



ADULT SOCIAL CARE

e-Brokerage Providers Guide

Version
1.4

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

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.

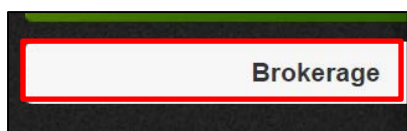
Here are a few useful tips to navigate the system:

User Guides and Videos.

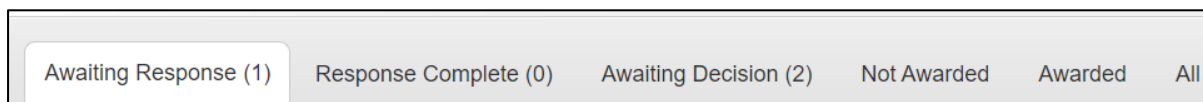
The e-Brokerage provider guide and videos can be accessed by visiting [Solihull MBC's Commissioning](#) internet page.

Brokerage Tabs.

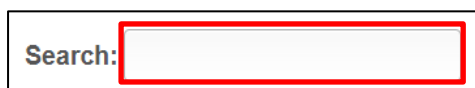
The Brokerage tab contains all details about care packages that have been sent to your organisation.



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.

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
-----------------	--------------	----------

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 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 sitting services 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 (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.

7. 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 Are you able to meet the health & social care requirements in the Brokerage Request?
Essential:Social Care Needs

Can meet requirement? 

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.

Placement Response

Your decision on whether your service can be provided to this client.

Placement response

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?

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

Rejection reason	<input type="text"/>
Rejection note	<input type="text"/>

8. Click Add a new note.

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

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.

Add a new note
Note
B I U \times_2 \times^2 " Ix ...
Details to be sent to Brokerage from the provider...
P tiny

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

<input type="button" value="Save your changes"/>	<input type="button" value="Save and Mark Response Complete"/>
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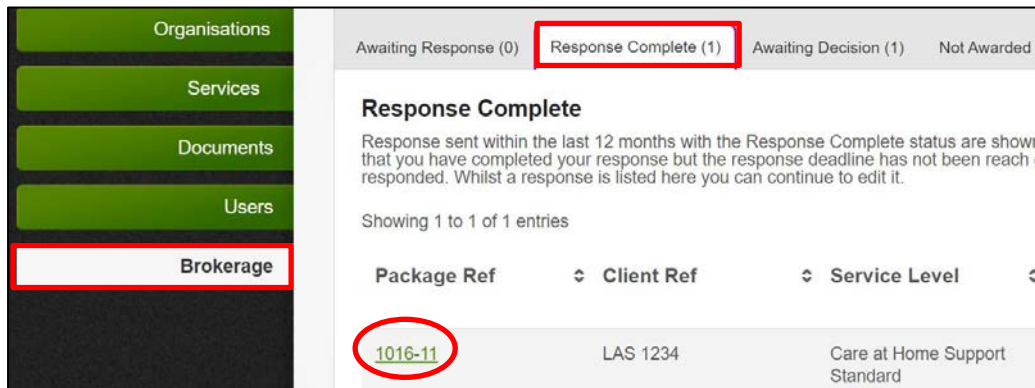
Your response will have been sent to Brokerage.

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.

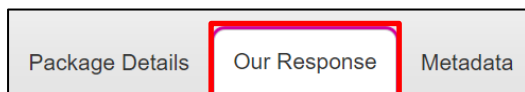
Change Care Package Response (This is before deadline is reached).

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.

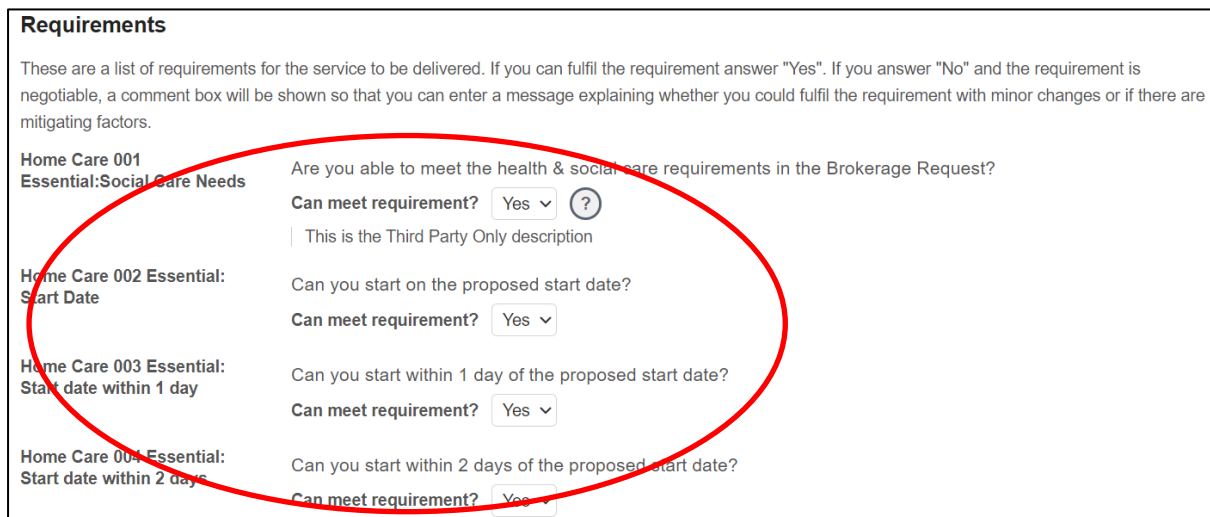
1. Go to Brokerage, package will display in either Response complete, or Awaiting Decision tab. Click on the relevant package ref.



