CareMatch Portal: User Guide for Providers - Version 3.1

1 CONTENT PAGE

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2   INTRODUCTION

We are pleased to introduce Birmingham City Council's social care commissioning system – CareMatch Portal. The system was developed based on feedback from a range of stakeholders. This user guide will document and walk through the entire CareMatch Portal system from a provider's perspective.

Information on how to register/log in to the system is included, as well as the dashboard and main functionality. Throughout the guide, tips and useful information will be given to help users use the system to its full capacity.

3   APPLYING FOR A CONTRACT

There are several routes that can be used to apply for a contract. Which route you should use, depends on whether you already have a CareMatch Portal User account, and whether one of your services has previously been awarded a contract. Please read the guidance below carefully, so that you proceed by the correct route.

CareMatch Portal and [Care Quality Commission (cqc.org.uk)](cqc.org.uk)

You should be aware that the language used in CareMatch Portal differs from that used by CQC. Your registration as the owner of a company or organisation running the service is described by CQC as a 'Provider' registration. On CareMatch Portal, this is described as your 'Owner' registration. The registration of the specific service you want to apply for a contract for on CareMatch Portal is described by CQC as a 'Location' registration. On CareMatch Portal, this is described as your 'Provider' registration.

For CQC registered services, entering the Provider ID and the Location ID will enable CareMatch Portal to populate the form from data held by CQC.

CareMatch Portal uses CQC registration information as follows:

- Each CQC Provider ID creates a separate CareMatch Portal Owner account (so some organisations may need more than one Owner account)

- Having created an Owner account with a CQC Provider ID, you then apply for a contract by entering the CQC Location ID for the particular service (CareMatch Portal then identifies this CQC location as a 'Provider')

- For services based outside England (in Wales, Scotland & Northern Ireland) there is the facility to make a 'Non-CQC' application. Services based in England, with a CQC Location ID, **should not use this route.**

- If the company or organisation owning your service, and the service itself, are both registered in Wales, Scotland or Northern Ireland, the Owner and Provider details will need to be completed manually, following the guidance provided. You should enter the Owner & Provider details as they are registered with the appropriate regulator (see below)

  [Home | Care Inspectorate Wales](Home)

  [Welcome to the Care Inspectorate](Welcome) (Scotland)

  [Regulation and Quality Improvement Authority - Regulation and Quality Improvement Authority – Health & Social Care Services Northern Ireland (rqia.org.uk)](Regulation)

- If the company or organisation owning your service is registered with CQC but the service itself is registered in Wales, Scotland or Northern Ireland, or vice versa, please contact marketintelligence@birmingham.gov.uk for advice before starting your application.

Selecting the correct route to apply for a contract

a) **If your company or organisation has never previously entered your Owner details (CQC Provider ID) into CareMatch Portal,** you should follow the guidance in **Section 3.1** below to make your contract application

b) **If your company or organisation has previously entered your Owner details (CQC Provider ID) into CareMatch Portal, but has never been awarded a contract as a result,** you must log into CareMatch Portal using the email address and password for the previously created User account. Once logged in, please follow the guidance in **Section 3.1** below to make your contract application. If you don't know the details of a previously created User account, please email marketintelligence@birmingham.gov.uk for assistance quoting the CQC Provider ID.

c) **If your company or organisation has previously entered your Owner details (CQC Provider ID) into CareMatch Portal, and has been awarded a contract via CareMatch Portal for one of your Providers (CQC Locations), and you want to apply for a new contract for the same Provider**, log in to CareMatch Portal and follow the steps in **Section 8.3.** If you have more than one User account, please read Section 8.7 for information on which User account you should use to log in.

d) **If your company or organisation has previously entered your Owner details (CQC Provider ID) into CareMatch Portal, and has been awarded a contract for one of your Providers (CQC location IDs), and you want to apply for a contract for a different Provider (CQC location) linked to the same Owner (CQC Provider ID) registration, but that has not previously been awarded a contract,** please log into CareMatch Portal and follow the steps in **Section 8.2**. If you have more than one User account, please read **Section 8.7** for information on which User account you should use to log in.

Please Note

If you are applying for a contract by following the steps in paragraphs **a)** or **b)** above, you will have access to the Contracts Information page during the course of your application. If you are following the steps in paragraphs **c)** or **d)** above, and you want to access information about the contract, please go to the CareMatch Portal log in page and click on 'New Provider – Register here'. Although you are not a new provider, this will take you to the Contract Information page, where you can access contract information by clicking the relevant contract button. **Do not click the 'New Owner (CQC provider) Register here' button on this page**, which is the route for new providers only.

Upon opening the CareMatch provider website, you will be presented with a welcome screen (see Figure 3.1.1).
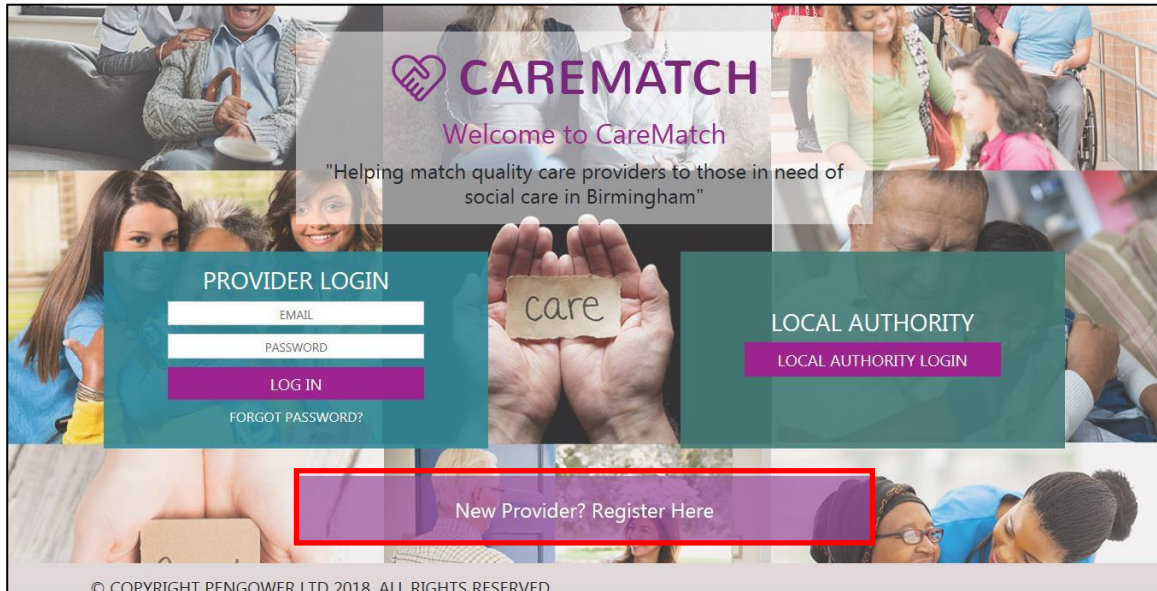

Figure 3.1.1: The CareMatch Login/Registration Screen

Here, as a new provider you will be able to create an account, or login to the system as an existing provider to see your dashboard (Dashboard details will be discussed later in this document).

To register for a new account, you must click on the 'New Provider, Register Here' button, as highlighted in red (see Figure 3.1.1). Upon clicking on the button, you will be presented with an information page:

Step 1 - Information
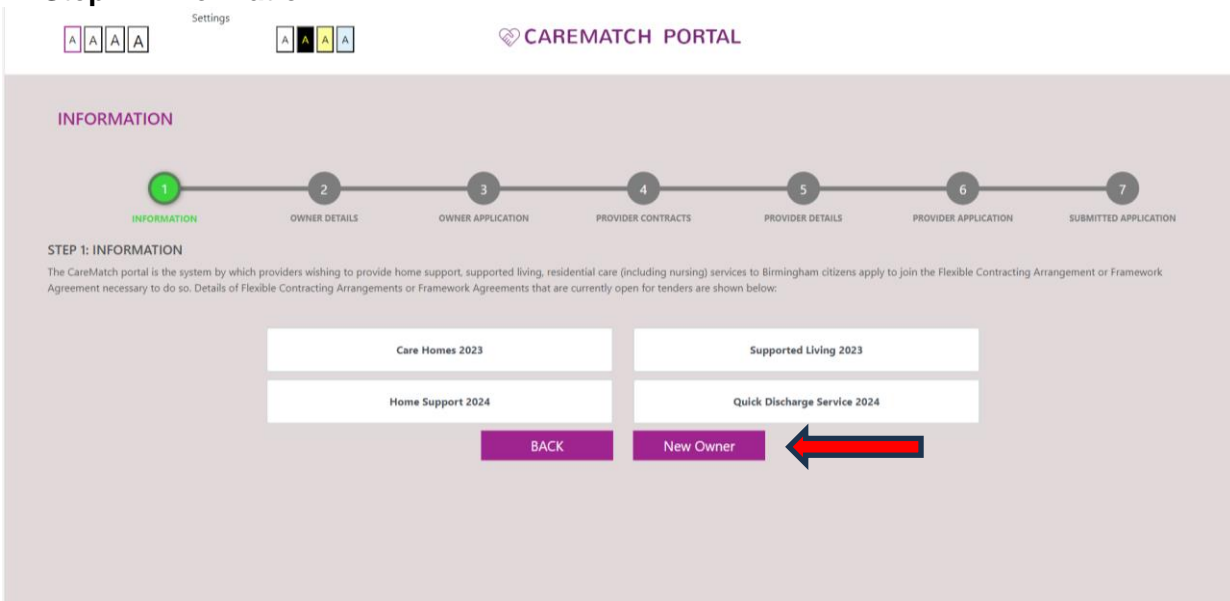
Figure 3.1.2: The Registration Information page

This is the first step in a 7-stage application process. This first step consists of information to review before deciding whether to apply, such as details of Flexible Contracting Arrangements or Framework Agreements that are currently open for tenders. Once done, you may click on the "New Owner" button arrowed in red (see Figure 3.1.2) to move on to the next stage.

Step 2 – Owner Details

Figure 3.1.3 The Owner Details Page

To return to an application, having saved it to complete at a later time, go to Section 8.4

The second stage of the application process consists of entering your owner (CQC provider) details. If you are a Care Quality Commission regulated provider, please check "Yes" on the relevant question (see Figure 3.1.3) and then enter your CQC Provider ID into the search bar and click 'Go' (for information on where to find your CQC Provider ID, hover over the "i" icon next to the question). Upon entering your CQC Provider ID, the owner (CQC provider) details will automatically be filled within the form (Please note, any fields indicated with an asterisk, are required fields, and must be filled in to continue to the next stage). If the CQC Provider Details are incorrect, this needs to be amended through the CQC, as the system pulls through details that have been registered on their website.

If you get a message that your CQC Provider ID has already been registered in CareMatch Portal, you need to log in with the user account that you (or someone else in your organisation) has already set up for that Provider ID. If you don't know the email that was used in the user account, please email marketintelligence@birmingham.gov.uk for assistance quoting CQC Provider ID.

However, if you are not a CQC registered provider, due to your being located outside of England, please check "No" on the relevant question (see Figure 3.1.3 – 1) and the "CQC Provider ID Search" will be replaced with two other fields (see Figure 3.1.4).

Figure 3.1.4 Fields for Non-CQC registered providers in the Company Registration Page

If the company or organisation owning your service, and the service itself, are both registered in Wales, Scotland or Northern Ireland, you can proceed to manually enter the mandatory Owner & Provider details as they are registered with the appropriate regulator (see below)

Home | Care Inspectorate Wales

Welcome to the Care Inspectorate (Scotland)

Regulation and Quality Improvement Authority - Regulation and Quality Improvement Authority – Health & Social Care Services Northern Ireland (rqia.org.uk)

If the company or organisation owning your service is registered with CQC but the service itself is registered in Wales, Scotland or Northern Ireland, please contact marketintelligence@birmingham.gov.uk for advice before starting your application.

After all the information regarding the provider has been pulled through and you have verified it is correct; check the "please tick to confirm the provider details are correct" tick box.

Creating Your User Account

Once done, you will need to enter details regarding yourself (or the person you wish to manage your care match provider profile as well as your provider locations). All the fields in this user registration section are required. The email and password you enter here will create your User Account and will be your log in details, so do not forget them.

For validation and security purposes, if your email and password do not match in the confirm email or password box, a warning message will be displayed, and you will need to retype them until they match. Once completed, click on the "Next" button (see Figure 3.1.3) to continue onto the next page. Doing so, will cause a window to appear with the terms and conditions (see Figure 3.1.4).
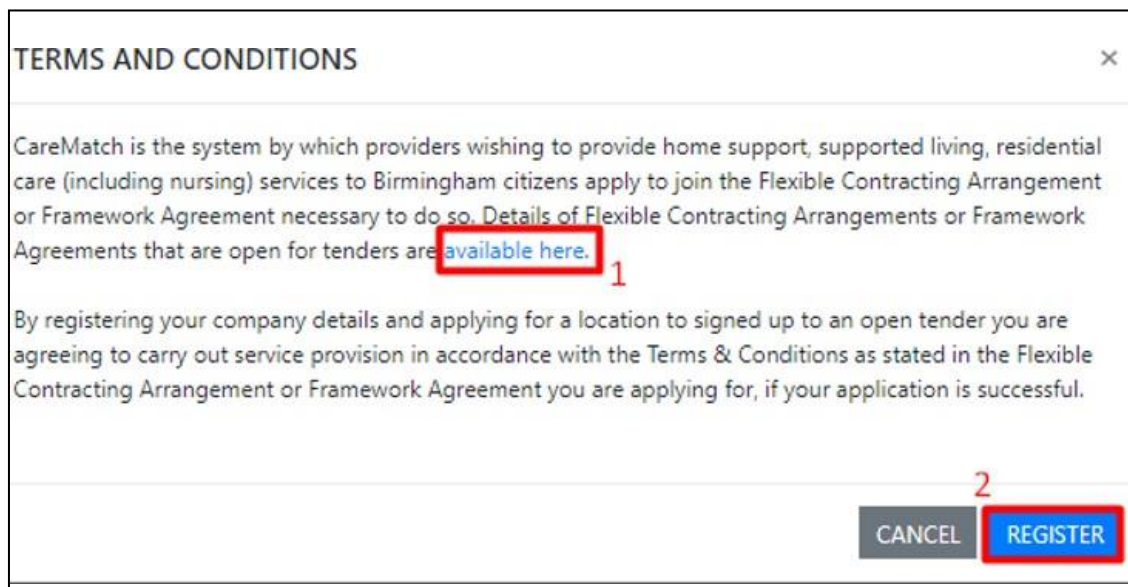
Figure 3.1.4 Terms and Conditions

Next, you will be presented with a Terms and Conditions pop-up. Here you must accept the Terms and Conditions to register for an account (see Figure 3.1.4 -1). To agree and continue you may click on the register button (see Figure 3.1.4 – 2).

