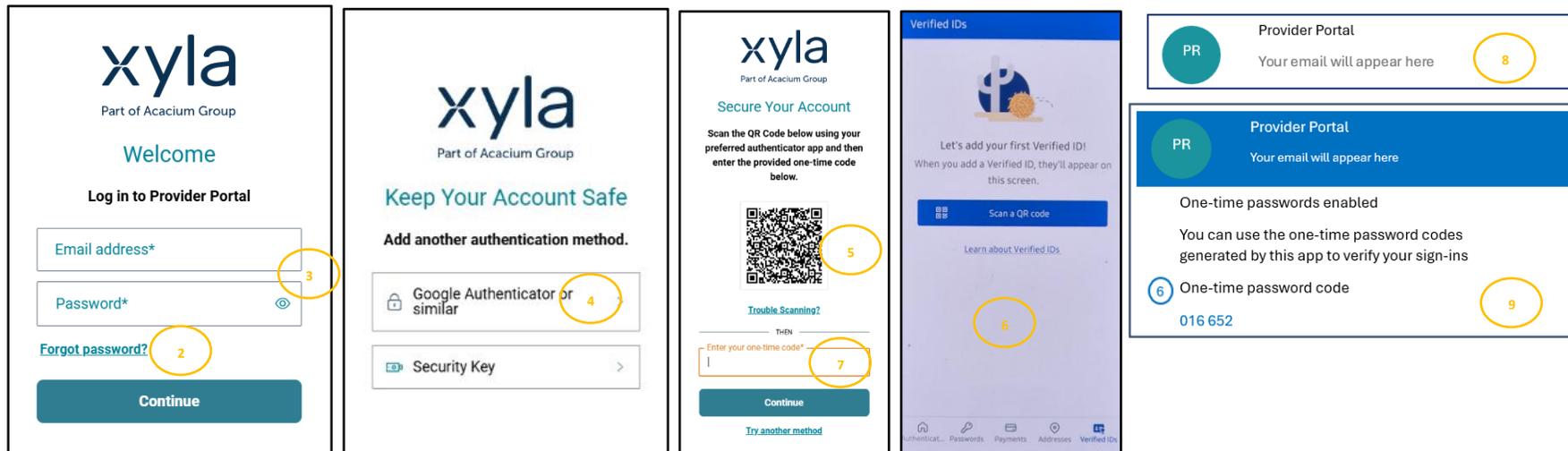
- Please note the ‘Set password’ link will expire after 5 days. If you click ‘Set password’ after 5 days of receiving the ‘Welcome’ email the below message will appear, prompting you to select ‘Forgot password’ from your login page.
- Please set you password before setting up MFA.



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**

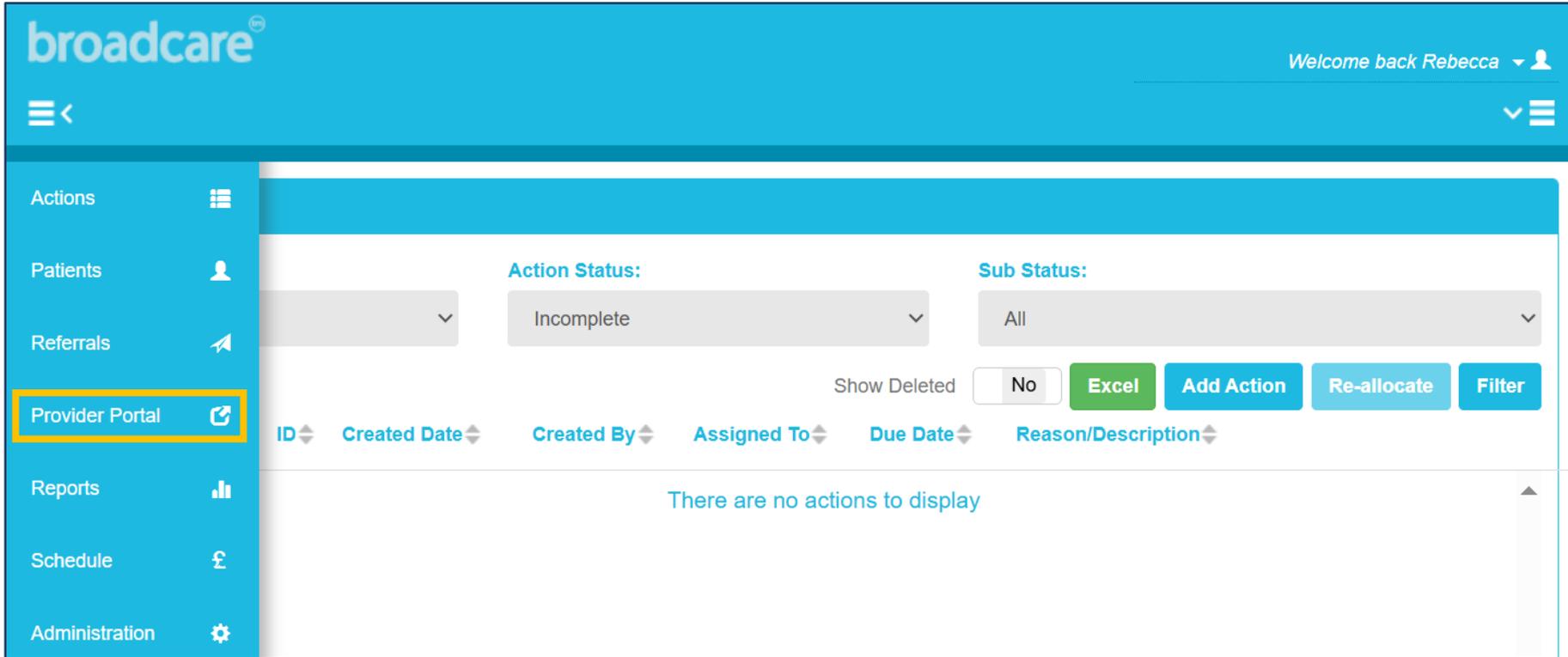
1. Enter your Email Address and Password into the Referral Portal
2. Select Authenticator App and a QR Code will be displayed
3. Open up your Authenticator App
4. On the top right of the app click on the + button
5. This will open up your mobile camera from within the app itself
6. Hover over the QR 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

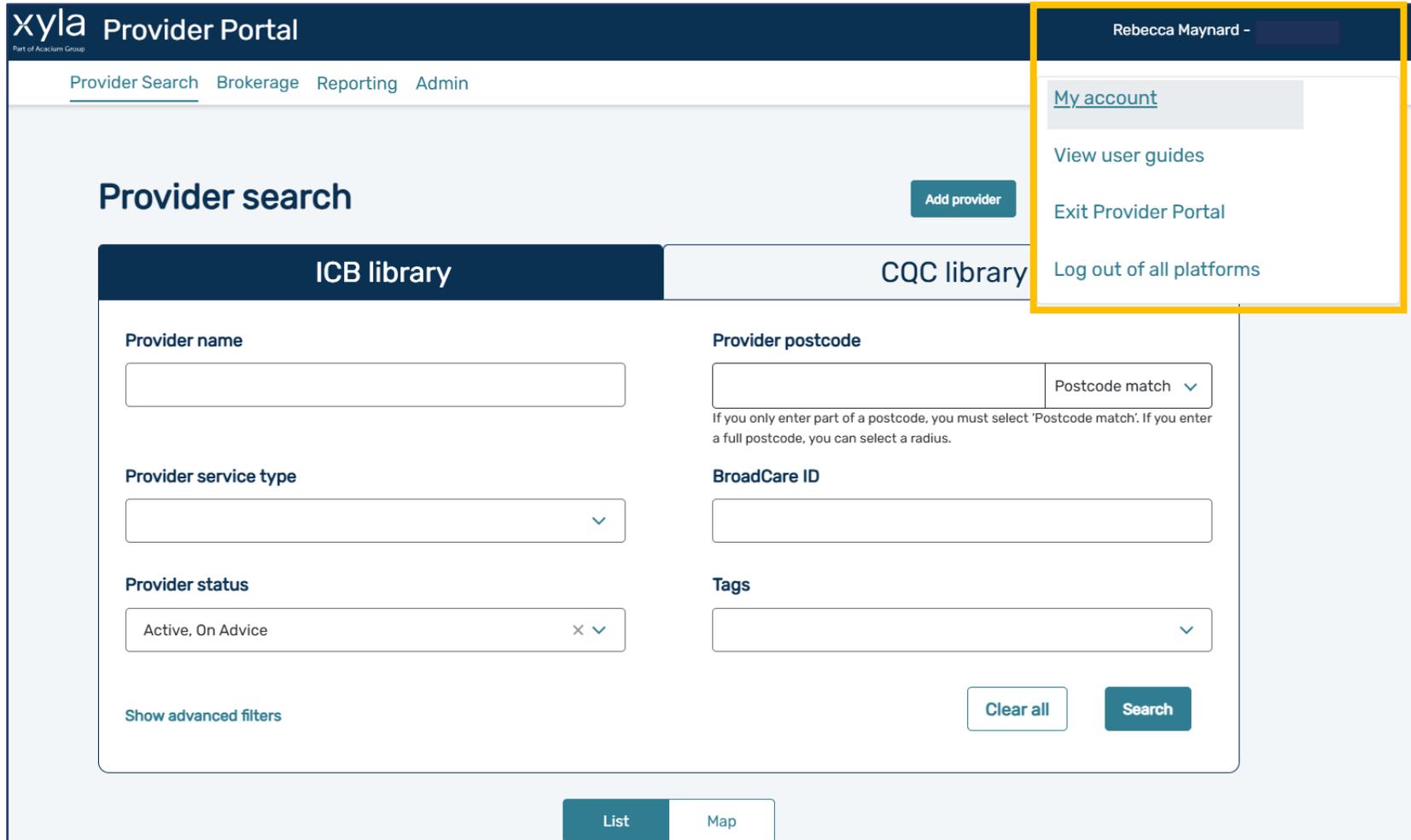
After you have set up MFA for the Provider Portal you can log in directly to the Provider Portal using the link you have been provided in your 'Welcome' email or through your BroadCare login using Single Sign On (SSO).

The Provider Portal will replace the Provider section.



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

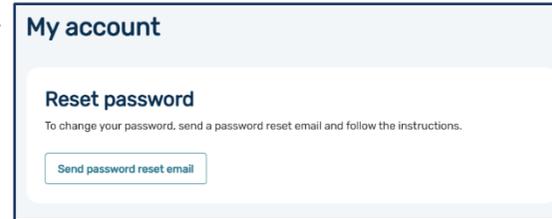
After logging into the Provider Portal, you will be presented with the below screen. The down arrow next to your name will open up and present you with your own settings.



The screenshot displays the xyla Provider Portal interface. At the top left, the xyla logo and 'Provider Portal' text are visible, with 'Part of Acacium Group' in smaller text below. A navigation bar contains links for 'Provider Search', 'Brokerage', 'Reporting', and 'Admin'. The main content area is titled 'Provider search' and features an 'Add provider' button. Below this, there are two tabs: 'ICB library' (selected) and 'CQC library'. The search filters are organized into two columns. The left column includes 'Provider name' (text input), 'Provider service type' (dropdown), and 'Provider status' (dropdown with 'Active, On Advice' selected). The right column includes 'Provider postcode' (text input with a 'Postcode match' dropdown), a note about partial postcodes, 'BroadCare ID' (text input), and 'Tags' (dropdown). At the bottom of the filters are 'Show advanced filters', 'Clear all', and 'Search' buttons. A 'List' button and a 'Map' button are located at the bottom center. In the top right corner, a user profile dropdown menu is open, showing the name 'Rebecca Maynard' and options: 'My account', 'View user guides', 'Exit Provider Portal', and 'Log out of all platforms'. The dropdown menu is highlighted with a yellow border.

#### 4.1 My Account

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

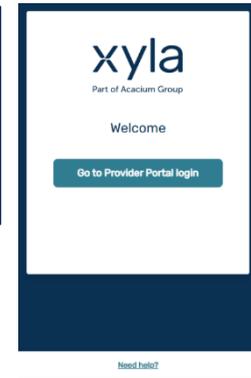


#### 4.2 View user guides

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

#### 4.3 Need Help

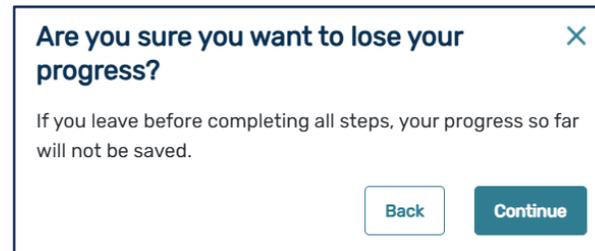
The Need help link will provide you with next steps if you are struggling.



#### 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.

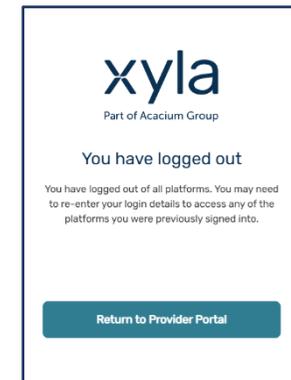
To re-enter click 'Return to Provider Portal'.



#### 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.

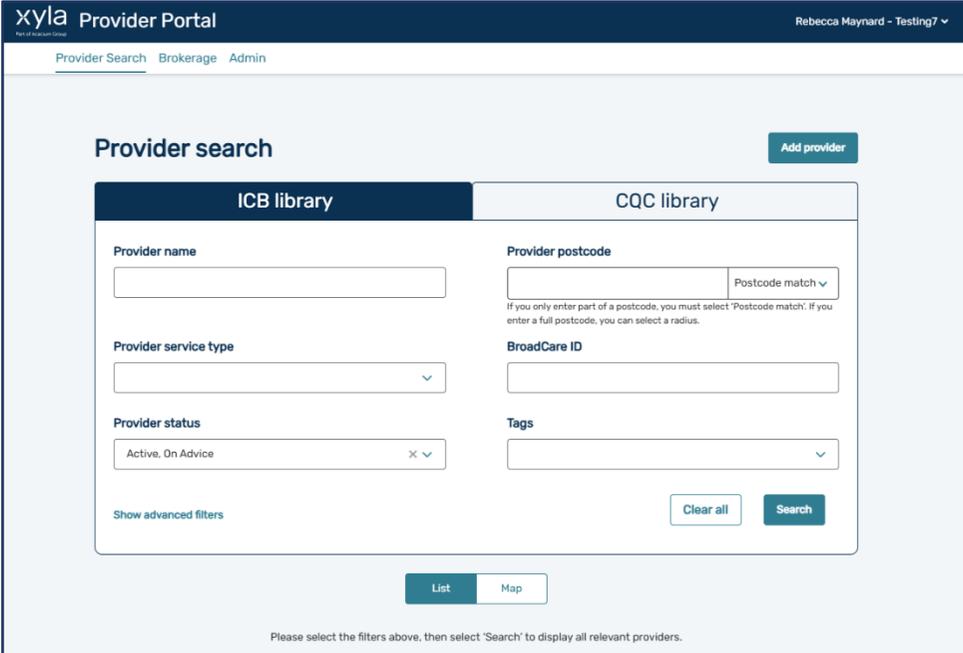
#### 5.1.1 Standard Search

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.

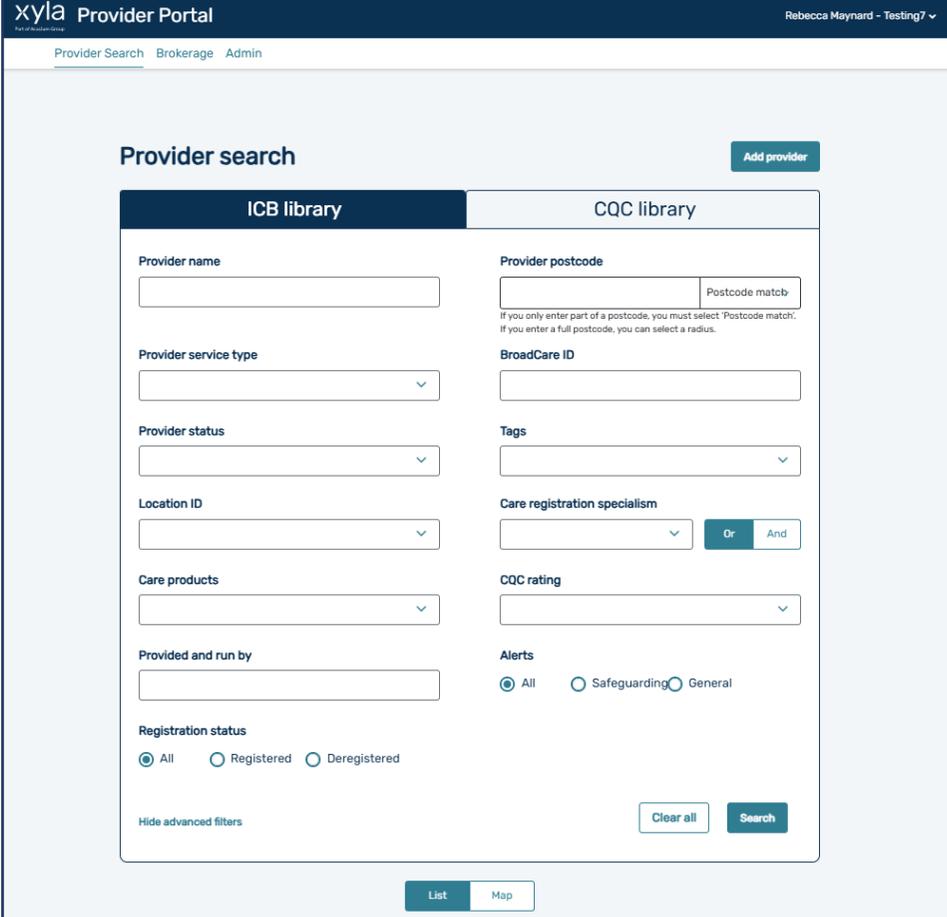


### 5.1.2 Advanced Search

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.

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

#### Provider search

Add provider

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**

**BroadCare ID**

**Provider status**

**Tags**

Show advanced filters
Clear all
Search

Displaying 13 providers

List Map
A-Z provider name

Select all
Load providers
Create report

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

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

[View on Google Maps](#)

**Phone number**                      **Email**  
test@email.com

Select

**CQC rating** -

**Alerts** 1

**Show more details**

View provider profile

### Map View

#### Provider search

Add provider

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**

**BroadCare ID**

**Provider status**

**Tags**

Show advanced filters
Clear all
Search

Displaying 13 providers

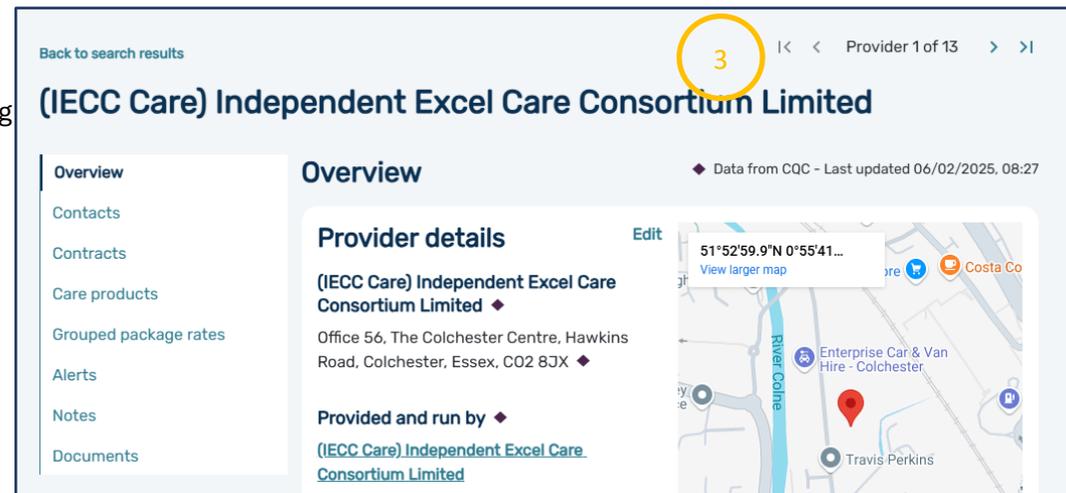
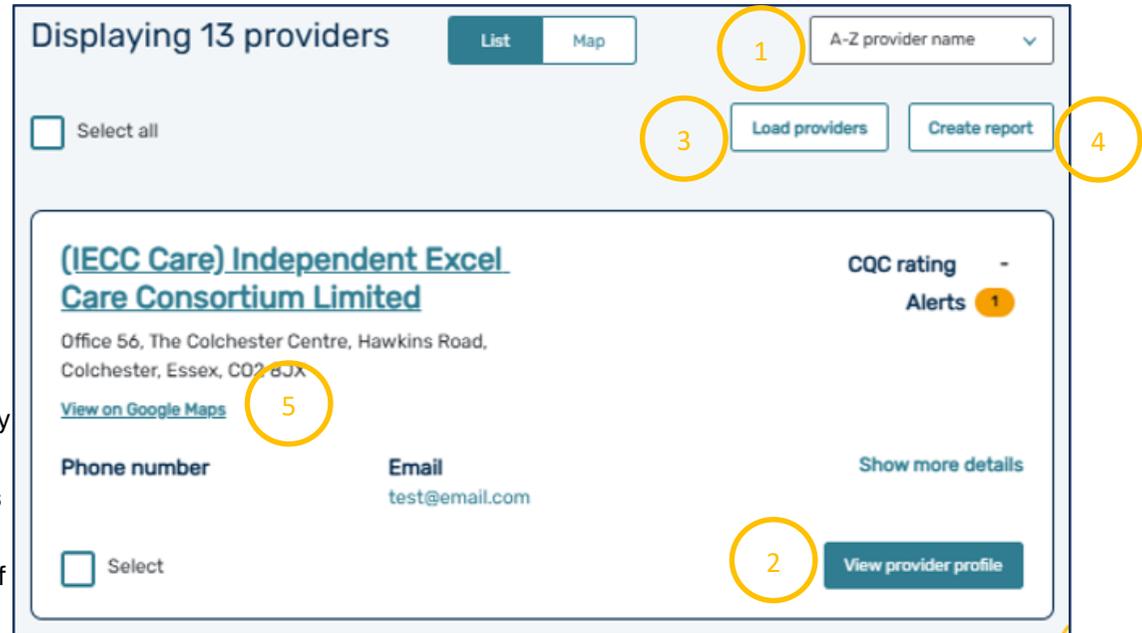
List Map



### 5.1.3 List View

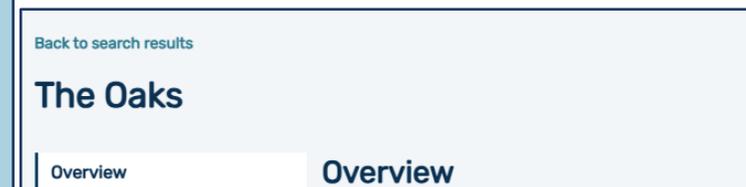
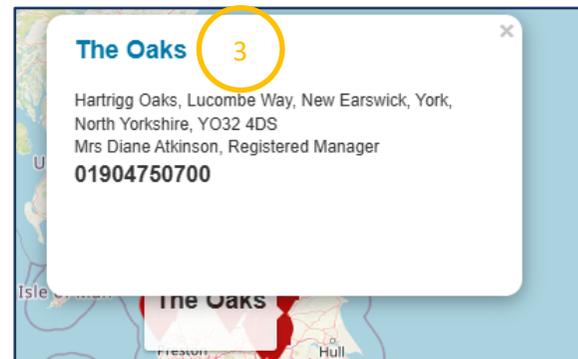
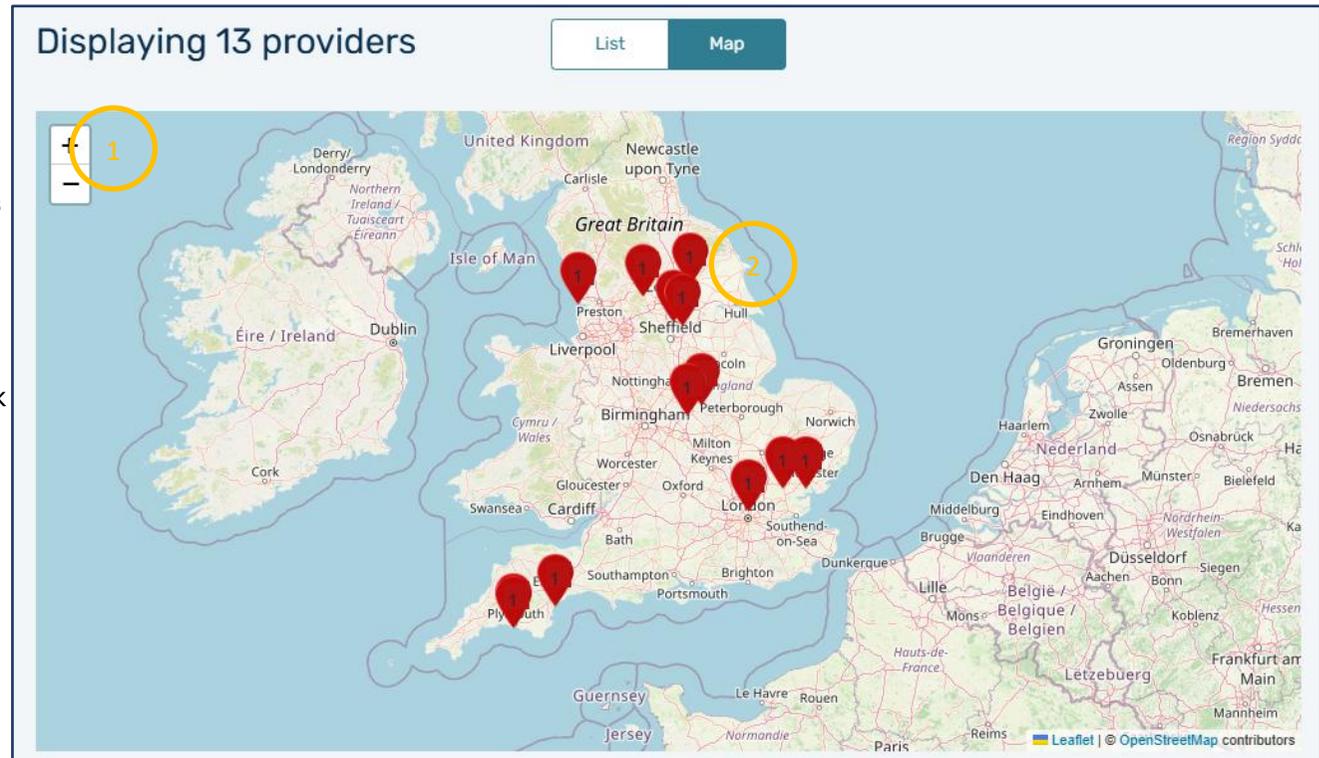
Once the list of providers is showing you can:

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.



## 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.

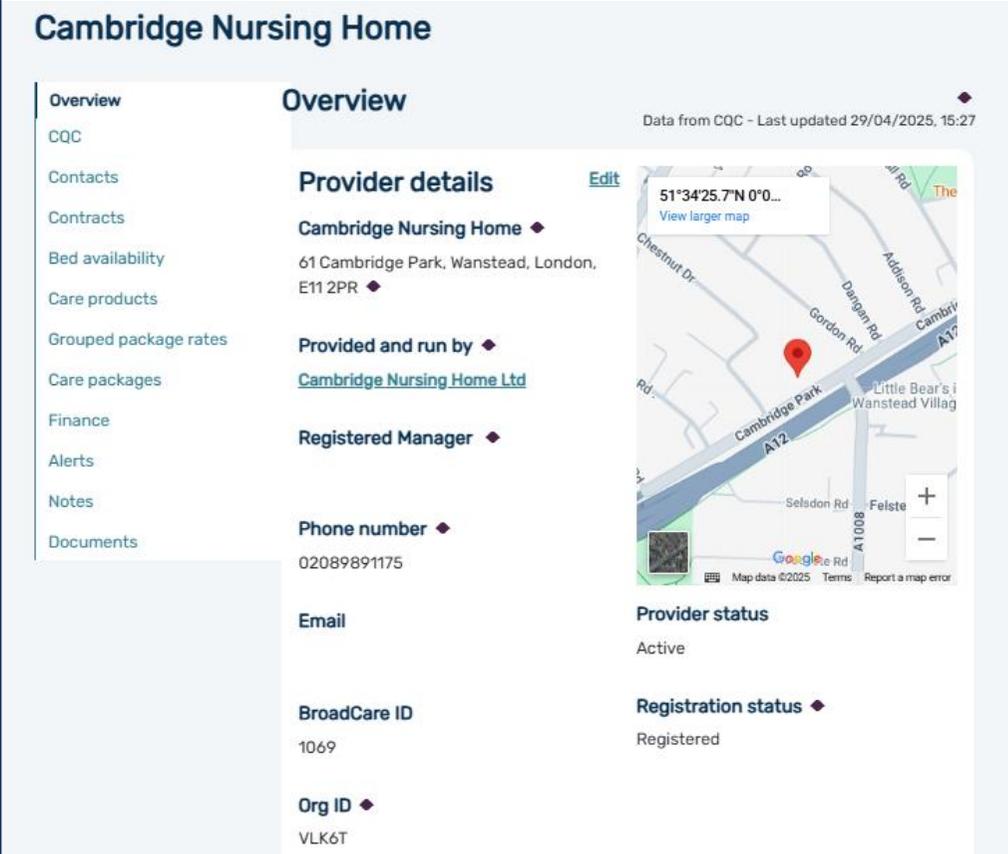
 Indicates that these fields are automatically updated by CQC – This is updated every 24 hours in the evening.

