

Adult Social Care

making a Difference in the Right Way, Every Day

e-Brokerage Providers Guidance



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.
1.6	27/11/2024	Hannah Dodds	Amended to incorporate day opps process
1.7	26/06/2025	Hannah Dodds	HDS service level updated
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.

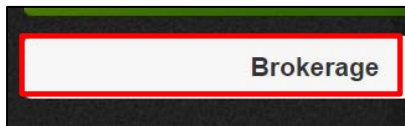
Here are a few useful tips to navigate the system:

User Guides and Videos.

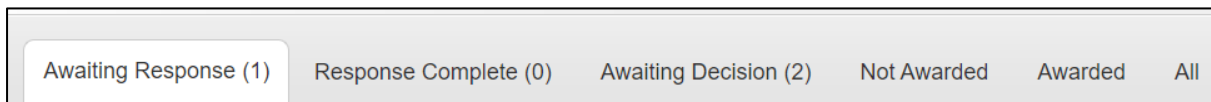
The e-Brokerage provider guide and videos can be accessed by visiting [Solihull MBC's Commissioning](#) internet page.

Brokerage Tabs.

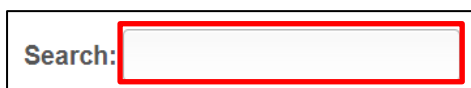
The **Brokerage** tab contains all details about care packages that have been sent to your organisation.



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.


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>
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/days 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.

Package Details	Our Response	Metadata
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Day opportunities providers move to step 7

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

Additional Information	
The following is a list of additional information provided by the local authority.	
Person's Gender	Female

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.

Documents

These are a list of files attached 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).

Package Documents

- Care Plan **Download**
- Risk Assessment1 **Download**

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 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).

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 through 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 <input type="button" value="v"/> <input style="border: 1px solid black;" type="button" value="?"/>

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.

Accept provider brokerage package T&C?	<input checked="" type="checkbox"/>
--	-------------------------------------

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

Rejection reason	
Rejection note	

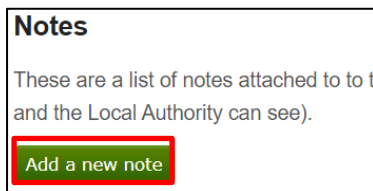
FOR DAY OPPORTUNITIES SPOT PROVIDERS ONLY. All other services move to step 10:

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 offering to meet the client's need	
Frequency	* Weekly
Days required	* 5
Unit price	* 50
Core price	£250.00
Expiry date	06/12/2024

10. Click **Add a new note**.



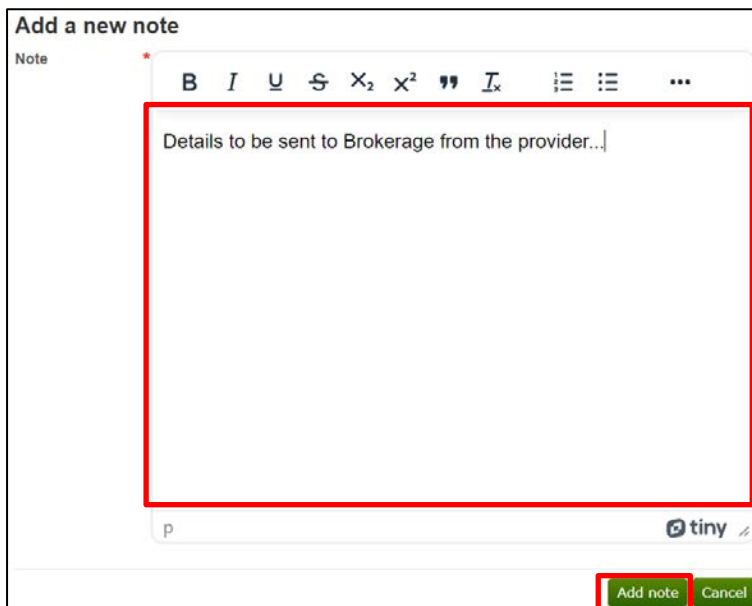
Notes

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**.




