ADULT SOCIAL CARE

e-Brokerage Providers Guide

Version 1.5

Version Control Log

Version:	Date:	Author Name:	Rationale:
1.0	03/01/2024	Hannah Dodds	Initial document created
1.1	13/02/2024	Hannah Dodds	Update to location and additional information.
1.2	05/02/2024	Hannah Dodds	Amendments to process.
1.3	13/03/2024	Hannah Dodds	Added downloading paperwork
1.4	02/05/2024	Hannah Dodds	Change to process
1.5	16/07/2024	Hannah Dodds	Sitting service changed to respite at home.

INTRODUCTION

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

These include, how to:

- Basic System Navigation
- Accept/decline a care package.
- Change care package response (once submitted and before deadline is reached).
- Withdraw care package response (once submitted and before deadline is reached).
- View awarded packages and download a person's paperwork.
- Search for a care package.
- Register a new account.
- Service Level types

Basic System Navigation.

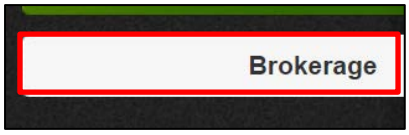
Here are a few useful tips to navigate the system:

User Guides and Videos.

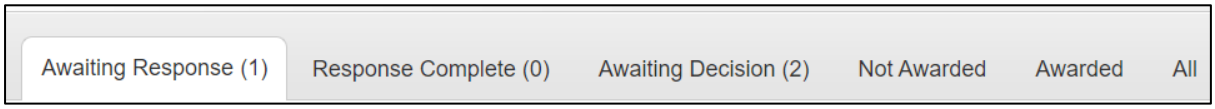
The e-Brokerage provider guide and videos can be accessed by visiting Solihull MBC's Commissioning internet page.

Brokerage Tabs.

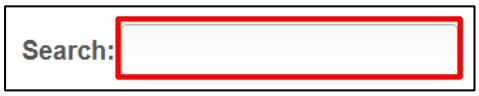
The Brokerage tab contains all details about care packages that have been sent to your organisation.



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.



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.

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

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

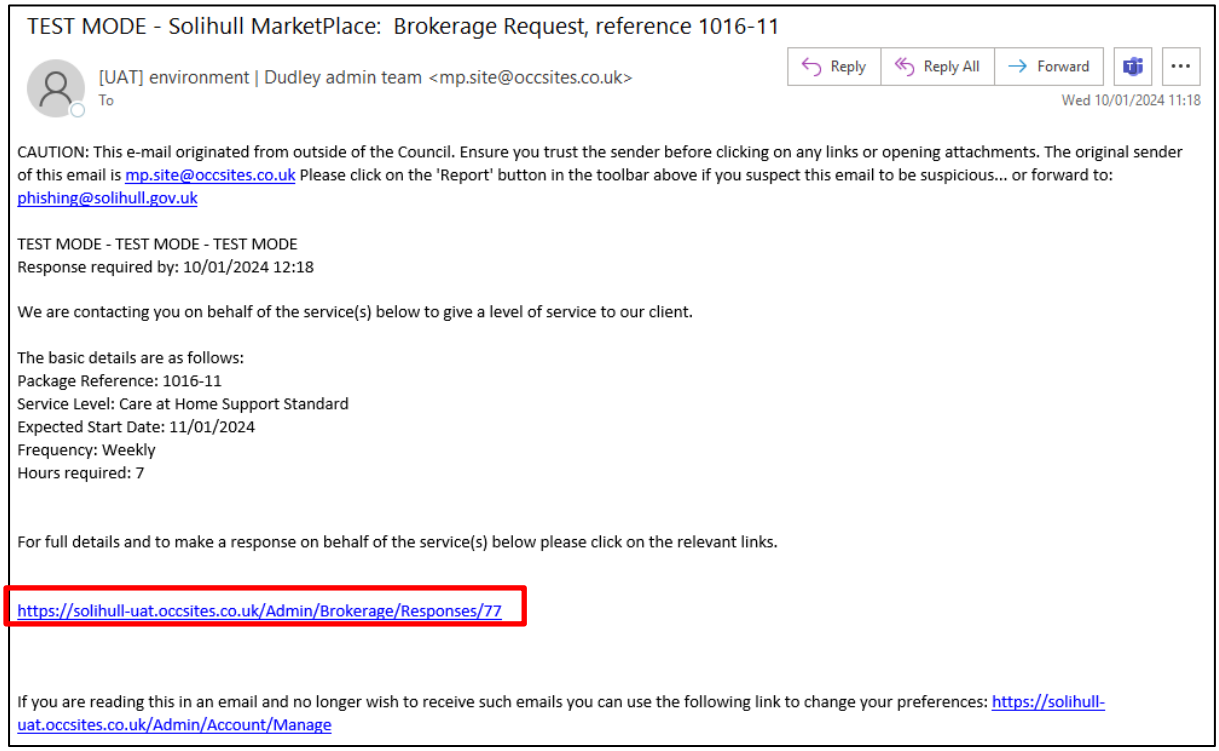
All – Shows all packages that have been sent to your organisation.