**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.



**Cambridge Nursing Home**

Overview

Data from CQC - Last updated 29/04/2025, 15:27

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

**Cambridge Nursing Home** ◆

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

**Provided and run by** ◆

[Cambridge Nursing Home Ltd](#)

**Registered Manager** ◆

**Phone number** ◆

02089891175

**Email**

**BroadCare ID**

1069

**Org ID** ◆

VLK6T

**Provider status**

Active

**Registration status** ◆

Registered

Map showing location: 51°34'25.7"N 0°0'0"...

- **Alerts** (known as Case Management in BroadCare) - View, Add, Edit, Delete and filter Alerts. Add comments to an Alert. Please note the Alert options will only be available once they have been added to the Alert Type Lookups within BroadCare.
- **Notes** (known as Case Management in BroadCare) – View, Delete, Add Note, filter and Assign Action to another user.
- **Documents** (known as Case Management in BroadCare) – View, Add, Delete, filter and Download a Document.

## 6.1 Overview

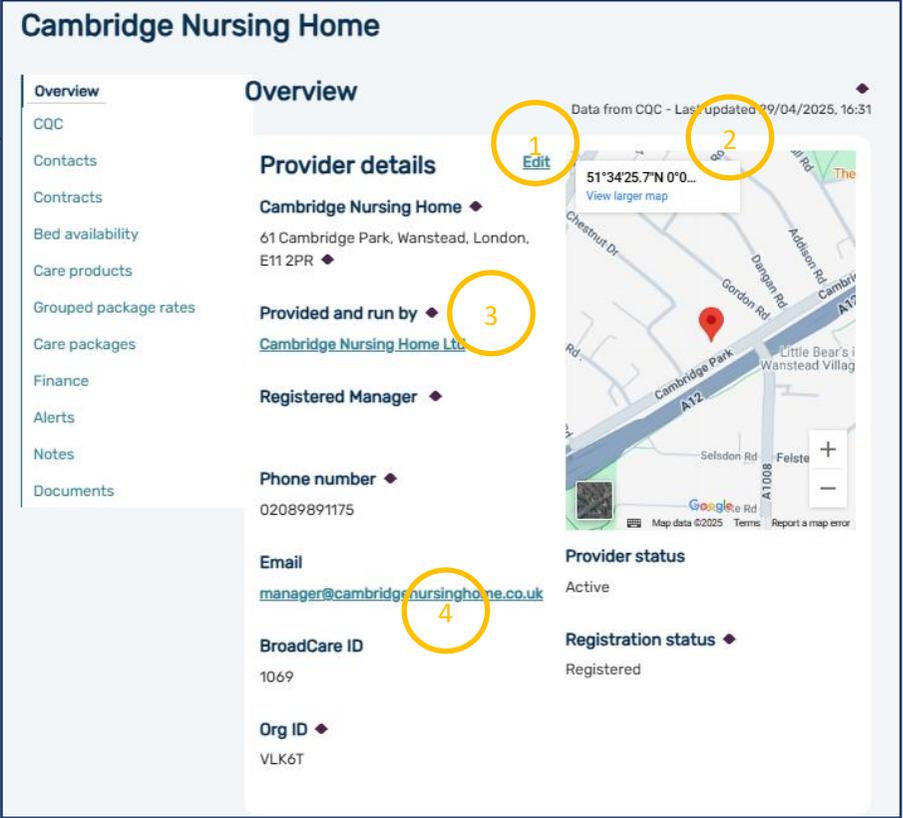
Provides the address, phone number, email address, manager information, BroadCare ID (unique Provider ID), Org ID, Provider Status, and Registration Status.

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

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

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

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



**Cambridge Nursing Home**

Overview

CQC

Contacts

Contracts

Bed availability

Care products

Grouped package rates

Care packages

Finance

Alerts

Notes

Documents

**Provider details**

Cambridge Nursing Home

61 Cambridge Park, Wanstead, London, E11 2PR

**Provided and run by**

[Cambridge Nursing Home Ltd](#)

**Registered Manager**

**Phone number**

02089891175

**Email**

[manager@cambridgenursinghome.co.uk](mailto:manager@cambridgenursinghome.co.uk)

**BroadCare ID**

1069

**Org ID**

VLK6T

**Provider status**

Active

**Registration status**

Registered

Data from CQC - Last updated 09/04/2025, 16:31

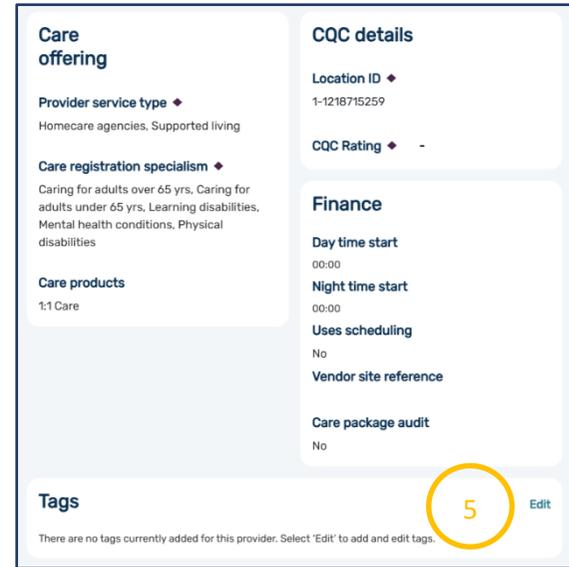
51°34'25.7"N 0°0'...

View larger map

Map data ©2025 Terms Report a map error

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

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



**Care offering**

**Provider service type** ◆  
Homecare agencies, Supported living

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

**Care products**  
1:1 Care

**CQC details**

**Location ID** ◆  
1-1218715259

**CQC Rating** ◆ -

**Finance**

**Day time start**  
00:00

**Night time start**  
00:00

**Uses scheduling**  
No

**Vendor site reference**

**Care package audit**  
No

**Tags**

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

5 Edit

## 6.2 CQC

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

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

- View Report**  
This allows you to view the CQC Report.
- 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** ◆.



**Cambridge Nursing Home**

Overview | **CQC** | Data from CQC - Last updated 29/04/2025, 07:26

**Ratings** ⓘ

**Overall** ◆ **Good**

**Safe** ◆ **Requires improvement**

**Well-led** ◆ **Good**

**Caring** ◆ **Good**

**Responsive** ◆ **Good**

**Effective** ◆ **Good**

**Details**

**Report published** ◆  
05/10/2019  
[View report](#) 1

**Last inspection** ◆  
09/02/2022

**Location ID** ◆  
1-122191502  
[View on CQC website](#) 2

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

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.

#### Add contact ✕

Title	First name *	Last name *	
<input type="text"/>	<input type="text"/>	<input type="text"/>	
Job role *	Phone	Mobile	
<input type="text"/>	<input type="text"/>	<input type="text"/>	
Email		<input type="checkbox"/> Mark as a primary contact	
<input type="text"/>			
Comments			
<input style="width: 100%;" type="text"/>			
		<input type="button" value="Cancel"/> <input type="button" value="Save"/>	

### Cambridge Nursing Home

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

#### Contacts

Current Deleted
1
2

---

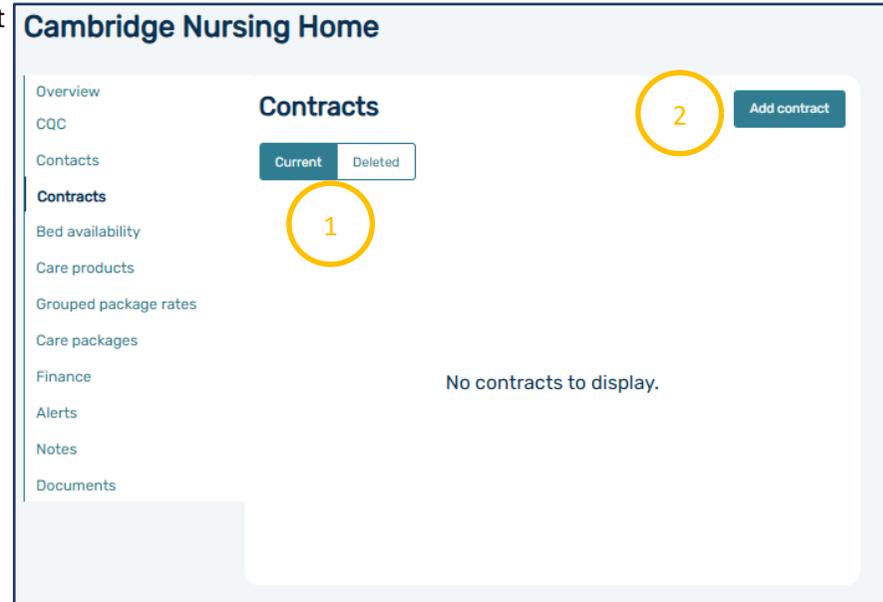
<b>Mr Walter Scott</b>	SS1	<span style="border: 2px solid orange; border-radius: 50%; padding: 2px 5px;">3</span> <span style="font-size: 0.8em;">^</span>
<b>Phone</b>	<b>Comments</b>	
<b>Mobile</b>		
<b>Email address</b>		
<b>Added:</b> 29/04/2025, 16:39 by Rebecca Maynard		
<b>Last updated:</b> 29/04/2025, 16:39 by Rebecca Maynard		
		<span style="border: 2px solid orange; border-radius: 50%; padding: 2px 5px;">4</span> <input type="button" value="Delete"/> <input type="button" value="Edit"/>

## 6.4 Contracts

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

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

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



### Add contract

Has the contract been signed? No Sign with eSignature tool?

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 \* Contract received Contract start

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

Contract review Contract renewal

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

Indemnity insurance? Yes No Save

3

### 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.

- 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.



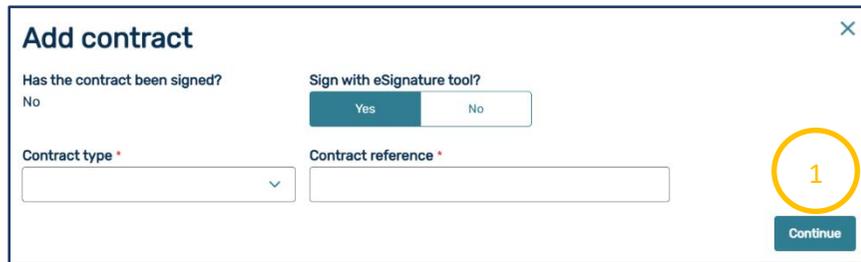
Indemnity insurance from date \*      Indemnity insurance to date \*

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

### 6.4.1 Signing a contract with the eSignature tool

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

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



**Add contract** [Close]

Has the contract been signed?  
No

Sign with eSignature tool?  
Yes No

Contract type \*      Contract reference \*

[Dropdown]      [Text Field]

[Continue]



**Add contract** [Close]

Choose how to prepare the document for signing

Select an existing template

Upload a new document

[Back]

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

- 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.



**Add contract** [Close]

Choose how to prepare the document for signing

Select an existing template

Upload a new document

[Back]

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 \***

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*
<input style="width: 90%;" type="text"/>	<input style="width: 90%;" type="text"/>	<input style="width: 90%;" type="text"/>
<input style="width: 90%;" type="text"/>	<input style="width: 90%;" type="text"/>	<input style="width: 90%;" type="text"/>

Back

4

Continue

**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.	<input style="width: 90%;" type="text"/>	<input style="width: 90%;" type="text"/>	<input style="width: 90%;" type="text"/>
⬆ ⬇	2.	<input style="width: 90%;" type="text"/>	<input style="width: 90%;" type="text"/>	<input style="width: 90%;" type="text"/>

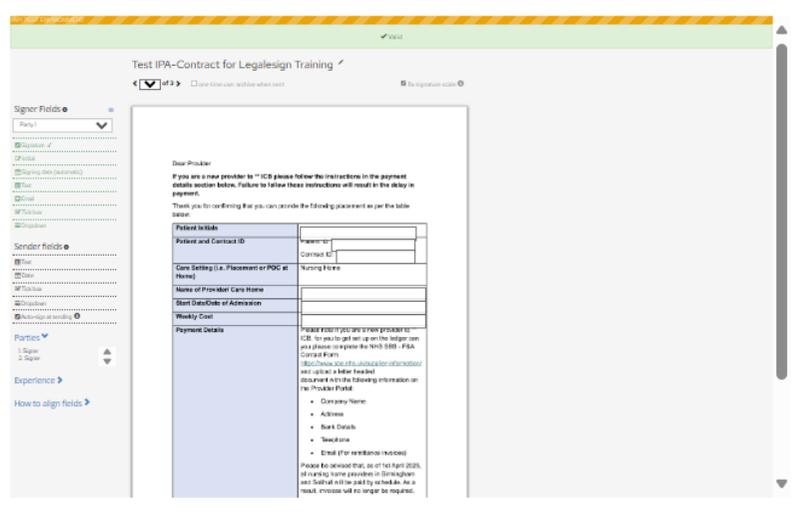
Back

4

Continue

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'.

### Add contract



**BroadCare ID (Provider ID)**

**Provider name**

**Patient BC ID**

**Initial**

**From**

**Total Cost**

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.

#### Refresh Your Link

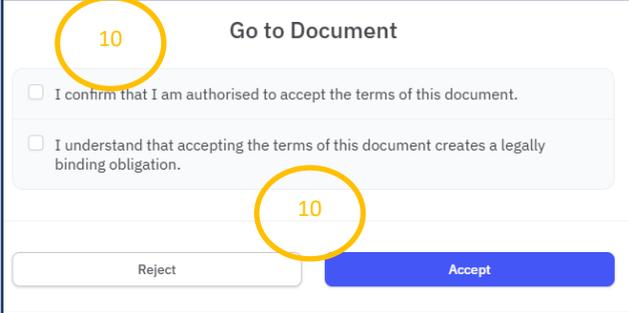
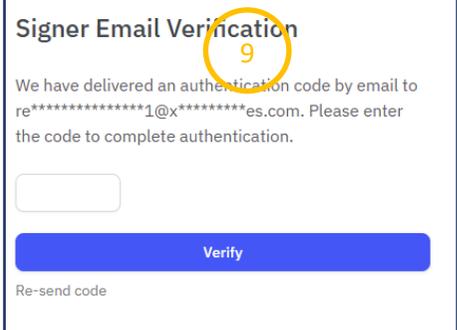
The link to your document needs to be refreshed. Please click the button below for a new one.

If links keep bringing you here please clear cookies, try a new browser, or [click here to get a one time passcode](#).

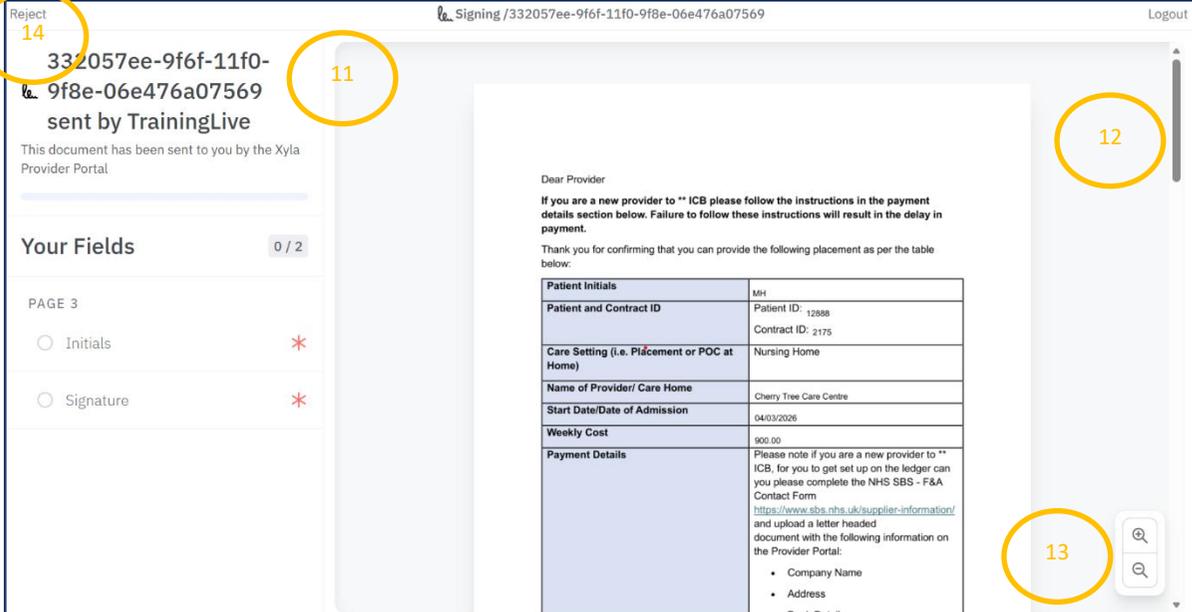
Please find a pdf draft copy attached to this email.

**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**.

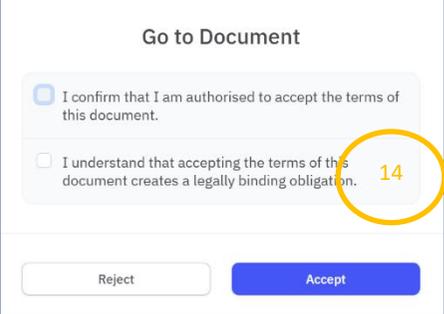



11. This will open the contract, the below is a test example, please note the document name will show on the top left, in the training environment this will show as a combination of letters and numbers.
12. You can use the scroll bar on the right to view all the contract.
13. The magnifying glass will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



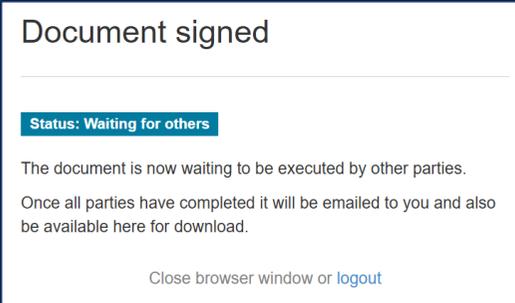
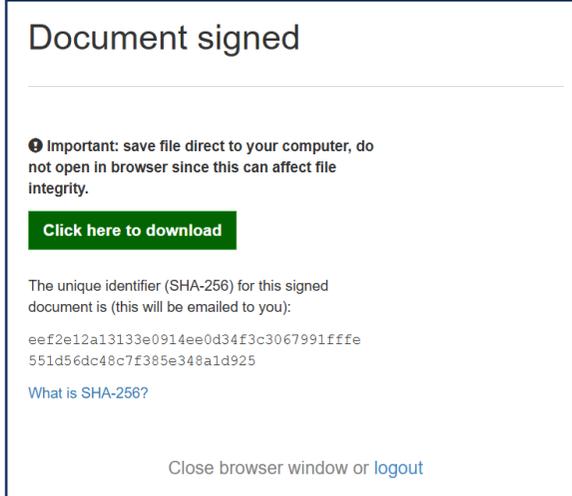
Patient Initials	
Patient and Contract ID	Patient ID: 12888 Contract ID: 2175
Care Setting (i.e. Placement or POC at Home)	Nursing Home
Name of Provider/ Care Home	Cherry Tree Care Centre
Start Date/Date of Admission	04/03/2026
Weekly Cost	900.00
Payment Details	Please note if you are a new provider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

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.



**Add contract**

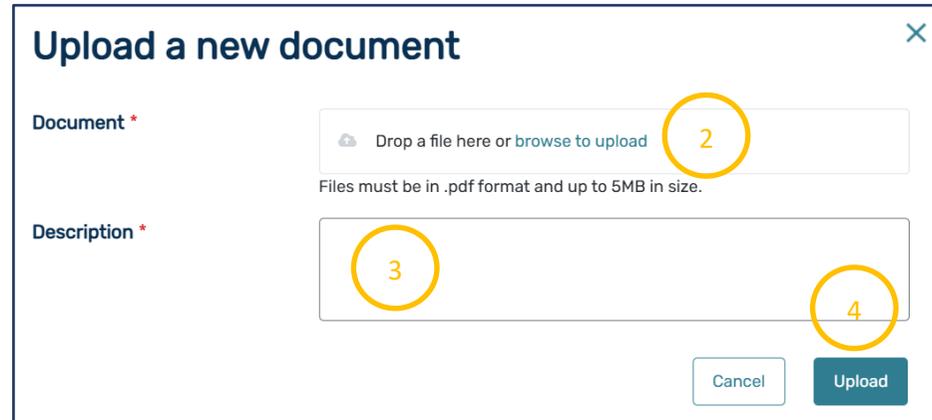
Choose how to prepare the document for signing

Select an existing template

Upload a new document

1

Back



**Upload a new document**

Document \*

Drop a file here or browse to upload

2

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

Description \*

3

4

Cancel Upload

### 6.5 Bed availability

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



**Cambridge Nursing Home**

Overview

CQC

Contacts

Contracts

**Bed availability**

Care products

Grouped package rates

Care packages

Finance

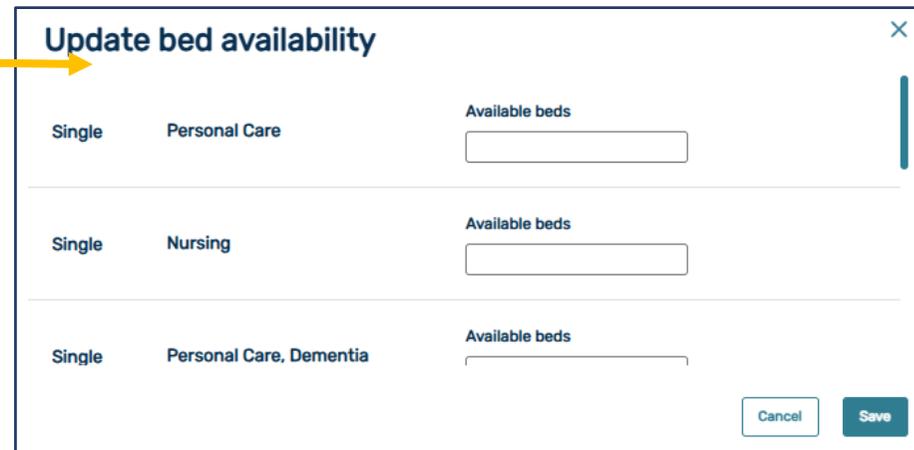
Alerts

Notes

Documents

Bed type	Care type	Available beds
Single	Personal Care	-
Single	Nursing	-
Single	Personal Care, Dementia	-
Single	Nursing, Dementia	-
Shared	Male, Personal Care	-
Shared	Female, Personal Care	-
Shared	Male, Nursing	-
Shared	Female, Nursing	-

Edit



**Update bed availability**

Single	Personal Care	Available beds
Single	Nursing	Available beds
Single	Personal Care, Dementia	Available beds

Cancel Save

## 6.6 Care Products

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

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

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

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

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

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

Rate unit \*

▼

Day

Unit

Week

**Cambridge Nursing Home**

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Bed availability  
**Care products**  
Grouped package rates  
Care packages  
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Documents

**Care products**

All Deleted (1)

Add care product (3)

<b>1:1 Care</b>	£0.00/Week ^
Available from: 01/03/2021 Available to:	
Added: 31/03/2021, 19:08 by Salim Shaikh	
Last updated: 09/02/2022, 17:14 by Vishvajeet M	
Delete Edit (2)	
<b>2:1 Care</b>	£0.00/Week v
<b>Based on Needs</b>	£0.00/Day v
<b>Block Beds</b>	£0.00/Day v
<b>Direct Payment</b>	£0.00/Week v

**Add care product**

Care product type \*

From date

To date

Enter in the format DD/MM/YYYY.

Rate

Rate unit \*

£ per

Cancel Save

### 6.7 Grouped package rates

(known as Roles in BroadCare)

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

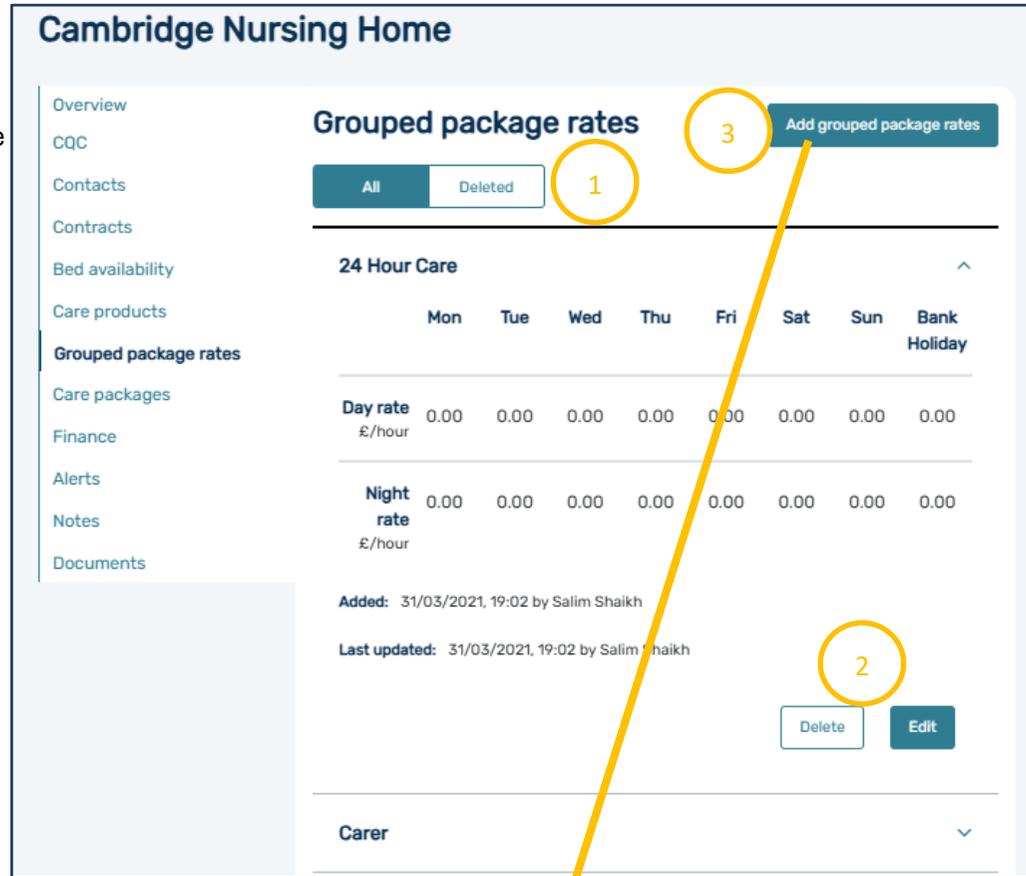
Please note you can only add the Grouped package rates to the provider if this has already been added to the Lookups.

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

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

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

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



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**Grouped package rates**  
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Documents

**Grouped package rates**

All Deleted **1**

**Add grouped package rates** **3**

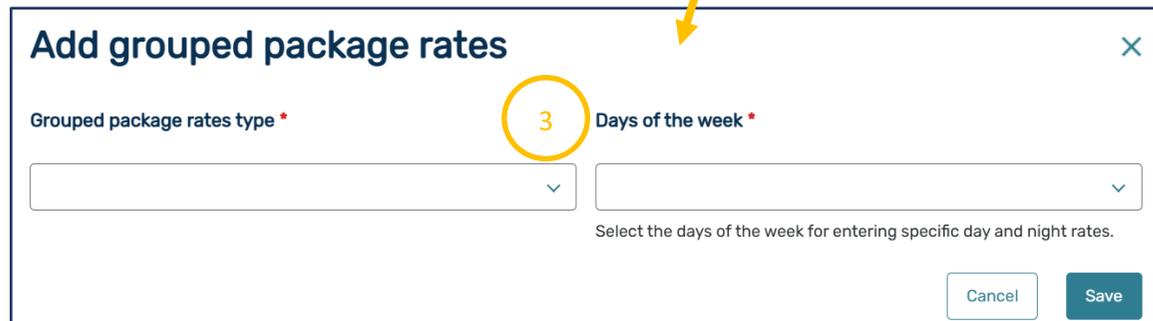
**24 Hour Care**

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

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

Delete Edit **2**

Carer



**Add grouped package rates**

Grouped package rates type \* **3** Days of the week \*

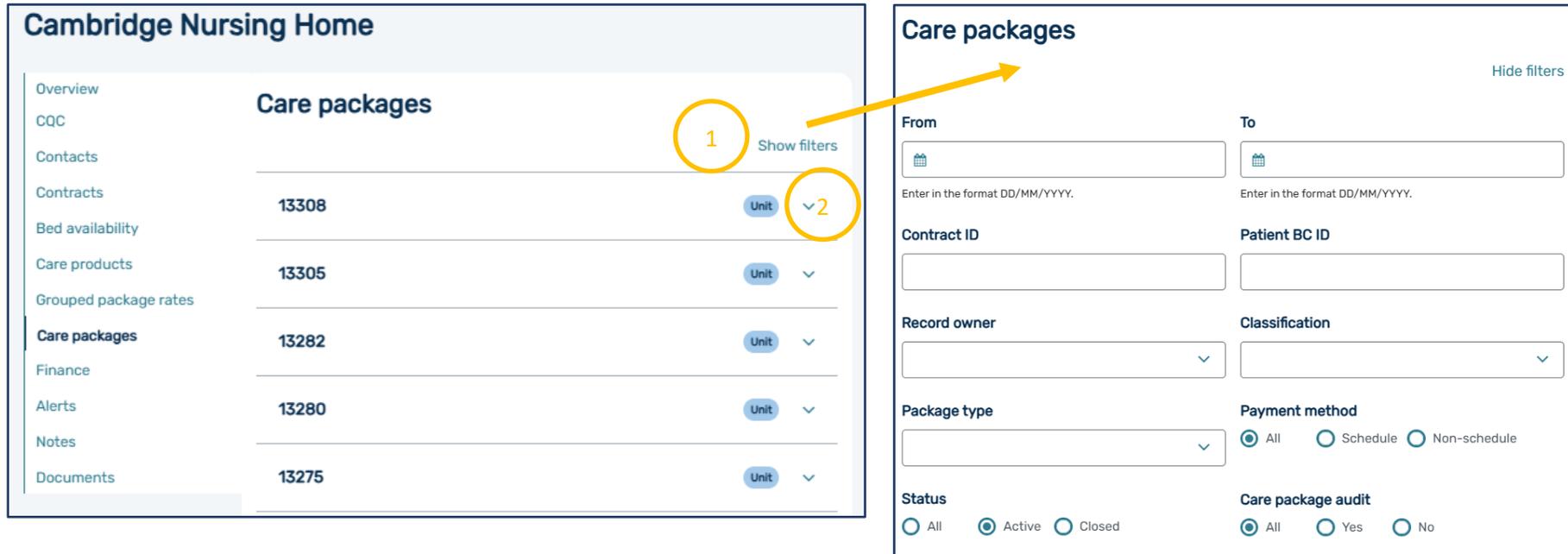
Select the days of the week for entering specific day and night rates.