Add a new note

Note


B I U  \times_2 \times^2     ...

Details to be sent to Brokerage from the provider...

 tiny

Add note Cancel

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



Save your changes **Save and Mark Response Complete**

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.

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**.

The screenshot shows the 'Brokerage' section of a web application. On the left is a sidebar with navigation links: Organisations, Services, Documents, Users, and Brokerage (which is highlighted with a red box). The main area has four tabs: 'Awaiting Response (0)', 'Response Complete (1)' (highlighted with a red box), 'Awaiting Decision (1)', and 'Not Awarded'. Below the 'Response Complete' tab, there is a heading 'Response Complete' followed by explanatory text. A table shows 'Showing 1 to 1 of 1 entries'. The table has columns: 'Package Ref', 'Client Ref', and 'Service Level'. One entry is visible with 'Package Ref' 1016-11 (circled in red), 'Client Ref' LAS 1234, and 'Service Level' Care at Home Support Standard.

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

This screenshot shows the 'Package Details' section with three tabs: 'Package Details', 'Our Response' (highlighted with a red box), and 'Metadata'.

3. Review **requirement** answers and amend as required.

The screenshot displays the 'Requirements' section. It starts with an introductory paragraph. Below, there are four requirements listed on the left, each with a corresponding question and a 'Can meet requirement?' dropdown menu. A large red oval highlights the first three requirements and their dropdowns. The fourth requirement is partially visible. The requirements are:

- Home Care 001 Essential: Social Care Needs. Question: 'Are you able to meet the health & social care requirements in the Brokerage Request?'. Dropdown: 'Yes' (with a question mark icon).
- Home Care 002 Essential: Start Date. Question: 'Can you start on the proposed start date?'. Dropdown: 'Yes'.
- Home Care 003 Essential: Start date within 1 day. Question: 'Can you start within 1 day of the proposed start date?'. Dropdown: 'Yes'.
- Home Care 004 Essential: Start date within 2 days. Question: 'Can you start within 2 days of the proposed start date?'. Dropdown: 'Yes'.

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

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**.

Add a 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
 Note
 B I U
 AMENDMENT TO PREVIOUS NOTE: We can provide...
 Add note Cancel

4. Click **Save your changes**.

Save your changes Withdraw Response

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.

The screenshot shows a web interface with a left-hand navigation menu containing 'Organisations', 'Services', 'Documents', 'Users', and 'Brokerage'. The 'Brokerage' tab is selected and highlighted with a red box. The main content area has a tab bar with 'Awaiting Response (0)', 'Response Complete (1)', and 'Awaiting Decision (1)'. The 'Response Complete (1)' tab is selected and highlighted with a red box. Below the tab bar, the 'Response Complete' section displays a message: 'Response sent within the last 12 months with the Response Complete status are shown on this tab. The table that you have completed your response but the response deadline has not been reached or all participating providers have responded. Whilst a response is listed here you can continue to edit it.' Below this message, it says 'Showing 1 to 1 of 1 entries' and 'Search:'. A table with columns 'Package Ref', 'Client Ref', 'Service Level', and 'Service Name' is partially visible.

2. Click on the relevant **package ref** link.

1016-11	LAS 1234	Care at Home Support Standard
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3. Click on **Our response** tab.

The screenshot shows three tabs: 'Package Details', 'Our Response', and 'Metadata'. The 'Our Response' tab is selected and highlighted with a red box.

4. Click **Withdraw response**.

The screenshot shows a button labeled 'Withdraw Response' with a red border and a green background.

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.