Step 3 – Owner Application

Step 3 of the application process is the Owner Application (see Figure 3.1.4 a). Here there are several sections that must be completed. As you can see, for this application, there are four sections, each with its own progress bar. Each section contains different questions which you will need to complete. Some of these are mandatory. Each section follows the same layout and has the same features. One feature that is common throughout the application sections is shown on this page. The information icon symbol next to the 'Insurance documents' question section is known as a tool tip. Clicking on this information icon will show a message with some guidance.
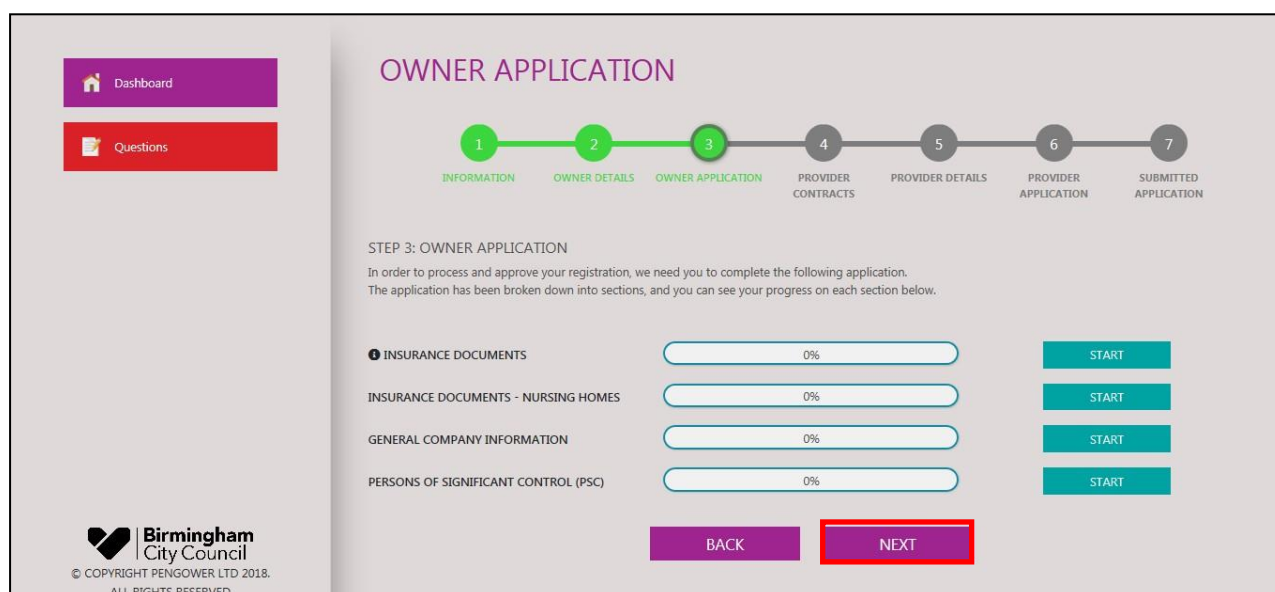
Figure 3.1.4a Owner Application

An example of how the question sections are completed is shown below for the 'Insurance Documents' section.

By clicking 'Start' next to the 'Insurance Documents' section (see Figure 3.1.4a) the user can open the question section where they will see all the questions relating to this section. The questions can be of various types.

Figure 3.1.5 Application Summary – Owner Application

As you can see, this section only has two questions. Both the questions are mandatory which is shown by the red asterisk. Both questions require the upload of a file. To do this, all the user needs to do, is click 'Select' and choose a file to upload. Doing this will show the file and a green/red icon to represent the status of the file upload (green means successful) as shown below:

An expiry date must be entered when a file is uploaded.

When both questions have been answered and files uploaded successfully, click save. Doing so, will take you back to the owner application summary. You will now see that the progress bar for the first question section has gone to 100%. At this point, you have finished one whole question section and can log out and return later as each section can be saved, even if it is only partly completed.

If you do miss a question by accident, the percentage and the bar would not reach 100%, which would inform you a mandatory question was missed. Any non-mandatory questions can be left empty which

will not stop the bar from reaching 100%. Below is a screenshot of what the page looks like when all question sections have been completed:

Once all question sections have been answered and all the progress bars are at 100%, as above, the user needs to click 'Review' and review their answers. Clicking the 'Review' button before the progress bars are at 100% will cause an error message to be shown, informing users which question sections have not yet been completed. In the review (see Figure 3.1.6 Questions Section) the user can see all their answers for each question section, which have been separated into tabs. Clicking "Edit response" will take the user back to that question section, to that exact question, for them to edit their response and resave the page. After you have reviewed the questions and are happy with your responses, click "Next" on the review page.
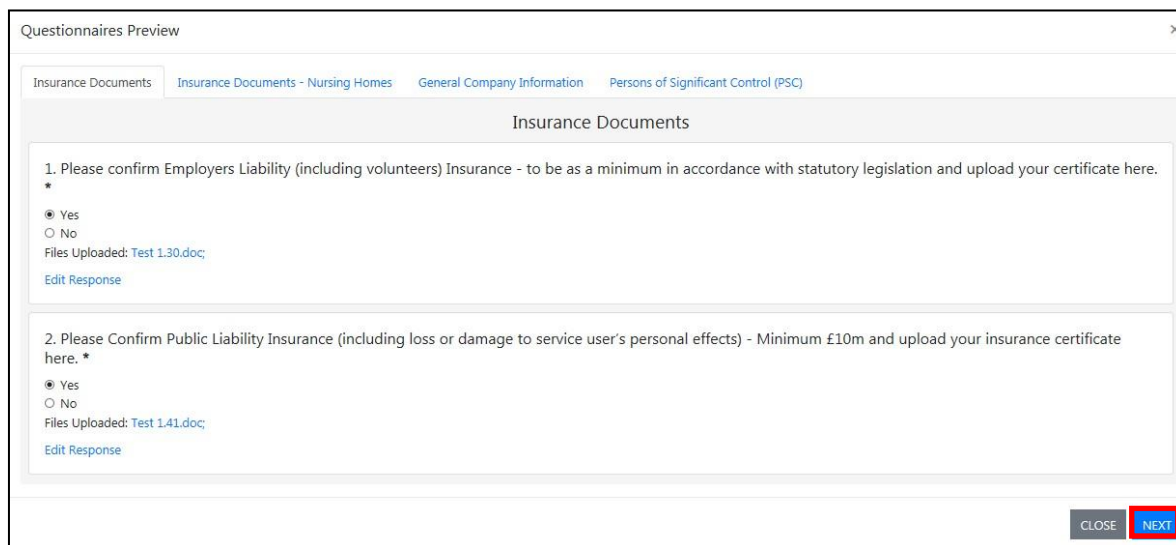
Figure 3.1.6 Question Sections Review

Step 4 – Provider Contracts

Step 4 of the application process is selecting the contract that the provider (CQC location) you are registering in Step 5 would like to deliver. Figure 3.1.7 shows the contracts available, based on the regulated activities the Owner is registered to deliver with CQC. You need to check that the particular CQC location concerned can deliver the regulated activities required by the contract.
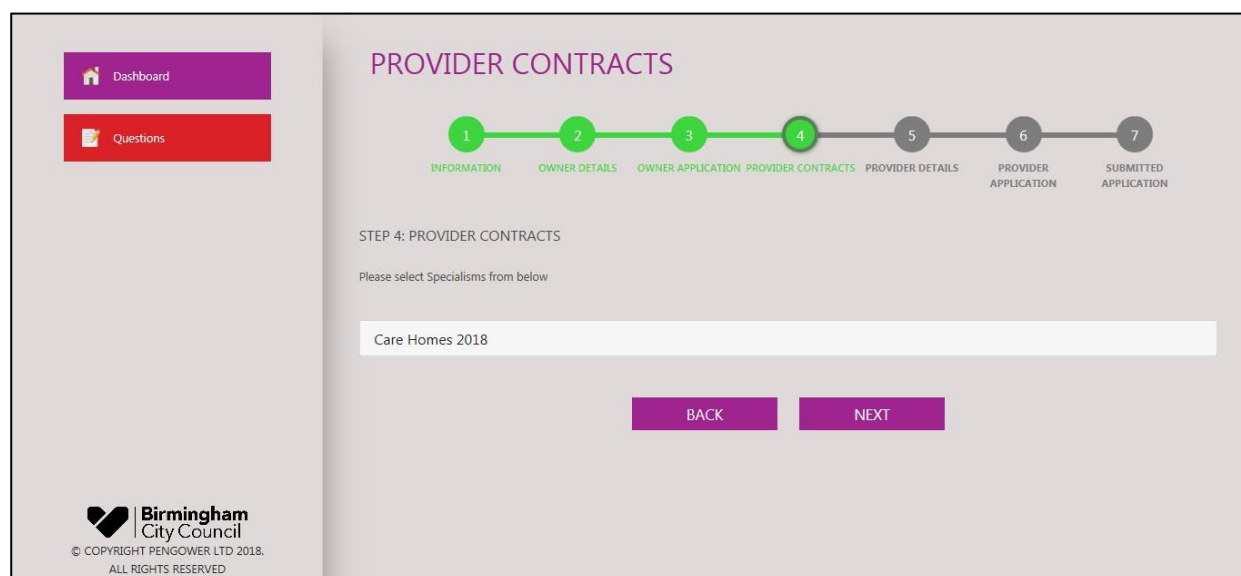
Figure 3.1.7 Contract Selection

Once you have selected the contract, you will be asked to select what service specialisms (client types) you would like to deliver under the contract. Only those service specialisms that are registered with CQC will be accepted. If there are elements that you wish to include, that are not currently on the CQC location registration, please contact CQC to have them added to the registration details. Click on the next button to continue to the next stage of the application process (see Figure 3.1.7).

Step 5 – Provider Details

Step 5 in the application process is the Provider Details. Here, you can register a provider (CQC location) for your owner (CQC provider). If the provider is regulated by the Care Quality Commission, then you may simply enter the CQC Location ID in the relevant field and press 'Go' to automatically fill in the first section of the form (See Figure 3.1.8). The CQC location ID you enter must be a location ID connected with the CQC provider ID you entered in step 2, otherwise an error message will be displayed, and you will not be able to register the location.

Figure 3.1.8 Provider Registration

If the CQC Location details are incorrect, this needs to be amended through CQC as the system pulls through details that have been registered on their website.

If the provider is not based in England, you will be able to select the relevant Non-CQC regulator and enter the registration ID with that regulator (see Figure 3.1.9) as well as the provider details (in the same way you did when entering the owner details).

Figure 3.1.9 Non-CQC Regulated Fields

After completing the required fields, you may click on the "Next" button to continue to the next stage (see Figure 3.1.8).

To return to an application, having saved it to complete at a later time, go to Section 8.4
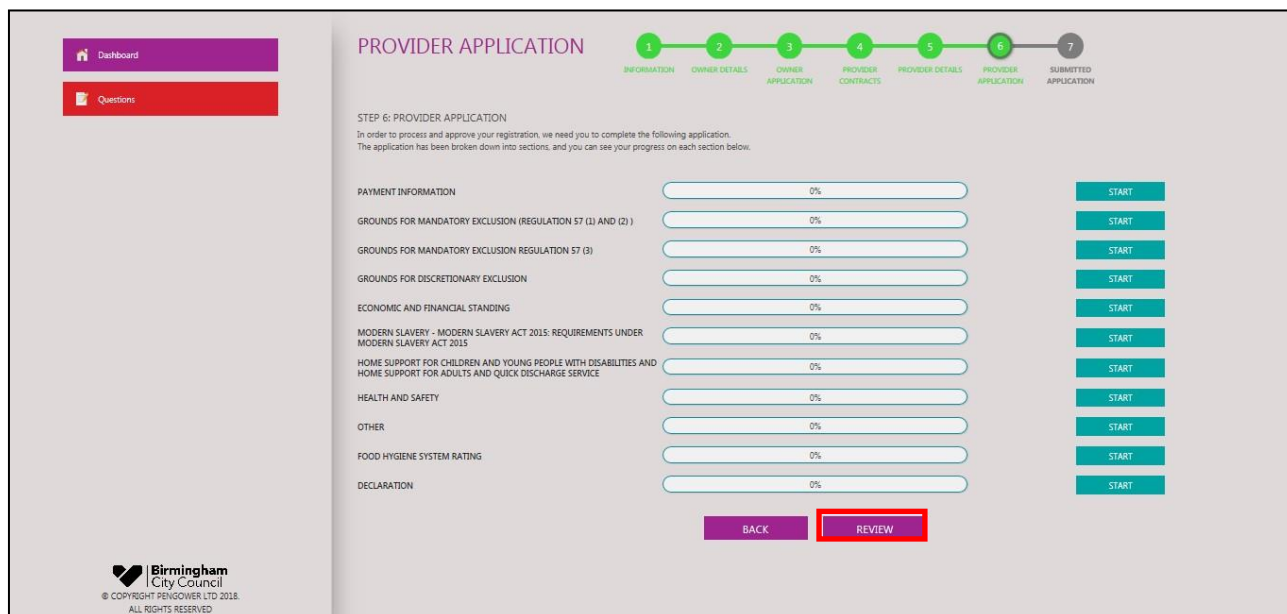
Figure 3.1.10 Application Overview – Provider Application

Step 6 – Provider Application

Step 6 is the Provider Application section which is similar to the Owner Application (Figure 3.1.10). All sections in this stage of the application must be completed. Some sections will only appear for specific contracts. Just like before, you will be able to save and return to this section at a later stage.

As an example, the following section will walk through the 'Grounds for Mandatory Exclusion Regulation (3)' section:

As you can see, just like the owner application question section walk through, earlier in this guidance document, there are two questions. However, this time no upload fields are present. There is a yes/no question and text field question. Only the yes/no question is required to be answered as it is mandatory (shown by the red asterisk). If stuck/unsure, users can click on the information icon next to these questions to see guidance provided directly by Birmingham City Council. For example, if the user is unsure what to answer for question 1; they can click the information icon highlighted below

which will cause a popup to appear with some guidance:

As you can see, this guidance also has a link which you can follow for more information.

Once all the required questions have been answered, just as before, you will be able to click on the "Review" button to proceed to the next step.

Before submitting the application, you will have the ability to review the answers to all the questions in this stage of the process. Each tab in the window represents a different section of the application, and if there are any errors, you will have the ability to make changes. Once you have completed the review, you may click on the 'Continue' button to proceed to the final stage (see Figure 3.1.11).