Cancel Save

## 6.8 Care Packages

View care packages that are in place for the provider.

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



**Cambridge Nursing Home**

**Care packages**

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**Care packages**  
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Notes  
Documents

Contracts	Unit
13308	Unit
13305	Unit
13282	Unit
13280	Unit
13275	Unit

**Care packages** Hide filters

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

**Contract ID**  **Patient BC ID**

**Record owner**  **Classification**

**Package type**  **Payment method**  
 All  Schedule  Non-schedule

**Status**  All  Active  Closed **Care package audit**  
 All  Yes  No

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

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

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

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

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

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

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

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

**Status** – All, Active, Closed

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

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

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

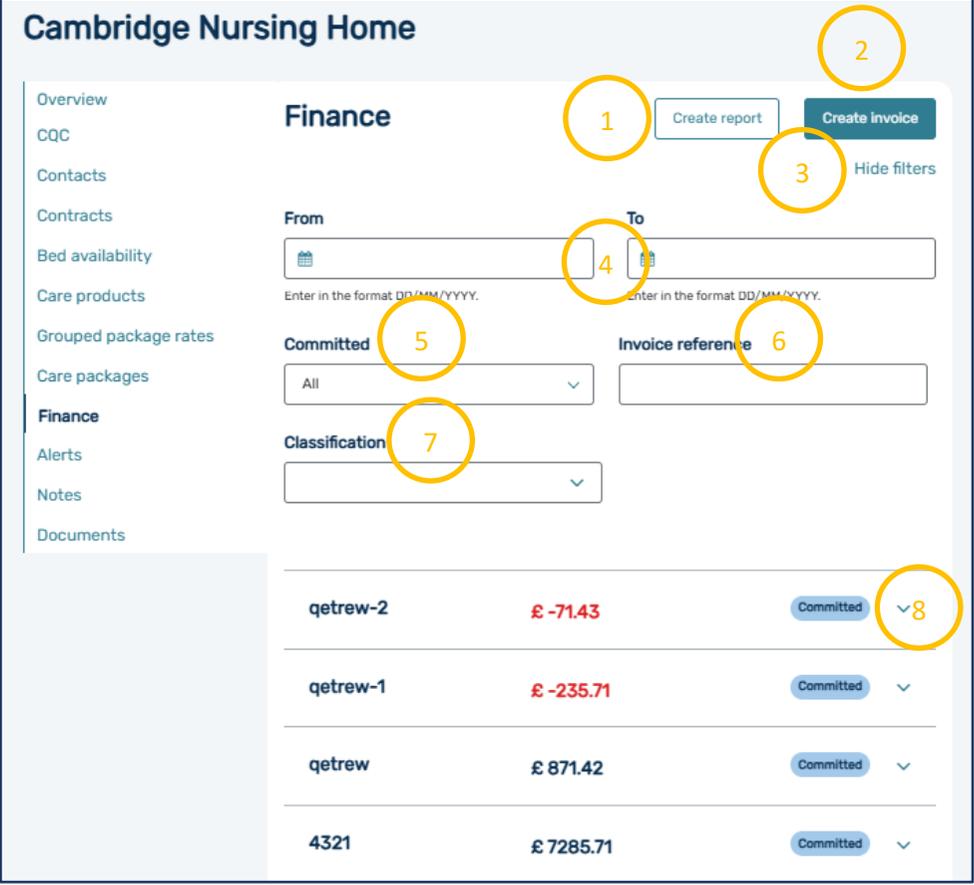
You can also click on the blue hyperlink to view the patient record from within BroadCare.

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

## 6.9 Finance

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

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



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**Finance**

1 Create report 2 Create invoice 3 Hide filters

From To 4

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

5 Committed 6 Invoice reference

7 Classification

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

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

**qetrew-2** **£ -71.43** Committed

<b>Received</b> 01/07/2023	<b>Invoice ID</b> 16417	<b>Classification</b> CHC/FNC
<b>From</b> 30/06/2024	<b>To</b> 30/06/2024	<b>Payment method</b>

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

**Last updated:** 25/07/2023, 10:01 by Pranav Bhatt

[Add note](#)
[Add document](#)
[View notes](#)
[View documents](#)
View patient invoices

### Patient invoices

Contract ID	Patient BC ID	Ledger Reference	From	To	Amount
9504	5620		30/06/2024	30/06/2024	£ -28.57
9511	5620		30/06/2024	30/06/2024	£ -42.86
<b>Total</b>					<b>£ -71.43</b>

Close

- **Add note**

**Add note**

Reason \* Assign action to

Note \*

Cancel Save

- **Add document**

**Add document**

Document \*

Drop a file here or browse to upload

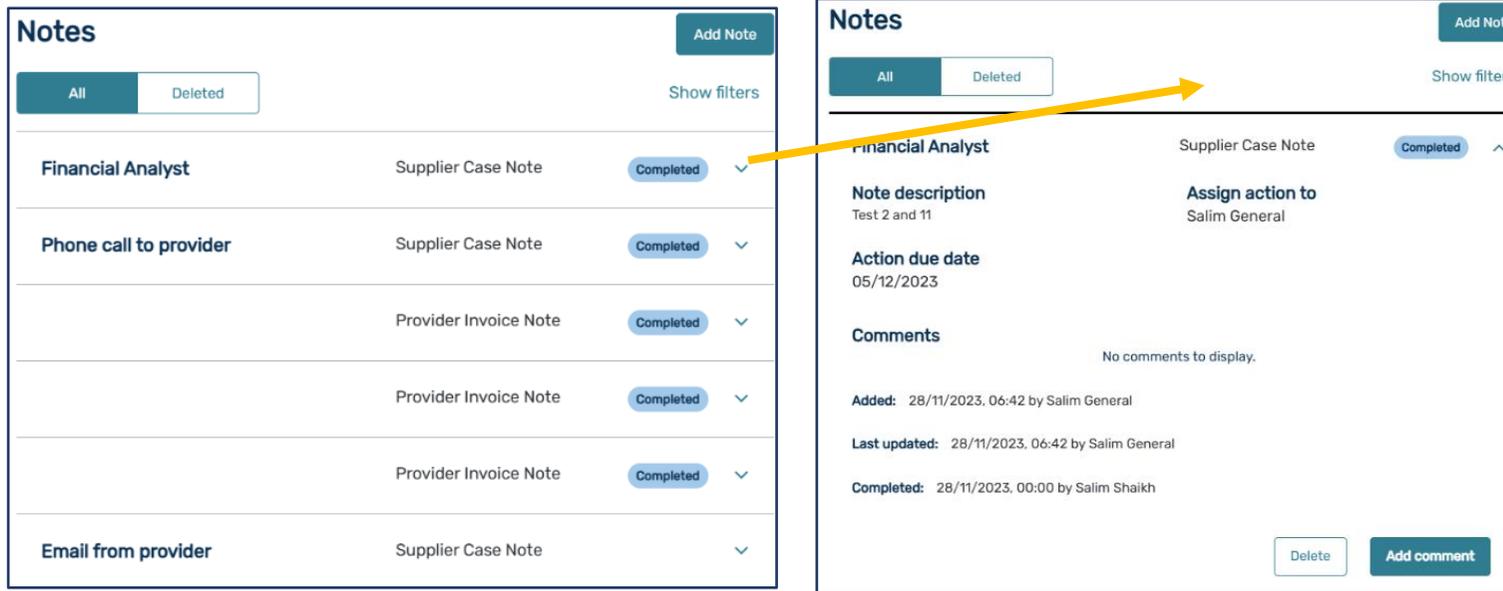
Description \*

Folder \*

General

Cancel Upload

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



**Notes** (Left Screenshot):

Subject	Type	Status	Action
Financial Analyst	Supplier Case Note	Completed	▼
Phone call to provider	Supplier Case Note	Completed	▼
	Provider Invoice Note	Completed	▼
	Provider Invoice Note	Completed	▼
	Provider Invoice Note	Completed	▼
Email from provider	Supplier Case Note		▼

**Notes** (Right Screenshot - Expanded Note):

**Financial Analyst** Supplier Case Note **Completed** ^

**Note description**  
Test 2 and 11

**Assign action to**  
Salim General

**Action due date**  
05/12/2023

**Comments**  
No comments to display.

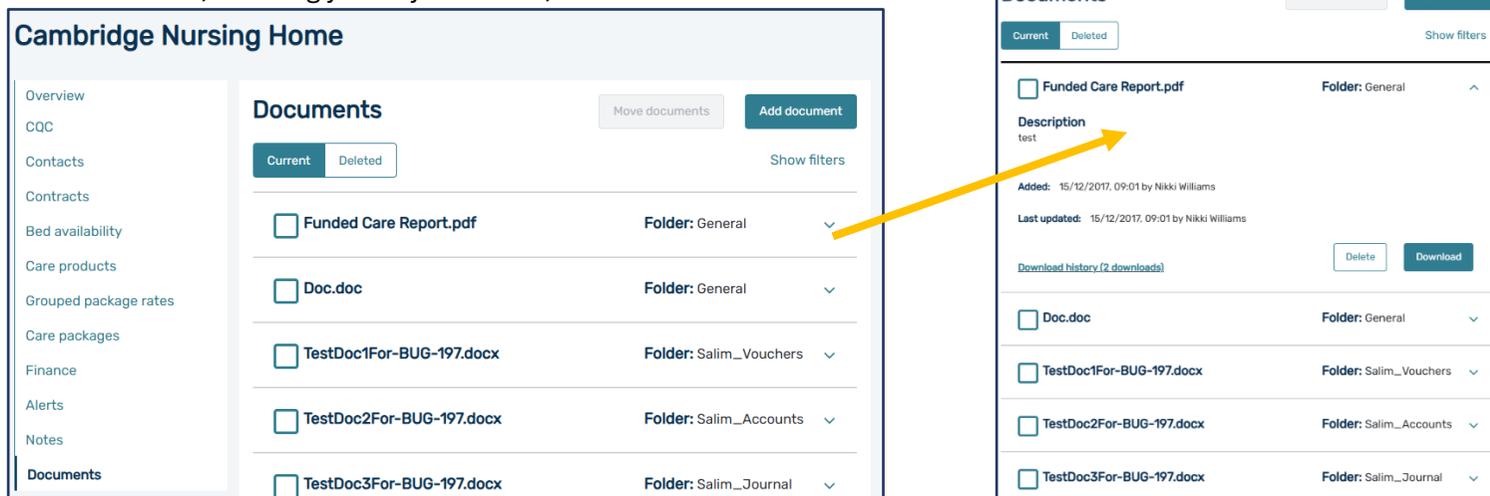
**Added:** 28/11/2023, 06:42 by Salim General

**Last updated:** 28/11/2023, 06:42 by Salim General

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

Buttons: Delete, Add comment

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



**Cambridge Nursing Home**

**Documents** (Left Screenshot):

Document Name	Folder	Action
Funded Care Report.pdf	General	▼
Doc.doc	General	▼
TestDoc1For-BUG-197.docx	Salim_Vouchers	▼
TestDoc2For-BUG-197.docx	Salim_Accounts	▼
TestDoc3For-BUG-197.docx	Salim_Journal	▼

**Documents** (Right Screenshot - Expanded Document):

**Funded Care Report.pdf** Folder: General ^

**Description**  
test

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

**Last updated:** 15/12/2017, 09:01 by Nikki Williams

[Download history \(2 downloads\)](#) Delete Download

**Doc.doc** Folder: General ▼

**TestDoc1For-BUG-197.docx** Folder: Salim\_Vouchers ▼

**TestDoc2For-BUG-197.docx** Folder: Salim\_Accounts ▼

**TestDoc3For-BUG-197.docx** Folder: Salim\_Journal ▼

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

**Cambridge Nursing Home**

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

**Finance** Create report Create invoice Hide filters

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

**Committed**  **Invoice reference**

**Classification**

SS1	£ 95.00	▼
qw65 invoice ref	£ 357.00	▼

**SS1** £ 95.00 ▲

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

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

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

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

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

View packages

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

**Edit invoice**

**Invoice reference \***  **Received \***  **Classification**

Enter in the format DD/MM/YYYY.

**Amount**  **Date paid**  **Credit note**  Yes  No

Enter in the format DD/MM/YYYY.

**Filter by**

**From \***  **To \***

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

View packages Add custom invoice

**Calculations**

Total on invoice: <b>£ 95.00</b>	Expected amount selected: <b>£ 0.00</b>	Total amount selected: <b>£ 0.00</b>	Invoice balance: <b>£ 95.00</b>
-------------------------------------	--	---	------------------------------------

Cancel Save as draft Commit

- **Add custom invoice**

### Edit invoice

**Invoice reference \***

**Received \***

Enter in the format DD/MM/YYYY.

**Classification**

**Amount**

**Date paid**

Enter in the format DD/MM/YYYY.

**Credit note**

**Filter by**

**From \***

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

**To \***

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

**Calculations**

Total on invoice: <b>£ 95.00</b>	Expected amount selected: <b>£ 0.00</b>	Total amount selected: <b>£ 0.00</b>	Invoice balance: <b>£ 95.00</b>
-------------------------------------	--	---	------------------------------------

### Add custom invoice

**Contract ID \***

**Patient - BC ID**

**From \***

Enter in the format DD/MM/YYYY.

**To \***

Enter in the format DD/MM/YYYY.

**Expected amount**

**Invoiced amount**

**Ledger reference**

Weekly cost: **£0.00**

- **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.

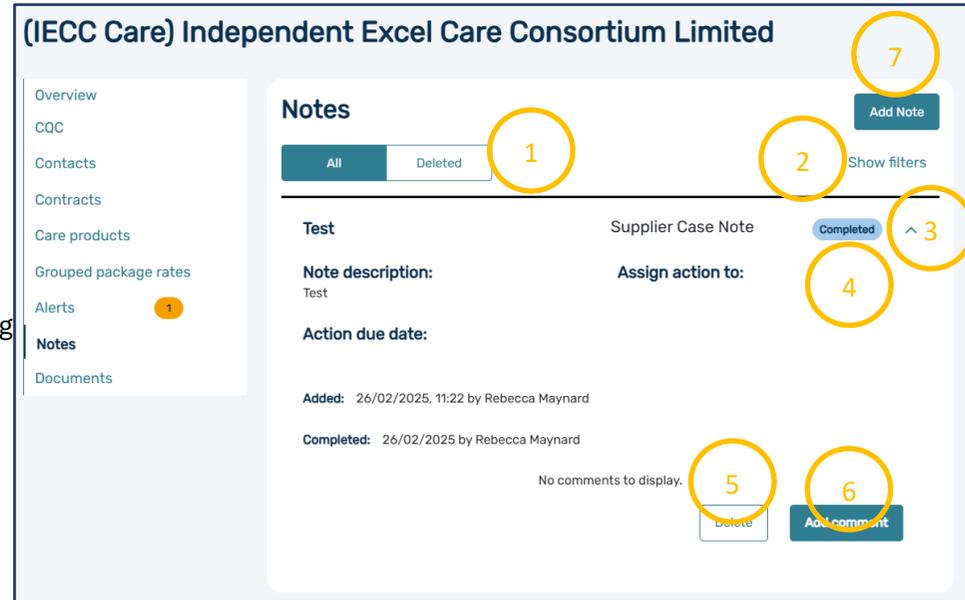
## 6.11 Notes

(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.

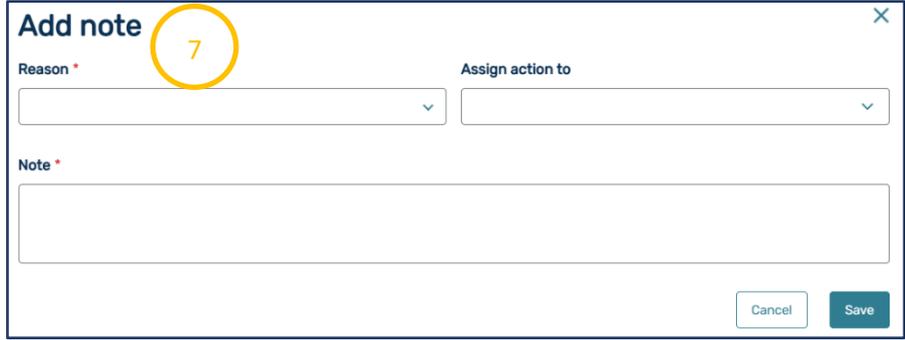


7. **Add Note** – This allows you to add notes to the provider record.

**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.



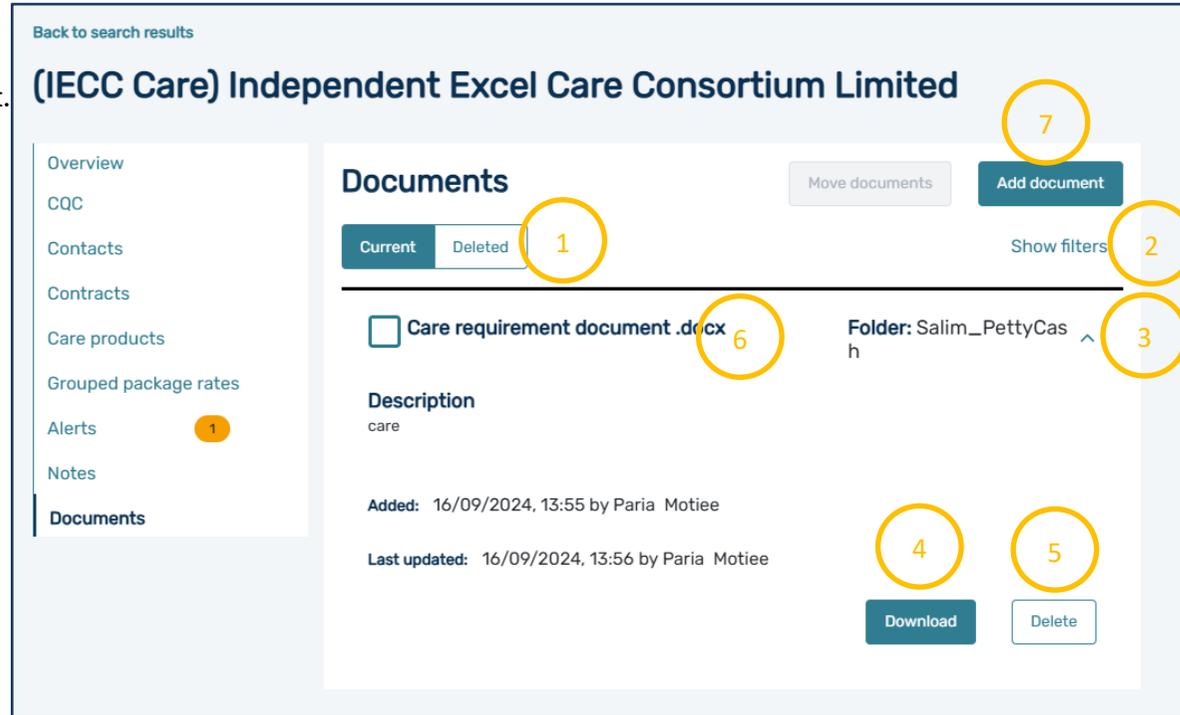
## 6.12 Documents

(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.



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

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

**Document** – Upload the document

**Description** – Provide information on what the document is

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

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

The screenshot shows a modal window titled "Add document" with a close button (X) in the top right corner. The form contains the following fields:

- Document \***: A file upload area with a cloud icon and the text "Drop a file here or browse to upload".
- Description \***: A large text input area.
- Folder \***: A dropdown menu with "General" selected and a downward arrow.

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

## 7 CQC Library

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

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

### 7.1 Standard Search

Enter the below filter information and click 'Search'.

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

- **Location ID**  
This is provider specific and stored in the provider record and is used to link the provider to CQC

#### Provider search

ICB library
CQC library

**Provider name**

**Provider 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.

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**

 X ▼

**Location ID**

 ▼

**Care registration specialism**

 X ▼
**Or**
**And**

**CQC rating**

 ▼

**Provided and run by**

**Registration status**

 All  Registered  Deregistered

Hide advanced filters
Clear all
Search

Displaying 19 providers

Select all
List
Map
A-Z provider name ▼

Load providers
Create report

**Angel Care Group Limited**

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

[View on Google Maps](#)

**Phone number**  
07496817762

Select

**CQC rating** Good

[Show more details](#)

Add to ICB library View provider profile

ICB library
CQC library

**Provider name**

**Provider postcode**

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

**Provider service type**

 X ▼

**Location ID**

 ▼

**Care registration specialism**

 X ▼
**Or**
**And**

**CQC rating**

 ▼

**Provided and run by**

**Registration status**

 All  Registered  Deregistered

Hide advanced filters
Clear all
Search

Displaying 19 providers

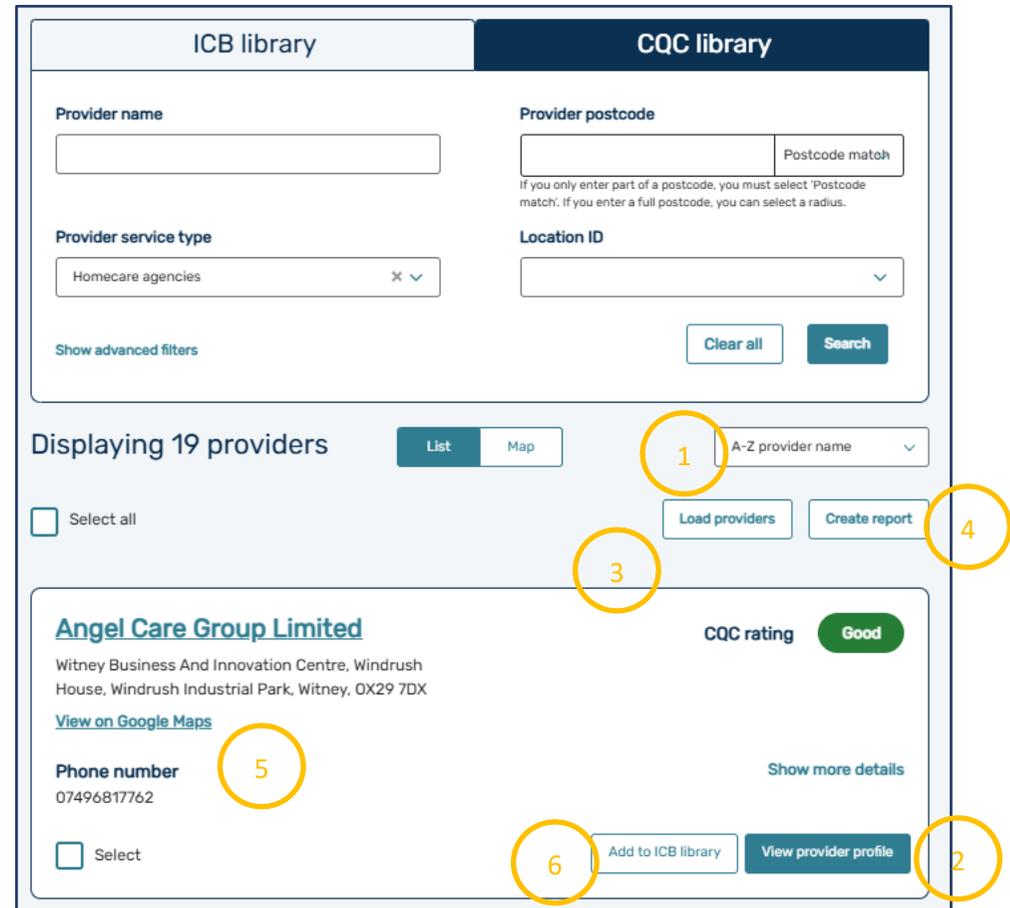
Select all
List
Map



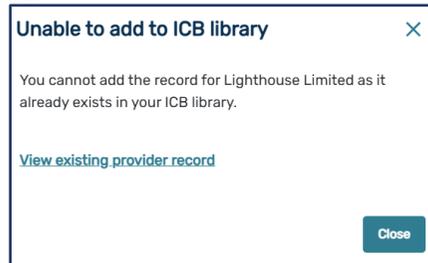
### 7.3 List View

Once the list of providers is showing you can:

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

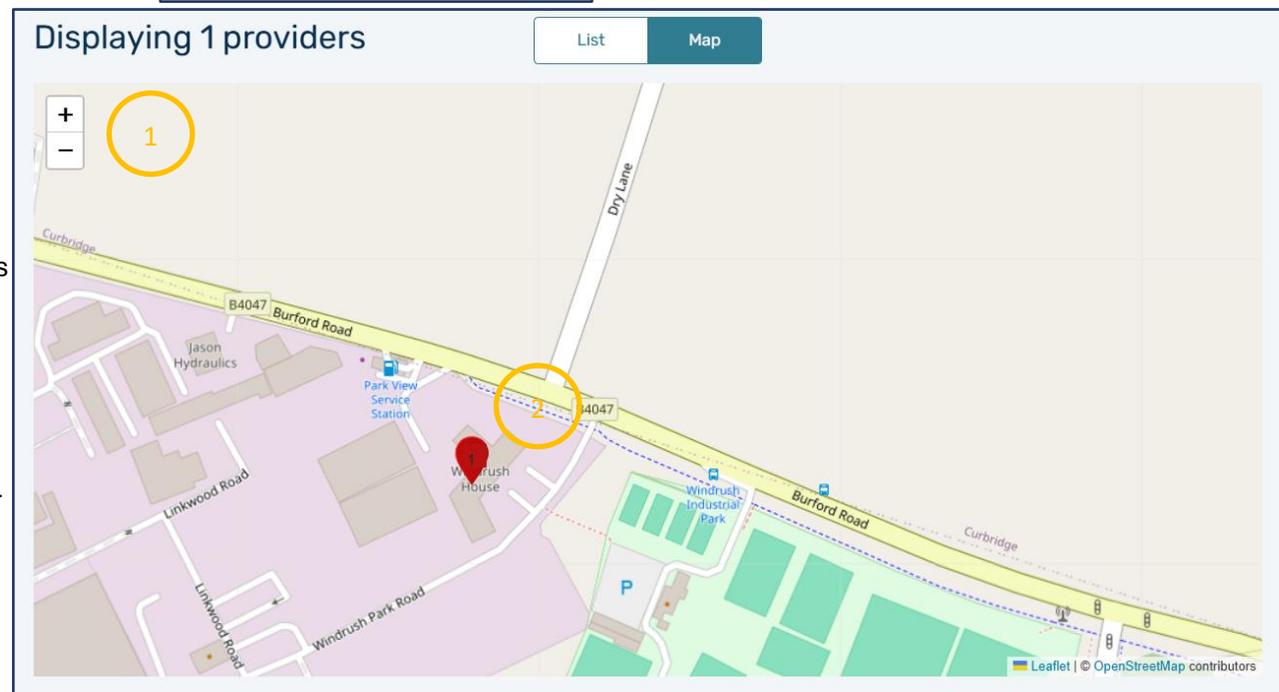


5. **View on Google Maps** – this will take you to google maps to view further information and get directions.
6. **Add to ICB Library** – By selecting this the provider will be added to the ICB Library. If the provider already exists you will be presented with the below where you can view the provider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