2. Click on Our response tab.



3. Review requirement answers and amend as required.



Review Placement Response and amend as required.

Placement Response

Your decision on whether your service can be provided to this client.

Placement response

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.

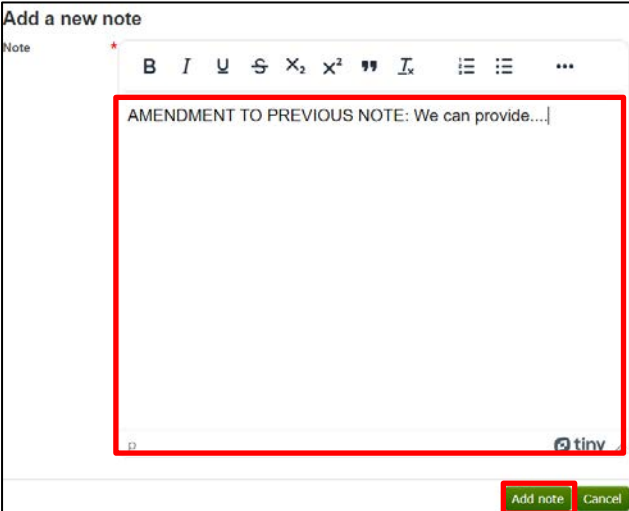
To do this:

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.

A dialog box titled "Add a new note" with a "Note" label. It features a rich text editor toolbar with icons for bold, italic, underline, link, unlink, text color, background color, bulleted list, numbered list, and more options. The text area contains "AMENDMENT TO PREVIOUS NOTE: We can provide...]" and is outlined with a red border. At the bottom right, there are "Add note" and "Cancel" buttons, with "Add note" highlighted in red.

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.

The screenshot shows a navigation menu on the left with 'Organisations', 'Services', 'Documents', 'Users', and 'Brokerage' (highlighted with a red box). The main content area has tabs for 'Awaiting Response (0)', 'Response Complete (1)', 'Awaiting Decision (1)', 'Not Awarded', 'Awarded', and 'All'. The 'Response Complete' tab is selected and highlighted with a red box. Below the tabs, the text reads 'Response Complete' and '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 reach or all participating prov responded. Whilst a response is listed here you can continue to edit it.' Below this is a search bar and the text 'Showing 1 to 1 of 1 entries'. A table header is visible with columns: 'Package Ref', 'Client Ref', 'Service Level', and 'Service Name'.

3. Click on the relevant package ref link.

The screenshot shows a table row with three columns. The first column contains the package reference '1016-11', which is circled in red. The second column contains 'LAS 1234' and the third column contains 'Care at Home Support Standard'.

4. 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.

5. Click Withdraw response.

The screenshot shows a single button labeled 'Withdraw Response' with a red border.

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 box.

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.

TEST MODE - Solihull MarketPlace: Brokered Service **Accepted**

[UAT] environment | Dudley admin team <mp.site@occsites.co.uk>
To

Wed 13/12/2023 10:37

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
Congratulations, your service 'Plan It Home Care Ltd' brokered with for package reference 1017-5 has been chosen for the client.

Details of the decision are as follows:
Source of decision - Brokerage Officer
Primary acceptance reason - Contractual Reason or Contractual Commitment
Additional acceptance reason(s) -

You will be contacted by the local authority to finalise the clients use of the service.

Use the following link to view the details of your response: <https://solihull-uat.occsites.co.uk/Admin/Brokerage/Responses/46>
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)

This will take you directly into the package details.