Figure 3.1.11 Question Section Review – Provider Application

Step 7 – Submitted Application

The final stage of the application is confirming you wish to submit the application for review by Birmingham City Council. If you are satisfied with all the information that you have inputted, and wish to complete your application, please click on the 'Submit' button (see figure 3.1.12). Once you submit your registration, your owner application will be sent to the Birmingham City Council Procurement team for approval.
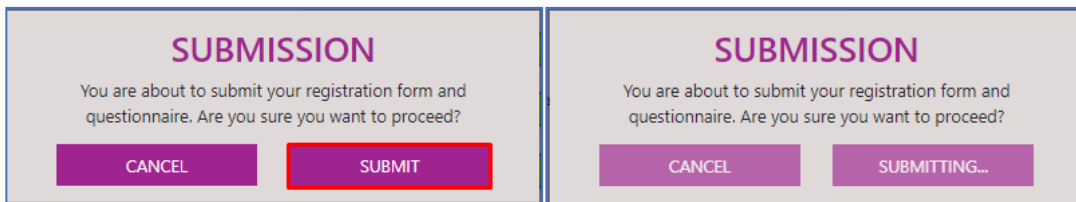
Figure 3.1.12 Final Submission Box

Please note that the final submission may take between 1-2 minutes to completely submit all the information. If the submission is successful, you will be presented with a dialog box stating that submission is successful. You may click on the 'Close' button to close this dialog box (see Figure 3.1.13).
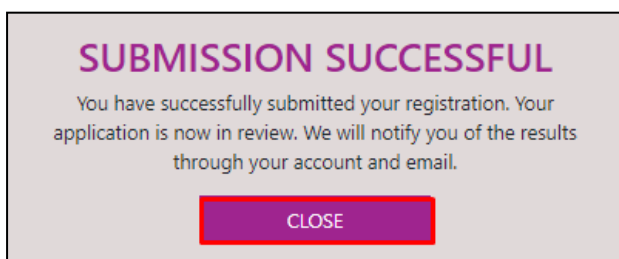
Figure 3.1.13 Submission Successful Dialog Box

Amending your application after submission

When you have submitted your application, its status will be recorded as 'Awaiting Approval'.

If you find that you need to amend any information in your submitted application, you can open it, and make the required amendments, at any time until the Procurement Team start to review it (when the status will change to 'In Review', or the tender period ends.

Finding and opening your submitted application

If you have applied for the contract using routes a) or b), (see Section 3 – Applying for a contract) you just need to log into your CareMatch Portal account to access your submitted application.

If you have applied for the contract using routes c) or d), (see Section 3 – Applying for a contract) you should log into the CareMatch Portal User account that was used to make the application and follow the steps in Section 8.4.

3.2 RAISING QUESTIONS ABOUT THE APPLICATION PROCESS

If you have any questions about the Application Process or specific questions that aren't answered by hovering over the "i" icon next to the question to display the guidance notes, then questions can be raised with Birmingham City Council by clicking on the "Questions" button (see highlighted section in Figure 3.2.1).
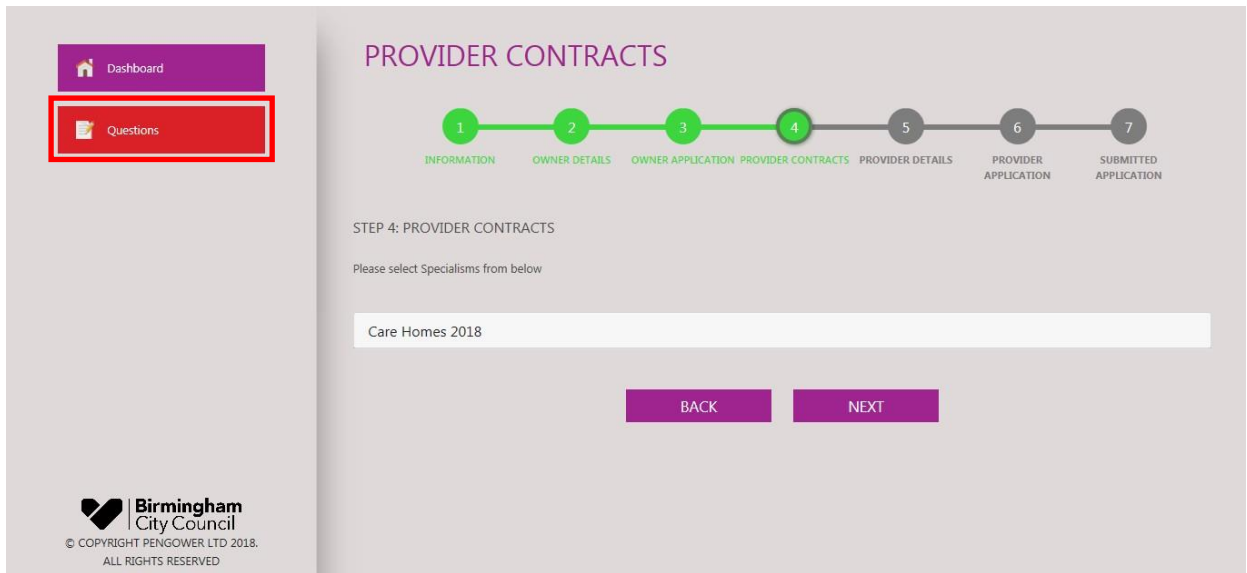
Figure 3.2.1 Question button on Application dashboard

On the questions page, you will have the ability to ask a question and view previous questions asked by providers and answered by Birmingham City Council. To do this, simply click on the "New Question" button (see highlighted section in Figure 3.2.2).
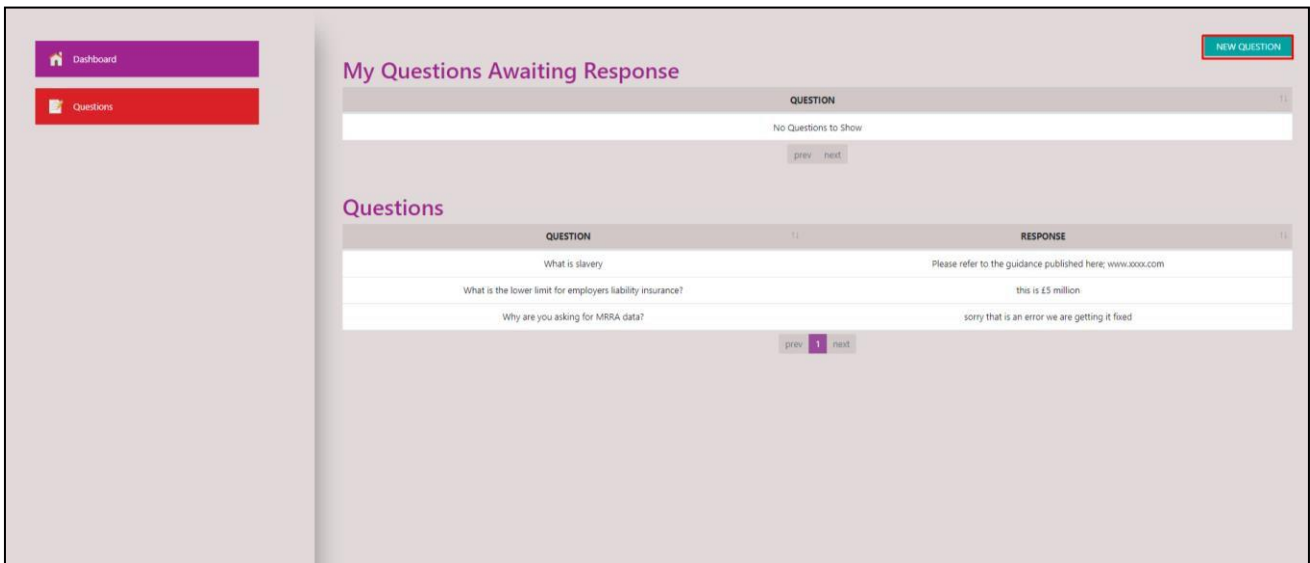
Figure 3.2.2 Questions Page

Once the dialog box has shown up on your screen, you will be able to enter your question and then click on the 'send' button to submit your question (see highlighted section in Figure 3.2.3).

Figure 3.2.3 Ask Question dialog box

You will then be able to see your question, in the section called "My Questions Awaiting Response", until it has been answered (see highlighted section in Figure 3.2.4).

Figure 3.2.4 Questions Page

Whilst reviewing your application, if the procurement staff at Birmingham City Council require you to provide additional details about a question response, or if you have uploaded an incorrect document, you may receive a correspondence asking you for the relevant information.

You will be able to view this correspondence in two different formats. The first will be through an email notification, and the second through a correspondence window within the system, as shown in Figure 3.3.1.

To receive correspondences in the form of email notifications, you will have to check that your email notifications are not disabled to ensure you do not miss out on important updates regarding your application. Please refer to Figure 4.5.2 in the My Account section for details on how to check this and ensure RECEIVE MESSAGE EMAIL NOTIFICATIONS" is set to YES.

Email notifications relating to an application will be sent to the user that submitted the application from the following email address; system.notifications@carematchportal.com. Please check your spam/junk email folders for emails from this address.
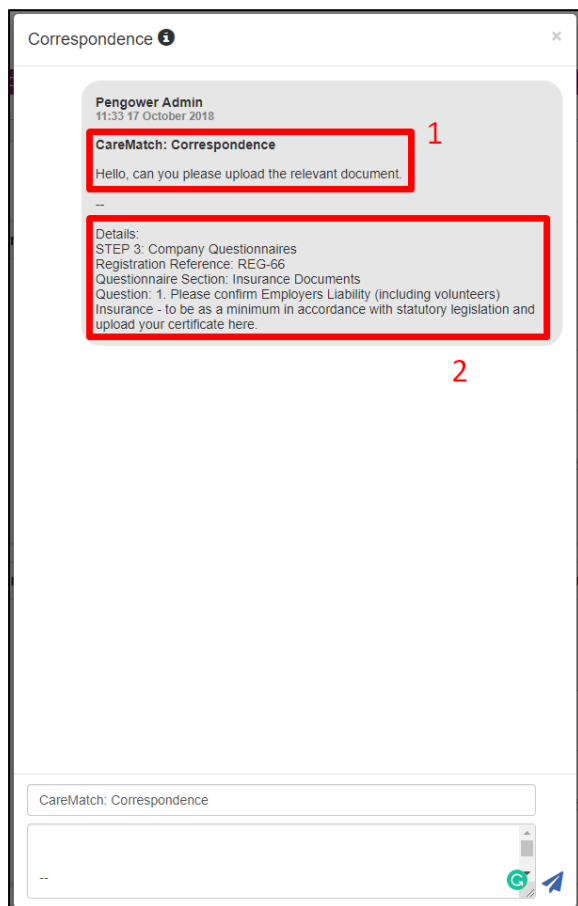
Figure 3.3.1 Correspondence Window

Figure 3.3.1 shows an example of a correspondence message that has been sent by the procurement team that can be accessed within the system. A provider can respond to the correspondence or ask a question by typing in the box at the bottom of the pop up shown in Figure 3.3.1 and pressing send (the paper aeroplane icon).

To access the correspondence window, review the Owner and Provider application sections to see if any are showing an unlocked padlock (see Figure 3.3.2). The number next to the padlock informs you how many questions in the section need reviewing. In this example, we can see that this correspondence relates to question 1 under the Company Questionnaire in step 3 of the registration process (see Figure 3.3.2 and 3.3.3).
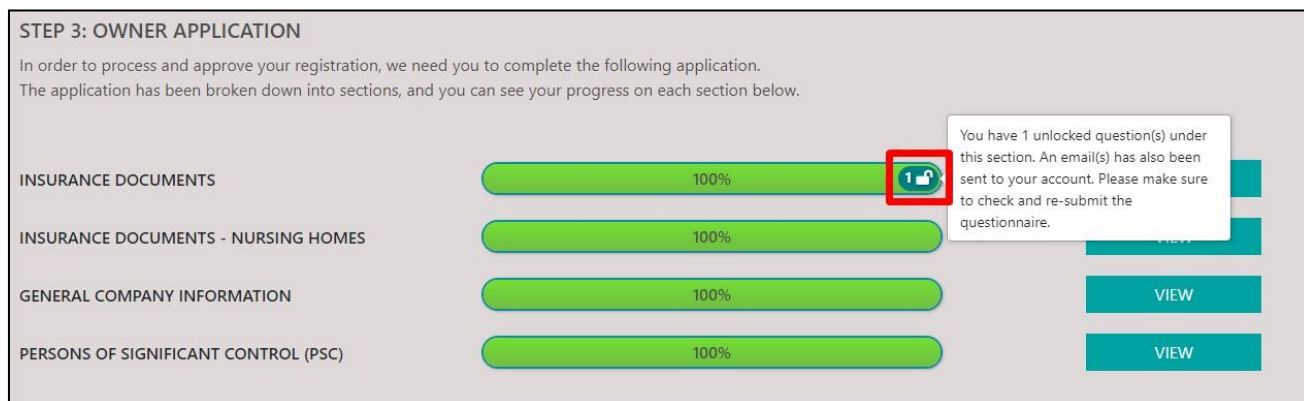
Figure 3.3.2 – Unlocked Questions

When you navigate to the respective step of the questionnaire, you will see an unlocked padlock icon (see highlighted section of Figure 3.3.2). If you hover your mouse over this icon, you will be able to see that you have an unlocked question under this section. This unlocked question represents the question that the correspondence was sent under. Here you will be able to edit your answer for this one question by clicking on the "View" button next to the relevant questionnaire section.

Figure 3.3.3 – Unlocked questions

Figure 3.3.3 shows the unlocked question in this section. You can tell it is unlocked by looking at the icon in the bottom righthand corner, or that it is highlighted by a red border. If you click on the Correspondence hyperlink you will be able to see the Correspondence window as shown in Figure 3.3.1, here you will be able to respond.

Once you have edited your response you can click on the "Save" button located at the bottom of the page in order to submit your new question response. You will not have to re-submit your application at this point. Please refer to section 3.1 for more information on the registration process.