### 7.4 Map View

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



**Angel Care Group Limited**

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

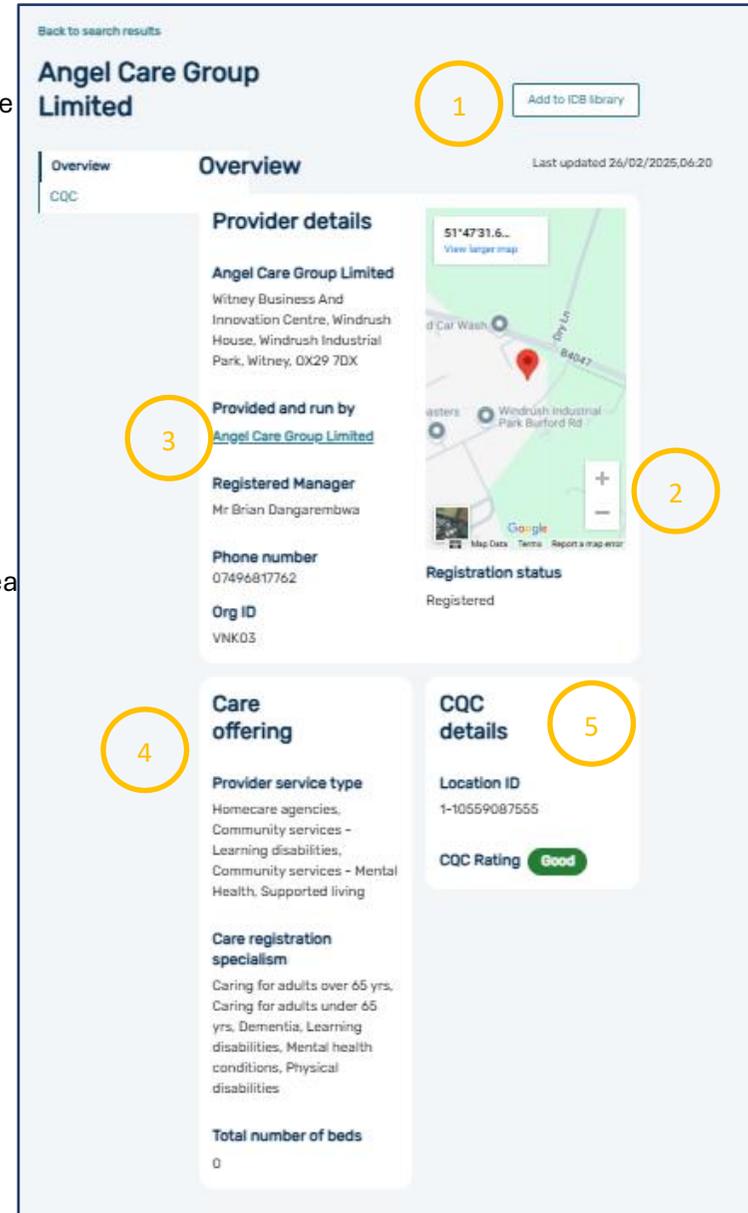
## 7.5 Provider record

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

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



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



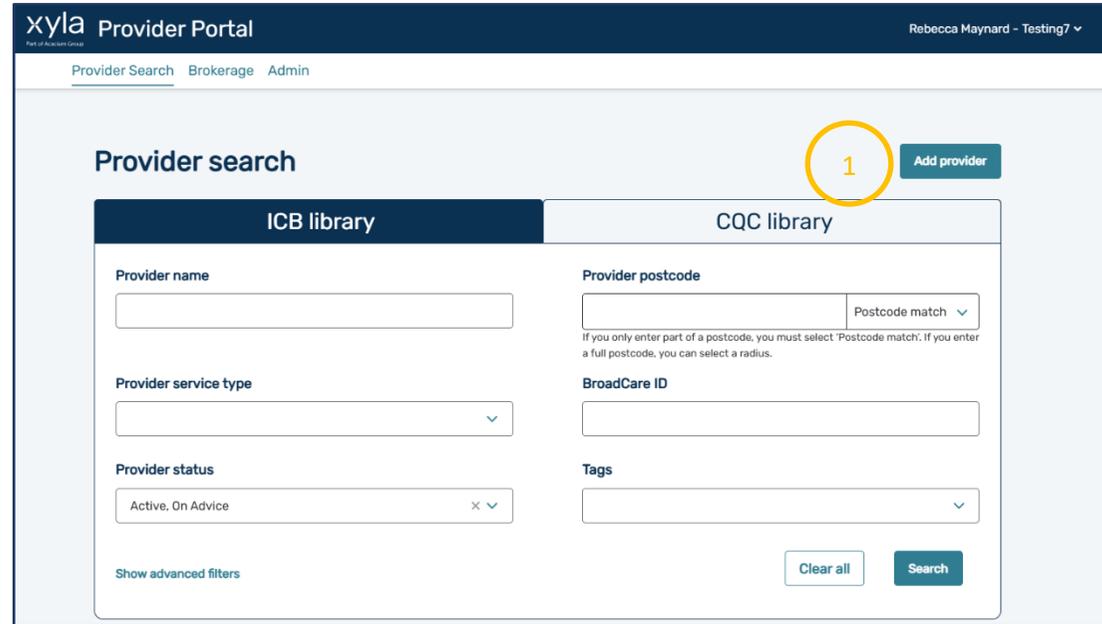
## 7.6 Adding a provider

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

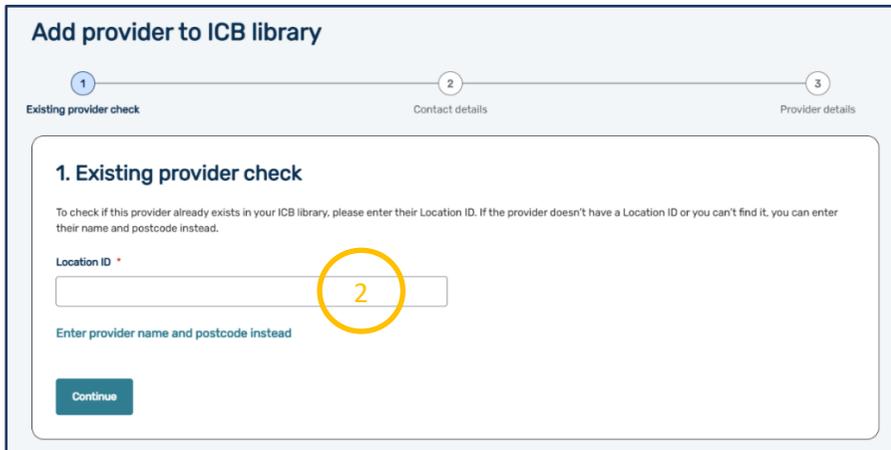
The below outlines how to add a provider from the ICB library.

1. Click 'Add Provider'.
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](https://www.cqc.org.uk) website.

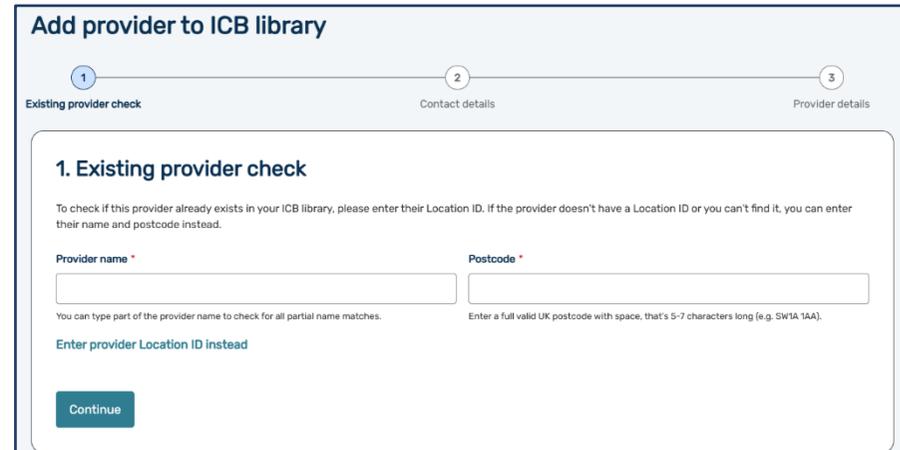
Once you have searched and located the provider the Location ID will appear in the address bar at the top left of your browser for instance <https://www.cqc.org.uk/location/1-123927323>. The last numbers are the Location ID 1-123927323. Alternatively, you can enter the provider name and postcode and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



The screenshot shows the 'Provider search' page in the xyla Provider Portal. At the top right, the user is identified as 'Rebecca Maynard - Testing7'. Below the navigation bar, there are three tabs: 'Provider Search', 'Brokerage', and 'Admin'. The main content area is titled 'Provider search' and features two tabs: 'ICB library' (selected) and 'CQC library'. A yellow circle with the number '1' highlights the 'Add provider' button in the top right corner. The search form includes fields for 'Provider name', 'Provider postcode' (with a 'Postcode match' dropdown), 'BroadCare ID', and 'Tags'. There are also 'Clear all' and 'Search' buttons at the bottom right.



This screenshot shows the first step of the 'Add provider to ICB library' process. The page title is 'Add provider to ICB library' and it has a progress indicator with three steps: 'Existing provider check' (1), 'Contact details' (2), and 'Provider details' (3). The current step is '1. Existing provider check'. The instructions state: 'To check if this provider already exists in your ICB library, please enter their Location ID. If the provider doesn't have a Location ID or you can't find it, you can enter their name and postcode instead.' There is a text input field for 'Location ID' which is circled in yellow with the number '2'. Below it, there is a link that says 'Enter provider name and postcode instead'. A 'Continue' button is at the bottom left.



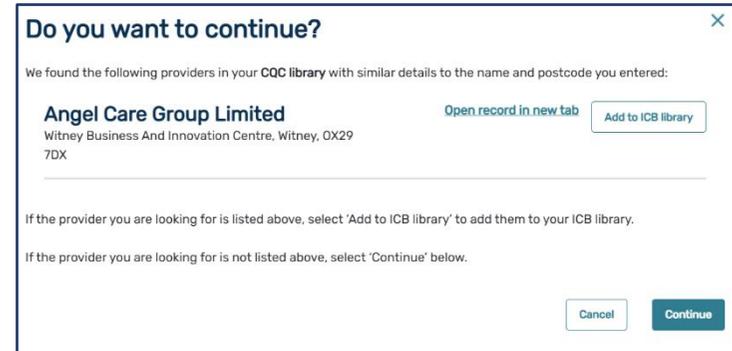
This screenshot shows the same 'Add provider to ICB library' form, step 1: Existing provider check. The instructions are the same as in the previous screenshot. However, there are two text input fields: 'Provider name' and 'Postcode'. The 'Provider name' field has a note: 'You can type part of the provider name to check for all partial name matches.' The 'Postcode' field has a note: 'Enter a full valid UK postcode with space, that's 5-7 characters long (e.g. SW1A 1AA)'. A 'Continue' button is at the bottom left.

### 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.



### 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.

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 \***

**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

**Day time start**

**Night time start**

**Vendor site reference**

Back

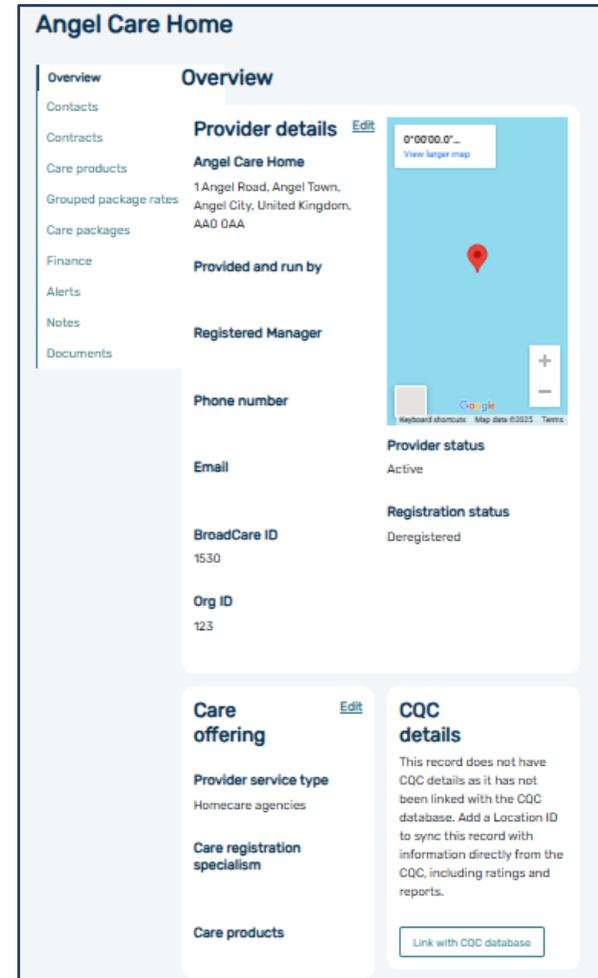
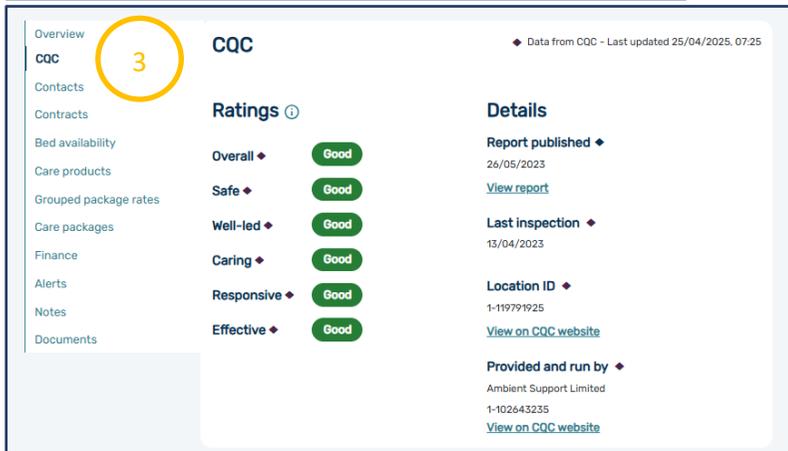
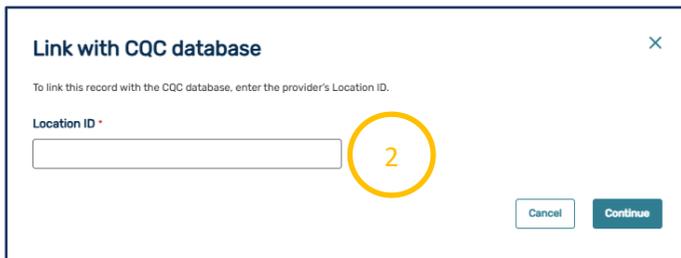
Save

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

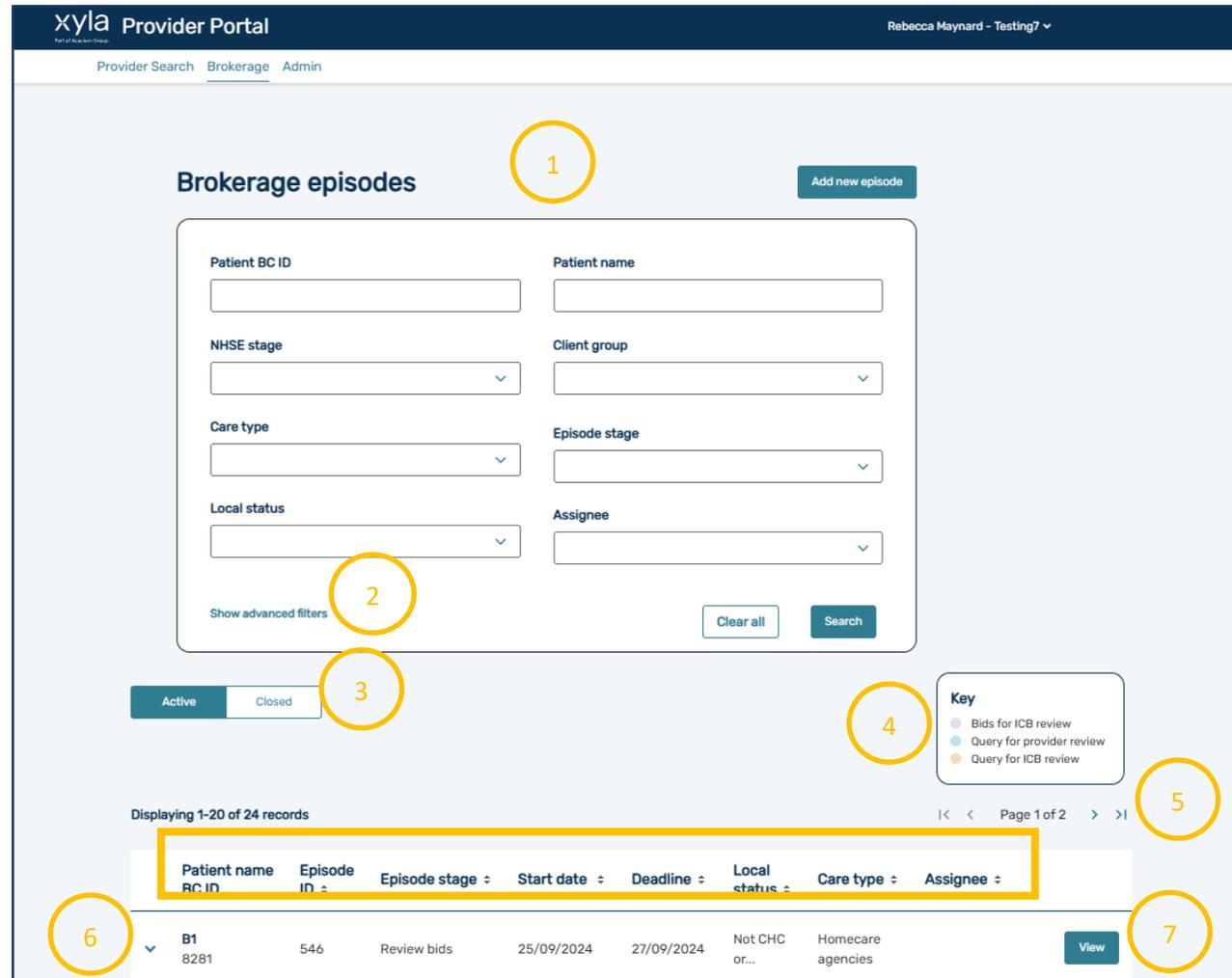


## 8 Brokerage

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.

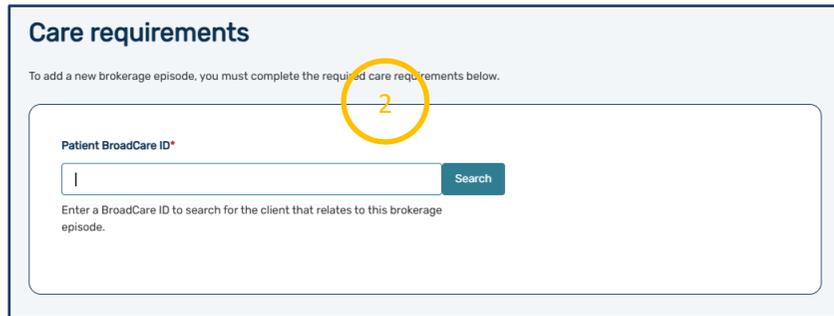
5. **Arrows** – This will show the episodes and allow you to navigate through the pages. By clicking on the headings, you can change the order of the episodes.
6. **Arrow** - This will open a summary of the brokerage episode.
7. **View** - This will open the episode.

Patient name BC ID	Episode ID ↕	Episode stage ↕	Start date ↕	Deadline ↕	Local status ↕	Care type ↕	Assignee ↕	
↑ <span style="border: 1px solid orange; border-radius: 50%; padding: 2px;">6</span>	B1 8281	546	Review bids	25/09/2024	27/09/2024	Not CHC or...	Homecare agencies	<span style="border: 1px solid orange; border-radius: 50%; padding: 2px;">7</span> <span style="background-color: #00728f; color: white; padding: 2px 5px; border-radius: 3px;">View</span>
<b>Client group</b>	Physical Disabilities		<b>Created</b>	25/09/2024, 11:08 by Joanna Smith				
<b>NHS number</b>	RES-TRI-CTED		<b>Last updated</b>	03/10/2024, 12:40 by Nicola Durham				
<b>NHSE stage</b>	None							
<b>Local stage</b>	CHC							
<b>Classification</b>	CHC/FNC							
<b>Record owner</b>	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.'



**Care requirements**

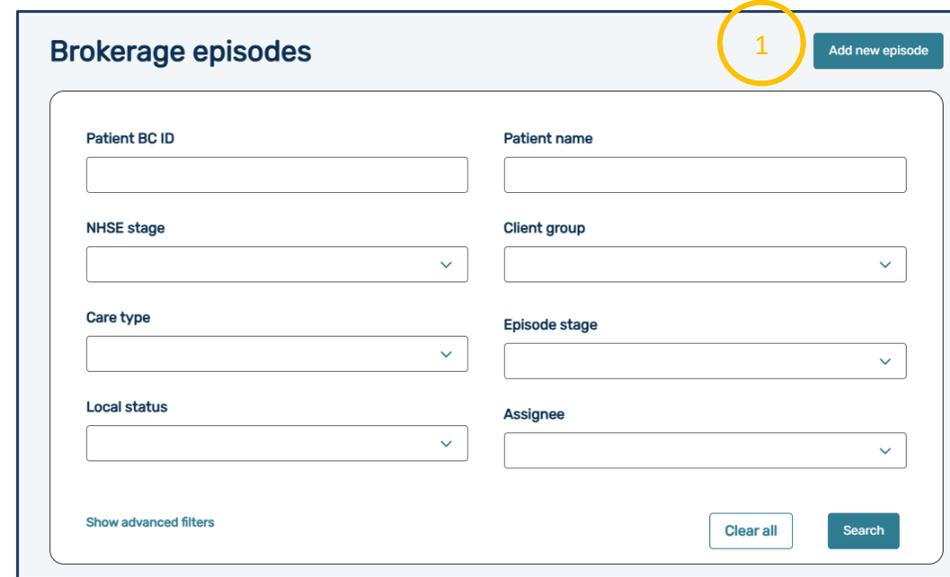
To add a new brokerage episode, you must complete the required care requirements below.

**Patient BroadCare ID\***

1

Search

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



**Brokerage episodes**

1 Add new episode

Patient BC ID

Patient name

NHSE stage

Client group

Care type

Episode stage

Local status

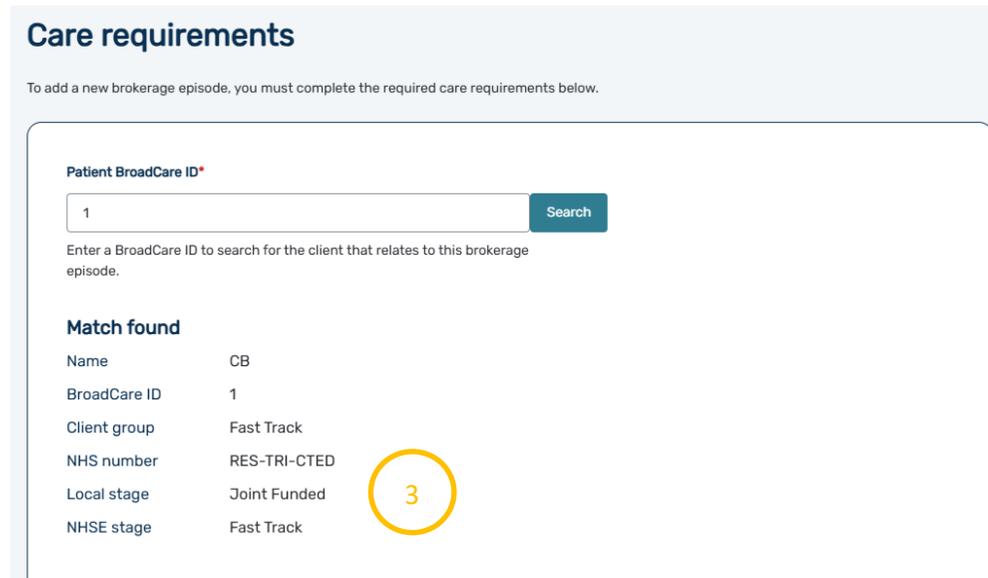
Assignee

Show advanced filters

Clear all Search

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 requirements**

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

**Patient BroadCare ID\***

1

Search

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

**Match found**

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

**Care type\***

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

**Assignee\***

**Local status**

**Episode start date\***

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.

**Supporting documents**

**Additional information**

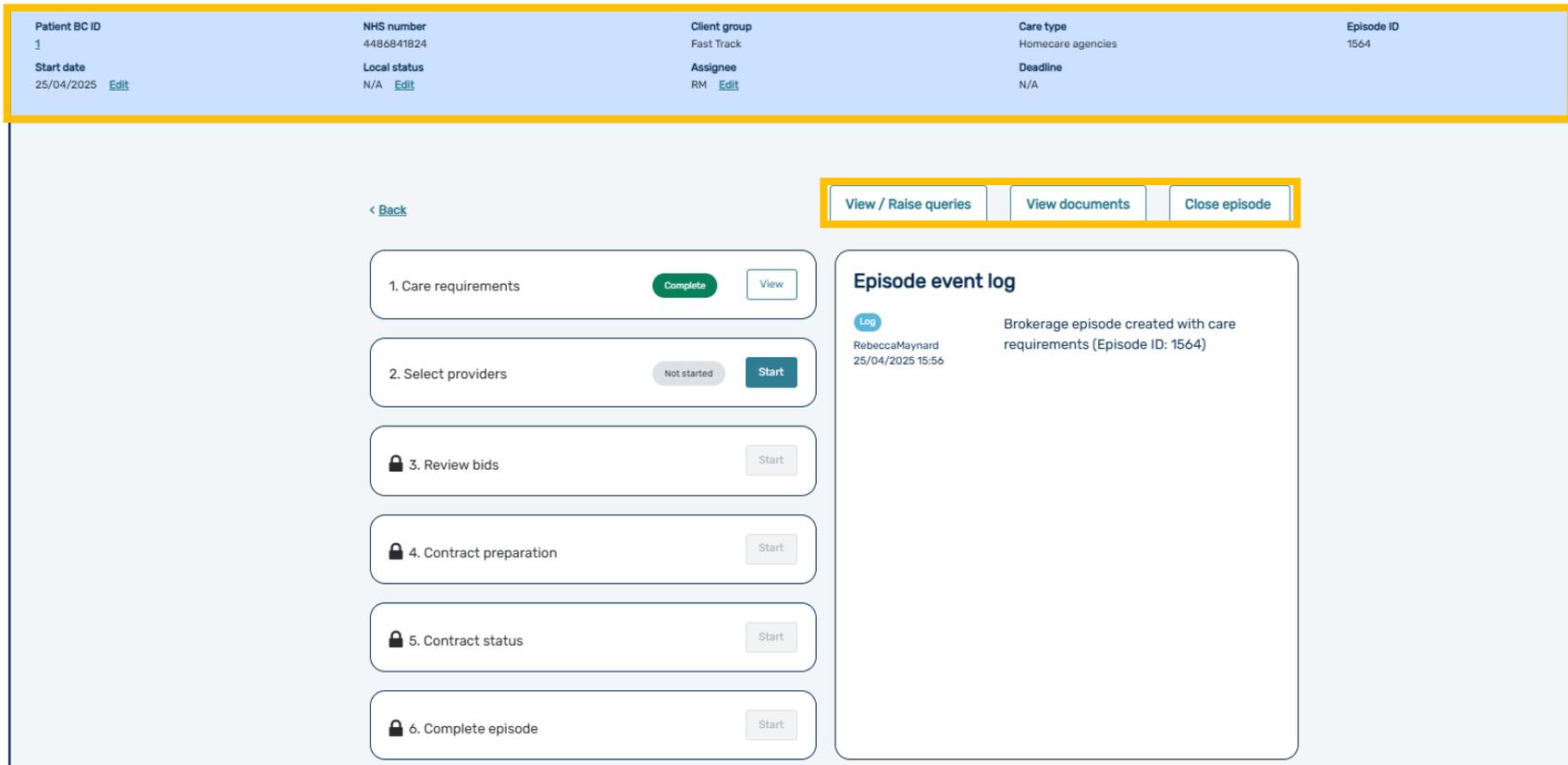
Enter any additional notes about the care required for the client that is not detailed in the care requirements or supporting documents.