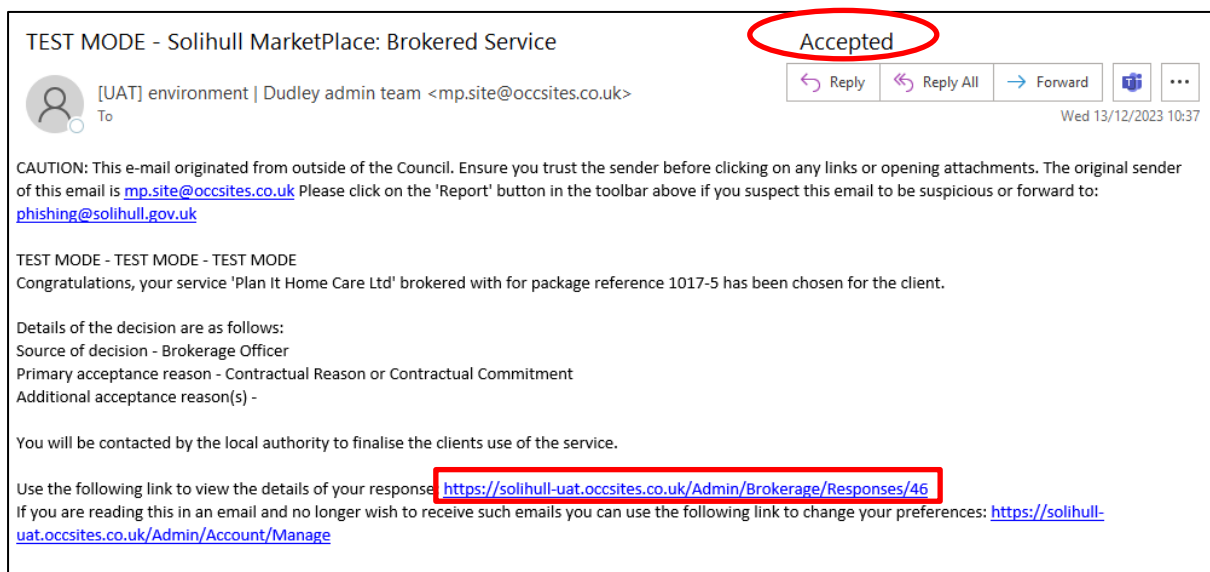
The screenshot shows two buttons: 'Save your changes' and 'Save and Mark Response Complete'. The 'Save and Mark Response Complete' button is highlighted with a red border and a green background.

5. View Awarded Packages and Download a Person's Paperwork.

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 [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** 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 ebrokerage1
Manage your account | Log out
Public site | Contact Admin

Dashboard

Organisations

Services

Documents

Users

Brokerage

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](#)

Response

Package Details

Our Response

Metadata

Local authority

Package reference

Client reference

Service level

Expected start date

Hours required

Frequency

Location

Solihull Metropolitan Borough Council

1016-47

TEST- Care and Support at Home - Standard

Care at Home Support Standard

18/01/2024

7.00

Weekly

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

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

Logged in as ebrokerage1
Manage your account | Log out
Public site | Contact Admin

Dashboard

Organisations

Services

Documents

Users

Brokerage

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](#)

Response

Package Details

Our Response

Metadata

Local authority

Package reference

Client reference

Service level

Expected start date

Hours required

Frequency

Location

Solihull Metropolitan Borough Council

1016-47

TEST- Care and Support at Home - Standard

Care at Home Support Standard

18/01/2024

7.00

Weekly

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.

Documents

These are a list of files attached to (see).

Package Documents

Care Plan

Download

Risk Assessment1

Download

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).