Accept/Decline a Care Package.

N.B. 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>
To

Reply | Reply All | Forward

Wed 10/01/2024 11:18

CAUTION: This e-mail originated from outside of the Council. Ensure you trust the sender before clicking on any links or opening attachments. The original sender of this email is mp.site@occsites.co.uk Please click on the 'Report' button in the toolbar above if you suspect this email to be suspicious... or forward to: phishing@solihull.gov.uk

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

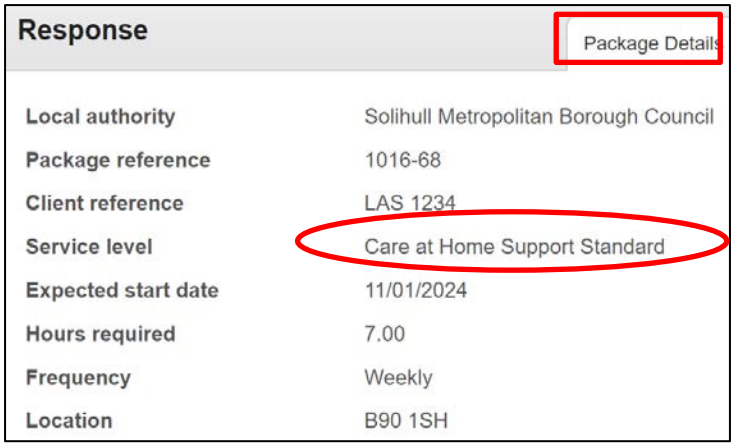
If you are reading this in an email and no longer wish to receive such emails you can use the following link to change your preferences: https://solihull-uat.occsites.co.uk/Admin/Account/Manage

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

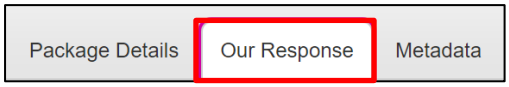
3. Review package details

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

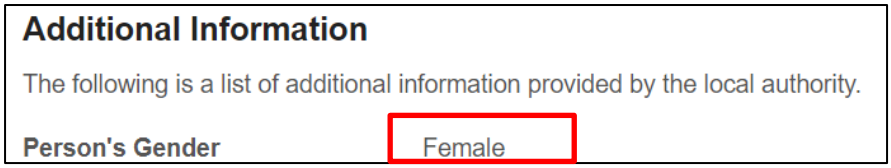
It will also display, package reference, client reference, expected start date, hours required, frequency and location of package.



4. Next, go to Our Response tab.



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

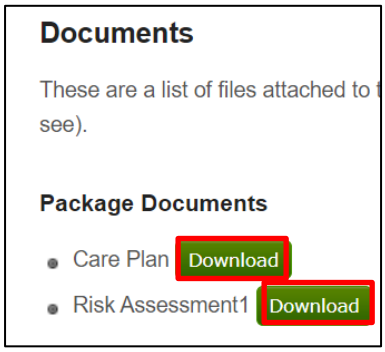


6. For discharge to assess (hospital discharge), early response service (ERS), changes to package (increase and decrease) and mental health enablement services ONLY.

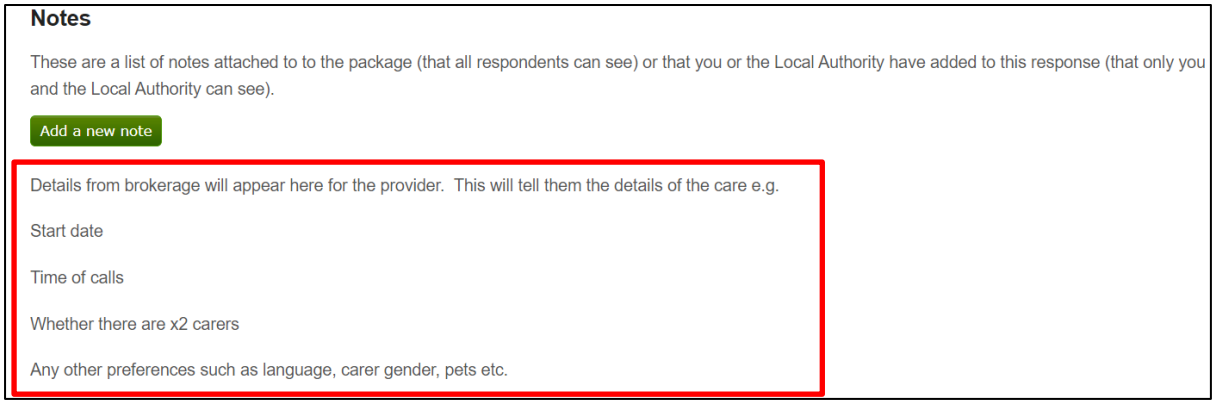
For care at home standard, low density and respite at home move to step 7.