### 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.



Patient BC ID	NHS number	Client group	Care type	Episode ID
1	4486841824	Fast Track	Homecare agencies	1564
<b>Start date</b> 25/04/2025 <a href="#">Edit</a>	<b>Local status</b> N/A <a href="#">Edit</a>	<b>Assignee</b> RM <a href="#">Edit</a>	<b>Deadline</b> N/A	

< Back

View / Raise queries
View documents
Close episode

1. Care requirements Complete [View](#)
2. Select providers Not started [Start](#)
3. Review bids Start
4. Contract preparation Start
5. Contract status Start
6. Complete episode Start

#### Episode event log

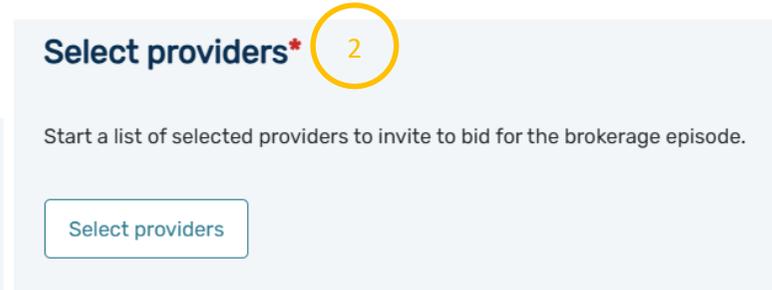
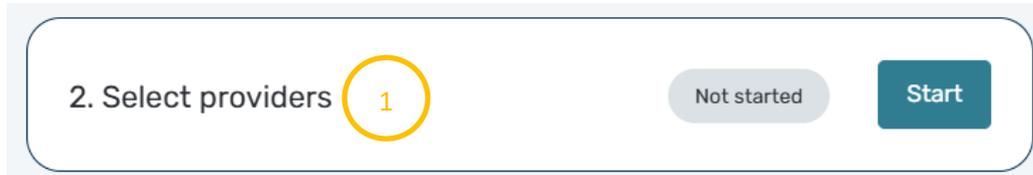
Log Brokerage episode created with care requirements (Episode ID: 1564)

RebeccaMaynard  
25/04/2025 15:56

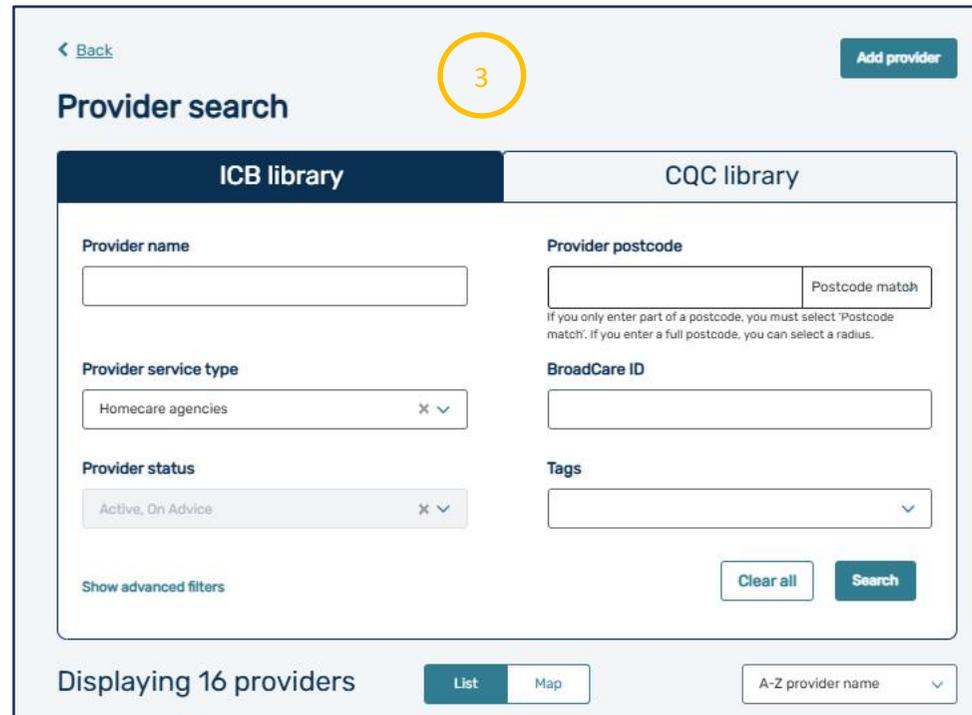
### 8.1.2 Brokerage - Select Providers

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

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



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,

**(IECC Care) Independent Excel Care Consortium Limited** CQC rating -  
Alerts **1**

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

Phone number Email Show more details

[test@email.com](#)

Select **4** [View provider profile](#)

**@PlymouthCare** CQC rating **Requires improvement**  
Alerts **1** **01**

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

Phone number Email Show more details

01752312500

Select [View provider profile](#)

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

Expand ^
2 providers selected | Episode ID: 1564

5
Continue

- 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**

📅

Enter in the format DD/MM/YYYY.

**Time**

🕒

Edit

### 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 \***

📅

Enter in the format DD/MM/YYYY.

**Time**

🕒

**Reason for deadline change \***

v

Cancel

Save

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

2. Select providers In progress [View](#)

### Set a deadline

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

**Deadline date**  **Time**

Enter in the format DD/MM/YYYY.

---

### Selected providers \*

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

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

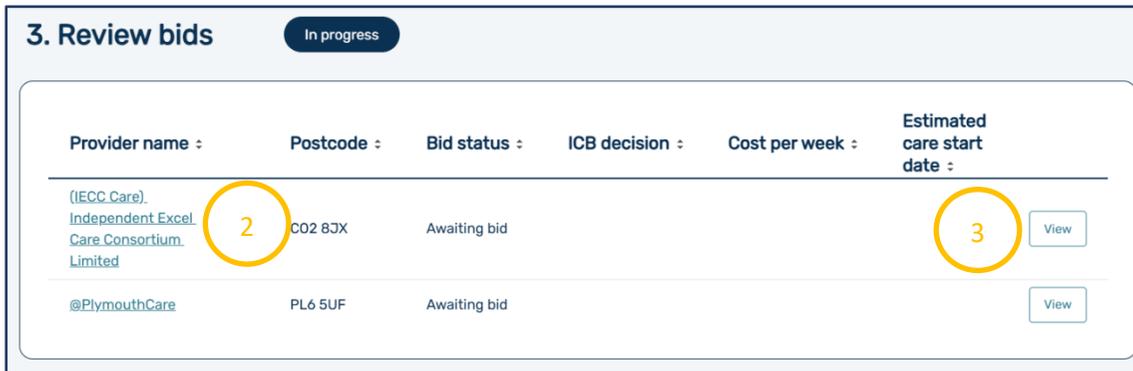
[Select more providers](#)

### 8.1.3 Brokerage - Review bids

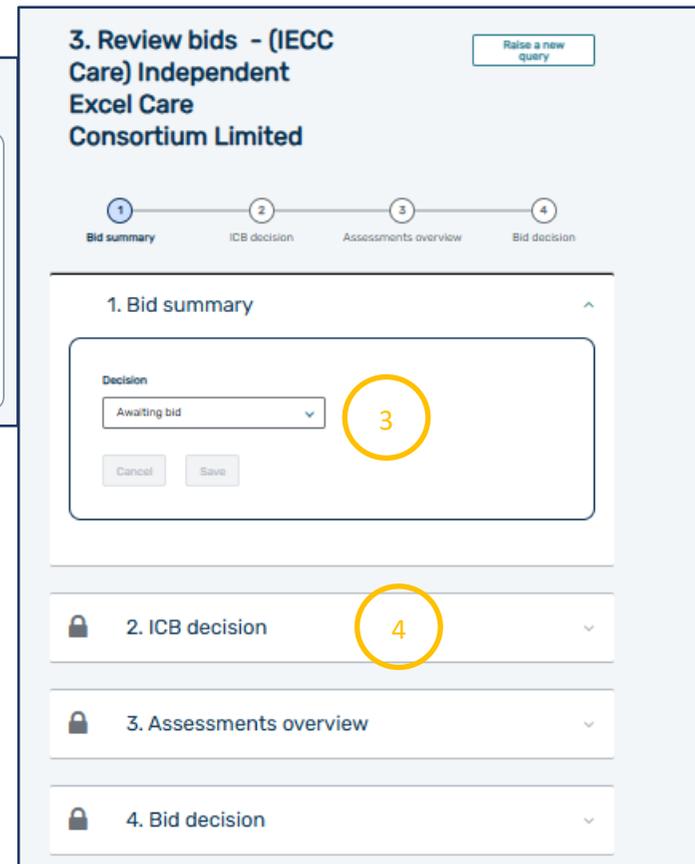
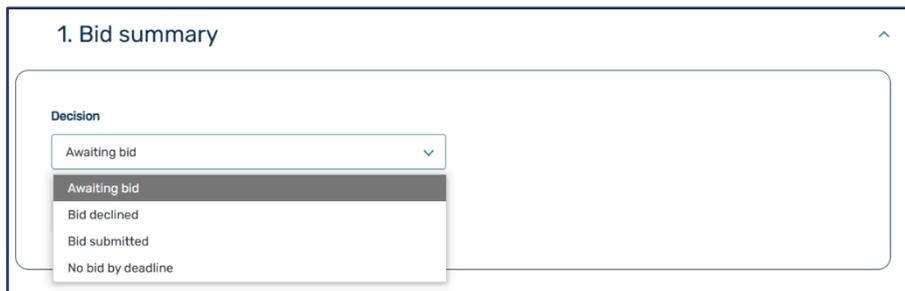
1. Click 'View'.



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 \***

[Empty dropdown menu]
▼

**Comments**

[Empty text area]

Cancel

Save

**8.1.3.2 Brokerage – Review bids - No bid by deadline**

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

### 8.1.3.3 Brokerage – Review bids - Bid submitted

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

Click Save when all required information has been completed.

**Decision**

Bid submitted
▼

**Cost per week \***

£

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

**Estimated start date of care \***

📅

**Planned assessment date**

📅

Enter in the format DD/MM/YYYY.

[Upload supporting document](#)

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

**Comments**

Cancel

Save

### 8.1.3.4 Brokerage – Review bids - ICB decision

2. ICB decision ^

**Decision**

Awaiting decision v

Awaiting decision

Bid progressed

Bid not progressed

### 8.1.3.5 Bid not progressed

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

**Decision**

Bid not progressed v

**Reason for not progressing \***

v

**Comments**

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

Cancel

Save

### 8.1.3.6 Bid progressed

This will allow you to record any comments.

**Decision**

Bid progressed v

**Comments**

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

Cancel

Save

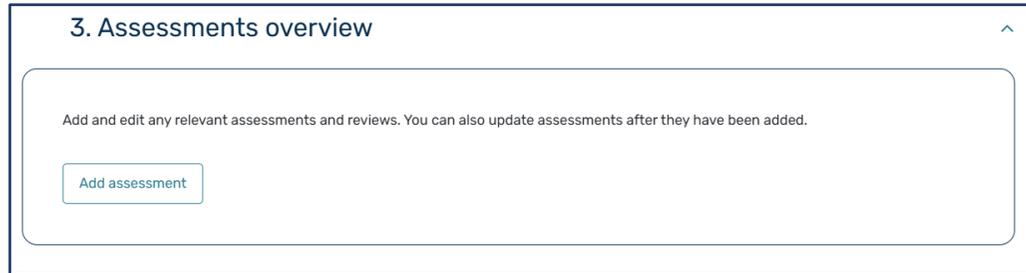
### 8.1.3.7 Brokerage – Review bids - Assessments overview

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

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

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

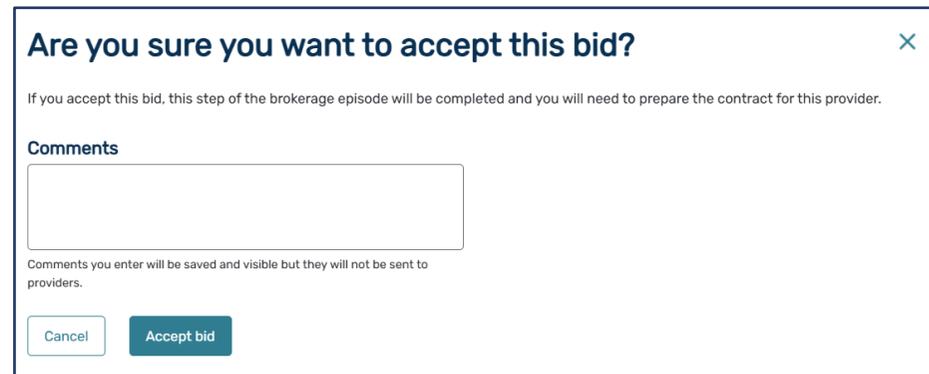
**Please note** the assessment overview section is not a mandatory requirement. You can progress to accepting the provider without filling in this section. However, if you do not complete it, you will have no data for this section in the Brokerage report.



### 8.1.3.8 Brokerage – Review bids - Bid decision

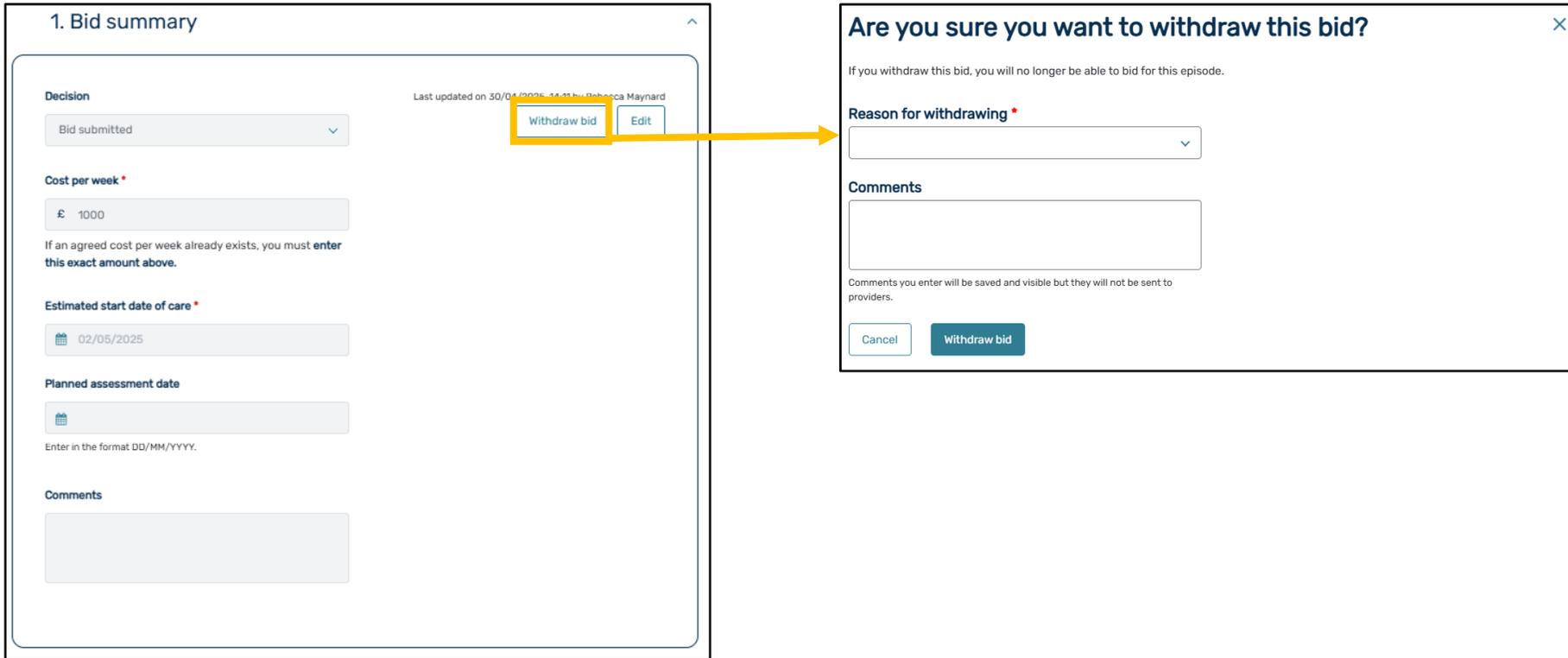
This will allow you to accept the bid.

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.



### 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.



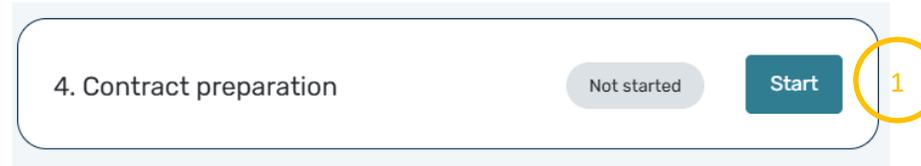
Once withdrawn the ICB can reopen the bid if required or if closed in error.

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

[Reopen withdrawn bid](#)

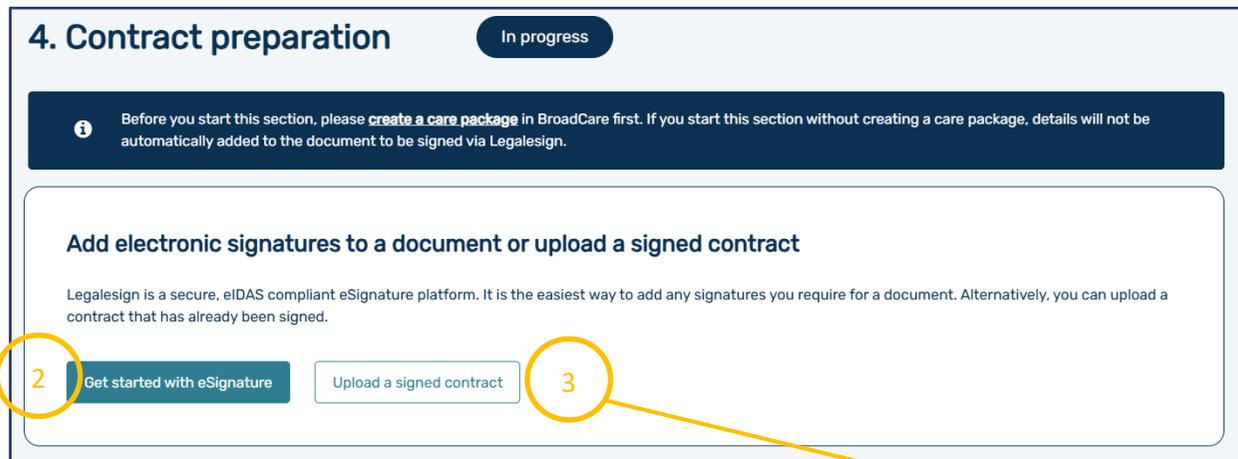
### 8.1.4 Contract preparation

1. Click Start.



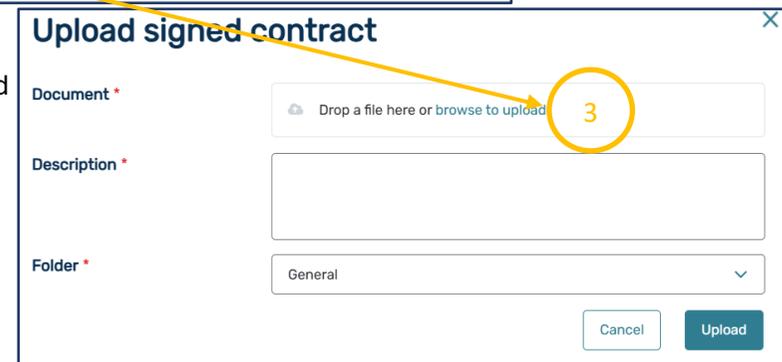
**Please note** before you start this section, please create a care package in BroadCare first. If you start this section without creating a care package, details will not be automatically added to the document to be signed via Legalesign.

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.



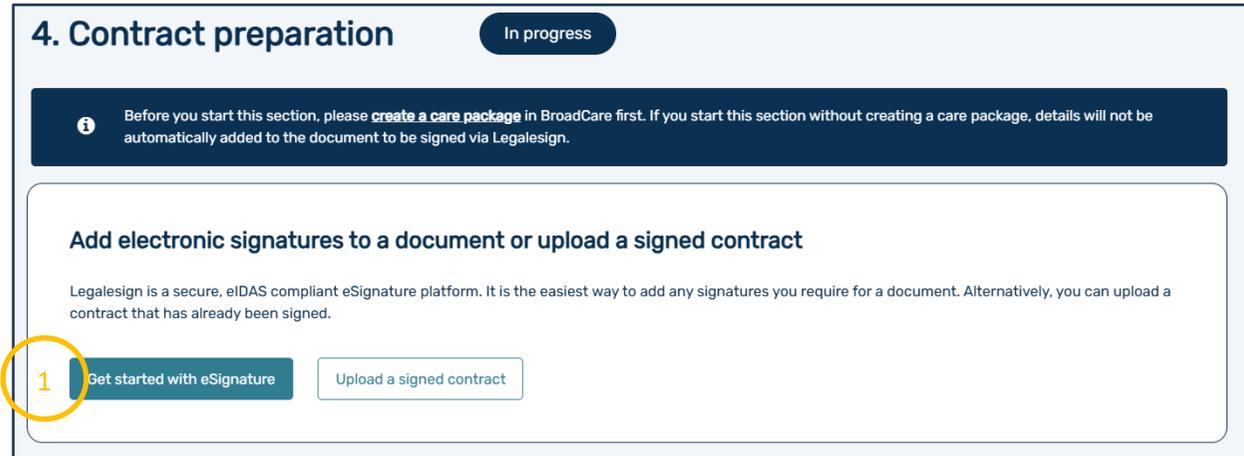
2. Sign a digital contract using Legalesign.
3. If you would not like to sign a digital contract, then you can upload a signed contract by choosing the document or drag and drop the file, add a document description, and choose what folder you would like the signed document to be saved in. Clicking ‘Upload’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

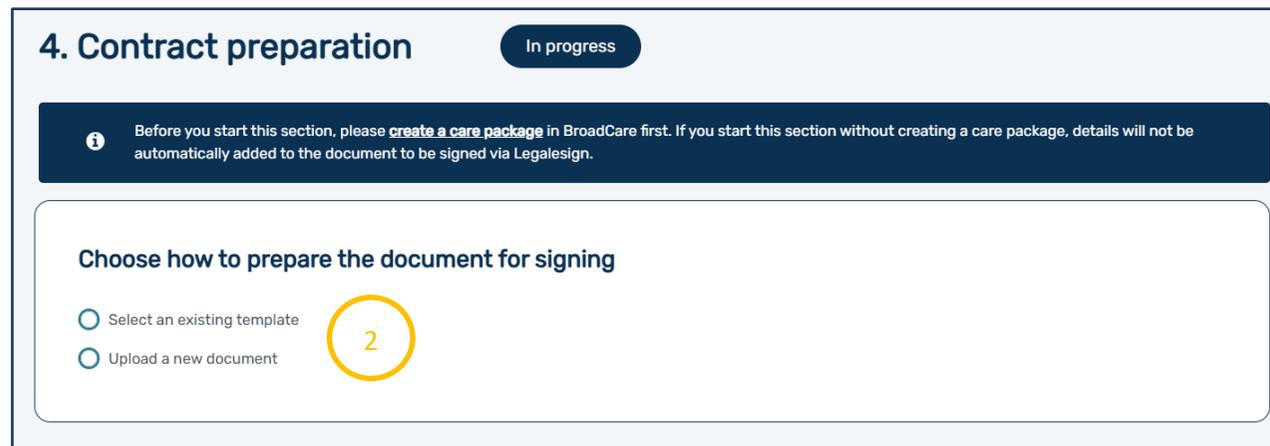


### 8.1.4.1 Contract Preparation - Signing with a digital signature

1. Click 'Get started with eSignature.'

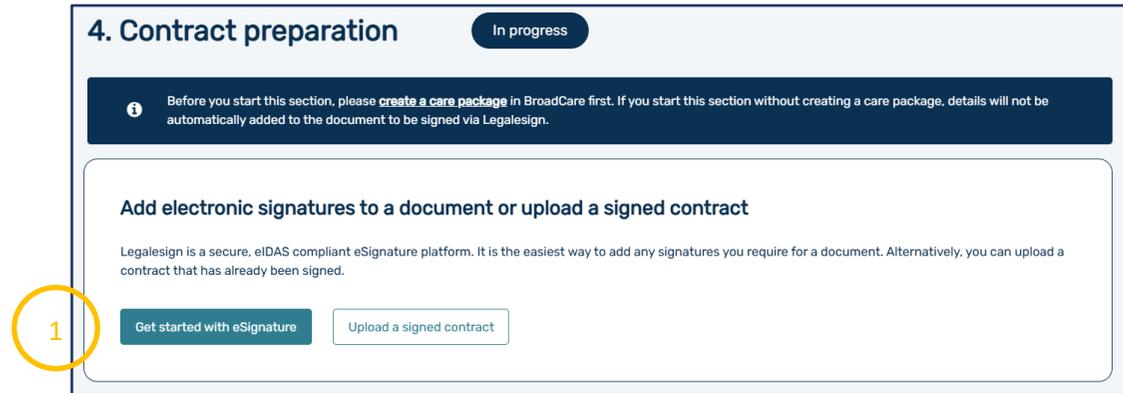


2. You can use an existing contract template, or you can upload a new document.



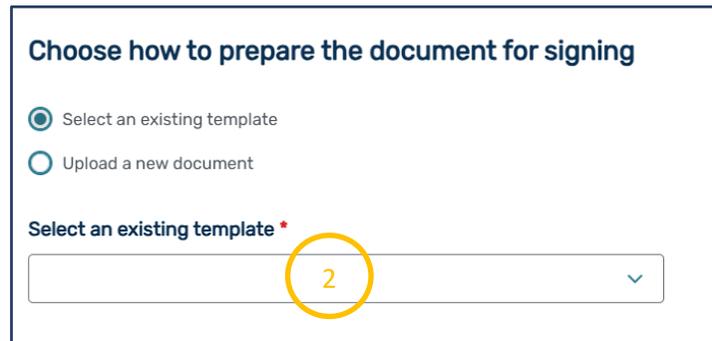
### 8.1.4.2 Contract Preparation – Signing with a digital signature - Using an existing template

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.

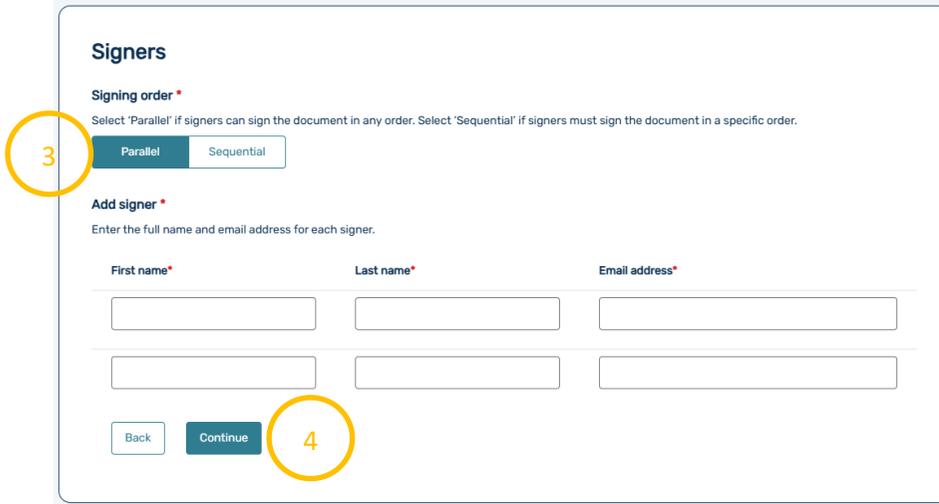


The contract templates are stored within the Legesign portal, only certain members of the ICB will have access to the portal. Legesign uses an electronic signature (eSignature) as a digital replacement for a handwritten (wet) signature and is just as legally binding.

2. If you are unable to locate the template, you wish to use in the drop down then please contact your Legesign 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



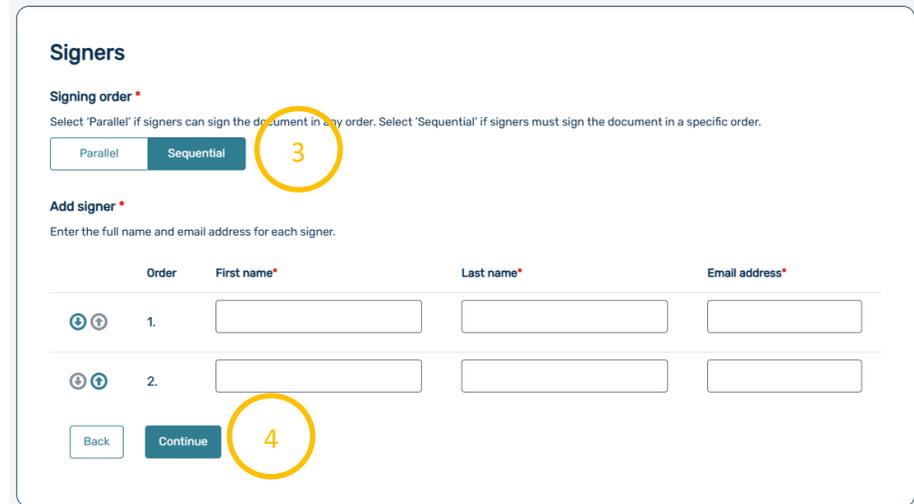
**Signers**

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

Parallel  Sequential

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

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



**Signers**

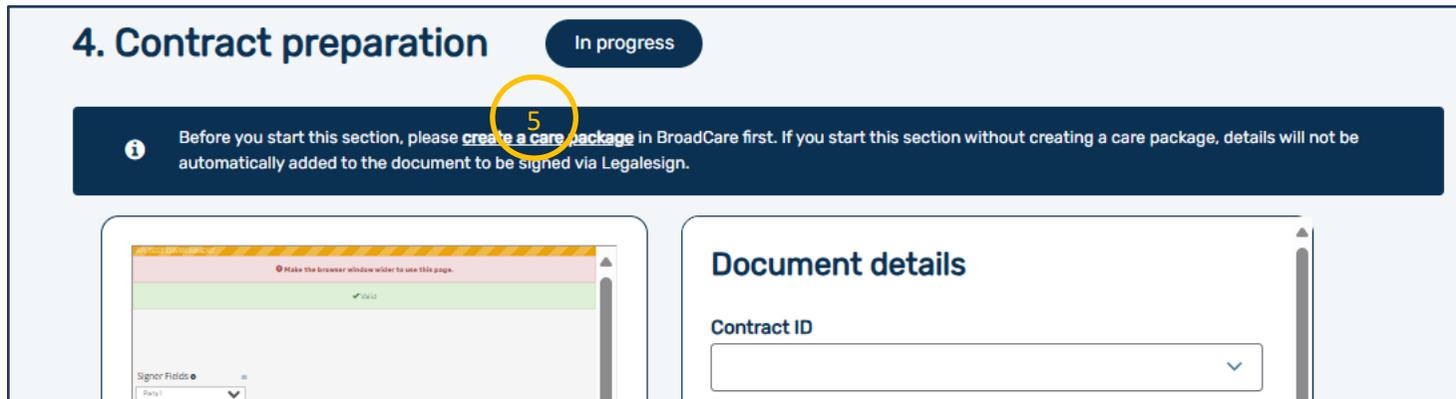
**Signing order \***  
Select 'Parallel' if signers can sign the document in any order. Select 'Sequential' if signers must sign the document in a specific order.