3.4 LOG IN

Upon opening the CareMatch provider website, you will be presented with a welcome screen. Here, in the Provider Log-in fields you will be able to enter the Email and Password that were set at the Owner Registration stage of the application process, or added later for additional User Accounts (see Section 8.7 for how to create additional user accounts). Enter your Email and Password in these fields and click on the 'Log In' button (see the highlighted section in Figure 3.3.1 below).
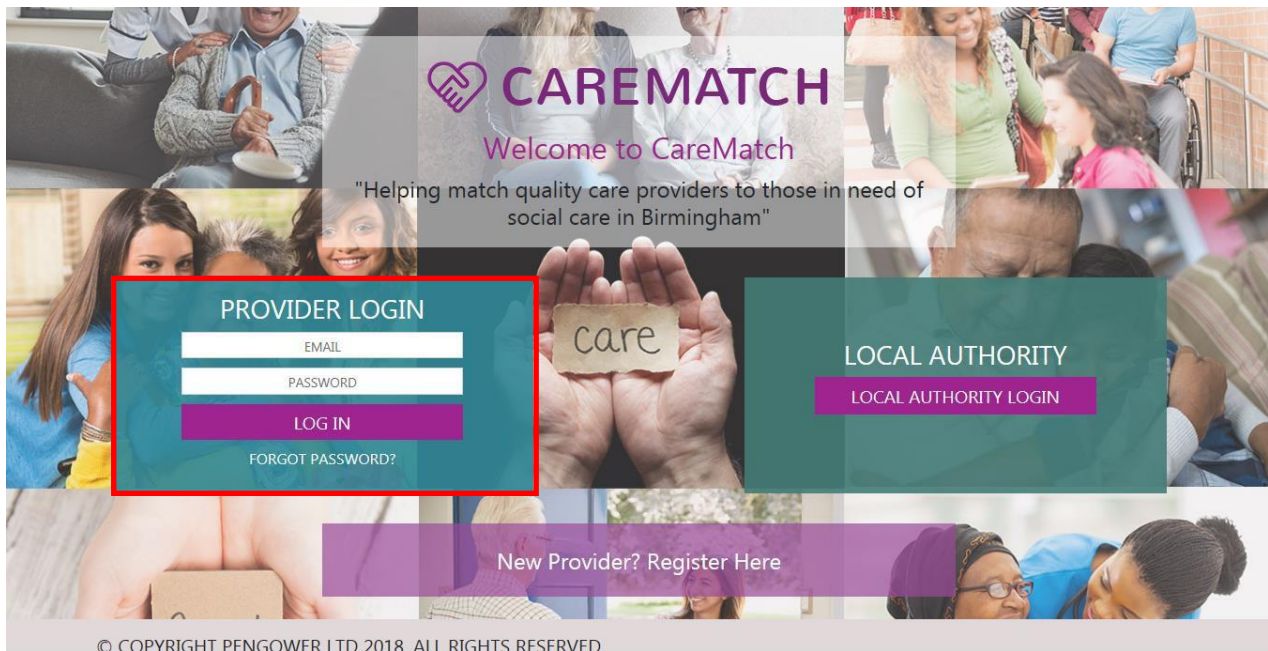
Figure 3.4.1 The CareMatch Login/Registration Screen

3.5 USER ACCOUNT LOCKED/PASSWORD FORGOTTEN

If you enter your password incorrectly more than four times, your User account will be locked. You should email marketintelligence@birmingham.gov.uk and ask for the account to be unlocked. Please include the email address for the User account.

If you have forgotten the password for your account, you will be able to receive a link to reset your password. To do this, simply click on the 'Forgot Password?' link on the Login/Registration Screen (see highlighted section in Figure 3.5.1).
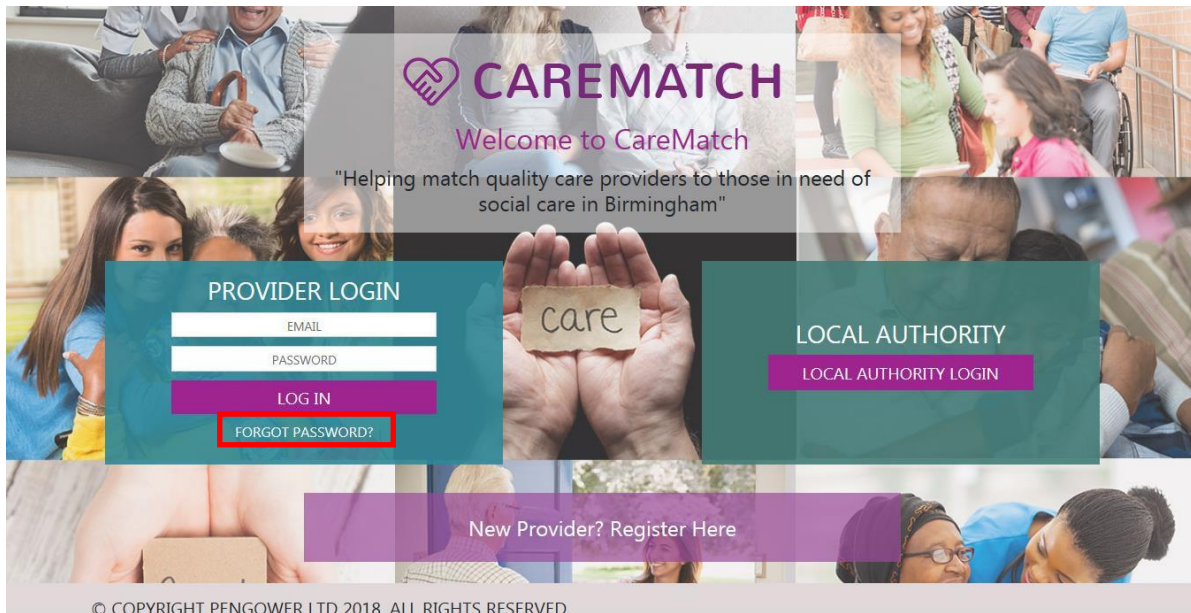
Figure 3.5.1 The CareMatch Login/Registration Screen

Upon clicking this link, you will be presented to a screen where you will be able to enter your email and receive an email link to reset your password (see highlighted section of Figure 3.4.2).
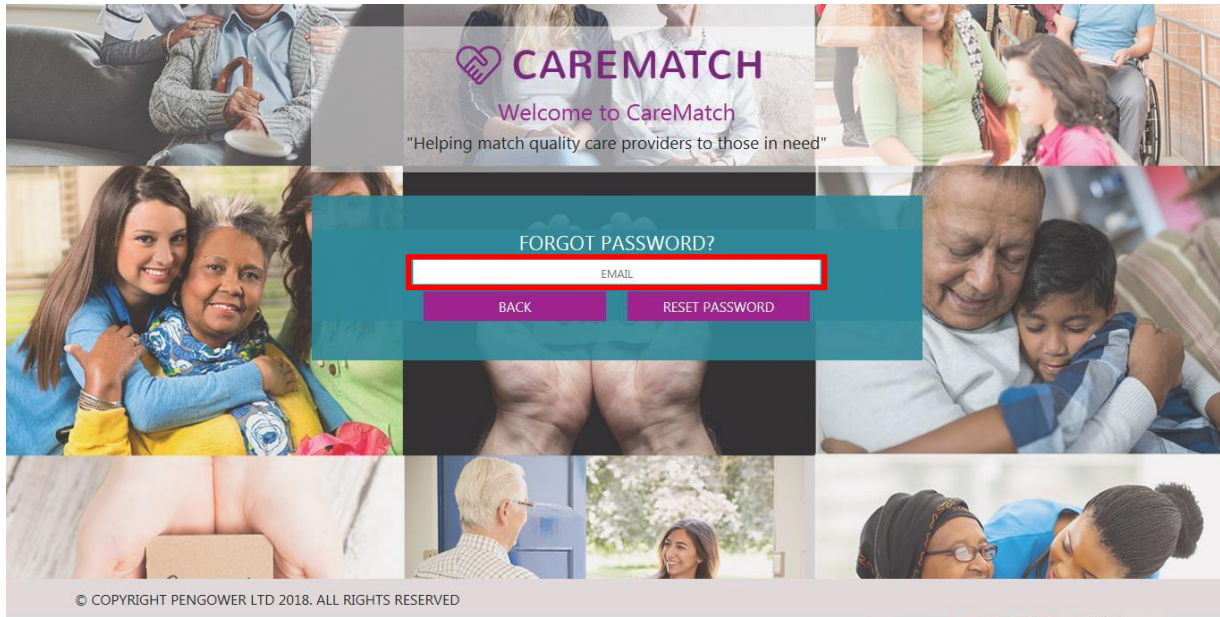
Figure 3.5.2 Forgot Password Page

Upon entering your email and clicking on the "Reset Password" button, you will be presented with a dialog box saying instructions have been sent to your email address (see Figure 3.4.3).
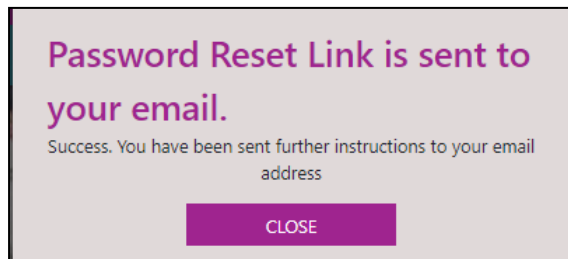
Figure 3.5.3 Password Reset Link dialog box

Once you have clicked on the link sent to your email address, you will be sent to a custom link where you will be able to reset your password. After you have entered your new password, you will be able to click on the 'Submit...' button to reset your password (see Figure 3.4.4). Please ensure to use a password that has a minimum length of 8 or more characters, includes lowercase and uppercase alphabetic characters, numbers and symbols to ensure the security of your account.

Figure 3.5.4 Password Reset Page

4   DASHBOARD

Once your application has been approved by Birmingham City Council you will be able to gain access to your dashboard. Here you will be able to access all the functionality you require as a user, such as viewing referrals, messages, service agreements and your providers. This section will breakdown the dashboard and identify what each section is responsible for.
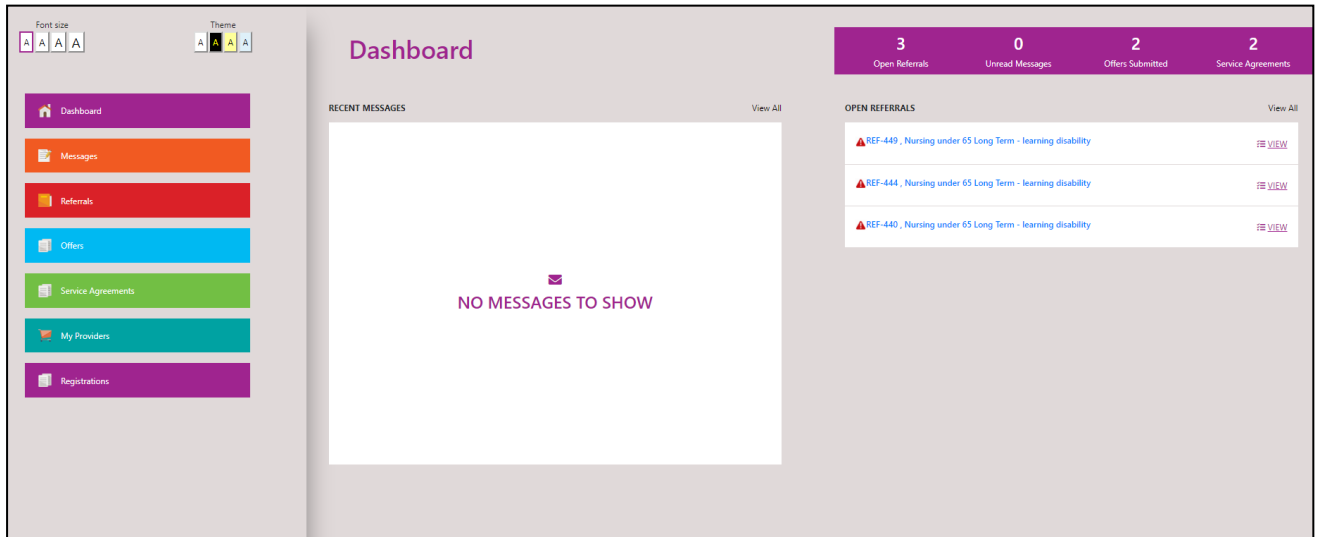
Figure 4.1.1 The Dashboard

4.1 STATUS BAR

The status bar on the dashboard represents new notifications or those awaiting a response that you should be aware of. These notifications consist of any open referrals, unread messages and service agreements awaiting acceptance. You will have the ability to click on any notification to be able to access it (see highlighted section in Figure 4.1.2).
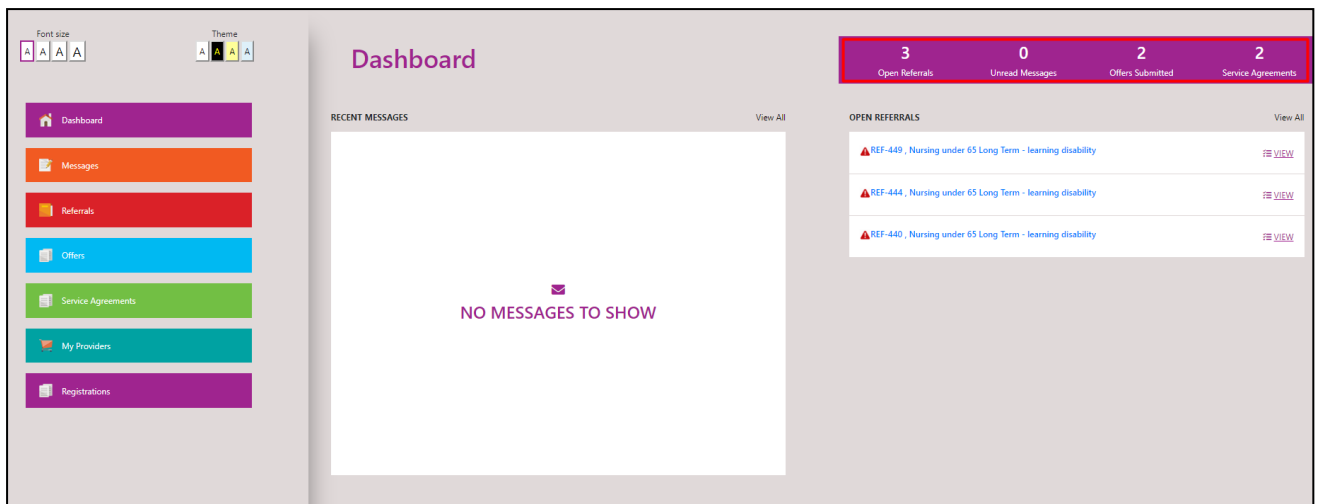
Figure 4.1.2 The Dashboard – Status Bar

4.2 RECENT MESSAGES

The highlighted section in Figure 4.2.1 shows the recent messages section. Here, if any messages are available to you, they will be visible here. In addition, if there are too many messages to view them all on the recent messages section, you may press the "View All" button to view all your messages.
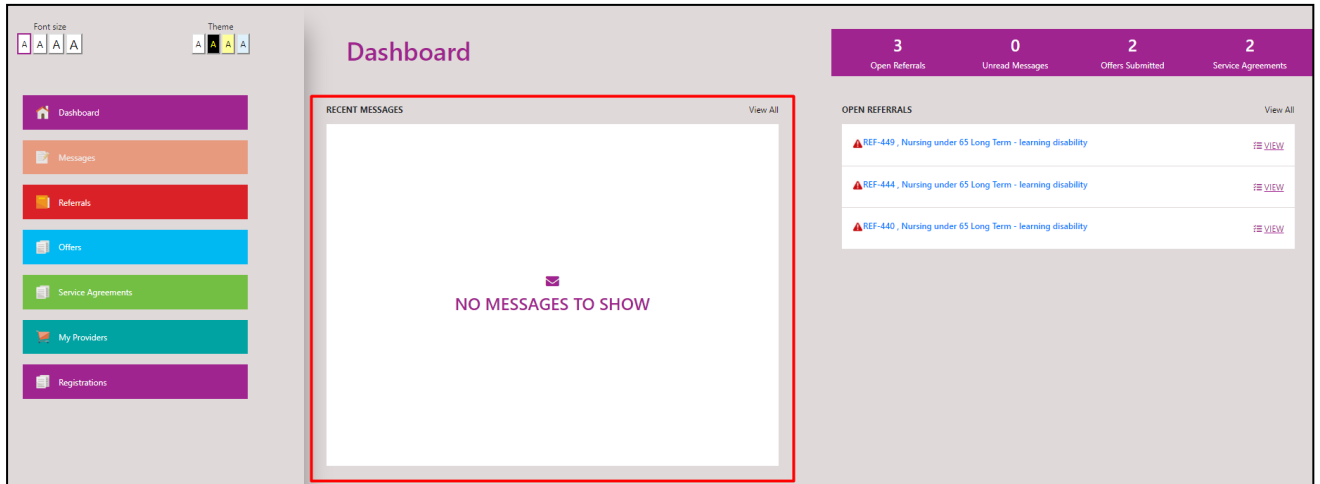
Figure 4.2.1 The Dashboard – Recent Messages

