Adult Social Care making a Difference in the Right Way, Every Day

e-Brokerage Providers Guidance





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Review date

INTRODUCTION

This guidance is for **Care Providers only**. It will describe Provider tasks on the e-Brokerage system.

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1. Basic System Navigation.

Here are a few useful tips to navigate the system:

User Guides and Videos.

The e-Brokerage provider guide and videos can be accessed by visiting <u>Solihull</u> <u>MBC's Commissioning</u> internet page.

Brokerage Tabs.

The **Brokerage** tab contains all details about care packages that have been sent to your organisation.



Within this area, the following **sub tabs** display horizontally across the page:



Each tab contains a **search** box where you can search by **Package Ref**, **Client Ref** or **Service Level**.

Search:	
- Curoni	

Awaiting Response – Contains care packages that have been sent to you from Brokerage and are awaiting your response.

Response Complete – Contains care packages that you have responded to but have not yet reached their deadline and awaiting other responses.

Awaiting Decision – Contains all care packages that are with Brokerage to decide whether to award or not award.

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Not Awarded – Contains all care packages where you have not been awarded the package.

Awarded – Contains all care packages that you have been awarded.

All – Shows all packages that have been sent to your organisation.

2. Accept/Decline a Care Package.

CARE AT HOME PROVIDERS ONLY (N/A to Day opportunity providers): For discharge to assess (hospital discharge), early response service (ERS), changes to package (increase and decrease) and mental health enablement services, Brokerage will upload both risk assessment and care plan with the initial brokerage request and you will be able to view the paperwork immediately. However, you must still accept the package to confirm that it is going ahead.

1. To view new care package request:

Go to your inbox, open the relevant e-mail, and click on **Responses** link.

TEST MODE - Solihull MarketPlace: Brokerage Request, reference 1016-11			
[UAT] environment Dudley admin team <mp.site@occsites.co.uk></mp.site@occsites.co.uk>	$\begin{array}{c c c c c c c c c c c c c c c c c c c $		
CAUTION: This e-mail originated from outside of the Council. Ensure you trust the sender before clicking or of this email is <u>mp.site@occsites.co.uk</u> Please click on the 'Report' button in the toolbar above if you suspephishing@solihull.gov.uk	n any links or opening attachments. The original sender ect this email to be suspicious or forward to:		
TEST MODE - TEST MODE - TEST MODE Response required by: 10/01/2024 12:18			
We are contacting you on behalf of the service(s) below to give a level of service to our client.			
The basic details are as follows: Package Reference: 1016-11 Service Level: Care at Home Support Standard Expected Start Date: 11/01/2024 Frequency: Weekly Hours required: 7			
For full details and to make a response on behalf of the service(s) below please click on the relevant links.			
https://solihull-uat.occsites.co.uk/Admin/Brokerage/Responses/77			
If you are reading this in an email and no longer wish to receive such emails you can use the following link uat.occsites.co.uk/Admin/Account/Manage	to change your preferences: <u>https://solihull-</u>		

You may need to login (if prompted to do so.)

3. Review package details

N.B. The service level will tell you the type of service that was requested. View <u>service level types</u> for details of the different types of service.

It will also display, package reference, client reference, expected start date, hours required, frequency and location of package.

Response	Package Details
Local authority	Solihull Metropolitan Borough Council
Package reference	1016-68
Client reference	LAS 1234
Service level	Care at Home Support Standard
Expected start date	11/01/2024
Hours required	7.00
Frequency	Weekly
Location	B90 1SH

4. Next, go to Our Response tab.



Day opportunities providers move to step 7

5. Check Additional Information to view the person's gender.



6. FOR CARE AT HOME PROVIDERS discharge to assess (hospital discharge), early response service (ERS), changes to package (increase and decrease) and mental health enablement services ONLY.

For care at home standard, low density and respite at home move to step 7.

Scroll down the page to **Documents.** This is where Brokerage will have uploaded the person's documents.

Click **Download** beside the risk assessment and care plan.