Parallel  Sequential

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

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

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.



**4. Contract preparation** In progress

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

Make the browser window wider to see this page.

Signer Fields

Role:

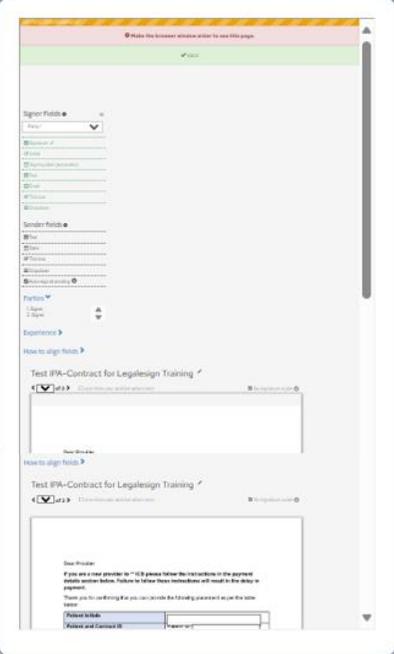
**Document details**

**Contract ID**

- Once all information has been checked and updated press ‘Send document’.

**4. Contract preparation** In progress

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



### Document details

**Contract ID**

Select a contract ID to update care package details.

**BroadCare ID (Provider ID)**

**Provider name**

**Patient BC ID**

**Initial**

**From**

**Total Cost**

Back Send document 6

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

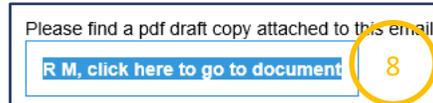
**Are you sure you want to send this document?** ×

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.

Back Send document 7

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

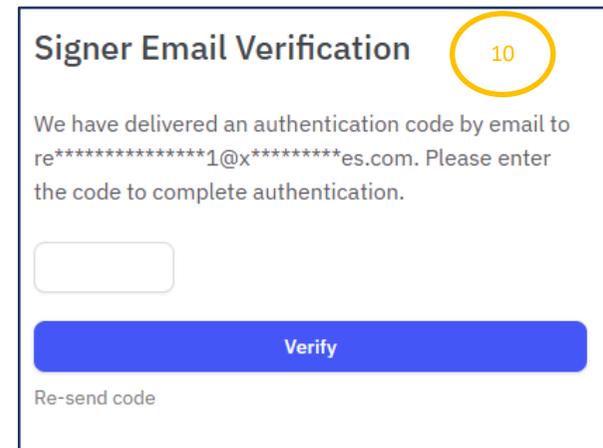
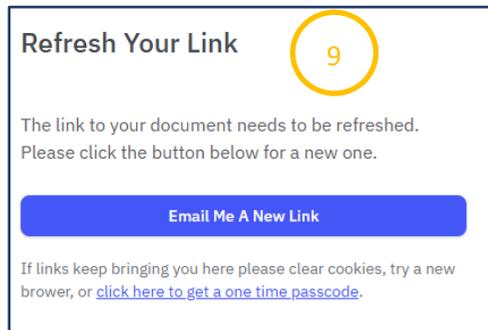
When you receive the contract by email, please click the link to access the document from the email.



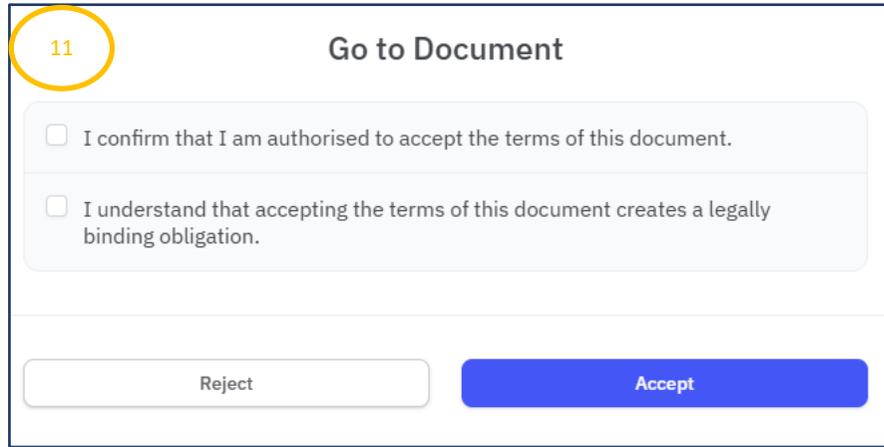
9. If the link does not work, you will be presented with the screen below, this is because your organisation does not accept the URL.

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**.



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.

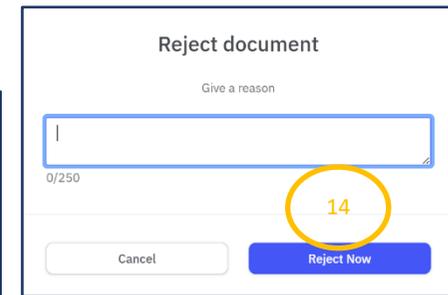


**11** **Go to Document**

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**



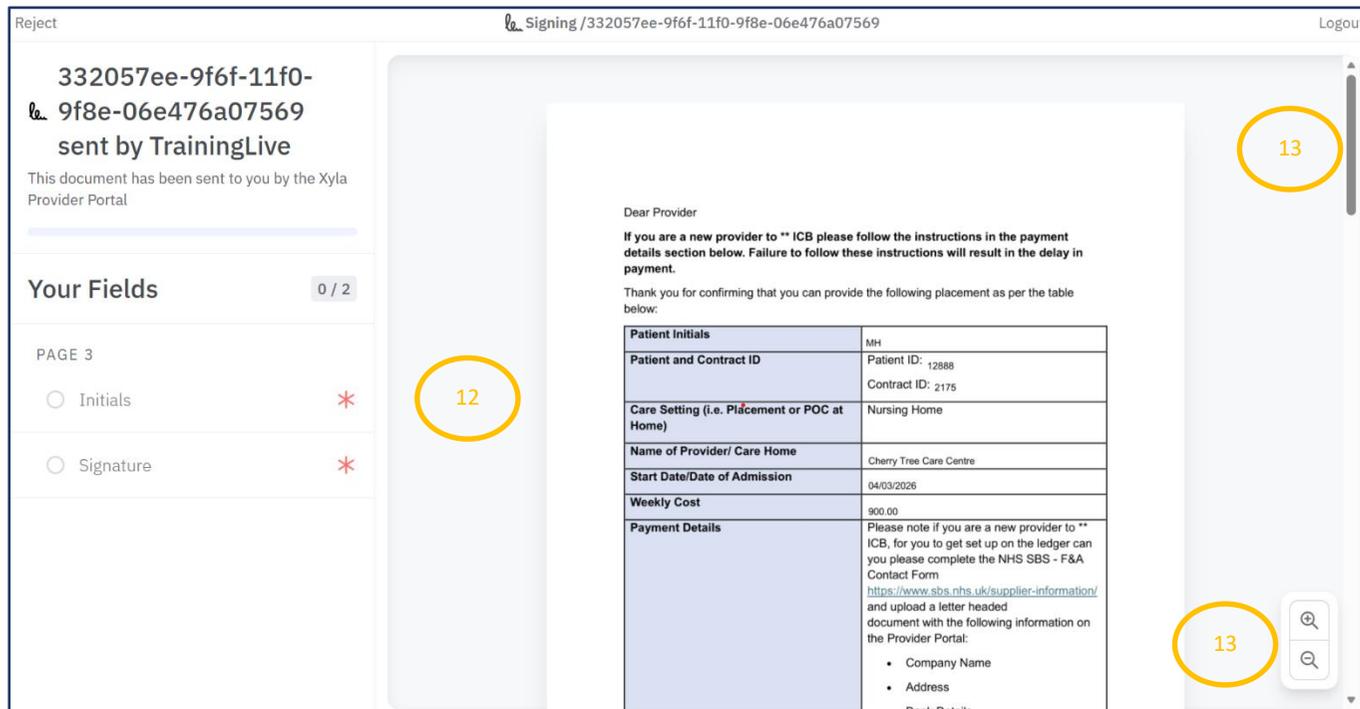
**Reject document**

Give a reason

0/250

**14**

**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 \*

**12**

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.

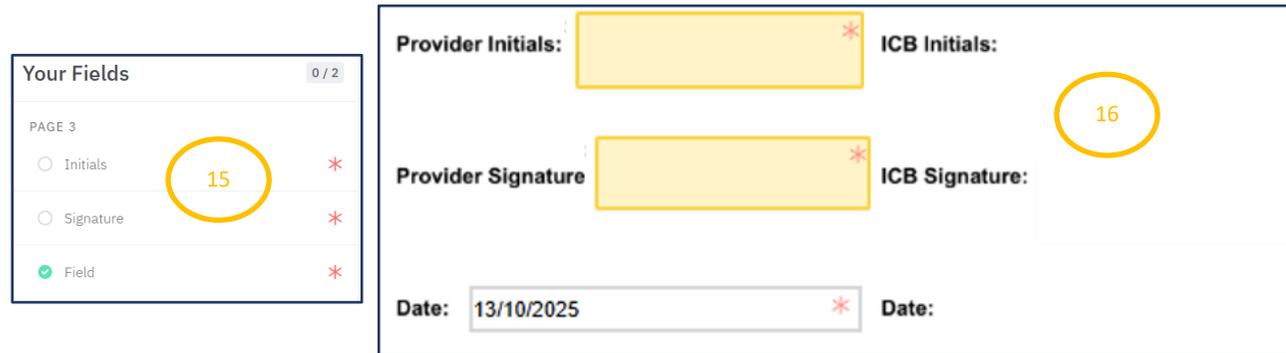
Thank you for confirming that you can provide the following placement as per the table below:

<b>Patient Initials</b>	MH
<b>Patient and Contract ID</b>	Patient ID: 12888 Contract ID: 2175
<b>Care Setting (I.e. Placement or POC at Home)</b>	Nursing Home
<b>Name of Provider/ Care Home</b>	Cherry Tree Care Centre
<b>Start Date/Date of Admission</b>	04/03/2026
<b>Weekly Cost</b>	900.00
<b>Payment Details</b>	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 <a href="https://www.sbs.nhs.uk/supplier-information/">https://www.sbs.nhs.uk/supplier-information/</a> and upload a letter headed document with the following information on the Provider Portal: <ul style="list-style-type: none"> <li>• Company Name</li> <li>• Address</li> </ul>

**13**

**13**

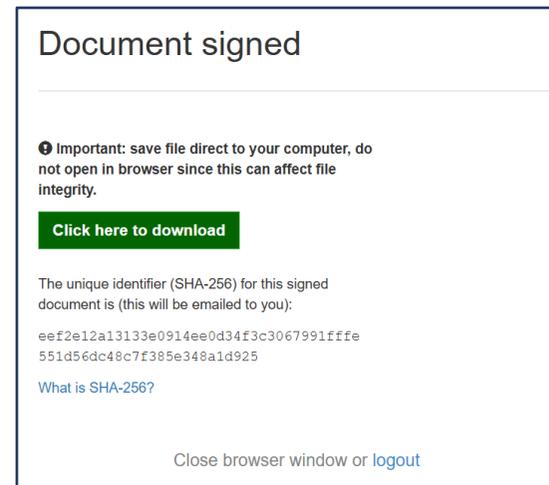
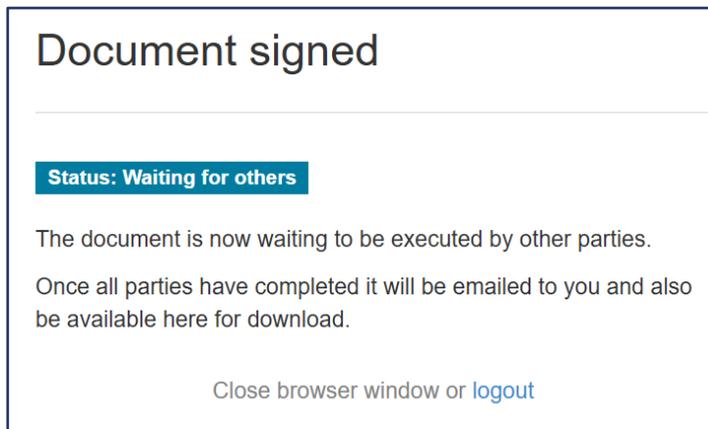
15. Clicking on the **Fields** will take you to the area you need to add information for instance your **Initials** and **Signature**, once these have been added a green tick will appear.
16. Alternatively, you can scroll down, the **yellow boxes** indicate where you are required to add information.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

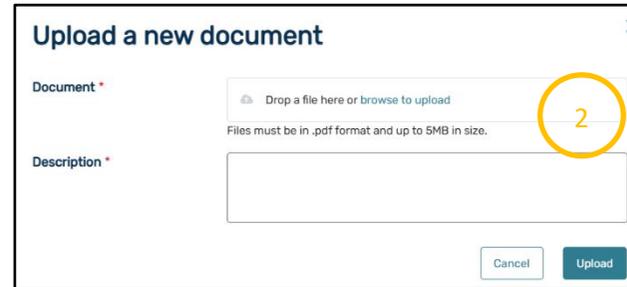
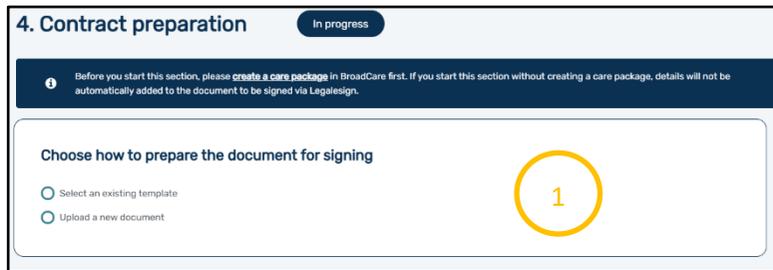
Once all signers have added a signature an email will be sent with a copy of the contract (PDF). At the end of the document there will be a document information page to show the date and time of the signatures.

The document will also be saved in the brokerage episode.

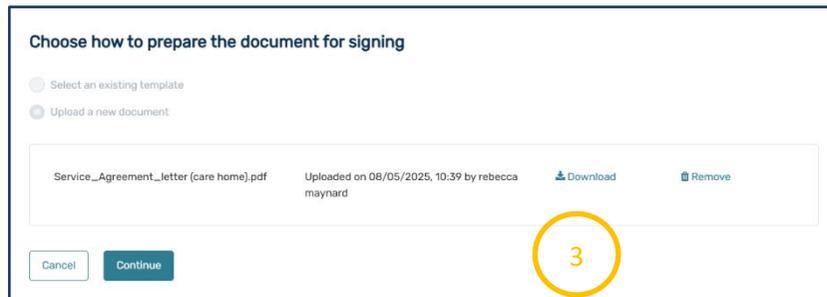


### 8.1.4.3 Contract Preparation – Signing with a digital signature – Upload a new document

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’.

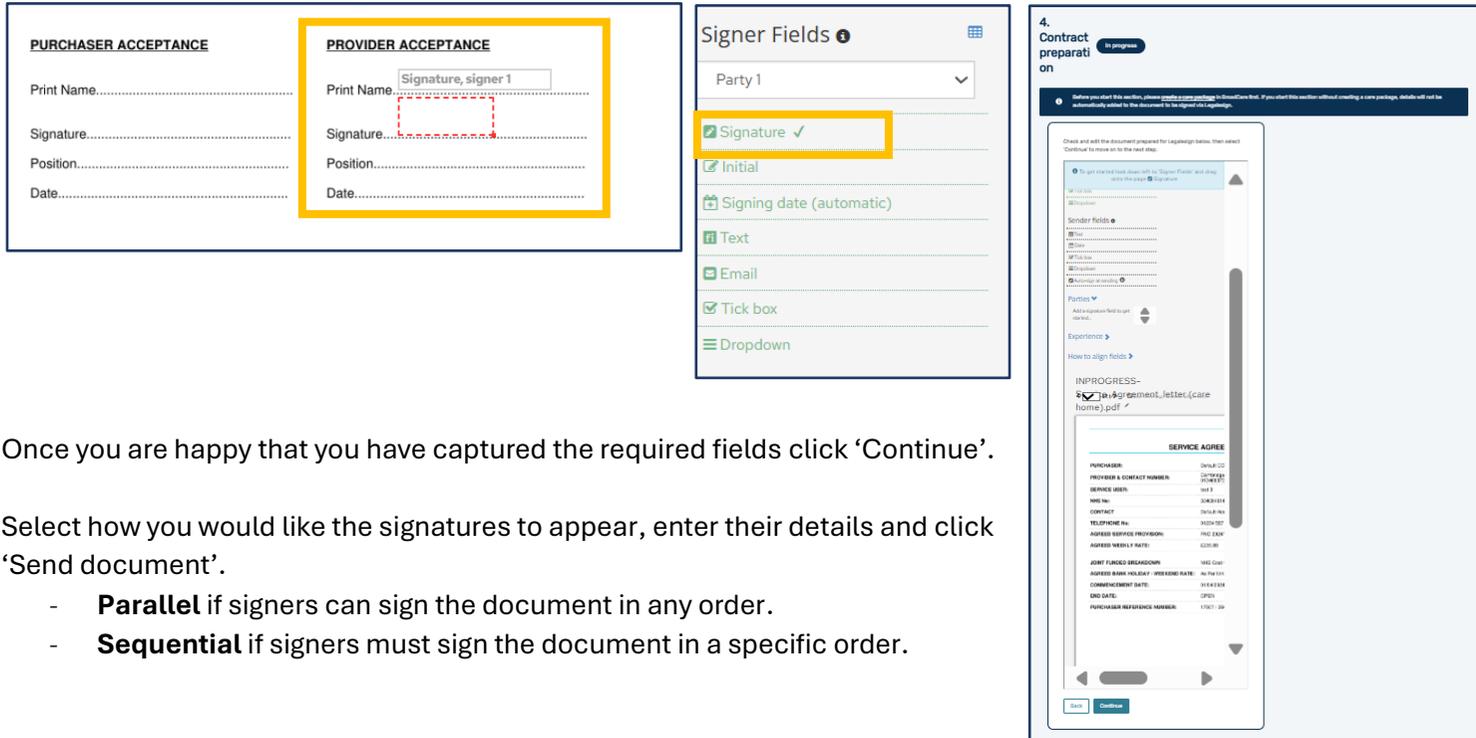


3. Press Continue.



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.

### Signers

**Signing order\***

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

Parallel
  Sequential

**Add signer\***

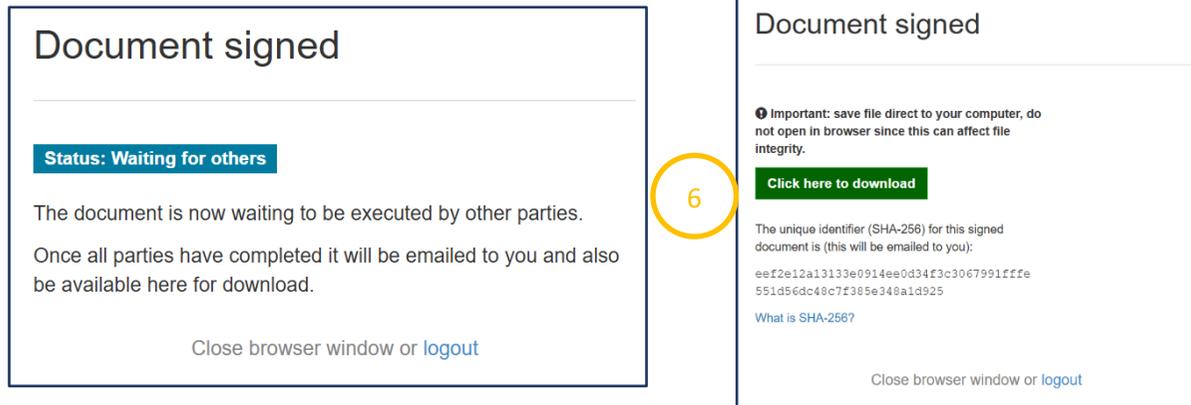
Enter the full name and email address for each signer.

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

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

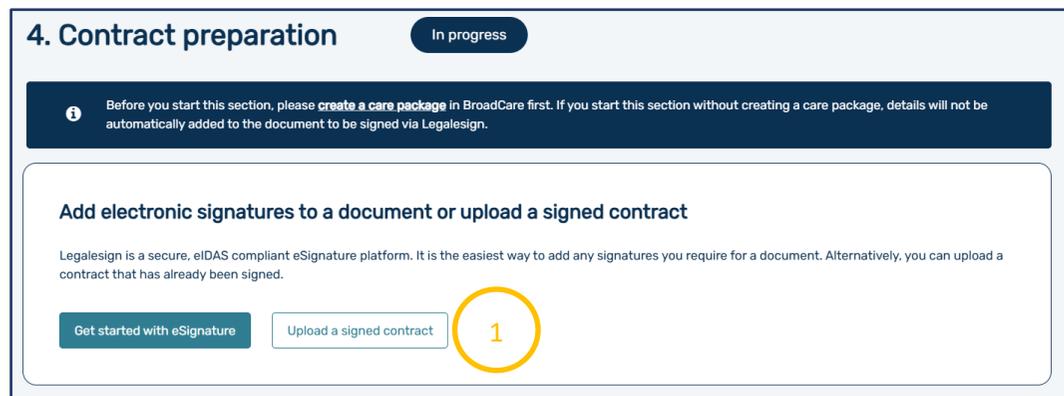
Once all signers have added a signature an email will be sent with a copy of the contract (PDF). At the end of the document there will be a document information page to show the date and time of the signatures.

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

- If you have already received a signed contract rather than using as digital signature you can click ‘Upload a signed contract’.



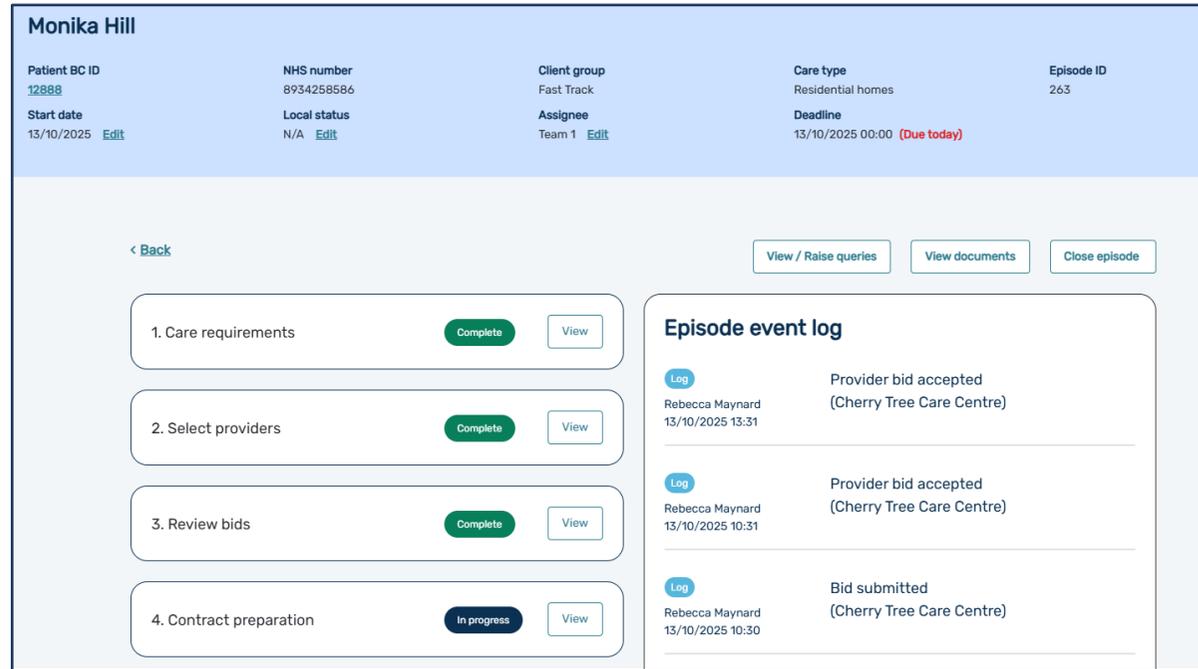
2. Drag and drop the file or browse to upload your contract.
3. Add a description of the document.
4. Choose the name of the folder you wish to save the document in. Please note the Folder names will only be available once they have been added to the Case Manager Folder Lookup within BroadCare.
5. Click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

The screenshot shows a dialog box titled "Upload signed contract" with a close button (X) in the top right corner. The dialog contains three main input fields and two buttons at the bottom. The fields are labeled "Document \*", "Description \*", and "Folder \*". The "Document" field is a file upload area with the text "Drop a file here or browse to upload" and a small cloud icon. The "Description" field is a text input area. The "Folder" field is a dropdown menu currently showing "General". At the bottom right, there are two buttons: "Cancel" and "Upload". Five yellow circles with numbers 1 through 5 are overlaid on the form to indicate the steps: 1 is on the close button, 2 is on the "Drop a file here or browse to upload" text, 3 is on the "Description" text input, 4 is on the "Folder" dropdown, and 5 is on the "Upload" button.

### 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.



**Monika Hill**

Patient BC ID 12888	NHS number 8934258586	Client group Fast Track	Care type Residential homes	Episode ID 263
Start date 13/10/2025 <a href="#">Edit</a>	Local status N/A <a href="#">Edit</a>	Assignee Team 1 <a href="#">Edit</a>	Deadline 13/10/2025 00:00 <b>(Due today)</b>	

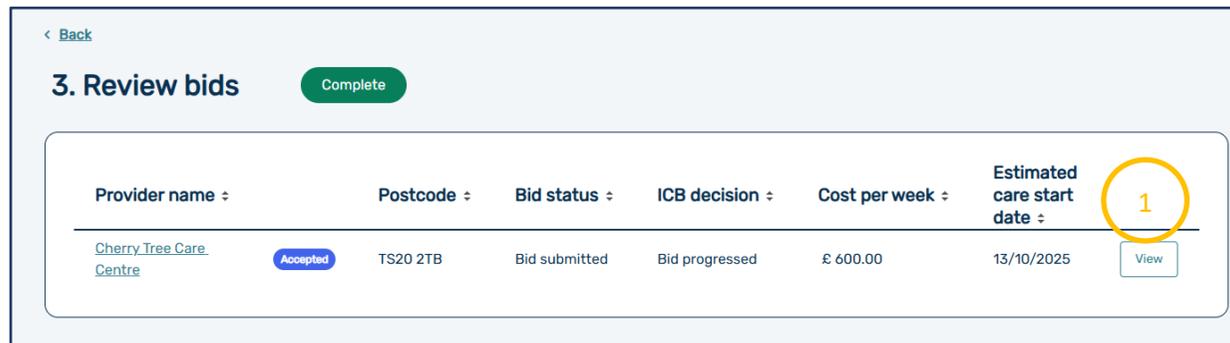
< Back View / Raise queries View documents Close episode

- 1. Care requirements Complete View
- 2. Select providers Complete View
- 3. Review bids Complete View
- 4. Contract preparation In progress View

#### Episode event log

- Log** Rebecca Maynard 13/10/2025 13:31 Provider bid accepted (Cherry Tree Care Centre)
- Log** Rebecca Maynard 13/10/2025 10:31 Provider bid accepted (Cherry Tree Care Centre)
- Log** Rebecca Maynard 13/10/2025 10:30 Bid submitted (Cherry Tree Care Centre)

1. Click on 'View' within Review bids.

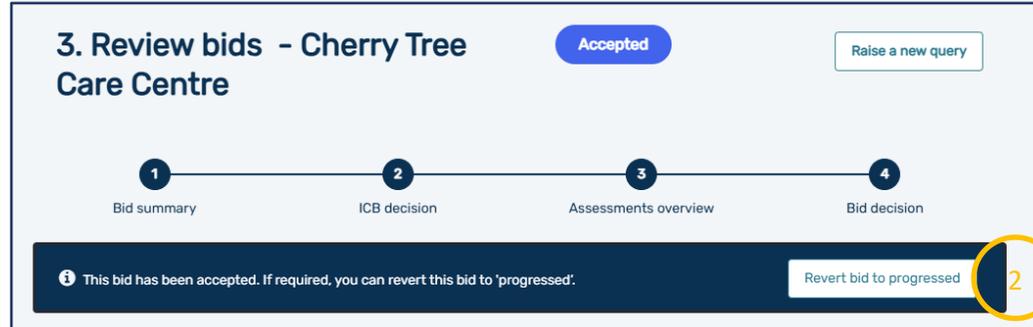


< Back Complete

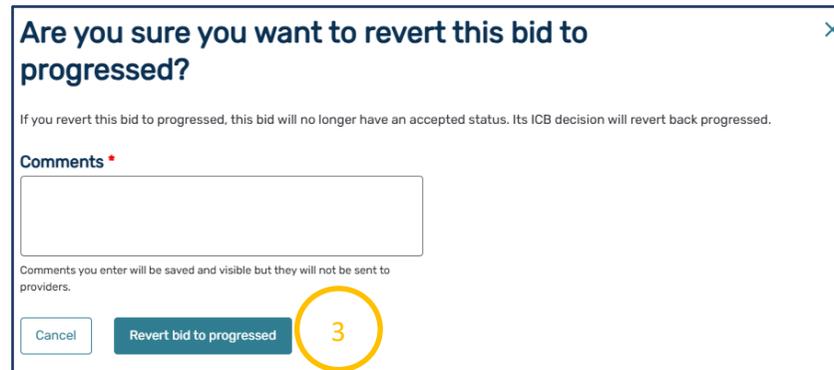
### 3. Review bids

Provider name ▾	Postcode ▾	Bid status ▾	ICB decision ▾	Cost per week ▾	Estimated care start date ▾	
<a href="#">Cherry Tree Care Centre</a>	TS20 2TB	Accepted	Bid progressed	£ 600.00	13/10/2025	<span style="border: 2px solid yellow; border-radius: 50%; padding: 2px 5px;">1</span> View

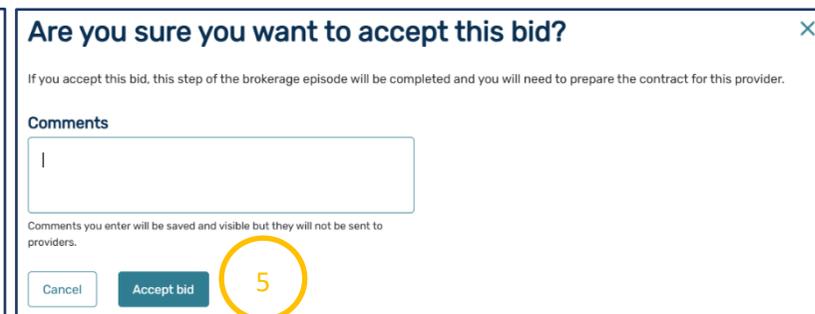
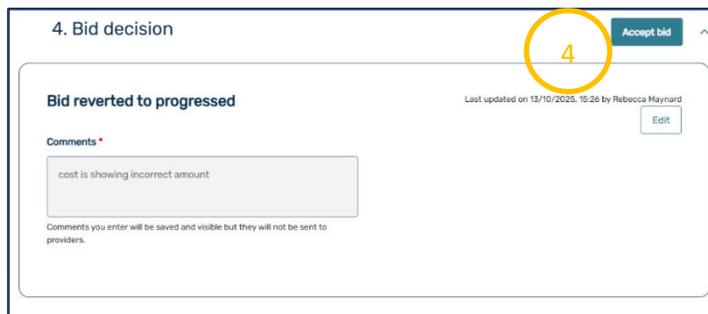
2. Within Review bids click ‘Revert bid to progressed’.