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.



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

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

Complete for all requirements.

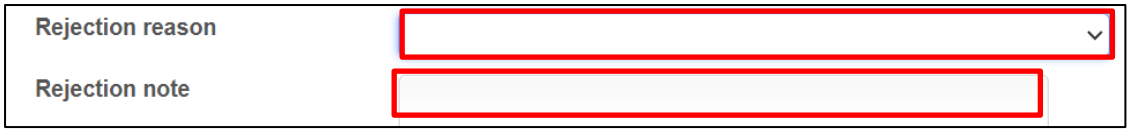
If there are no requirements or you are going to decline the package, move to step 8 below.

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

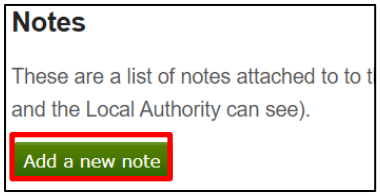
If selecting:

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

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

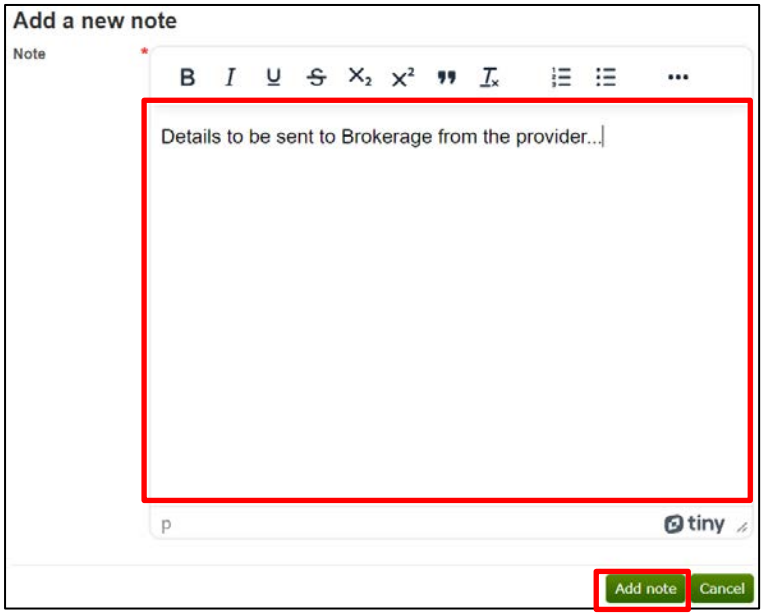


8. Click Add a new note.



Type details into box provided, include which call you can start with, any variations in times of calld and any other information Brokerage need to be aware of.

Then click Add note.



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

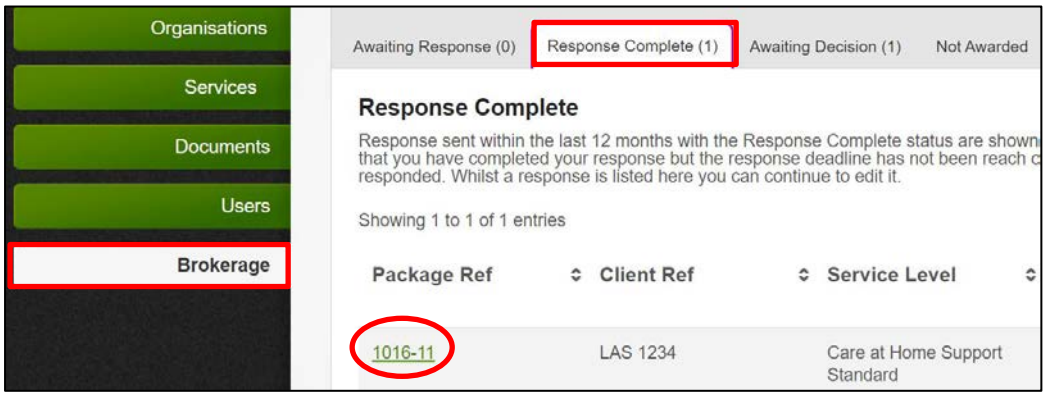
Your response will have been sent to Brokerage.

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

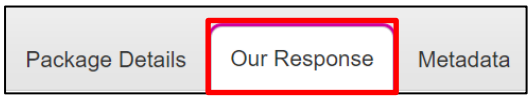
Change Care Package Response (This is before deadline is reached).