7. Then scroll down to **Notes.** This is where Brokerage will have detailed the requirements of care.

Notes	
These are a list of notes attached to to the package (that all respondents can see) or that you or the Local and the Local Authority can see).	Authority have added to this response (that only you
Add a new note	
Details from brokerage will appear here for the provider. This will tell them the details of the care e.g.	
Start date	
Time of calls	
Whether there are x2 carers	
Any other preferences such as language, carer gender, pets etc.	

Review the details and then return to the top of the page.

8. If you are going to **accept** the package, work though each **requirement** listed, answering whether you **can meet requirement?**

Complete for all requirements.

Home Care 001 Essential:Social Care Needs	Are you able to meet the health & social care requirements in the Brokerage Request?
	Can meet requirement? Yes 🗸 ?

If there are **no requirements** or you are going to **decline** the package, move to **step 9 below.**

9. For **Placement response** select whether you can accept the package or not.

Placement Response			
Your decision on whether your service can be provided to this client.			
Placement response Yes - we are able to provide this service			

If selecting:

Yes – we are able to provide this service, review **provider terms and conditions** and then tick to confirm you accept.

package T&C?

No – we are unable to provide this service, enter **rejection reason** and any further details in the **rejection note** box.

Rejection reason	~
Rejection note	

FOR DAY OPPORTUNITIES SPOT PROVIDERS ONLY. All other services move to step 10:

Enter offer details as below, for:

- Frequency select weekly.
- **Days required** enter **the number of days per week** the person will be attending.
- Unit price record your day rate.
- Expiry date select 3 days from today.

Offer	
Details of the service you are o	ffering to meet the client's nee
Frequency	* Weekly 🗸
Days required	* 5
Unit price	* 50
Core price	£250.00
Expiry date	06/12/2024 📰

Notes		
These are a list of notes attached to to t and the Local Authority can see).		
Add a new note		

Type details into box provided, include which call you can start with, any variations in times of calls (applicable to care at home providers) and any other information Brokerage need to be aware of.

Then click Add note.



11. Click **Save and mark response as complete** at the top of the page.



Your response will have been sent to Brokerage.

Once Brokerage have awarded the package, you will be notified via e-mail to confirm whether you have won the package or not. See <u>View Awarded Packages</u> section for guidance on this.

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3. Change Care Package Response (This is before deadline is reached).

N.B. This applies to care packages where you have already submitted a response, but the deadline has not been reached (packages in the response complete tab). You cannot change responses once deadline has been reached.

1. Go to **Brokerage,** package will display in either **Response complete,** or **Awaiting Decision** tab. Click on the relevant **package ref.**

Organisations	Awaiting Response (0)	Response Complete (1)	Awaiting Decision	(1) Not Awa	rded
Services	Response Com	plete			
Documents	Response sent within that you have comple responded. Whilst a r	the last 12 months with the ted your response but the response but the response is listed here your	e Response Comp esponse deadline can continue to ed	ete status are s has not been re t it.	shown each c
Users	Showing 1 to 1 of 1 e	ntries			
Brokerage	Package Ref	Client Ref	≎ Servi	ce Level	\$
	1016-11	LAS 1234	Care a Standa	it Home Suppor	rt

2. Click on **Our response** tab.



3. Review requirement answers and amend as required.

Requirements			
These are a list of requirements for negotiable, a comment box will be mitigating factors.	or the service to be delivered. If you can fulfil the requirement answer "Yes". If you answer "No" and the requirement is a shown so that you can enter a message explaining whether you could fulfil the requirement with minor changes or if there are		
Home Care 001 Are you able to meet the health & social sare requirements in the Brokerage Request?			
Essential. Social sale weeds	Can meet requirement? Yes 🗸 ?		
	This is the Third Party Only description		
Home Care 002 Essential: Start Date	Can you start on the proposed start date?		
	Can meet requirement? Yes V		
Home Care 003 Essential: Stat date within 1 day	Can you start within 1 day of the proposed start date?		
	Can meet requirement? Yes V		
Home Care 004 Essential:	Can you start within 2 days of the proposed mart date?		
Start date within 2 days	Can meet requirement? Vee		

Review **Placement Response** and amend as required.