Logged in as ebrokerage1esting1
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	Solihull Metropolitan Borough Council			
Package reference	1016-47			
Client reference	TEST- Care and Support at Home - Standard			
Service level	Care at Home Support Standard			
Expected start date	18/01/2024			
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 ebrokerage1testing1
Manage your account | Log out
Public site | Contact Admin

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	Solihull Metropolitan Borough Council
Package reference	1016-47
Client reference	TEST- Care and Support at Home - Standard
Service level	Care at Home Support Standard
Expected start date	18/01/2024
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.

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 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).

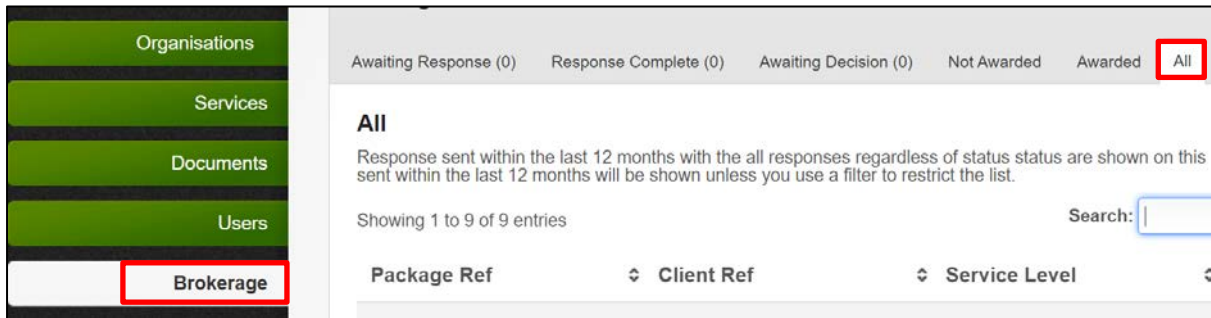
i Notes cannot be added after the deadline has passed or a decision has been made on the associated package.

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

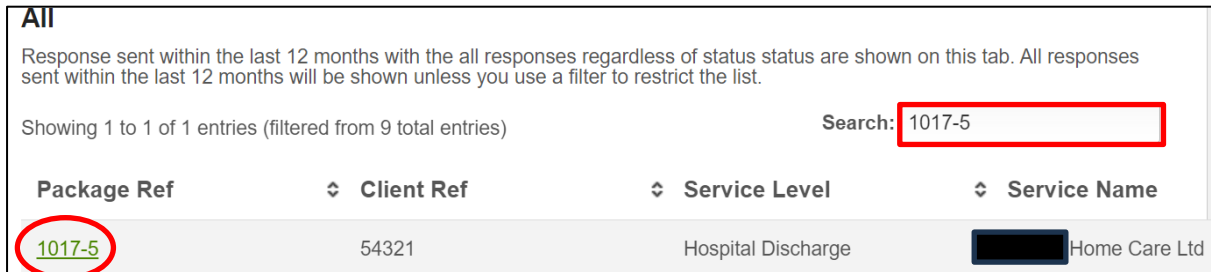
16:00 x 30 mins x 1 carer x 7 days

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

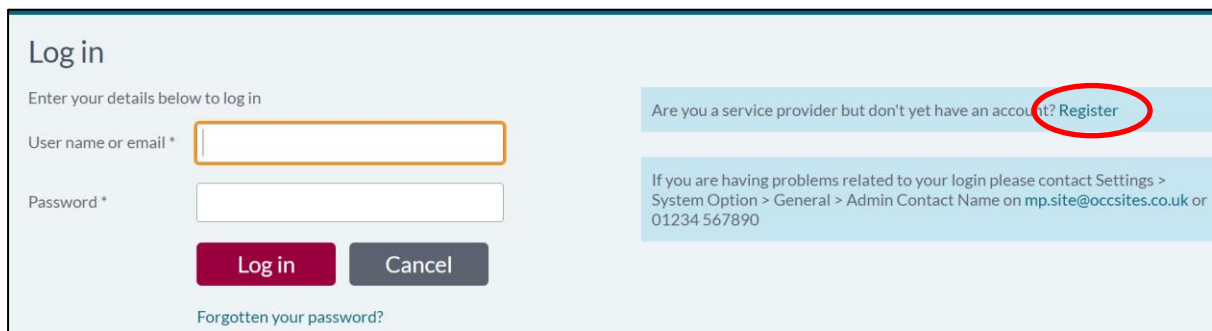
To be actioned by Manager

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.



Log in

Enter your details below to log in

User name or email *

Password *

[Forgotten your password?](#)

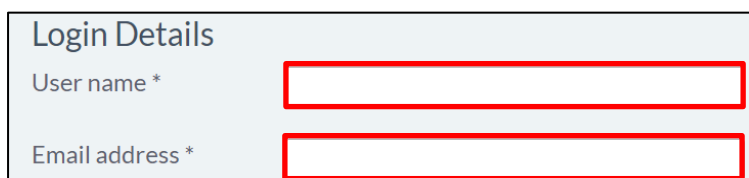
Are you a service provider but don't yet have an account? [Register](#)

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

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.