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.

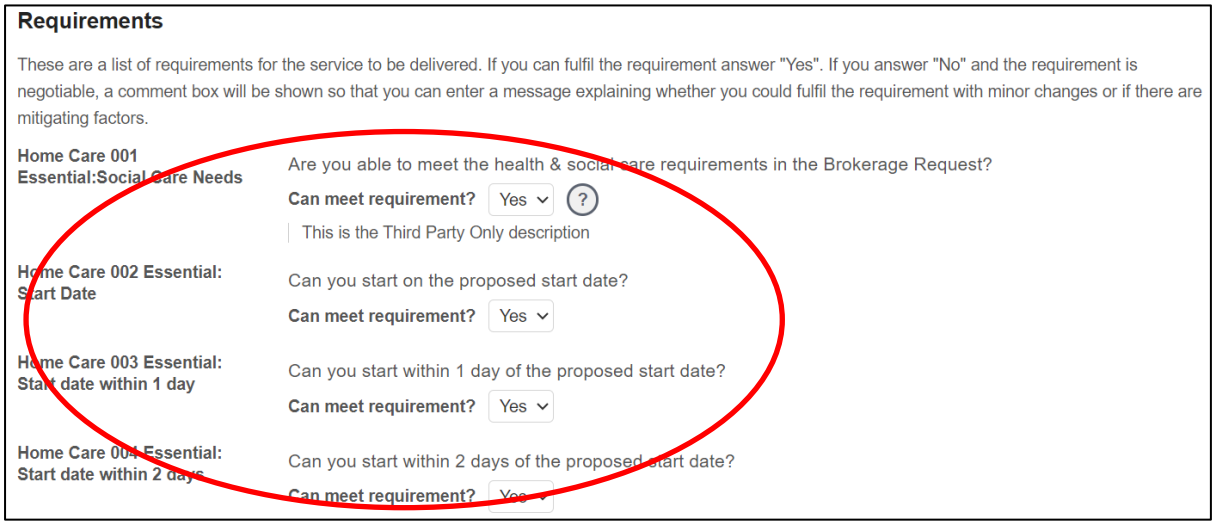
1. Go to Brokerage, package will display in either Response complete, or Awaiting Decision tab. Click on the relevant package ref.



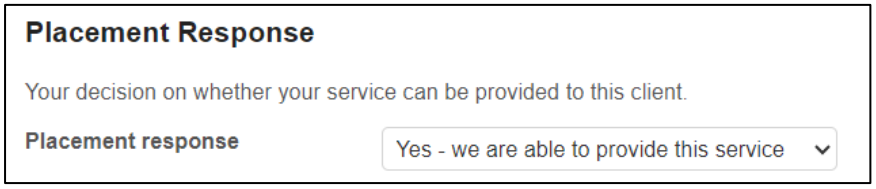
2. Click on Our response tab.



3. Review requirement answers and amend as required.



Review Placement Response and amend as required.



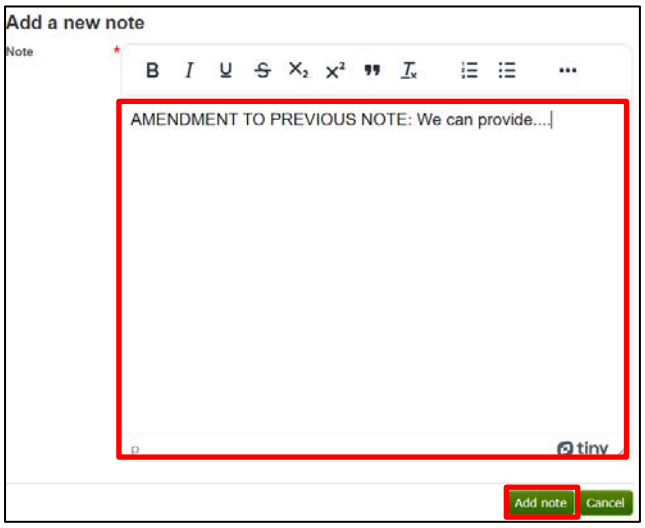
If you need to make an amendment to notes you have submitted, you are not able to delete the original note and will need to add an additional note.

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.



4. Click Save your changes.

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

Withdraw Care Package Response.

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

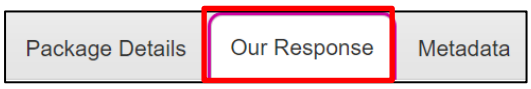
- Before deadline is reached.
- Deadline has been reached but, Brokerage have not yet awarded the package.

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.

3.Click on the relevant package ref link.