Placement Response				
Your decision on whether your service can be provided to this client.				
Placement response	Yes - we are able to provide this service \checkmark			

If you need to make an amendment to **notes** you have submitted, you are not able to delete the original note and will need to add an additional note.

To do this:

Click Add new note.



Type **"AMENDMENT TO PREVIOUS NOTE"** in capital letters at the start of note to make it clear to Brokerage that this is an amendment.

Then click Add note.

Add a new	note										
Vote	в	Ι	U	÷	×2	X²	99	<u></u> *	łΞ	iΞ	
	AME	NDM	ENT	TO F	REV	lous	NO	TE: W	e can p	orovide	
	_										
	p										O tiny
										Add	f note Cancel

4. Click Save your changes.



Your care package response will now have been updated and Brokerage will have been informed.

4. Withdraw Care Package Response.

N.B. Responses can only be withdrawn once they have been submitted and either:

- Before deadline is reached.
- Deadline has been reached but, Brokerage have not yet awarded the package.

For packages that have reached their deadline, you can only withdraw the package. You cannot change your response.

1. Go to **Brokerage** tab package will display in either **Response complete**, or **Awaiting Decision** tab.

Organisations	Awaiting Response (0)	Response Complete (1)	Awaiting Decision (1)	Not Awarded	Awarded All
Services	Response Com	plete			
Documents	Response sent within that you have complet responded. Whilst a re	the last 12 months with th ted your response but the esponse is listed here you	e Response Complete sta response deadline has no can continue to edit it.	atus are shown ot been reach or	on this tab. The table r all participating prov
Users	Showing 1 to 1 of 1 er	ntries			Search:
Brokerage	Package Ref	≎ Client Ref	≎ Service Le	evel ¢	Service Name

2.Click on the relevant package ref link.

<u>1016-11</u>	LAS 1234	Care at Home Support
		Standard

3. Click on **Our response** tab.



4. Click Withdraw response.



N.B. If deadline has been reached you can only withdraw the response. If deadline hasn't been reached you can make changes and then resubmit a response by clicking "save and mark response as complete" button.



FOR CARE AT HOME PROVIDERS ONLY (N/A for Day Opportunities providers) discharge to assess (hospital discharge), early response service (ERS), changes to package (increase and decrease), and mental health enablement services, Brokerage will upload both risk assessment and care plan with the initial brokerage request and you will be able to view the paperwork immediately. However, you must still accept the package to confirm that it is going ahead. Go to <u>accept/decline a care package</u> section to see how to do this.

1. Go to your inbox and open the relevant e-mail. If you have been **awarded** the package, it will state **accepted** in the subject heading. (If you have not been awarded the package it will state **rejected**.)

Click on responses link.



You may need to login (if prompted to do so)

This will take you directly into the package details.

Logged in as ebrokeragetesting1 Manage your account Log out Public site Contact Admin Dashboard	Home Care Ltd: Brokerage response The details of the brokered response for the service. It can no longer be changed as brokerage has ended. Back to list				
Organisations	Response		Package Details	Our Response	Metadata
Services	Local authority	Solihull Metropolitan Borough Council			
Documents	Package reference	1016-47			
Di Centra Maria Maria Mala (d. 21	Client reference	TEST- Care and Support at Home - Standard			
Users	Service level	Care at Home Support Standard			
NUMBER OF THE OWNER OF THE OWNER OF	Expected start date	18/01/2024			
Brokerage	Hours required	7.00			
	Frequency	Weekly			
	Location				

2. Next download the person's **documents.**

To do this, click on **Our response** tab.

Logged in as ebrokeragetesting1 Manage your account Log out Public site Contact Admin Dashboard	Home Care Ltd: Brokerage response The details of the brokered response for the service. It can no longer be changed as brokerage has ended. Back to list					
Organisations	Response		Package Details	Our Response	Metadata	
Services	Local authority	Solihull Metropolitan Borough Council				
Documents	Package reference	1016-47				
	Client reference	TEST- Care and Support at Home - Standard				
Users	Service level	Care at Home Support Standard				
TENA CAN DAMA TANDA AND AND AND AND AND AND AND AND AND	Expected start date	18/01/2024				
Brokerage	Hours required	7.00				
	Frequency	Weekly				
	Location					

3. Scroll down the page to **Documents.** This is where Brokerage will have uploaded the person's documents.

Click **Download** beside the risk assessment and care plan documents.