4.3 OPEN REFERRALS

The highlighted section in Figure 4.3.1 shows the open referrals section. Here, if any referrals are awaiting offers, they will be visible in this section. In addition, if there are too many open referrals to display them all on the screen, you may press the "View All" button to see all referrals awaiting offers (see Figure 4.3.1 – 1). To open a selected referral, you may press the "View" button to view more details on this referral (see Figure 4.3.1 – 2).
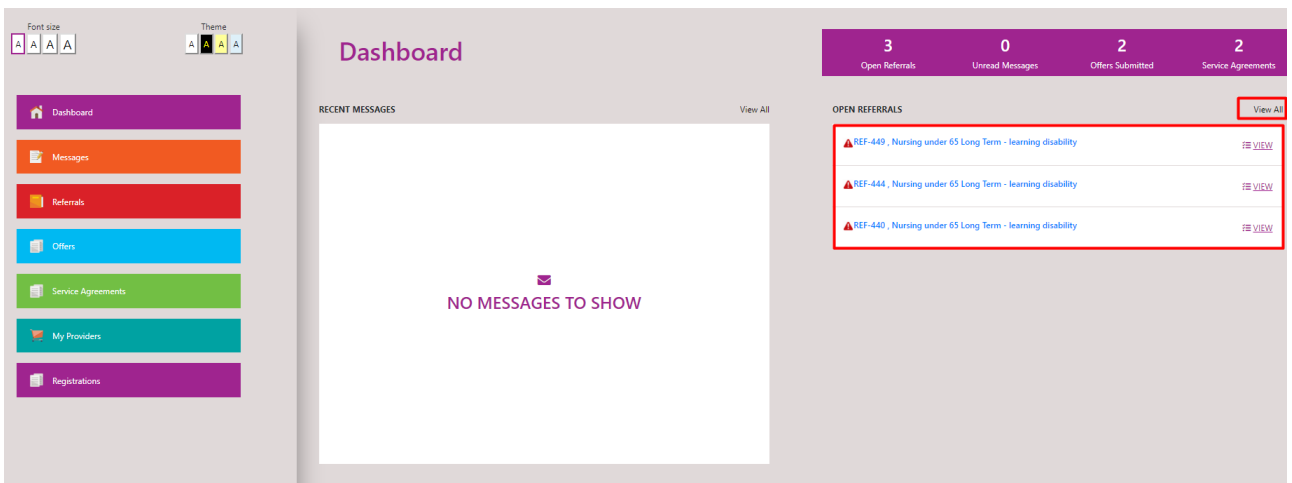
Figure 4.3.1 The Dashboard – Open Referrals

4.4 SIDE BAR

The highlighted section in Figure 4.4.1 shows the sidebar. Here, you can access all the functionality available to you as a user. From this sidebar, you will have the ability to access your messages, referrals, offers, service agreements and your providers.
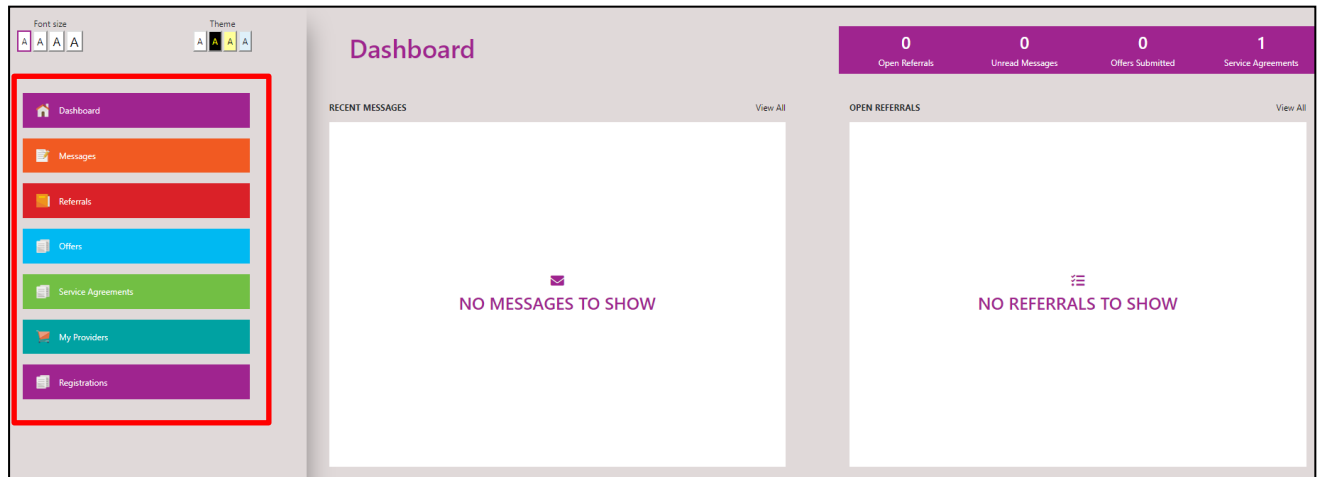
Figure 4.4.1 The Dashboard – Sidebar

We will cover all of these during the referral process except for 'My Providers'. This area is used to manage and view details regarding the providers you have registered with CareMatch. This includes viewing and editing the provider's details:
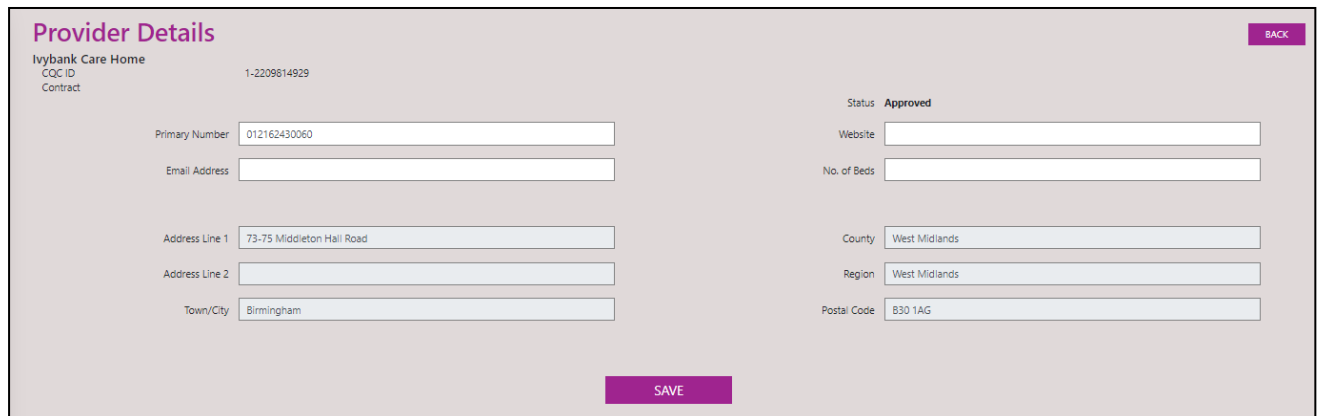
Figure 4.4.2 Provider Details

Viewing the contracts and service elements the provider has been registered to provide:

Contracts	
Contract	Service Element/s
	Nursing under 65 Short Term - drug alcohol
	Nursing under 65 Temporary - mental health
	Residential 65 and over Short Term - mental health
	Residential under 65 Short Term - eating disorder
	Residential 65 and over Long Term - dementia
	Nursing 65 and over Short Term - drug alcohol
	Residential under 65 Long Term - dementia
	Nursing under 65 Temporary - sensory impairment
	Nursing under 65 Short Term - dementia
	Residential 65 and over Temporary - sensory impairment
	Nursing 65 and over Temporary - drug alcohol
	Nursing 65 and over Long Term - sensory impairment
	Residential under 65 Short Term - mental health
	Nursing under 65 Short Term - autistic spectrum
	Residential 65 and over Long Term - autistic spectrum
	Residential 65 and over Short Term - learning disability

Figure 4.4.3 Service Elements

and viewing / adding users and documents to that particular provider:

Figure 4.4.4 Viewing and Adding Users and Documents

Users and Documents management is discussed in more detail in Section 8.7 and 8.8

4.5 MY ACCOUNT

From the dashboard, you will have the ability to access your account details from the top right-hand side menu (see highlighted section in Figure 4.4.1). From this section you will also be able to log out of your account. To access your account details, you may click on the "My Details" button under the "My Account" section.
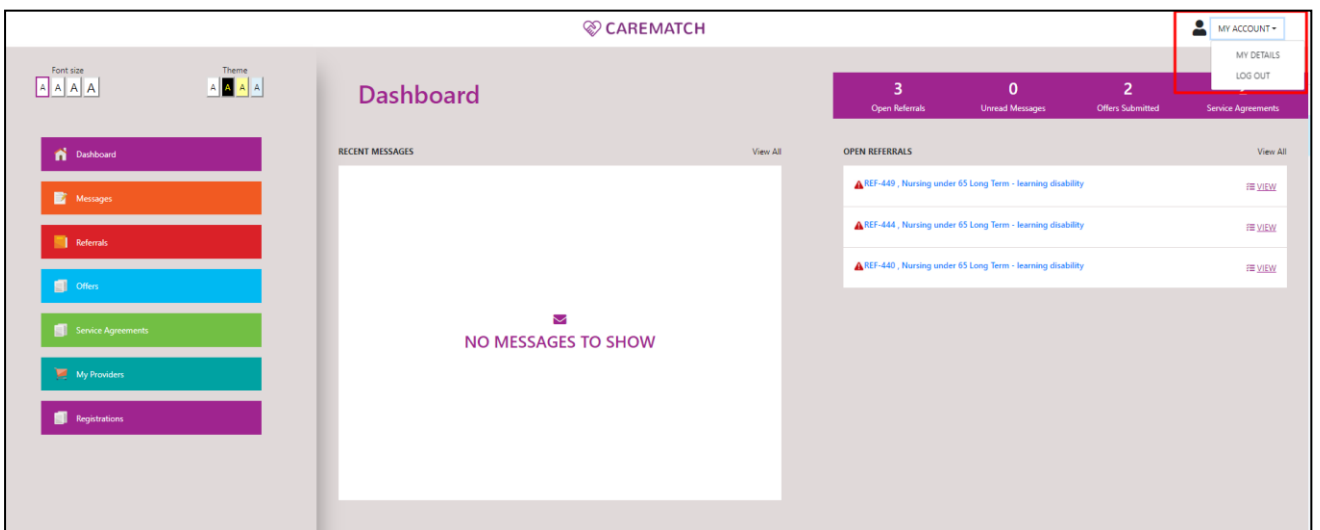
Figure 4.4.1 The Dashboard – My Account

Figure 4.4.2 shows the user details section. Here all your saved information will be displayed. As well as this, you can also enable or disable referral email notifications and message email notifications (see Figure 4.4.2 -1 and 2). To edit any saved information, you may click on the edit button (see Figure 4.4.2-3) to access the fields and be able to edit the information. Please click on the "save" button once all changes have been completed.

Figure 4.5.2 My Account – User Details

This view also shows you which providers you have been assigned to and also which permissions you have.

A description of the different types of permission are provided below:

- Add Providers/s? – This permission gives the user the ability to add provider locations under the owner. Any new provider location will need to be added via the 'My Providers' tab discussed in the previous section of this document. Please see instruction in Section 8.2. This will trigger the application process, once completed this will be sent to Birmingham City Council for review.
- Make Offer/Accept Service Agreement – This permission gives the user the permission to view/accept/decline referrals and view/accept service agreements.
- Change Provider Details? – This permission gives the user the ability to change some of the details saved regarding the provider filled out during step 5 of the registration process. You can change the contact phone number, email address and website details. Information relating to the Providers CQC registration will not be editable (e.g. the Provider address). You will need to do this via the CQC website if this information needs editing. Editable details can also be changed from the 'My Providers' tab. Users who do not have this permission will not be able to edit the data or see the 'Save' button under the 'Provider Details' section.
- Manage Users? – This permission gives the user the ability to add and edit users within the 'My Providers' tab under the 'Users' section/table. This can be from changing passwords, emails, numbers and also assigning permissions.

Section 8.7 covers Managing User Accounts (including adding users).

5 REFERRALS
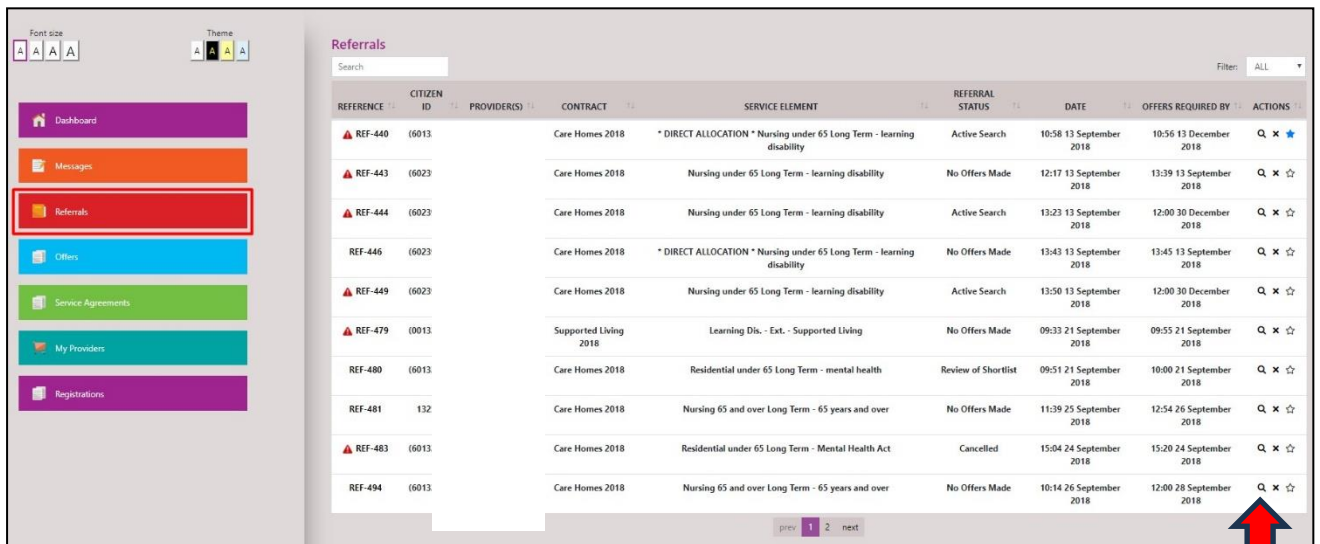
This section will go through the referrals section of the CareMatch system.