4. Click on Our response tab.



5. Click Withdraw response.

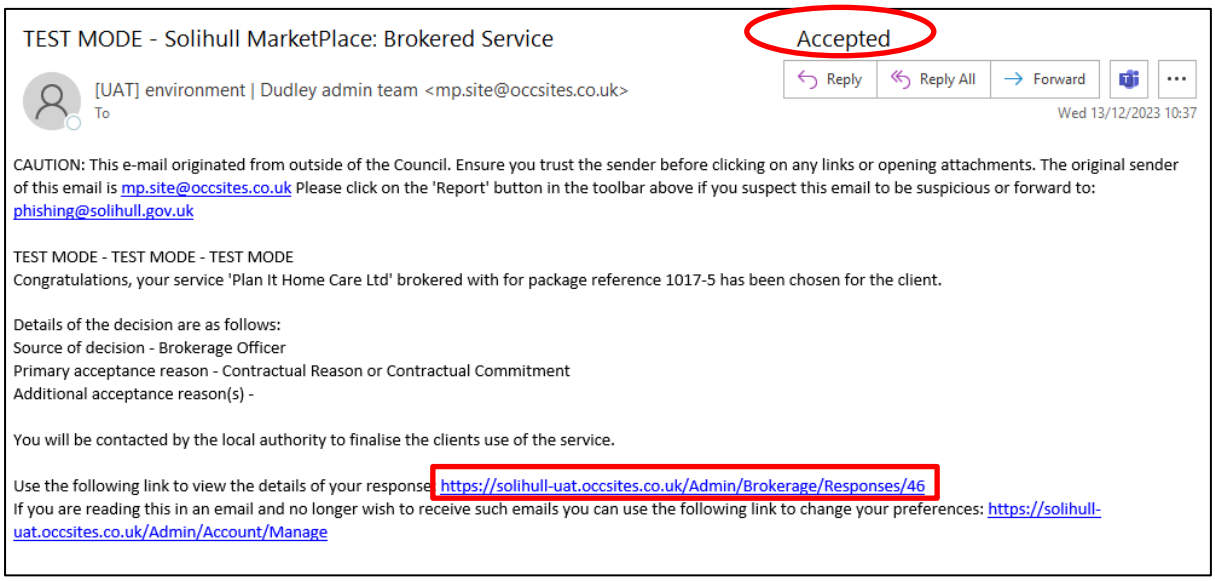
N.B. If deadline has been reached you can only withdraw the response. If **deadline hasn't been reached** you can make changes and then resubmit a response by clicking "save and mark response as complete" button.

View Awarded Packages and Download a Person's Paperwork.

N.B. 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. Go to accept/decline a care package 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 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)

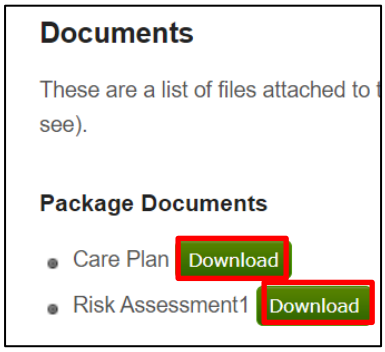
This will take you directly into the package details.

2. Next download the person's documents.

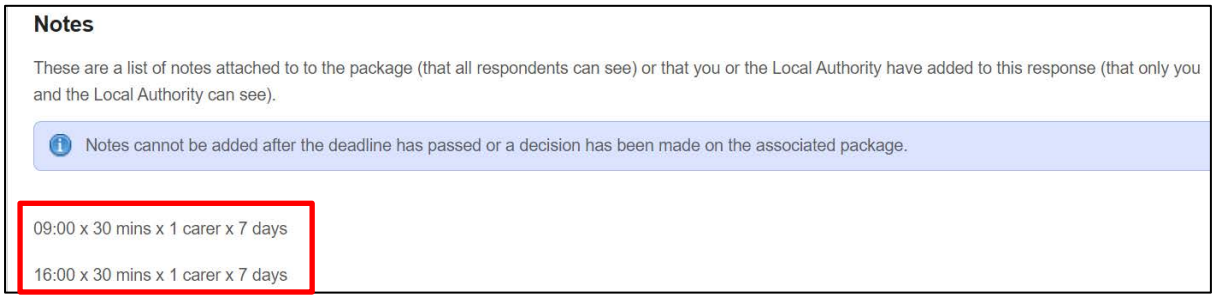
To do this, click on Our response tab.

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.