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

[UAT] environment | Dudley admin team <mp.site@occsites.co.uk>

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

Your Solihull MarketPlace login request has been accepted and your account has been created.

Visit the URL below to continue the activation process.

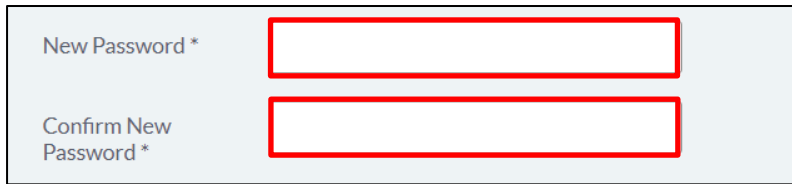
You will be asked to accept the terms and conditions of the site and set up your login credentials.

<https://solihull-uat.occsites.co.uk/Account/NewLogin?token=t0azNcLgwE2Dsb0xtwHbxQ%3D%3D>

This link is only valid for the next 24 hour(s)

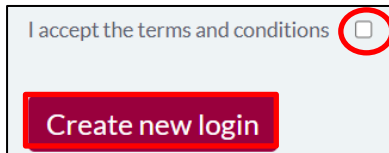
9. Create new password and confirm new password.

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



A screenshot of a form with 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 screenshot of a form section. It contains a checkbox labeled "I accept the terms and conditions" with a red circle around the checkbox. Below the checkbox is a red button with the text "Create new login".

11. This should take you into the system.

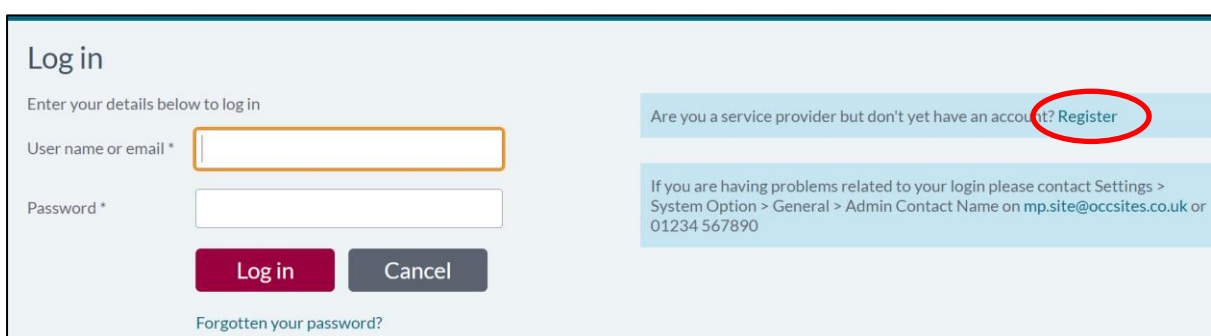
IMPORTANT: You must now register each individual employee that will access the system. To do this see below:

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.



A screenshot of a login page. The page has a header "Log in" and a sub-header "Enter your details below to log in". There are two input fields: "User name or email *" and "Password *". Below the password field are two buttons: "Log in" (red) and "Cancel" (grey). At the bottom left is a link "Forgotten your password?". On the right side, there is a light blue box with the text "Are you a service provider but don't yet have an account? Register" where "Register" is circled in red. Below this is another light blue box with the text "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 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

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

Authorising manager is "insert name here"

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 an 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.

TEST MODE - Solihull MarketPlace: Login request accepted

[UAT] environment | Dudley admin team <mp.site@occsites.co.uk>

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

Your Solihull MarketPlace login request has been accepted and your account has been created.

Visit the URL below to continue the activation process.

You will be asked to accept the terms and conditions of the site and set up your login credentials.

<https://solihull-uat.occsites.co.uk/Account/NewLogin?token=t0azNcLgwE2Dsb0xIwHbxQ%3D%3D>

This link is only valid for the next 24 hour(s)

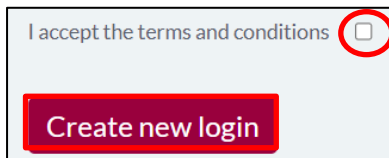
9. Employee to create new password and confirm new password.

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



A screenshot of a form with 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 screenshot of a form section. It contains a checkbox labeled "I accept the terms and conditions" with a red circle around the checkbox. Below the checkbox is a red button with the text "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 Sitting Services	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.