4. Also remember to check **Notes** to see what information Brokerage have supplied about the person and the package.

Notes
These are a list of notes attached to to the package (that all respondents can see) or that you or the Local Authority have added to this response (that only you and the Local Authority can see).
Notes cannot be added after the deadline has passed or a decision has been made on the associated package.
09:00 x 30 mins x 1 carer x 7 days 16:00 x 30 mins x 1 carer x 7 days

6. Search for a Care Package.

1. All brokerage packages can be found in the **Brokerage**, All tab.

Organisations	Awaiting Response (0)	Response Complete (0)	Awaiting Decision (0)	Not Awarded	Awarded	All
Services	All					
Documents	Response sent within sent within 12	the last 12 months with the months will be shown unle	e all responses regardles ss you use a filter to res	ss of status status strict the list.	are shown o	n this
Users	Showing 1 to 9 of 9 er	ntries			Search:	
Brokerage	Package Ref	≎ Client R	ef 🗧	Service Leve	el	0

2. In the search bar type either **Package ref, client ref or service level**. In the

example below, search has been carried out by package ref:

All				
Response sent within the last 12 months with the all responses regardless of status status are shown on this tab. All responses sent within the last 12 months will be shown unless you use a filter to restrict the list.				
Showing 1 to 1 of 1 entries	(filtered from 9 total entries)	Search: 1	017-5	
Package Ref	≎ Client Ref	Service Level	Service Name	
1017-5	54321	Hospital Discharge	Home Care Ltd	

N.B. Remember to clear the search box to view all care packages.

7. Register a New Account

To be actioned by Manager

IMPORTANT: If you are a new organisation to the e-brokerage system. You should create a <u>Team Admin account</u> in addition to an <u>individual account</u> for each person using the system. This is so all care package requests and responses will go to a centralised team inbox. You will only need to create the team admin account once.

To create a team admin account, follow the steps below. If this has already been actioned, go to "<u>Registering a New Employee</u>" section.

To **register a Team Admin account**, a manager must submit a Solihull MBC eBrokerage Access Request Form.

1. Form can be accessed from the e-Brokerage login page by clicking on the **register** link.

Log in	
Enter your details below to log in User name or email *	Are you a service provider but don't yet have an account? Register
Password *	If you are having problems related to your login please contact Settings > System Option > General > Admin Contact Name on mp.site@occsites.co.uk or 01234 567890
Log in Cancel	
Forgotten your password?	

2. Complete Login details

Recommendation is that **User name** should be your **Organisation's name** without any spaces.

E-mail address should be the team e-mail address that you wish care package requests to be sent to.

Login Details	
User name *	
Email address *	

3. Complete Personal details. Enter:

Organisation name in Forename field.

Admin in Surname field.

Personal Details	
Forename *	
Surname *	
Telephone number *	
Mobile number	
Fax number	
Address line 1	
Address line 2	
Address line 3	
Address line 4	

4. Complete Employer details.

Type organisation name into search by organisation name field and click Find.

Employer Details	
Enter part of your employer's name in the box and press the Find button	
Search by organisation name	
	Find

Select correct organisation from the dropdown menu.

Organisation	Matches found, please select from list	~

If you organisation isn't listed, click **My employer is not listed**.

Organisation	No matches	~
	My employer is not listed	

And type your organisation into the box provided.

New organisation		
l	f your organisation is not in the list above, please enter its name	here

5. Leave role blank.



6. In the **Notes** box type who has authorised the request for your organisation (this should be a manager).

Notes	Authorising manager is "insert name here"

7. Click Request login

Request login

Screen will update to acknowledge request.



N.B. The below stage will only happen once your request has been approved by Brokerage manager. There may be a slight delay for this to be processed. Please contact Brokerage if you need to follow up this request.

8. Once Brokerage manager has approved the request, an e-mail will be received in the team inbox.

Open relevant e-mail advising login request accepted and click on **terms and conditions** link.