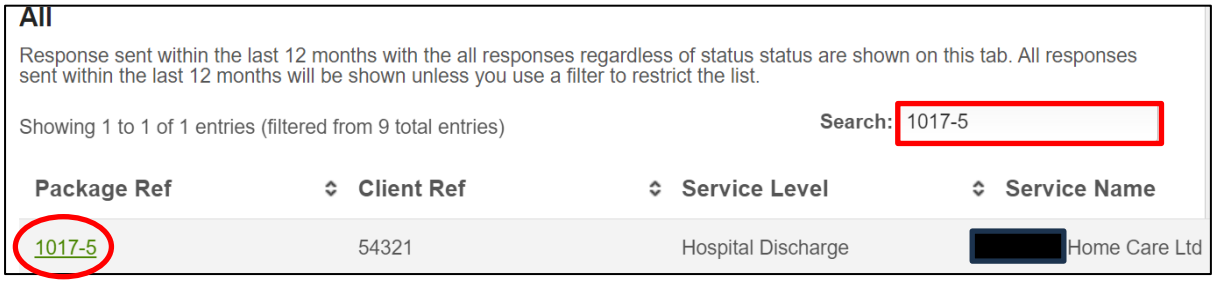
4. Also remember to check Notes to see what information Brokerage have supplied about the person and the package.



Search for a Care Package.

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

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:



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

Register a New Account

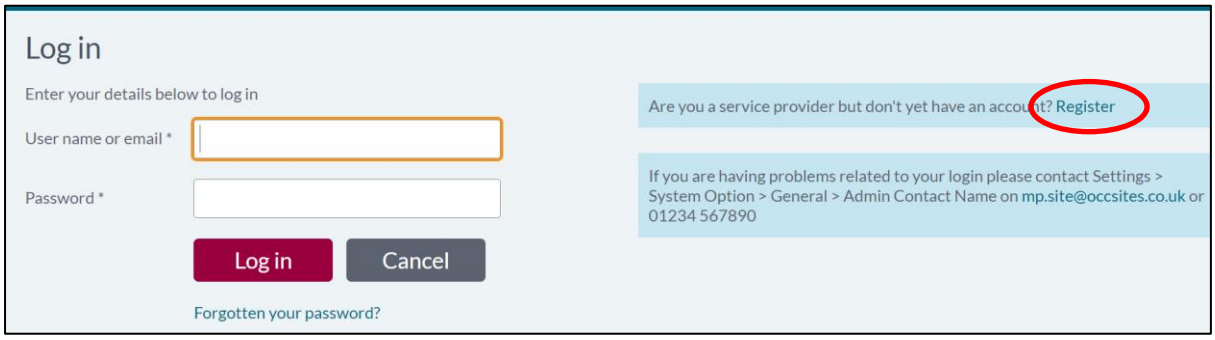
To be actioned by Manager

IMPORTANT: If you are a new organisation to the e-brokerage system. You should create a Team Admin account in addition to an individual account 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 "Registering a New Employee" section.

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

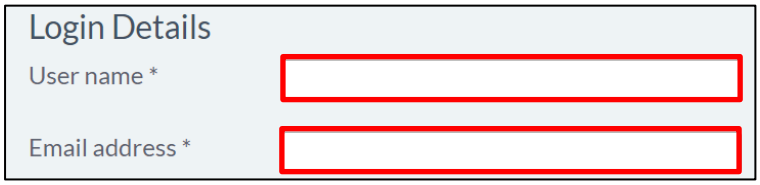
1. Form can be accessed from the e-Brokerage login page by clicking on the register link.



2. Complete Login details

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

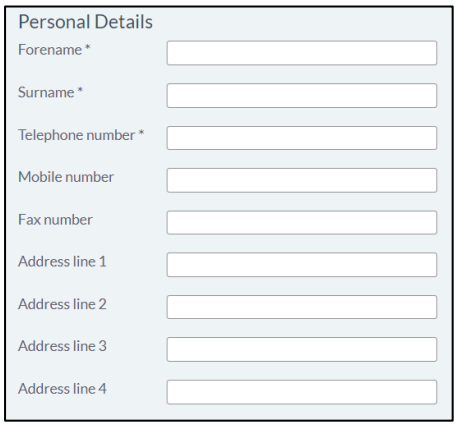
E-mail address should be the team e-mail address that you wish care package requests to be sent to.



3. Complete Personal details. Enter:

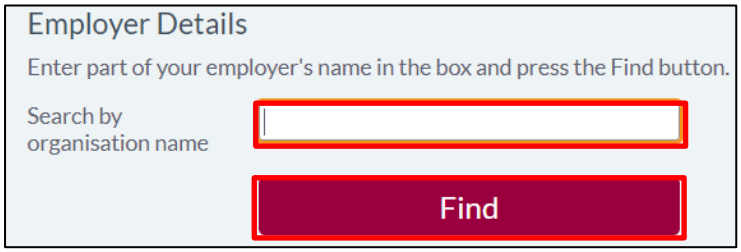
Organisation name in Forename field.

Admin in Surname field.