5.1 WHAT ARE REFERRALS?

Referrals contain details of a service user's social care needs and the service they require. Each referral will specify the care requirements, health conditions, service description (e.g. call times for home support referrals) and other information which will help you decide if you wish to make an offer and if so, the details of your offer.

5.2 HOW DO I ACCESS MY REFERRALS

To access your referrals, from any page, you may click on the "Referrals" button found on the sidebar (see highlighted area Figure 5.2.1). Once open, you should then see a page with a table containing all your current referrals on the system. Here, you will be able to see the referral reference, provider(s), contract, service type, status and date.

Figure 5.2.1 – My Referrals Page

To access a specific referral, you will be able to click on the magnifying glass icon on a referral entry to show more details (see arrow in Figure 5.2.1)

5.3 I HAVE A QUESTION ABOUT A REFERRAL

If you have a question about a referral, you may go on the referral page (for more information on how to do this, please see Section 5.2). Once the referral page is open, you may click on the "Questions" button to open the questions page (see highlighted section of Figure 5.3.1).
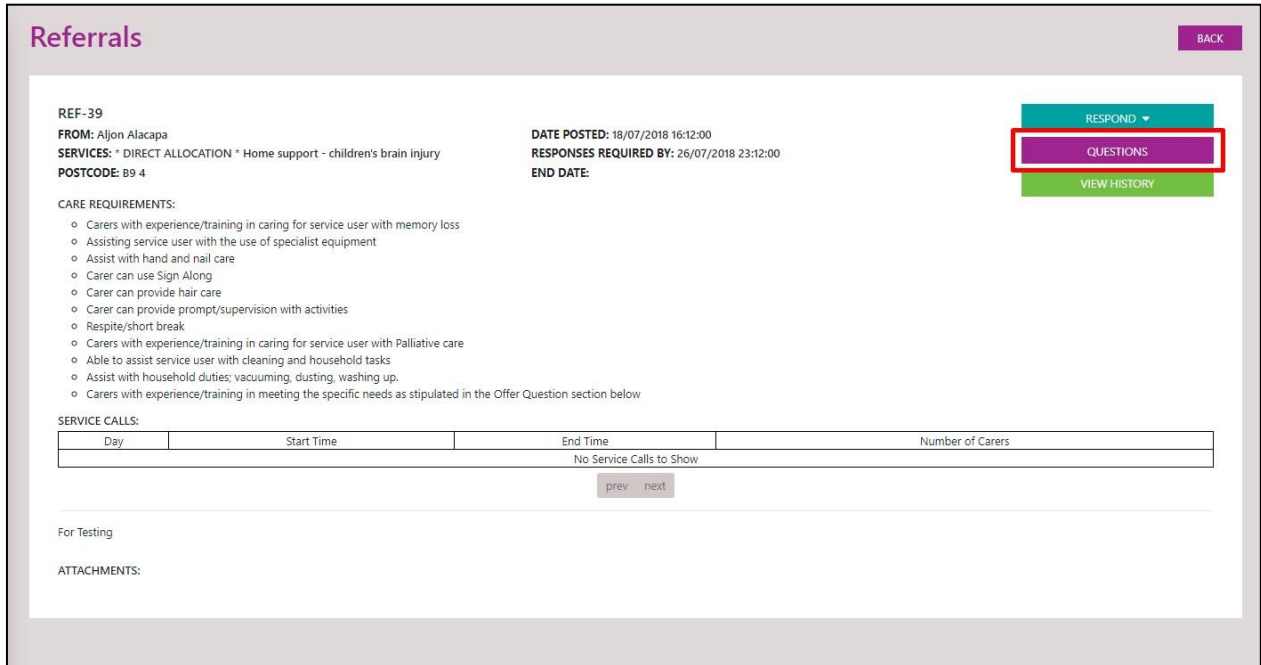
Figure 5.3.1 Referrals Page

Once the "Questions" button has been clicked, you will be presented with a questions page. Here you will be able to see your questions awaiting response as well as see the responses to those questions. To ask a new question, you may click on the "New Question" button on the top right-hand side of the page (see highlighted section of Figure 5.3.2).
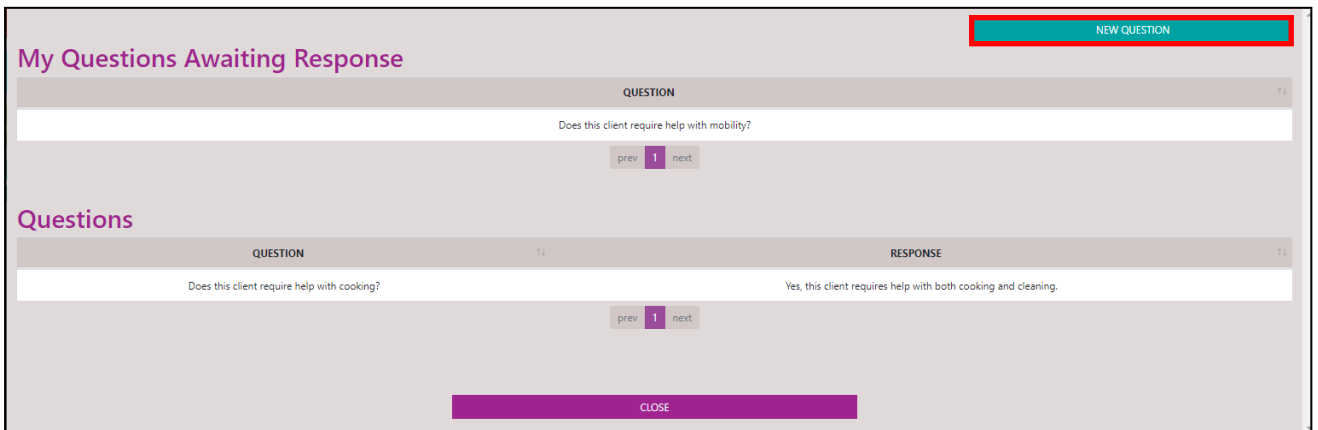
Figure 5.3.2 Questions Page

5.4 VIEW HISTORY

On the referrals page, you will be able to see the history of a referral. To do this, you may click on the "View History" button found on the referrals page (see highlighted section of Figure 5.4.1).

Figure 5.4.1 Referrals Page

Once you have clicked on the "View History" button, you will be presented with a dialog box, listing the entire history of the referral. You may click on the "Close" button to close this dialog box.

5.5 EMERGENCY PLACEMENTS

Whilst on CareMatch, you may notice a red warning icon next to a referral. If visible, this icon means that the corresponding referral is an emergency placement and may require an immediate response (See highlighted section on Figure 5.5.1).

Figure 5.5.1 Referrals Page – Emergency Placements

6   OFFERS

This section will go through the offers section of the CareMatch system.

6.1 HOW DO I RESPOND TO A REFERRAL?

To respond to a referral, start by opening the referral details. You can do this by clicking on the magnifying glass icon on the referrals page. (see highlighted section of Figure 6.1.1), or by clicking on the referral reference (REF-XXXXXX).

Figure 6.1.1 My Referrals Page

Once a referral has been opened, you will be able to review the referral details and respond by clicking on the "Respond" button on the top right-hand side (see highlighted section of Figure 6.1.2). From this section you will be able to either make an offer or decline, by clicking on the designated button. From this section, you will also be able to ask a question, or view the history of this referral by also clicking on the relevant buttons.

Figure 6.1.2 Specific Referral Page

6.2 MAKING AN OFFER

Once you have clicked on the "Make Offer" button, you will then be presented with a dialog box. In this dialog box, you will be able to select which provider you are making an offer on behalf of (if you are assigned as a user to more than one provider within your organisation). Enter the information requested (in the example of a home support referral, the hourly rate is requested), and respond to a number of key questions regarding the referral or your offer.

Please note; offer forms will look different dependent on the type of service the referral is for. For example, you will see service calls for the supported living and home support contracts but not for Care Homes 2018. Once all this information has been completed, you will then be able to click on the "Submit" to submit the offer on this referral (see highlighted section of Figure 6.2.1).

Figure 6.2.1 Make Offer

If you try to make an offer after the offer deadline has passed you will get the following error message:
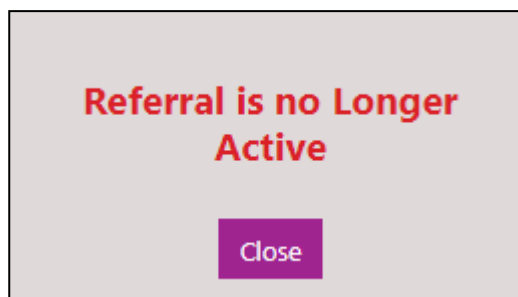
6.3 WITHDRAWING AN OFFER OR CHANGING A DECISION TO DECLINE A REFERRAL

If you have already made an offer on a referral, or if you have previously declined a referral, you can withdraw the offer or change the decision to decline, by going to the Offers page. At the Offers page, open the referral and click 'Withdraw' (Figure 6.3.1)

Figure 6.3.1

Clicking this withdraw button will generate a popup message asking the user to confirm whether they want to withdraw the offer or not and which provider they would like to withdraw it for. This is shown below (Figure 6.3.2)

Figure 6.3.2

Clicking "Withdraw" will remove your offer (or change a previous decision to decline the referral). If needed, you can resubmit a new offer by repeating the instructions in section 6.2 of this guidance document. You may not see the referral in the Open Referrals list on the homepage if 5 new referrals were sent to your provider. However, you will always see the referral within the 'Referrals' tab on the side bar.

6.4 HOW DO I VIEW MY OFFERS?

To access all of your offers, from any page, you may click on the "Offers" button found on the sidebar (see Figure 6.4.1). Alternatively, you can click the 'Offers Submitted' number on the quick status bar

discussed in section 4.1 of this report to see offers submitted but not yet handled. Once open, you should then see a page with a table referring to all your offers on the system. To view a specific offer details, you may click on the respective magnifying glass relating to that offer to open the referral/offer details page (see Figure 6.4.1 – 2).

Figure 6.4.1 Offers Page

Offers shown on this page will have different status which correspond to the status of the referral. For example, if you have just made an offer and the Birmingham City Council have yet to shortlist the providers; the status shown will be 'Offer Made'. Another example is that if the referral is being shortlisted; the status shown here will be 'Review of Shortlist'.

Once open, you will be able to see all the details relating to the referral and the offer you made. At this page, you can also ask a question (section 5.3), withdraw from the offer (section 6.3) and view the history for this referral (section 5.4), see highlighted section on Figure 6.4.2.

Figure 6.4.2 Offer Details Page

7   SERVICE AGREEMENTS
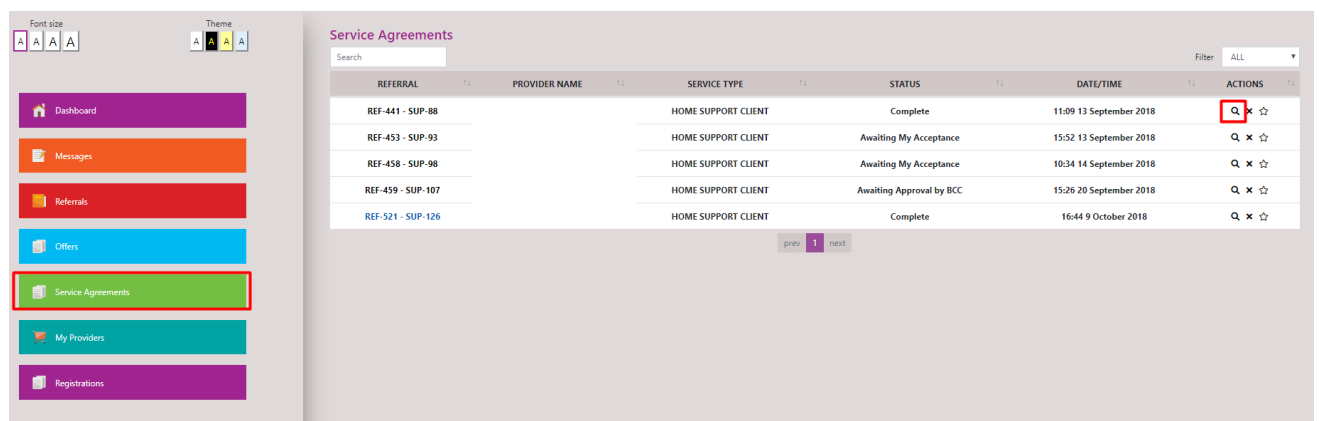
This section will go through the service agreement section of the CareMatch system

7.1 WHAT ARE SERVICE AGREEMENTS?

A service agreement is the call off to the contract the provider has successfully applied for (following the application process in section 3) in relation to an individual package of care described in the referral for which an offer has been successful.

7.2 HOW DO I ACCESS MY SERVICE AGREEMENTS?

To access your service agreements, from any page, you may click on the "Service Agreements" button found on the sidebar (see highlighted area on Figure 7.2.1). Once open, you should then see a page with a table referring to all your service agreements on the system. Here, you will be able to see the referral ID, provider name, service type, status and date/time of the service agreement. If you have any service agreements, you will be able to view the details of this agreement by clicking on the respective magnifying glass relating to that service agreement, to open the service agreement details.