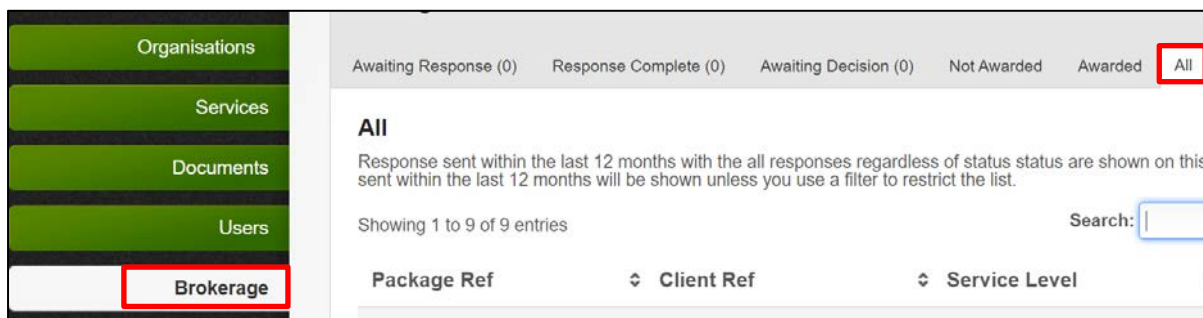
Notes cannot be added after the deadline has passed or a decision has been made on the associated package.

09:00 x 30 mins x 1 carer x 7 days

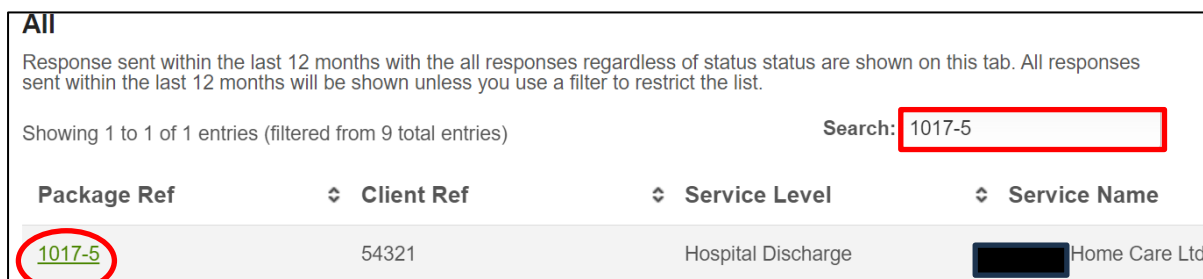
16:00 x 30 mins x 1 carer x 7 days

6. Search for a Care Package.

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



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.

7. Register a New Account

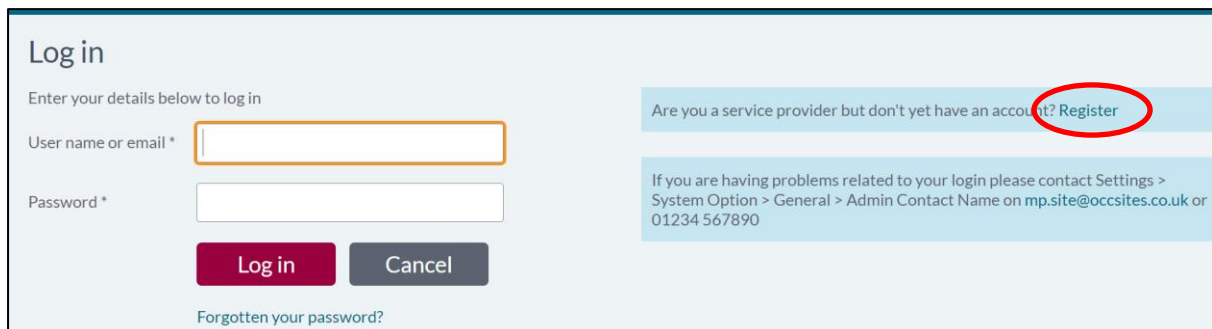
To be actioned by Manager

IMPORTANT: If you are a new organisation to the e-brokerage system. You should create a 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.