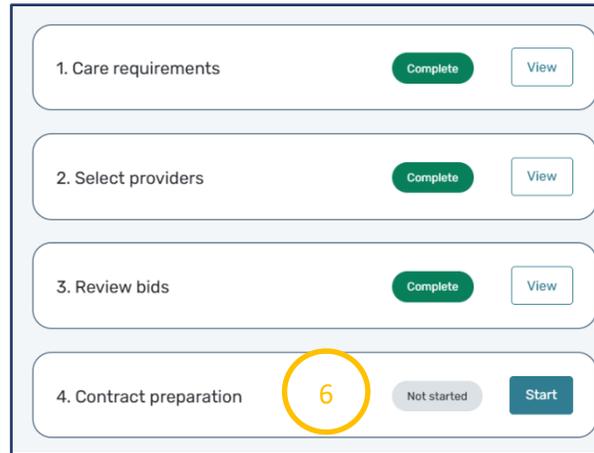
3. Add the reason for the bid being reverted to progressed in the ‘Comments’ box for instance ‘Cost is showing incorrect amount’ and click ‘Revert bid to progressed’.



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’.



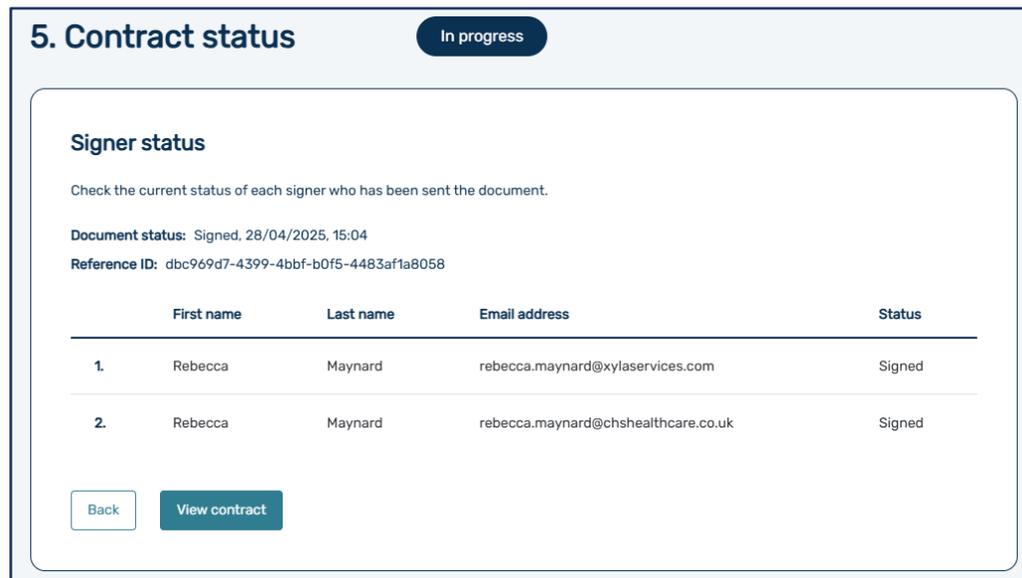
6. This will now allow you to start the ‘Contract preparation’ stage again.



1. Care requirements	Complete	View
2. Select providers	Complete	View
3. Review bids	Complete	View
4. Contract preparation	Not started	Start

### 8.1.5 Contract status

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



**5. Contract status** In progress

**Signer status**

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

**Document status:** Signed, 28/04/2025, 15:04  
**Reference ID:** dbc969d7-4399-4bbf-b0f5-4483af1a8058

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

[Back](#) [View contract](#)

### 8.1.6 Complete episode

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

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

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

**Are you sure you want to complete this episode?** ✕

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

Cancel
Complete episode

## 6. Complete episode

In progress

**Complete this episode**

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

**Completed date \***

1

Enter in the format DD/MM/YYYY.

**Completed outcome \***

**Care start date \***

Enter in the format DD/MM/YYYY.

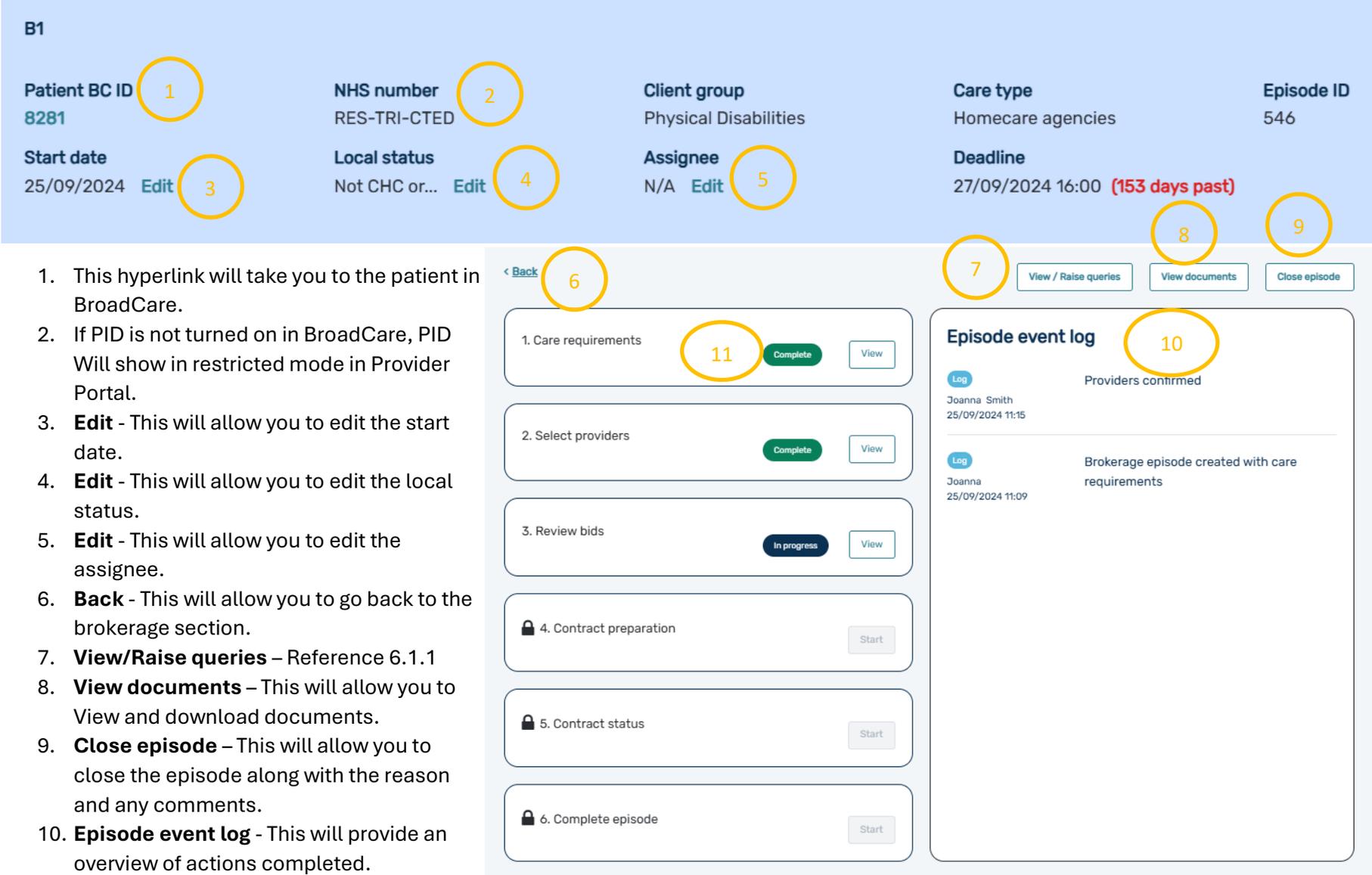
**Comments**

2

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

Cancel
Complete episode
3

## 8.2 Viewing a brokerage episode



**B1**

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

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

- Care requirements **11** [Complete](#) [View](#)
- Select providers [Complete](#) [View](#)
- Review bids [In progress](#) [View](#)
- Contract preparation [Start](#)
- Contract status [Start](#)
- Complete episode [Start](#)

**Episode event log** **10**

- Log** Providers confirmed  
Joanna Smith  
25/09/2024 11:15
- Log** Brokerage episode created with care requirements  
Joanna  
25/09/2024 11:09

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



The screenshot displays the 'Queries' interface. At the top left is a '< Back' link. The main heading is 'Queries', with a 'Raise a new query' button on the right. Below this is a query card for a 'General query'. The card includes a 'Note' field with the text 'test', an 'Assignee' field with 'ICB', and an 'Action due date' of '27/02/2025'. At the bottom of the card, it states 'Added: 27/02/2025, 15:03 by Rebecca Maynard'. On the right side of the card, there is a 'Query for ICB review' badge and an upward-pointing arrow icon labeled '1'. Below the card, there are two buttons: 'Edit' (labeled '2') and 'Add comment' (labeled '3').

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.

### Edit query

**Assignee \***  
ICB

**Provider \***

**Action due date**  
27/02/2025  
Enter in the format DD/MM/YYYY.

**Completed \***  
Yes No

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

Cancel Save

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

### Add comment

Add a comment to this query.

**Comments \***

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

Cancel Save

### 8.3 How to raise a new brokerage query

Filter for the episode you wish to view.

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

Patient name BC ID	Episode ID	Episode stage	Start date	Deadline	Local status	Care type	Assignee
<a href="#">^</a> B1 8281	546	Review bids	25/09/2024	27/09/2024	Not CHC or...	Homecare agencies	<span style="border: 2px solid orange; border-radius: 50%; padding: 2px 5px;">1</span> <a href="#">View</a>
<b>Client group</b>	Physical Disabilities		<b>Created</b>		25/09/2024, 11:08 by Joanna Smith		
<b>NHS number</b>	RES-TRI-CTED		<b>Last updated</b>		03/10/2024, 12:40 by Nicola Durham		
<b>NHSE stage</b>	None						
<b>Local stage</b>	CHC						
<b>Classification</b>	CHC/FNC						
<b>Record owner</b>	East Downs						

**B1**

<b>Patient BC ID</b> 8281	<b>NHS number</b> RES-TRI-CTED	<b>Client group</b> Physical Disabilities	<b>Care type</b> Homecare agencies	<b>Episode ID</b> 546
<b>Start date</b> 25/09/2024 <a href="#">Edit</a>	<b>Local status</b> Not CHC or... <a href="#">Edit</a>	<b>Assignee</b> N/A <a href="#">Edit</a>	<b>Deadline</b> 27/09/2024 16:00 <span style="color: red;">(153 days past)</span>	

[< Back](#)

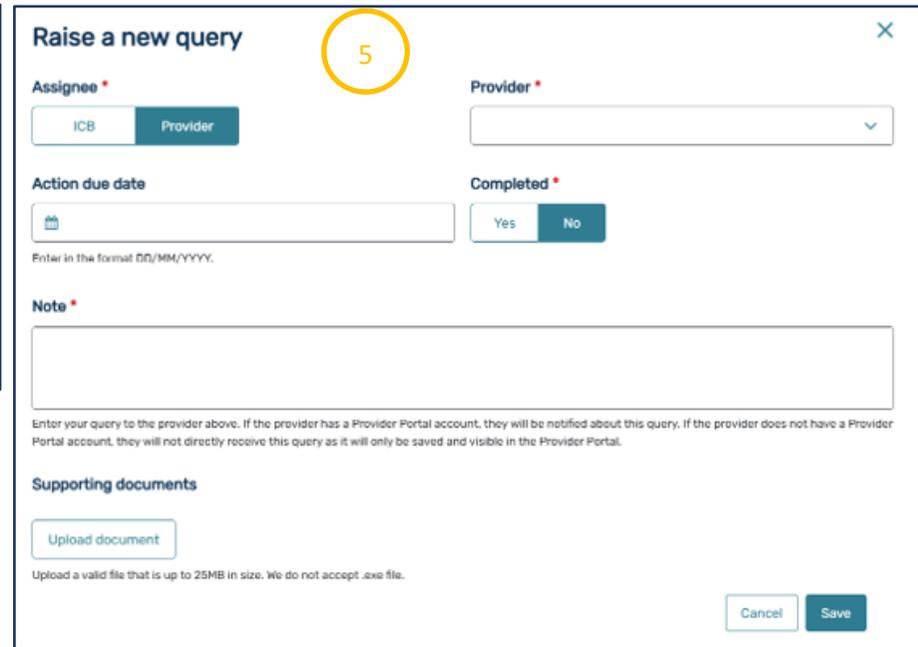
1 query for ICB review

3
[View / Raise queries](#)

[View documents](#)

[Close episode](#)

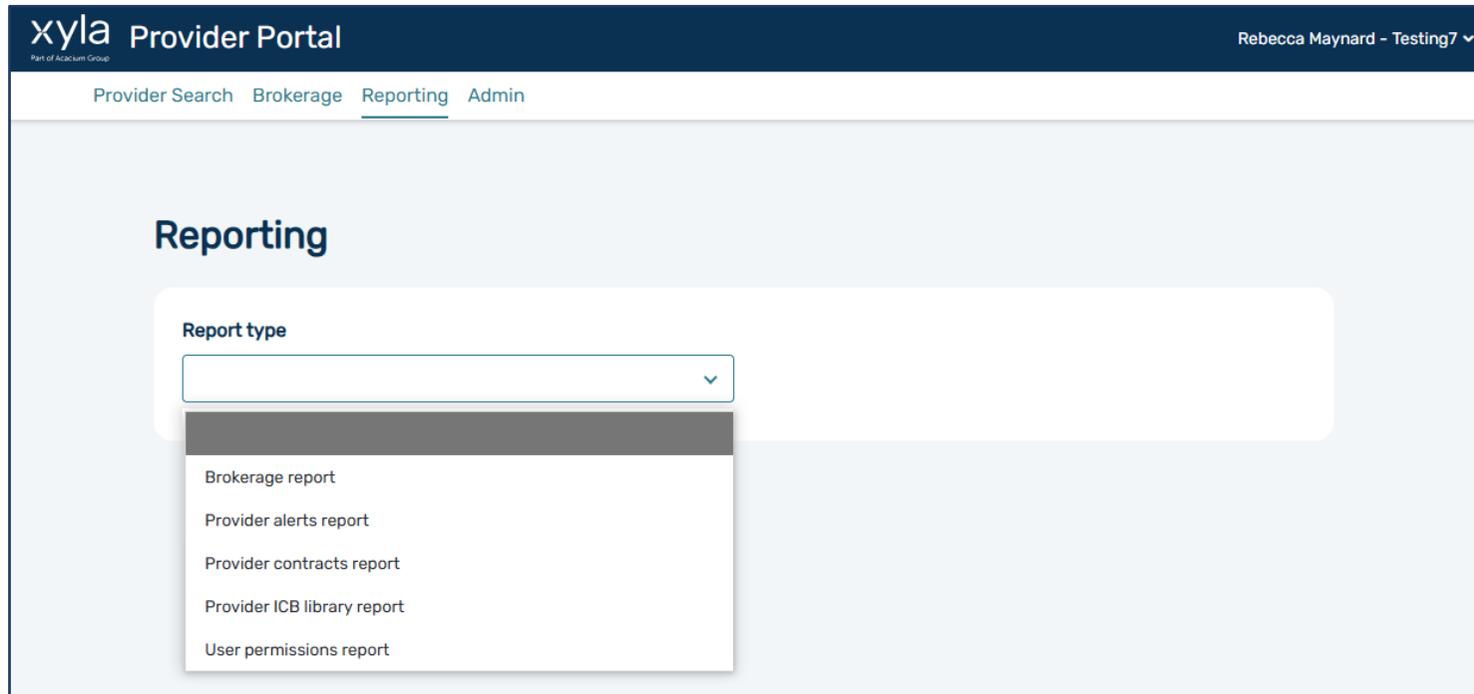
4. Select 'Raise a new query'.
5. Complete the information. Assignee, Provider, Completed, and Notes are mandatory fields.
  - **Assignee** – If ICB is selected the 'Provider' box will disappear.
  - **Action Due Date** – This is the date the action requires attention.
  - **Completed** – This will automatically 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

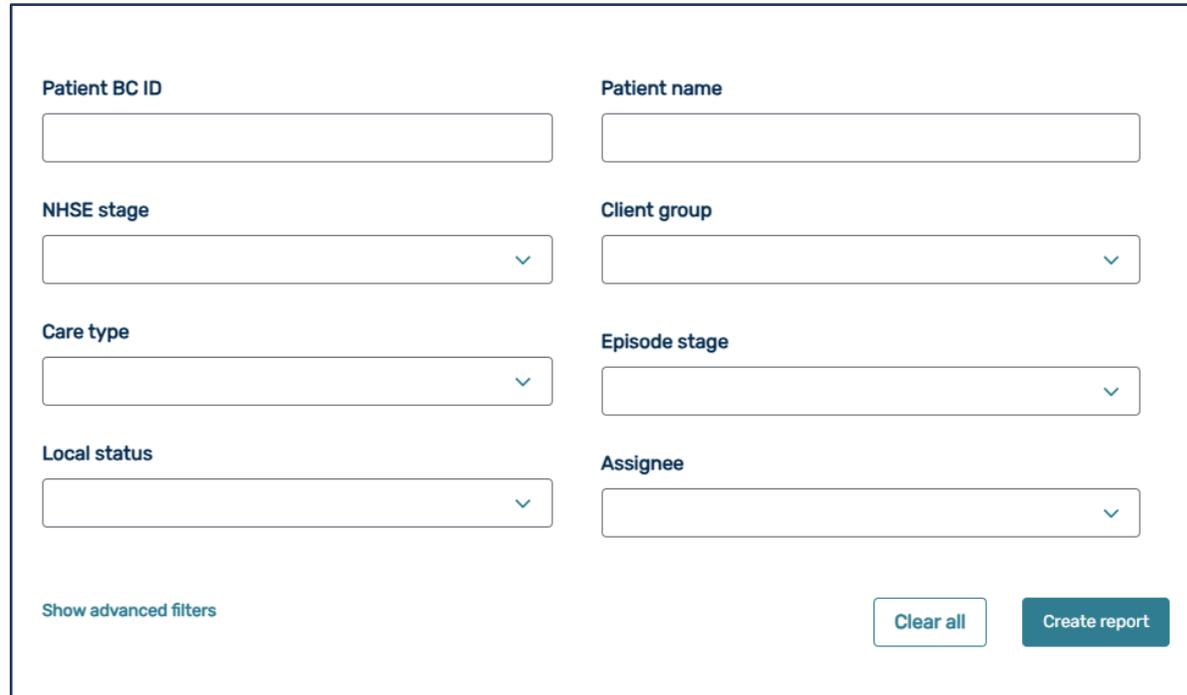
**Client Group** for instance Autism, Fast Track, Mental Health

**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



The screenshot shows a filter interface with the following fields:

- Patient BC ID**: Text input field
- Patient name**: Text input field
- NHSE stage**: Dropdown menu
- Client group**: Dropdown menu
- Care type**: Dropdown menu
- Episode stage**: Dropdown menu
- Local status**: Dropdown menu
- Assignee**: Dropdown menu

At the bottom left, there is a link: [Show advanced filters](#). At the bottom right, there are two buttons: [Clear all](#) and [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.

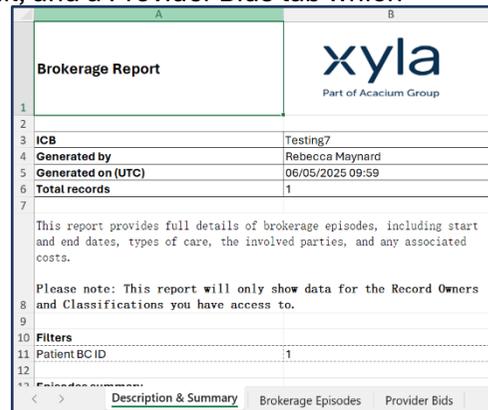
**Episode ID** which is the unique ID that was given when the brokerage episode was created.

**Episode status** for instance Active, Closed.

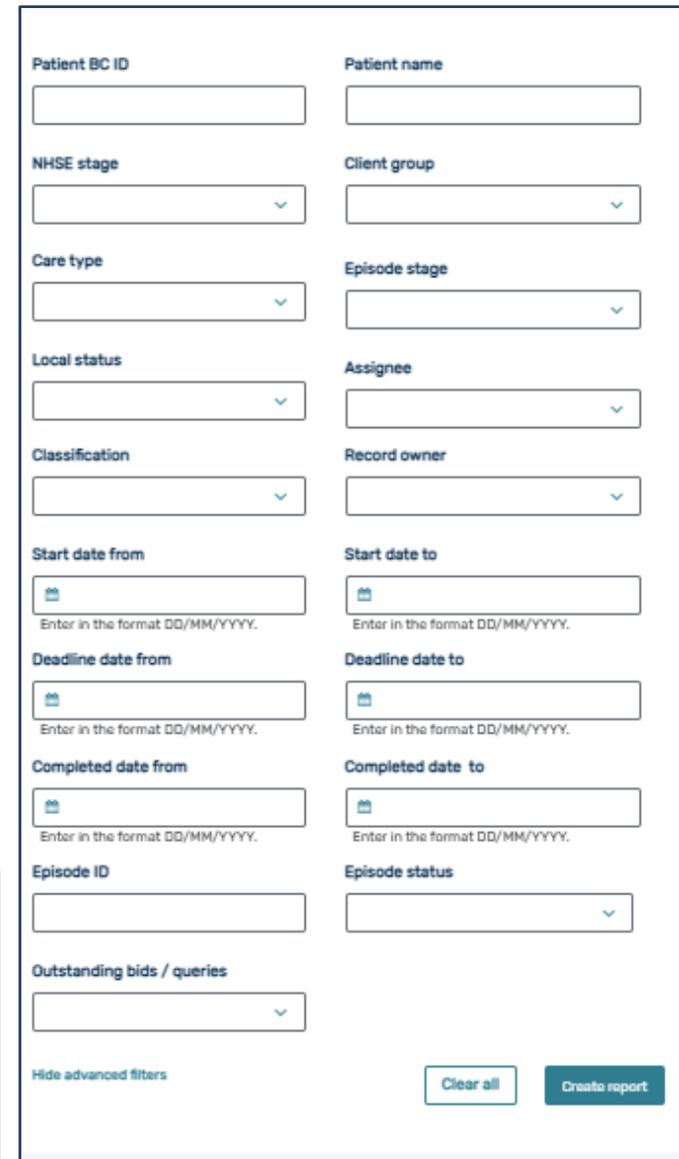
**Outstanding bid / queries** for instance bids for ICB review.

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.



Brokerage Report	
ICB	Testing7
Generated by	Rebecca Maynard
Generated on (UTC)	06/05/2025 09:59
Total records	1
This report provides full details of brokerage episodes, including start and end dates, types of care, the involved parties, and any associated costs.	
Please note: This report will only show data for the Record Owners and Classifications you have access to.	
<b>Filters</b>	
Patient BC ID	1



Patient BC ID       Patient name  
 NHSE stage       Client group  
 Care type       Episode stage  
 Local status       Assignee  
 Classification       Record owner  
 Start date from       Start date to  
Enter in the format DD/MM/YYYY.      Enter in the format DD/MM/YYYY.  
 Deadline date from       Deadline date to  
Enter in the format DD/MM/YYYY.      Enter in the format DD/MM/YYYY.  
 Completed date from       Completed date to  
Enter in the format DD/MM/YYYY.      Enter in the format DD/MM/YYYY.  
 Episode ID       Episode status  
 Outstanding bids / queries  
 Hide advanced filters

## 9.2 Provider alerts report

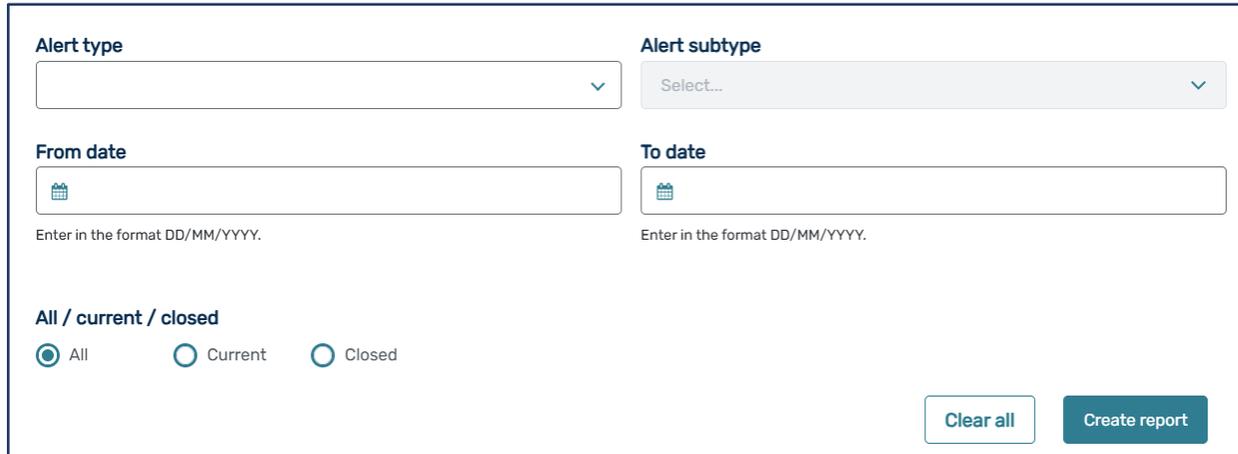
This report lists all alerts related to providers, including the alert type, date issued, provider name, and an alert description.

**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**



Alert type: [Dropdown]

Alert subtype: [Dropdown: Select...]

From date: [Date picker]

To date: [Date picker]

Enter in the format DD/MM/YYYY.

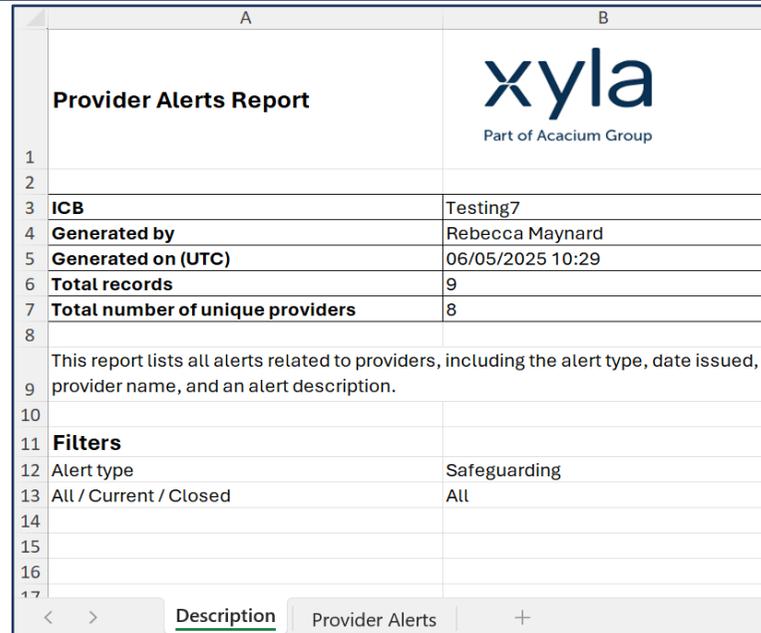
All / current / closed

All  Current  Closed

[Clear all] [Create report]

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

Example of how the Provider Alerts Report downloads into excel.