Figure 7.2.1 Service Agreements Page

7.3 HOW DO I ACCEPT A SERVICE AGREEMENT?

When a service agreement is in the "Awaiting Acceptance by Provider" stage (visible from the 'Status' field on the Service agreement page), you will have the ability to accept a service agreement. You can accept your service agreement, by opening the relevant service agreement (for more information on how to do this, please see Section 7.2), then clicking on the accept button located on the top right-hand section of the page (see highlighted section on Figure 7.3.1).
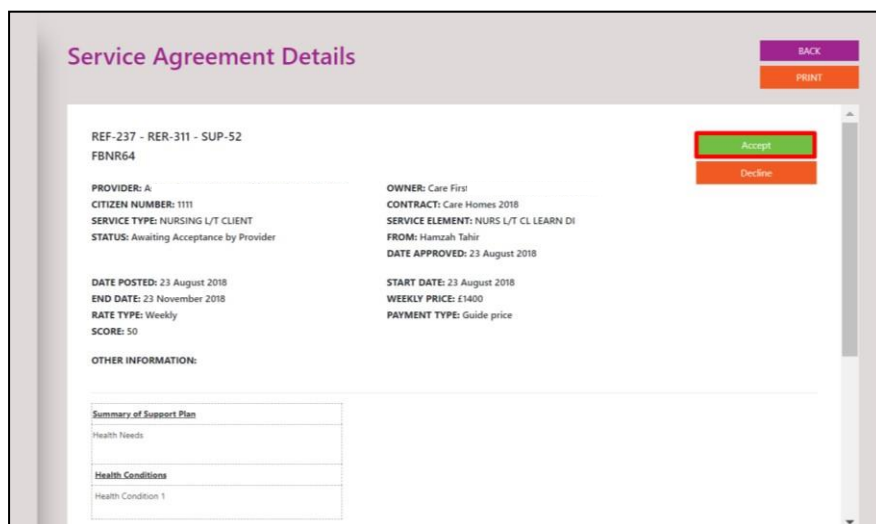
Figure 7.3.1 Service Agreement Details Page

7.4 HOW DO I PRINT MY SERVICE AGREEMENTS?

To print a service agreement, open an existing service agreement from the service agreement page (for more information on how to do this, please see section 7.2). Once you have opened the service agreement, you will see all the details of this agreement on your screen. To print this, simply click on the top right-hand button called "Print" (see highlighted section on Figure 7.4.1).
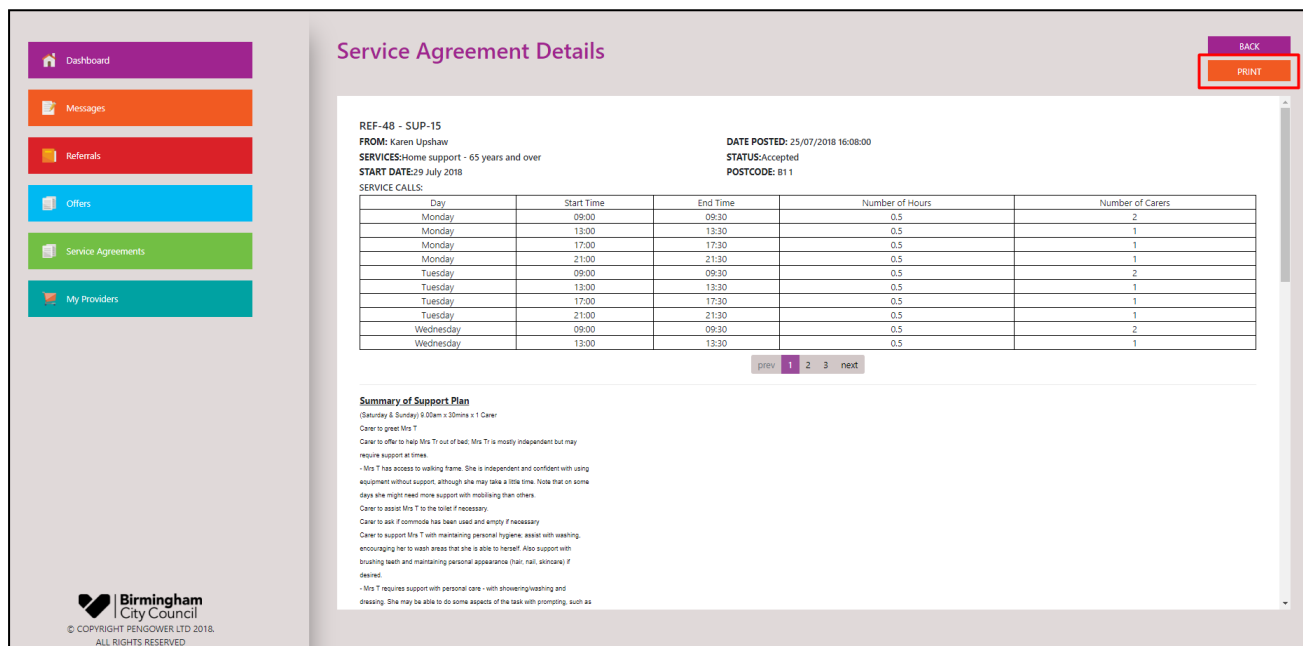
Figure 7.4.1 Service Agreements Details Page

8   MY PROVIDERS AND USERS

This section will go through the 'My Providers' section of the CareMatch system and inform you of how you can add and manage users.

8.1 HOW DO I VIEW MY PROVIDERS?

To access your providers, from any page, you may click on the "My Providers" button found on the sidebar (see Figure 8.1.1 - 1). Once open, you should then see a page with a table referring to all your current providers on the system. To view a specific provider's details, you may click on the respective magnifying glass relating to that provider, to open the provider details (see Figure 8.1.1 – 2).
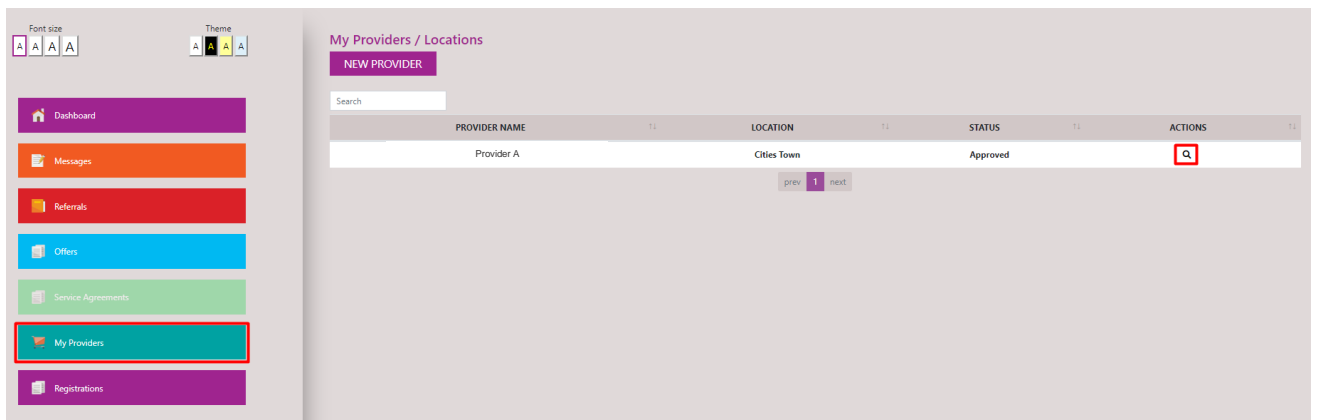
Figure 8.1.1 My Providers Page

Once the providers details have been opened, you will be able to edit some fields, add/view documents, and add users for your providers from this page.
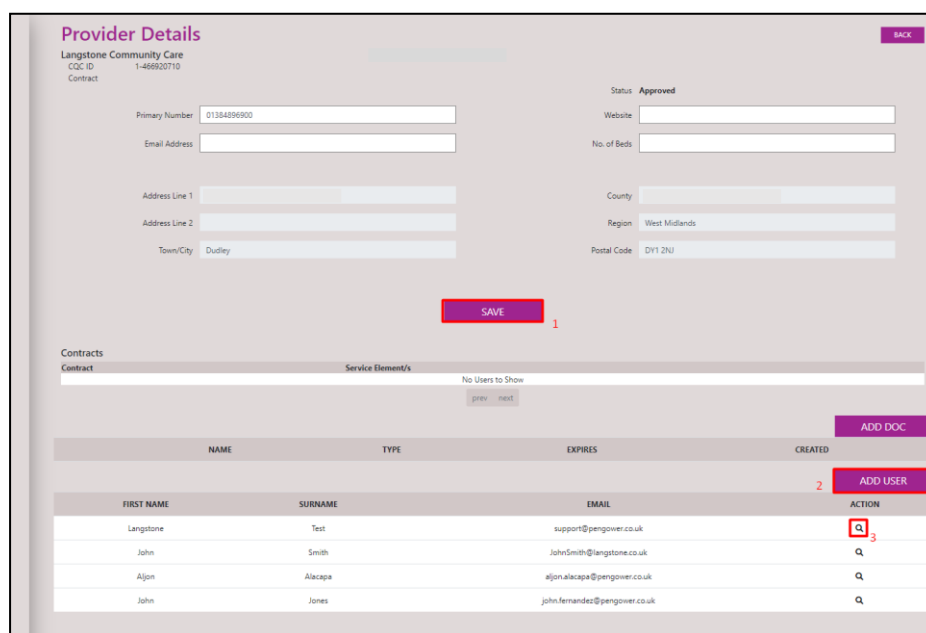
Figure 8.1.2 My Providers Details Page

8.2 HOW DO I ADD A NEW PROVIDER (CQC LOCATION) AND APPLY FOR A CONTRACT?

To add a new provider (CQC location), and then apply for a contract for it, you must first go to the 'My Providers' page from the sidebar (for more information on how to do this, please refer to section 8.1). On the page, you will be able to see a link called "New provider" (see highlighted section on Figure 8.2.1). Click on this link in order to open a new provider contract application page.
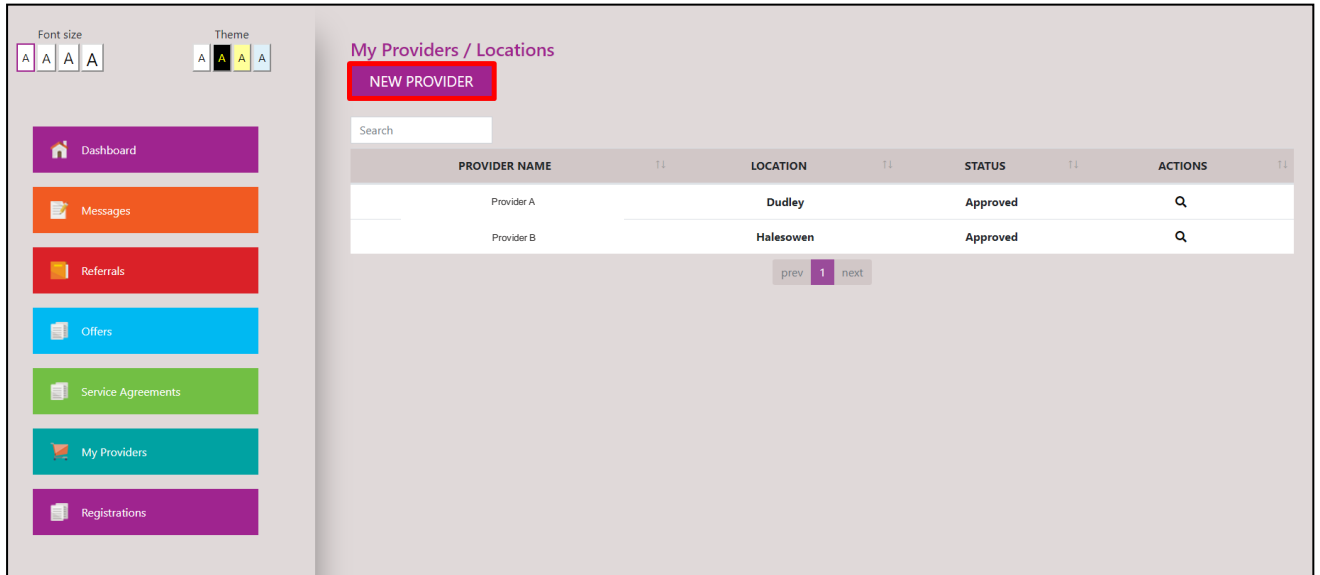
Figure 8.2.1 My Providers Page

Once you have clicked the link on the 'My Providers' page, you will be presented with an application page. This application page consists of 6 steps, similar to those found in the initial application process.

Figure 8.2.2 New Provider Registration Page

Figure 8.2.2 shows information relating to your company. Here you will have to confirm the information presented is correct by ticking the confirmation box. If correct, you can continue by clicking on the "Next" button. The rest of the application will remain similar to that found in the new provider section in section 3.1.

8.3 HOW TO DO I APPLY FOR A NEW CONTRACT FOR ONE OF MY APPROVED PROVIDERS?

Figure 8.3.1 My Providers
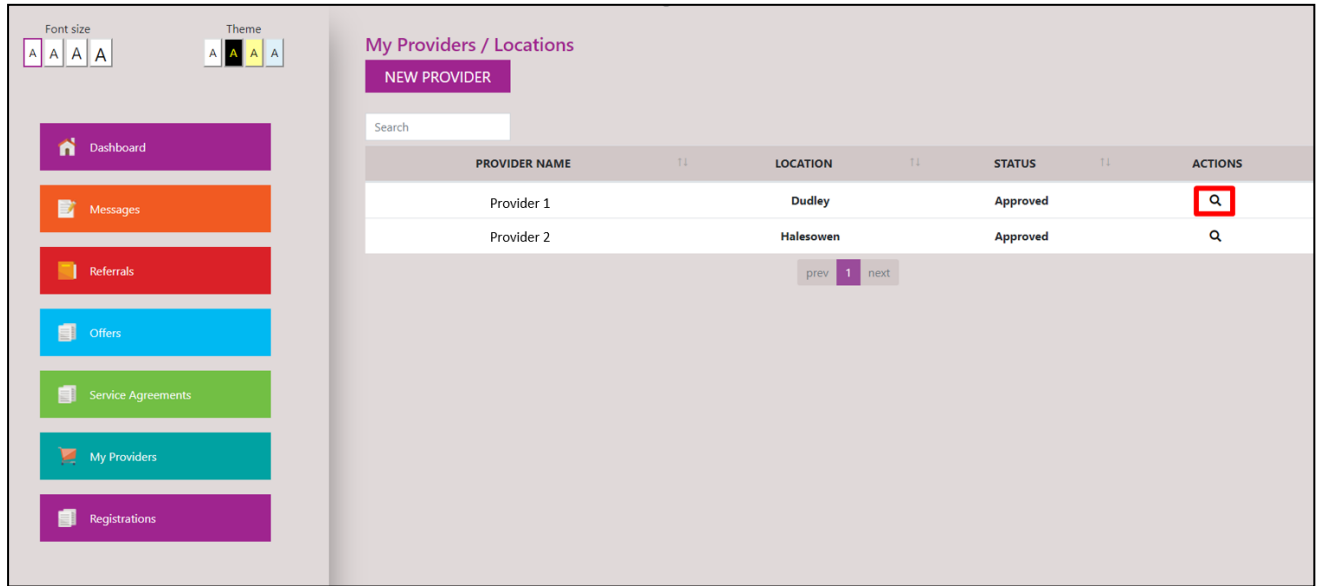
To apply for a new contract, please click on the magnifying glass icon for the provider you would like to apply for this contract for, from the 'My Providers' page (see highlighted section on Figure 8.3.1).
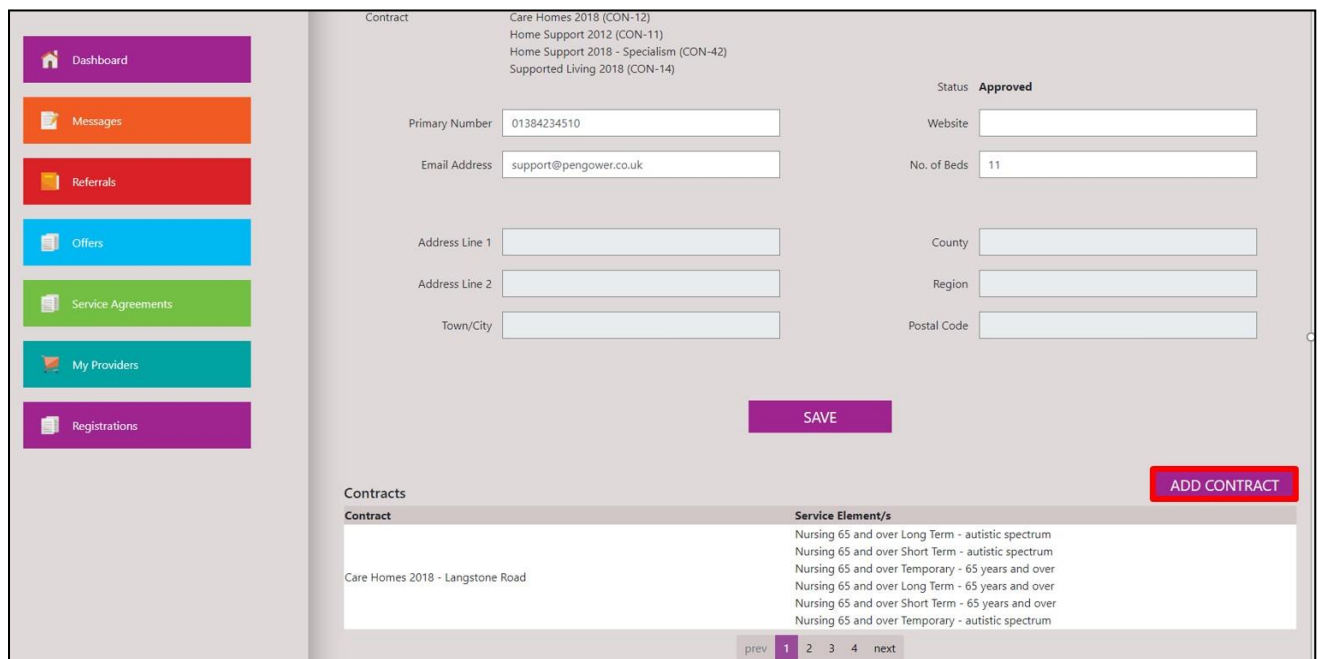
Figure 8.3.2 Provider Details Page