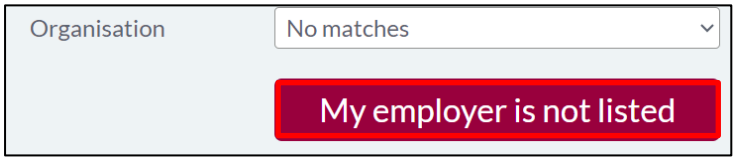
4. Complete Employer details.

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

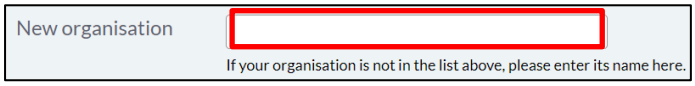


Select correct organisation from the dropdown menu.

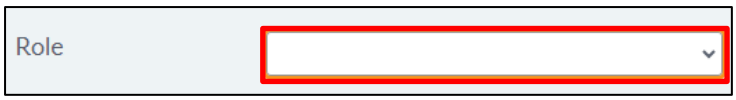
If you organisation isn't listed, click My employer is not listed.



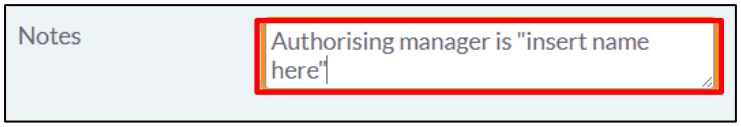
And type your organisation into the box provided.



5. Leave role blank.

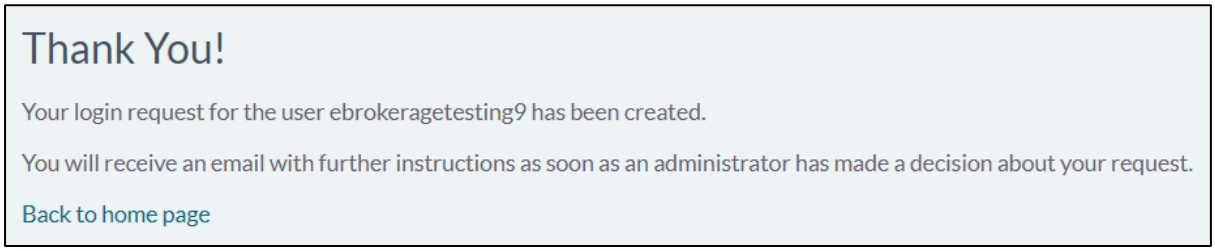


6. In the Notes box type who has authorised the request for your organisation (this should be a manager).



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.

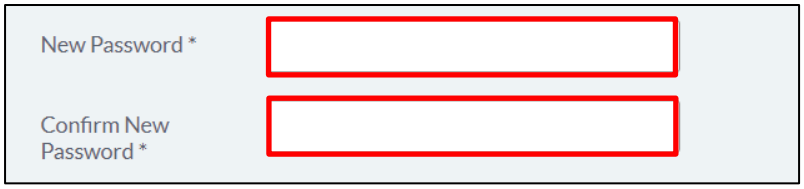
8. Once Brokerage manager has approved the request, an e-mail will be received in the team inbox.

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

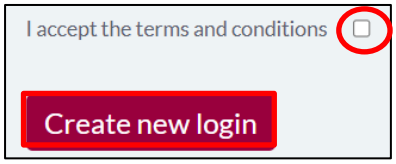
N.B. Please be aware that the link will only be valid for 24 hours after it was sent.

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.



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



11. This should take you into the system.

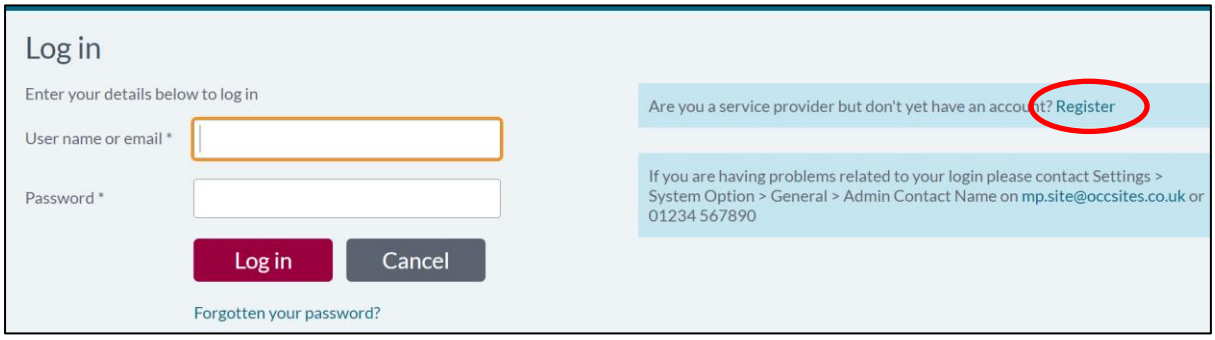
IMPORTANT: You must now register each individual employee that will access the system. To do this see below:

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.