Log in

Enter your details below to log in

User name or email *

Password *

[Forgotten your password?](#)

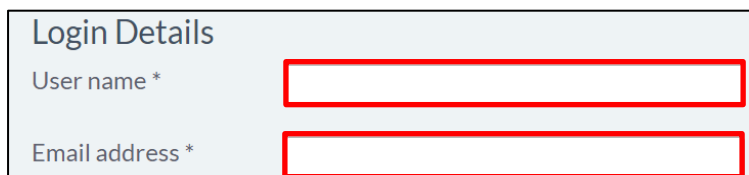
Are you a service provider but don't yet have an account? **Register**

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

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 *	<input type="text"/>
Surname *	<input type="text"/>
Telephone number *	<input type="text"/>
Mobile number	<input type="text"/>
Fax number	<input type="text"/>
Address line 1	<input type="text"/>
Address line 2	<input type="text"/>
Address line 3	<input type="text"/>
Address line 4	<input type="text"/>

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	<input type="text"/>
<input type="button" value="Find"/>	

Select correct **organisation** from the dropdown menu.

Organisation	<input type="text" value="Matches found, please select from list"/>
--------------	---

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

Organisation	<input type="text" value="No matches"/>
<input type="button" value="My employer is not listed"/>	

And type your organisation into the box provided.

New organisation	<input type="text"/>
If your organisation is not in the list above, please enter its name here.	

5. Leave **role** blank.

Role	<input type="text"/>
------	----------------------

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

Notes	<input type="text" value="Authorising manager is 'insert name here'"/>
-------	--

7. Click **Request login**

Request login

Screen will update to acknowledge request.

<h2>Thank You!</h2> <p>Your login request for the user ebrokeragetesting9 has been created.</p> <p>You will receive an email with further instructions as soon as an administrator has made a decision about your request.</p> <p>Back to home page</p>

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.

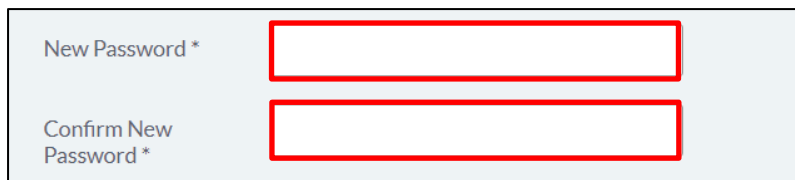
Open relevant e-mail advising login request accepted and click on **terms and conditions** link.

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

TEST MODE - Solihull MarketPlace: Login request accepted			
<p>[UAT] environment Dudley admin team <mp.site@occsites.co.uk></p> <p>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</p> <p>TEST MODE - TEST MODE - TEST MODE</p> <p>Your Solihull MarketPlace login request has been accepted and your account has been created.</p> <p>Visit the URL below to continue the activation process.</p> <p>You will be asked to accept the terms and conditions of the site and set up your login credentials.</p> <p>https://solihull-uat.occsites.co.uk/Account/NewLogin?token=t0azNclgwE2Dsb0xlwHbxQ%3D%3D</p> <p>This link is only valid for the next 24 hour(s)</p>			

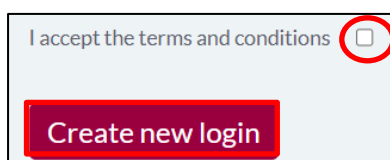
9. Create **new password** and **confirm new password**.

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



A light blue rectangular form containing two input fields. The first field is labeled 'New Password *' and the second is labeled 'Confirm New Password *'. Both fields are empty and have a red rectangular border around them.

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



A light blue rectangular form. At the top, it says 'I accept the terms and conditions' followed by a small square checkbox. The checkbox is circled in red. Below this, there is a red rectangular button with the text 'Create new login' in white.

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.

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**.

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

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

7. Click **Request login**

Request login

Screen will update to acknowledge request.

Thank You!

Your login request for the user ebrokeragetesting9 has been created.

You will receive an email with further instructions as soon as an administrator has made a decision about your request.

[Back to home page](#)

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 *	<input type="password"/>
Confirm New Password *	<input type="password"/>

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

I accept the terms and conditions	<input type="checkbox"/>
<input type="button" value="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) HDS Care at Home Support	Home care to facilitate hospital discharge service
(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.