Provider Alerts Report	
<b>ICB</b>	Testing7
<b>Generated by</b>	Rebecca Maynard
<b>Generated on (UTC)</b>	06/05/2025 10:29
<b>Total records</b>	9
<b>Total number of unique providers</b>	8
This report lists all alerts related to providers, including the alert type, date issued, provider name, and an alert description.	
<b>Filters</b>	
Alert type	Safeguarding
All / Current / Closed	All

### 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.

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

**Contract type**

**Signed?**

**Issue date from**

Enter in the format DD/MM/YYYY.

**Issue date to**

Enter in the format DD/MM/YYYY.

**Start date from**

Enter in the format DD/MM/YYYY.

**Start date to**

Enter in the format DD/MM/YYYY.

**Renewal date from**

Enter in the format DD/MM/YYYY.

**Renewal date to**

Enter in the format DD/MM/YYYY.

**Review date from**

Enter in the format DD/MM/YYYY.

**Review date to**

Enter in the format DD/MM/YYYY.

### 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**

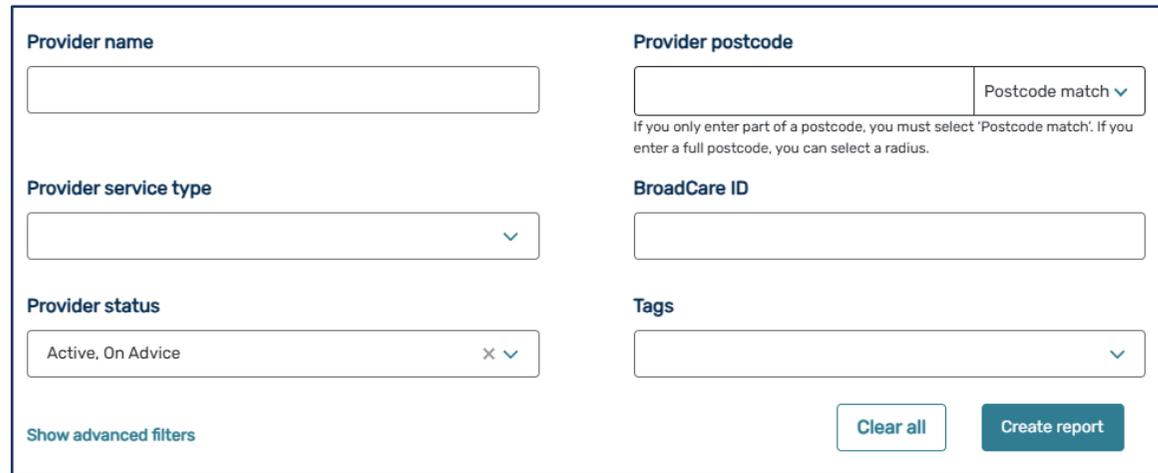
**Provider postcode**

**Provider service type** for instance Homecare agencies, Nursing Homes

**BroadCare ID** which is the unique Provider ID

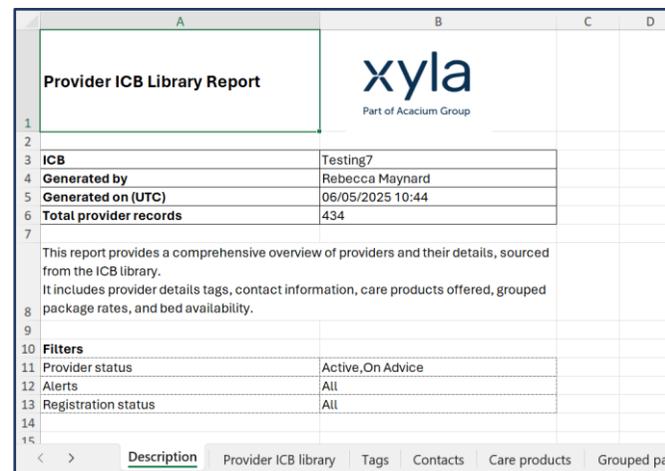
**Provider status** for instance, Active, Inactive, or On Advice

**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.



Provider ICB Library Report	
ICB	Testing7
Generated by	Rebecca Maynard
Generated on (UTC)	06/05/2025 10:44
Total provider records	434

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.

Filters	
Provider status	Active, On Advice
Alerts	All
Registration status	All

### 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**

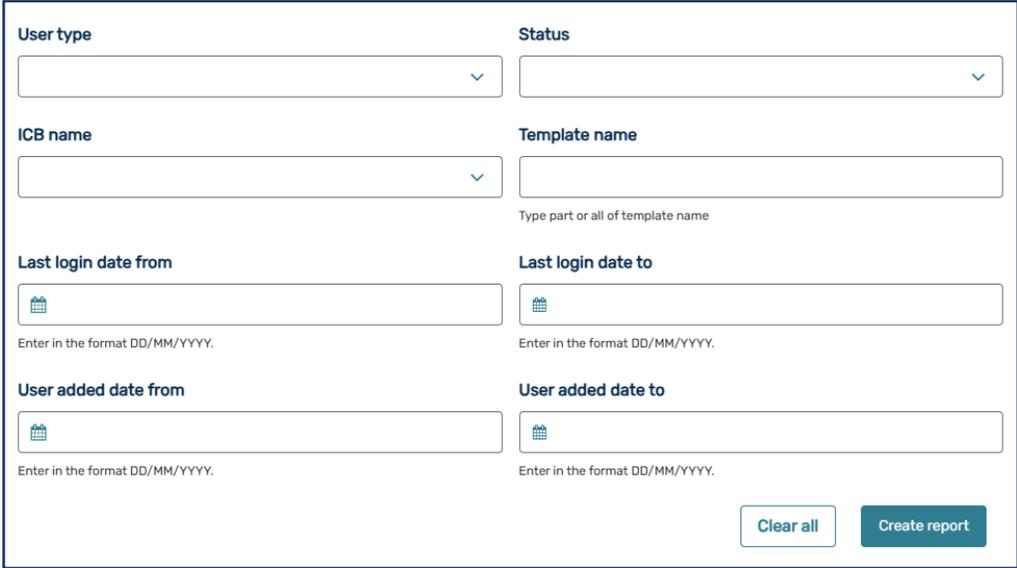
**Template name**, this is the name of the user permission template

**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.

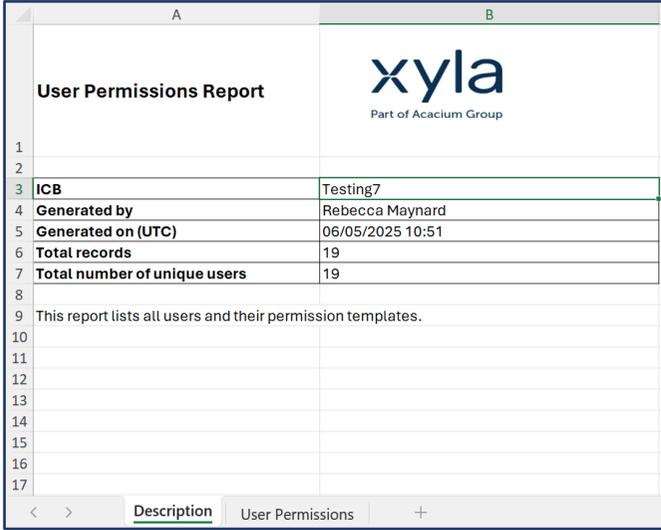
Example of how the User Permissions Report downloads into excel.



The form contains the following fields:

- User type**: Dropdown menu
- Status**: Dropdown menu
- ICB name**: Dropdown menu
- Template name**: Text input field with a note "Type part or all of template name"
- Last login date from**: Date picker with a note "Enter in the format DD/MM/YYYY."
- Last login date to**: Date picker with a note "Enter in the format DD/MM/YYYY."
- User added date from**: Date picker with a note "Enter in the format DD/MM/YYYY."
- User added date to**: Date picker with a note "Enter in the format DD/MM/YYYY."

Buttons: **Clear all** and **Create report**

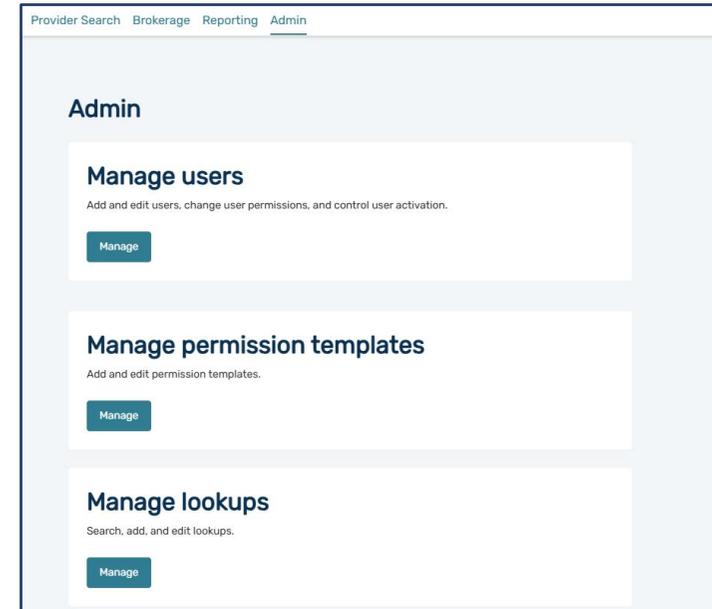


User Permissions Report	
<b>ICB</b>	Testing7
<b>Generated by</b>	Rebecca Maynard
<b>Generated on (UTC)</b>	06/05/2025 10:51
<b>Total records</b>	19
<b>Total number of unique users</b>	19
This report lists all users and their permission templates.	

Excel tabs: Description (selected), User Permissions

## 10 Admin

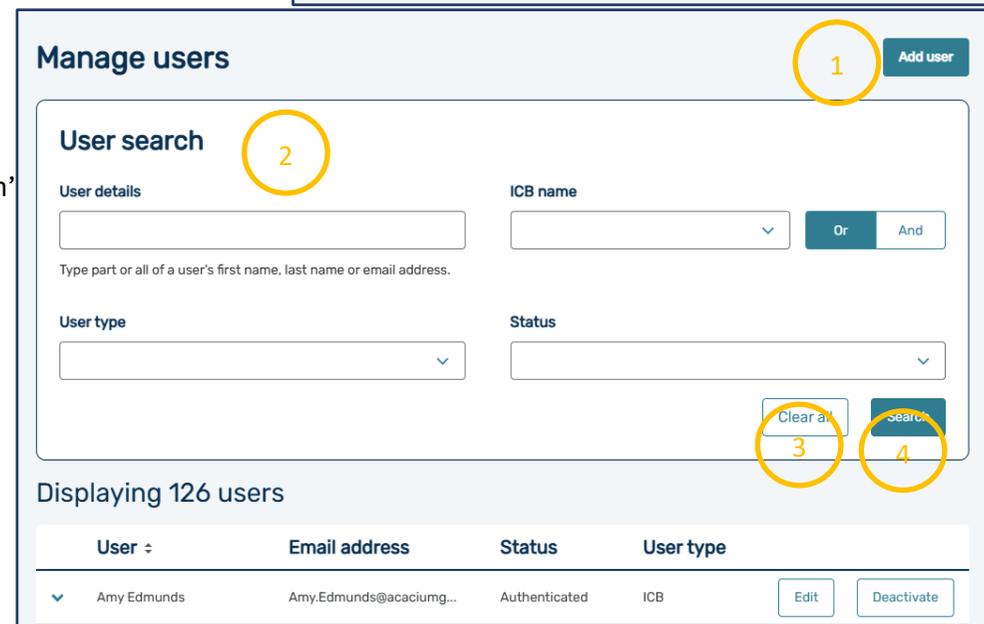
The admin tab allows for a user who has permission to view, add, or amend user information, permission templates which outline what a user can and cannot see, and manage lookups to ensure users can select items from the drop downs for instance when creating a brokerage episode.



### 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**

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

**ICB name**

▼

Or
And

**User type**

**Status**

Clear all
Search

### Add user

1  
User details

2  
ICB access

3  
Permissions

4  
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'.

### 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'.



### 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.

## Manage users Add user

### User search 1

**User details**

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

**ICB name**

Or

**User type**

**Status**

Clear all
Search

### Displaying 1 users

User <span style="font-size: 0.8em;">⌵</span>	Email address	Status	User type	
<span style="border: 1px solid #007060; border-radius: 50%; padding: 2px 5px; display: inline-block; text-align: center; width: 20px; height: 20px; line-height: 20px;">2</span> <div style="display: flex; align-items: center; margin-top: 5px;"> <span style="font-size: 0.8em; margin-right: 5px;">⌵</span> <span style="font-size: 0.8em;">RebeccaProvider Mayn...</span> </div>	rebeccaProvidermayna...	Unauthenticated	Provider	<span style="border: 1px solid #007060; padding: 2px 5px; margin-right: 5px;">Edit</span> <span style="border: 1px solid #007060; padding: 2px 5px;">Deactivate</span>

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.

<input checked="" type="checkbox"/>	TestDB11	<div style="border-left: 1px solid #004a7c; border-right: 1px solid #004a7c; height: 40px; width: 10px; margin: 0 auto;"></div>
<input checked="" type="checkbox"/>	TestDB14	
<input checked="" type="checkbox"/>	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 <span style="float: right;">▼</span>
TestDB14	Provider Access <span style="float: right;">▼</span>
TestDB6	Provider Access <span style="float: right;">▼</span>
Testing7	Admin Access <span style="float: right;">▼</span>

Back
Continue

### Providers

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

#### Edit providers ✕

##### Provider search

**Provider name**

Type part or all of the provider name.

**Provider postcode**

Type part or all of the provider postcode.

**BroadCare ID**

**Location ID**

[Hide advanced filters](#)

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

#### 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]	<input type="button" value="Edit providers"/>
TestDB6	Provider Access	Caremark (South Cambridgeshire)	<input type="button" value="Edit providers"/>
TestDB14	Provider Access	1 Diamond Home Care Limited	<input type="button" value="Edit providers"/>
Testing7	Admin Access	Cambridge & Nursing Home(1)	<input type="button" value="Edit providers"/>

### 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**

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

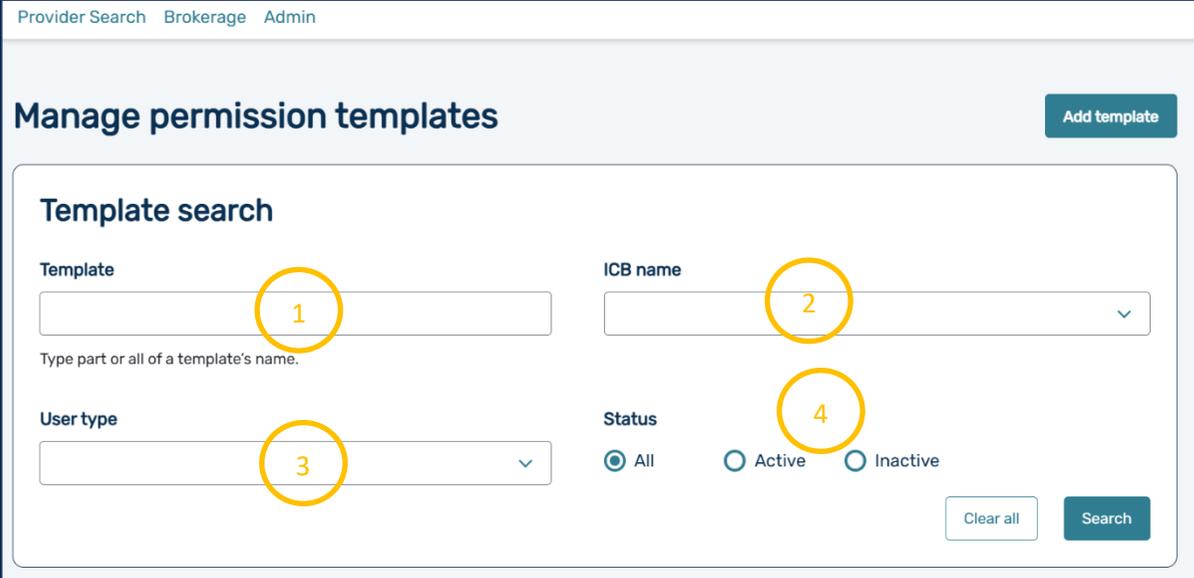
ICB	Permission template	Provider
TestDB11	Provider template	Good Oaks Home Care [Cambridge]
TestDB14	Provider Access	1 Diamond Home Care Limited
TestDB6	Provider Access	Caremark (South Cambridgeshire)
Testing7	Admin Access	Cambridge & Nursing Home(1)

## 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.



Provider Search Brokerage Admin

### Manage permission templates

Add template

#### Template search

**Template**  1  
Type part or all of a template's name.

**ICB name**  2

**User type**  3

**Status**  All  Active  Inactive 4

Clear all Search

The templates displayed will depend on the filters selected.

### 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

**Displaying 5 templates**

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

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

**Deactivate template** ×

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

Back
Deactivate template

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

### Permissions

#### Template details

User type ICB  
 ICB Testing7  
 Template name

Select which permissions to enable for this template.

Admin	View	Add	Edit	Deactivate
<b>Manage users</b> Enable viewing and searching users, as well as adding, editing or deactivating them.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Manage permission templates</b> Enable viewing and searching templates, as well as adding, editing or deactivating them.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Manage lookups</b> Enable viewing Lookups, as well as adding and editing.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

#### Reporting

	View
<b>Provider ICB library report</b> Enable reporting provider records in provider ICB library to Excel.	<input checked="" type="radio"/> No <input type="radio"/> Yes
<b>Provider alerts report</b> Enable reporting alerts details for provider records in provider ICB library to Excel.	<input checked="" type="radio"/> No <input type="radio"/> Yes
<b>Provider contracts report</b> Enable reporting contracts details for provider records in provider ICB library to Excel.	<input checked="" type="radio"/> No <input type="radio"/> Yes
<b>Brokerage report</b> Enable reporting brokerage episodes details to Excel.	<input checked="" type="radio"/> No <input type="radio"/> Yes
<b>User permissions report</b> Enable reporting user permissions to Excel.	<input checked="" type="radio"/> No <input type="radio"/> Yes

Brokerage episodes	View	Add	Edit	Deactivate
<b>Manage brokerage episodes</b> Enable viewing and searching brokerage episodes, as well as adding and editing them.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

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

**Report to Excel**  No  Yes

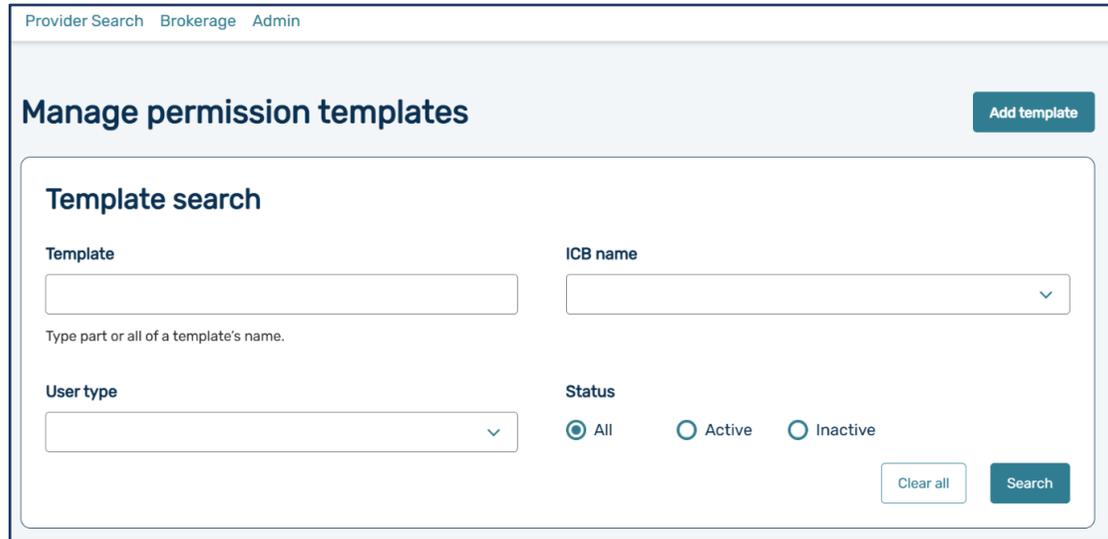
Enable exporting copies of provider records in provider libraries to Excel.

### 10.2.1 Add template

Within the Admin section click ‘Manage permission templates’.

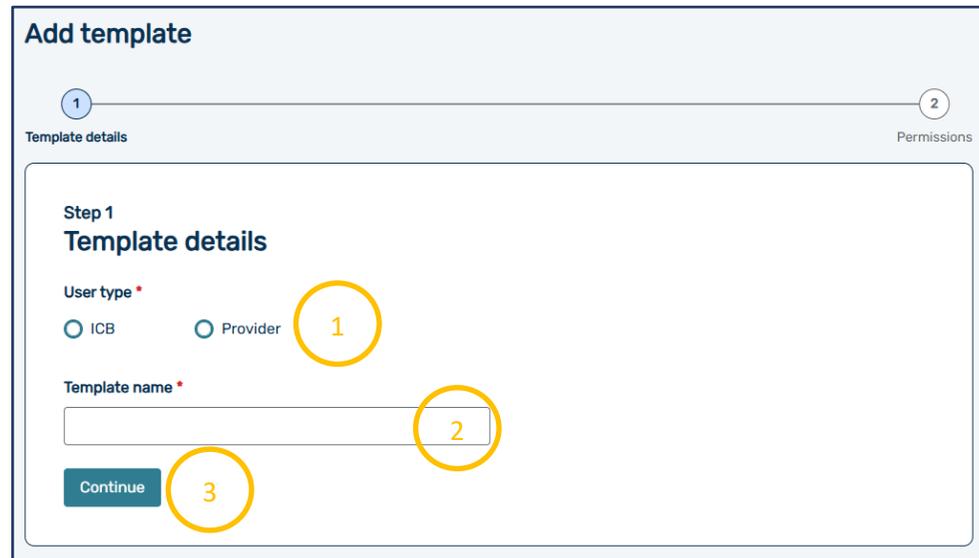
Click ‘Add template’.

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



### Template details

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



## Permissions

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

### Permissions

#### Template details

User type ICB  
ICB Testing7  
Template name

Select which permissions to enable for this template.

Admin	View	Add	Edit	Deactivate
<b>Manage users</b> Enable viewing and searching users, as well as adding, editing or deactivating them.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Manage permission templates</b> Enable viewing and searching templates, as well as adding, editing or deactivating them.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Manage lookups</b> Enable viewing Lookups, as well as adding and editing.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

#### Reporting

	View
<b>Provider ICB library report</b> Enable reporting provider records in provider ICB library to Excel.	<input checked="" type="radio"/> No <input type="radio"/> Yes
<b>Provider alerts report</b> Enable reporting alerts details for provider records in provider ICB library to Excel.	<input checked="" type="radio"/> No <input type="radio"/> Yes
<b>Provider contracts report</b> Enable reporting contracts details for provider records in provider ICB library to Excel.	<input checked="" type="radio"/> No <input type="radio"/> Yes
<b>Brokerage report</b> Enable reporting brokerage episodes details to Excel.	<input checked="" type="radio"/> No <input type="radio"/> Yes
<b>User permissions report</b> Enable reporting user permissions to Excel.	<input checked="" type="radio"/> No <input type="radio"/> Yes

Brokerage episodes	View	Add	Edit	Deactivate
<b>Manage brokerage episodes</b> Enable viewing and searching brokerage episodes, as well as adding and editing them.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

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

**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

### 10.3 Manage Lookups

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

## Manage lookups

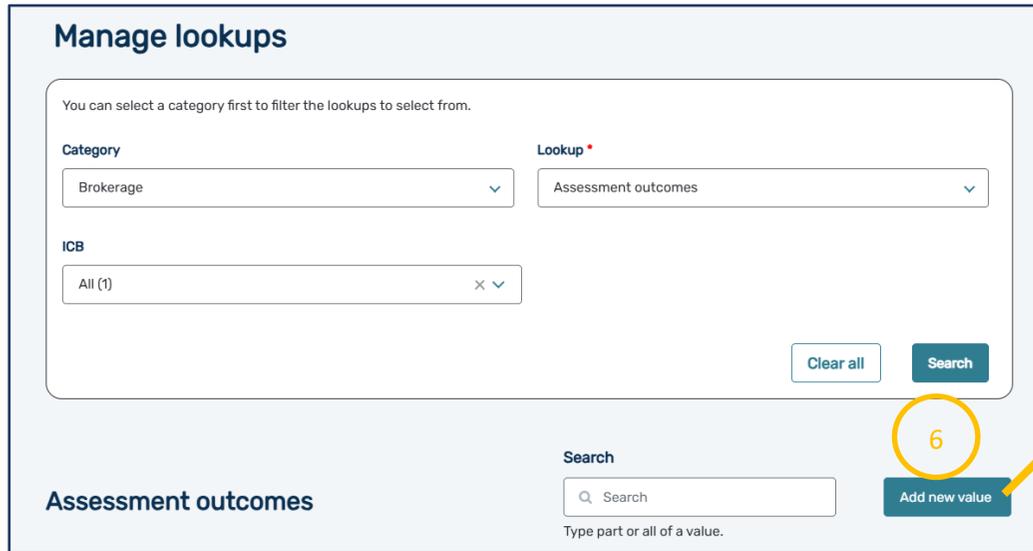
You can select a category first to filter the lookups to select from.

**Category**  **Lookup \***

**ICB**

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.

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



**Manage lookups**

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

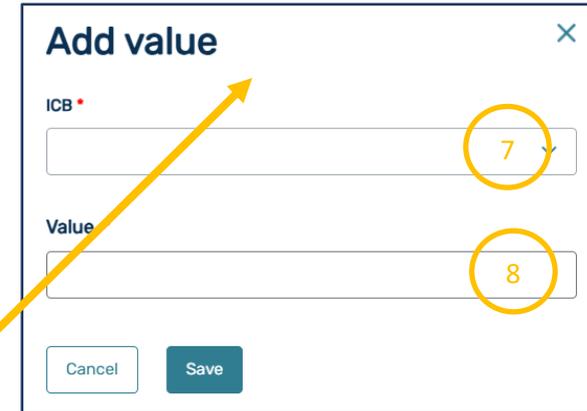
Category: Brokerage  
 Lookup: Assessment outcomes  
 ICB: All (1)

Clear all Search

**Assessment outcomes**

Search: Search  
 Type part or all of a value.

Add new value



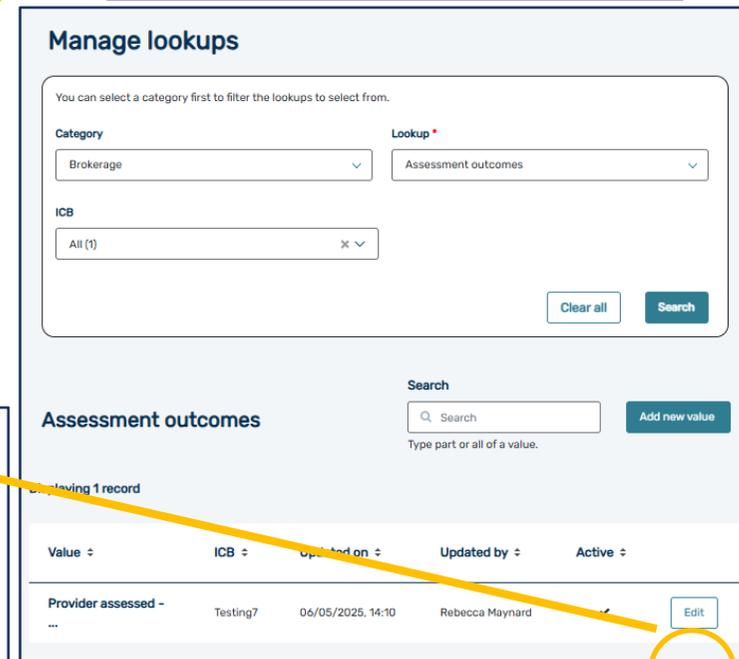
**Add value**

ICB: [dropdown] 7

Value: [input] 8

Cancel Save

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



**Manage lookups**

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

Category: Brokerage  
 Lookup: Assessment outcomes  
 ICB: All (1)

Clear all Search

**Assessment outcomes**

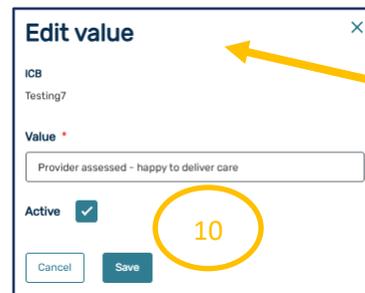
Search: Search  
 Type part or all of a value.

Add new value

Showing 1 record

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

Edit



**Edit value**

ICB: Testing7

Value: Provider assessed - happy to deliver care

Active:  10

Cancel Save