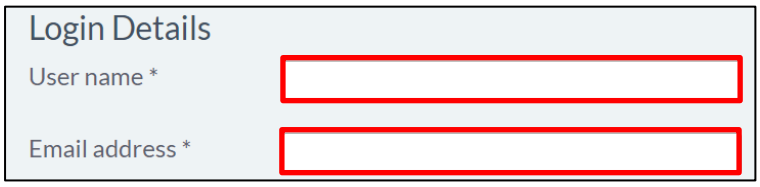
1. Form can be accessed from the e-Brokerage login page by clicking on the register link.



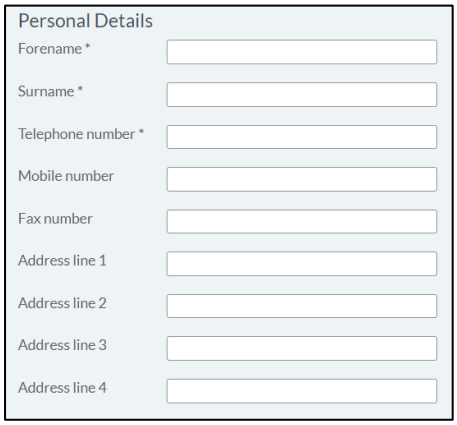
2. Complete Login details

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.

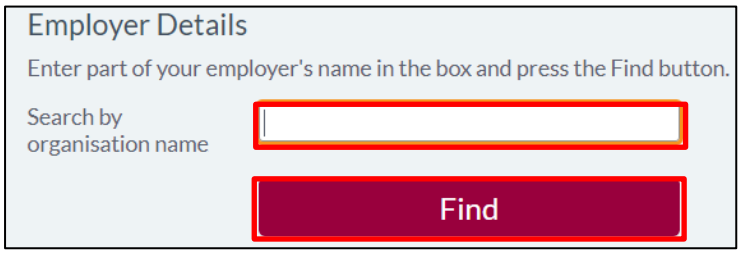


3. Complete Personal details



4. Complete Employer details.

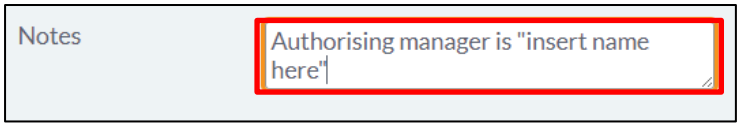
Type your organisation's name into search by organisation name field and click Find.



Select correct organisation from the dropdown menu.

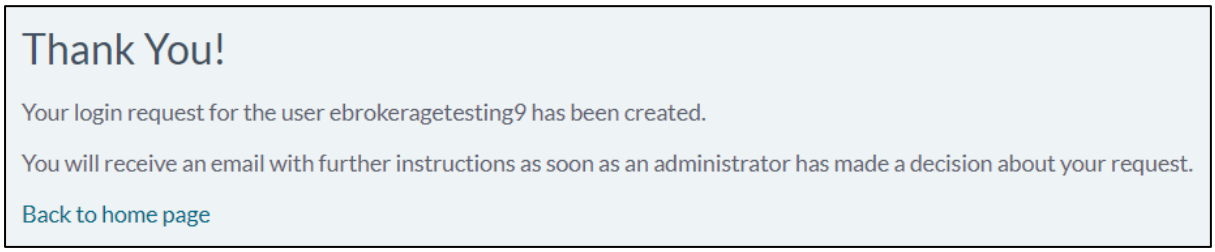
5. Select the most appropriate role from the dropdown list for the employee.

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



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.

<u>To be Completed by Employee.</u>

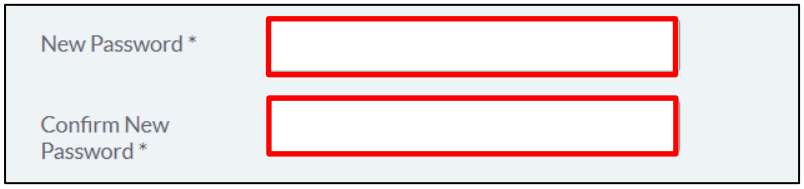
8. Once Brokerage manager has approved the request, the employee will receive and e-mail to their work inbox.

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

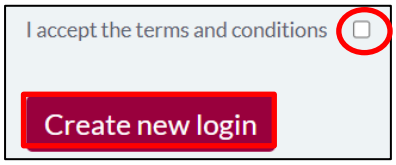
N.B. Please be aware that the link will only be valid for 24 hours after it was sent.

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.



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.

Service Level Types

Below is a list of the different service types:

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.

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