N.B. Please be aware that the link will only be valid for 24 hours after it was sent.



9. Create **new password** and **confirm new password**.

N.B. Remember this password as it will be required every time if you need to log in as admin.

New Password *	
Confirm New Password *	

10. Tick I accept terms and conditions box and click Create new login

I accept the terms and conditions	
Create new login	

11. This should take you into the system.

IMPORTANT: You must now register each individual employee that will access the system. To do this see next page.

8. Registering a New Employee.

N.B. You must complete registration for each employee that will be using the system.

To register a new employee, their manager must submit a Solihull MBC eBrokerage Access Request Form.

1. Form can be accessed from the e-Brokerage login page by clicking on the **register** link.

Log in	
Enter your details below to log in	Are you a service provider but don't yet have an account? Register
User name or email *	
Password *	If you are having problems related to your login please contact Settings > System Option > General > Admin Contact Name on mp.site@occsites.co.uk or 01234 567890
Log in Cancel	
Forgotten your password?	

2. Complete Login details

Recommendation is that **User name** should be **firstnamesurname** without a space. (If the username already exists add a number on the end).

E-mail address should be individual's work e-mail address.

Login Details	
User name *	
Email address *	

3. Complete Personal details

Personal Details	
Forename *	
Surname *	
Telephone number *	
Mobile number	
Fax number	
Address line 1	
Address line 2	
Address line 3	
Address line 4	

4. Complete Employer details.

Type your **organisation's name** into **search by organisation name** field and click **Find**.

Employer Details	
Enter part of your employer's name in the box and press the Find button.	
Search by organisation name	
	Find

Select correct organisation from the dropdown menu.



5. Select the most appropriate **role** from the dropdown list for the employee.

Role

6. In the **Notes** box type who has authorised the request for your organisation (this should be a manager).

Notes Authorising manager is "insert name here"

Supervisor

7. Click Request login



Screen will update to acknowledge request.



N.B. The below stage will only happen once your request has been approved by Brokerage manager. There may be a slight delay for this to be processed. Please contact Brokerage if you need to follow up this request.

To be Completed by Employee.

8. Once Brokerage manager has approved the request, the employee will receive and e-mail to their work inbox.

Employee to open relevant e-mail advising login request accepted and click on **terms and conditions** link.

N.B. Please be aware that the link will only be valid for 24 hours after it was sent.



9. Employee to create new password and confirm new password.

N.B. Employee should remember this password as it will be required every time they log in.

New Password *	
Confirm New Password *	

10. Tick, I accept terms and conditions box and click Create new login.



11. This should take employee into the system.

IMPORTANT: User must remember these login details to be able to access the system in the future.

9. Service Level Types

Below is a list of the different service types.

N.B. Not all these service types may apply to your organisation.

Care at Home Service Levels

Service Level	Description
Care at Home Support Standard	Home care at standard rate.
Care at Home Respite at Home	This is when someone is having
	respite at home. Previously called
	sitting service.
Care at Home Support Low Density	Home care at low density (rural) rate.
	This is at a higher rate because of
	package location.
(P1) D2A Care at Home Support	Home care to facilitate hospital
	discharge (discharge to assess)
(P2) Care at Home Support Standard	Home care at standard rate where the
	person is coming from a P2 hospital
	bed.
(P2) Care at Home Support Low Density	This is home care at low density(rural)
	rate where the person is coming from
	a P2 hospital bed. This is at a higher
	rate because of package location.
Mental Health Enablement	Mental Health Matters Service.
	Reablement/non chargeable service.
(ERS) Care at Home Support	Early Response service.
Change of Package	This is a package you are already
	providing but there has been a change
	e.g. increase/decrease, change in call
	times.

Day Opportunities Service Levels.

Service Level	Description
Day Opportunities - Internal	Day opportunity packages that go to our internal providers
Day Opportunities - FCA	Day opportunity packages that go to our FCA providers
Day Opportunities - Spot	Day opportunity packages that go to our spot providers
Change of Package	This is a package you are already providing but there has been a change e.g. increase/decrease, change of days.