Once on the provider details page, if you scroll down you will be able to see an "Add Contract" button. By clicking on this button you will be able to register for a new contract.

Figure 8.3.3 Registering for a new Contract

Figure 8.3.3 shows information relating to your company. Here you will have to confirm the information presented is correct by ticking the Confirmation box. If correct, you can continue by clicking on the "Next" button.

You may find that you will have to fill in additional information into this application that you may have not had to enter during your initial registration, this is due to the nature of Contract Specific Questions, depending on the Contract you are applying for. The rest of the application will remain similar to that found in the new provider registration. For more information on the provider application, please refer to section 3.1.

8.4 HOW DO I SAVE MY REGISTRATION (CONTRACT APPLICATION) TO COMPLETE LATER?

Once you have started a registration, whether it is for a new contract or a new provider, you can save it and come back later. To do this, ensure you have saved any question sections you have entered responses to in steps 2 or 5 by clicking the 'Save' button at the bottom of the page. Also, ensure you have clicked 'Save' if you edited your owner or provider details. **Make a note of your registration number which can be found next to the page heading on each registration step and starts with the prefix REG** (Figure 8.4.1)
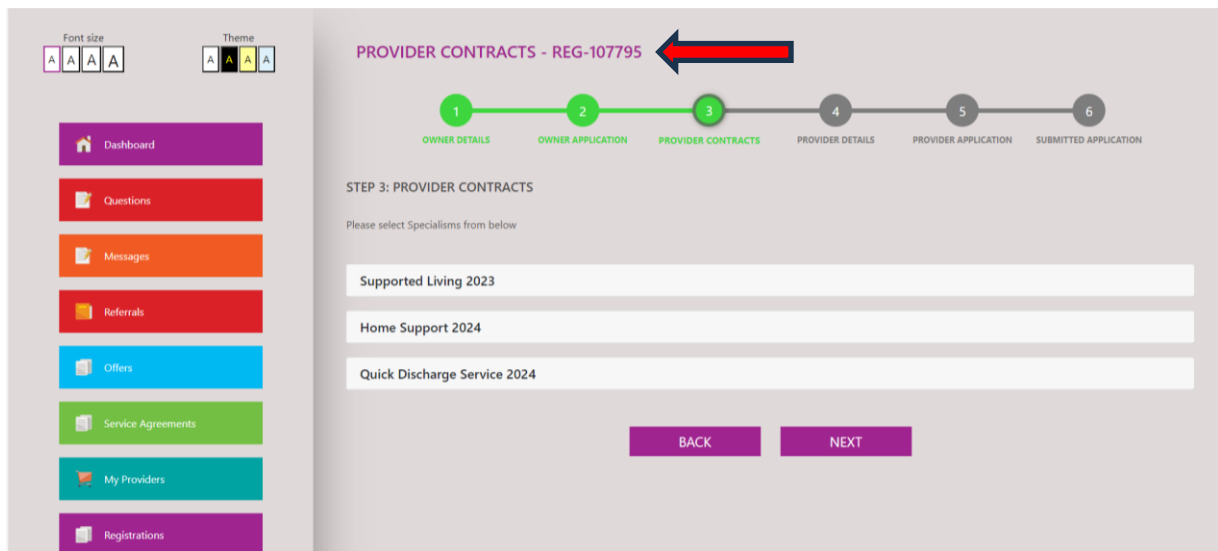
Figure 8.4.1

Next, logout of your account (My Account > Logout) or navigate away from the registration (e.g. to referrals section if a referral has been sent to you). Then, when you are ready to carry on with the registration, from the side navigation panel, click on the 'Registrations' tab.
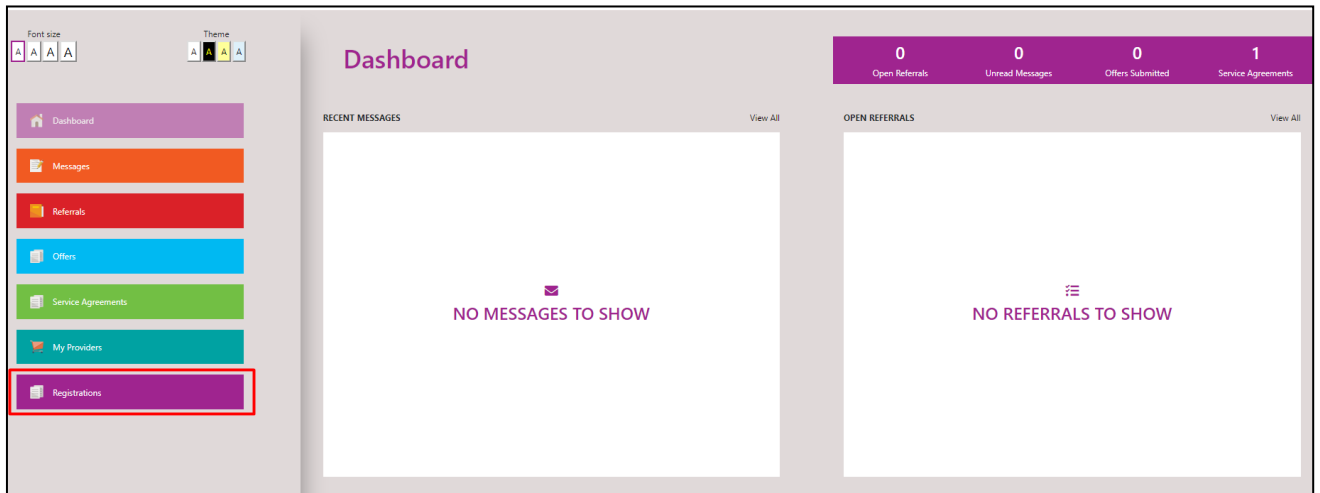
This will take you to a list of all of your registrations including completed and approved registrations. From here, find your registration by looking in the Reference column for the REG number you made a note of earlier. You can see the type of the registration (Provider or Contract), the status, who it was registered by and more. You can also reorder the data by clicking on the arrows next to each column heading or the heading itself. For example, clicking the arrows next to 'Date/Time Created' will reorder the registrations from oldest to newest. Clicking on it again will reorder them from newest to oldest.

Once you have found your registration, click on the magnifying glass icon to navigate back into the registration.

From here, simply click the 'Continue Registration' button to resume with your registration from where you left off.
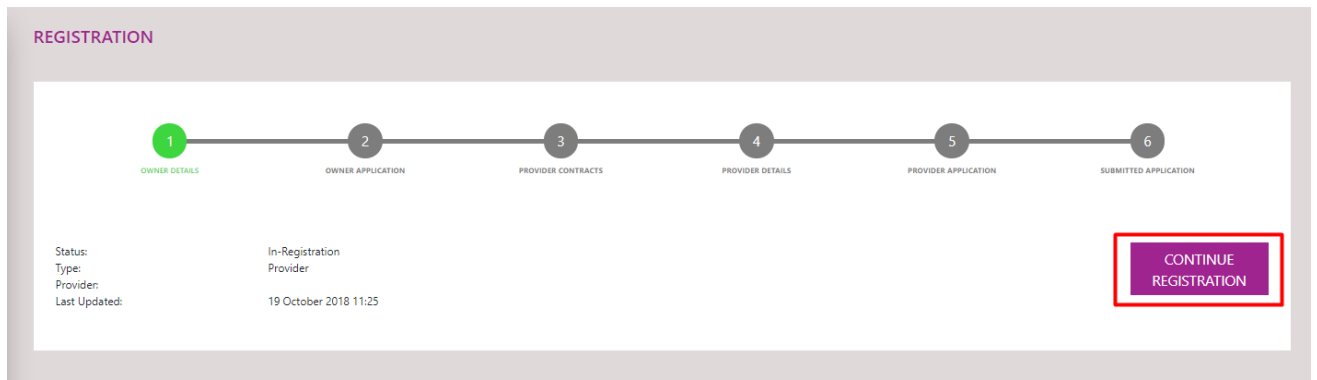
8.5 HOW DO I DELETE A REGISTRATION?

Providers also have the ability to delete a contract or provider registration which have not yet been submitted. Submitted registrations will already be awaiting approval or would have been approved/rejected by BCC and cannot be deleted. Deleted registrations will be removed from the system completely and cannot be undone. To delete a registration/application, navigate from the dashboard to the 'Registrations' tab from the left navigation panel:
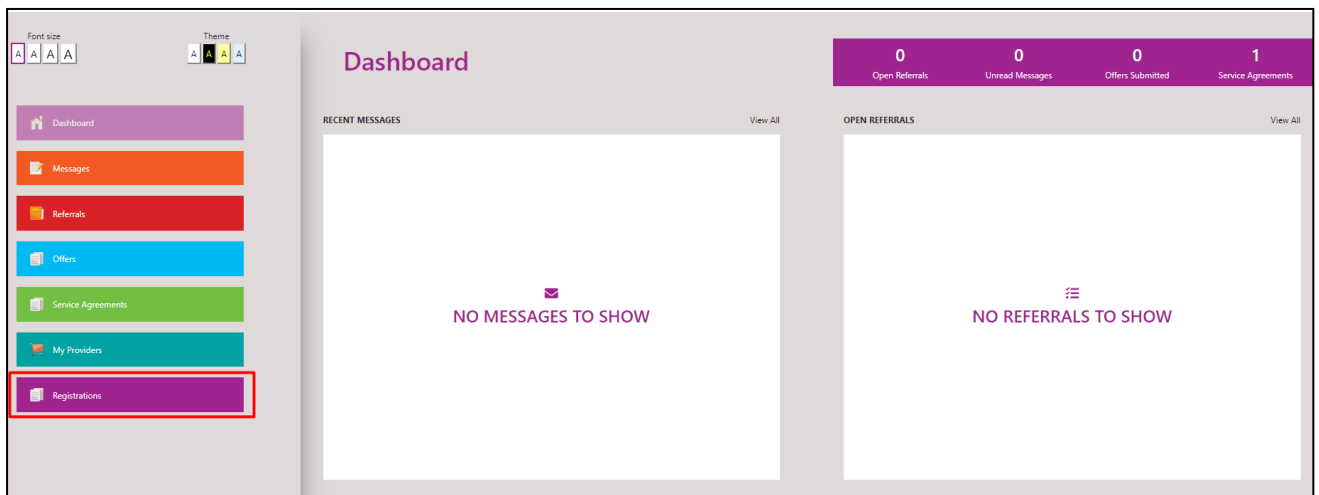
From here, you will see your registrations with all the relevant information such as the provider name, type of registration, status, reference and more. Next to this information for each registration you will also see two icons; a magnifying glass icon which allows you to go into and open the registration as well as the 'cross/x' icon. This is the icon you will need to click to delete a registration.

When clicked you will see the following message which will ask you to confirm whether you want to delete the registration or not:
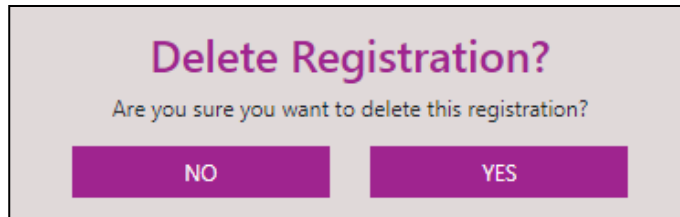
Clicking 'No' will cancel the deletion. Clicking 'Yes' will delete the registration if it has not already been submitted (status is 'In-Registration'). The registration will then disappear from your list. For example, if we click the 'x' icon next to the second registration in the screenshot above with the reference 'REG-361' and then click 'Yes'; we can see that it has been removed:

Hosanna Social Care Services	Contract	In-Registration	Lisa Jones	28 October 2018 22:14	REG-355	Q	✗
Hosanna Social Care Services	Contract	In-Registration	Lisa Jones	29 October 2018 15:09	removed REG-369	Q	✗
Hosanna Social Care Services	Contract	In-Registration	Lisa Jones	30 October 2018 12:15	REG-385	Q	✗

If the registration has already been submitted, meaning it has a status which isn't In-Registration', you will see an error message which informs you that "This application has been submitted and is currently awaiting approval from BCC. Submitted applications cannot be deleted".

8.6 HOW DO I EDIT A PROVIDER?

To edit a provider, please click on the magnifying glass icon next to a provider from the 'My Providers' page (see highlighted section on Figure 8.6.1).
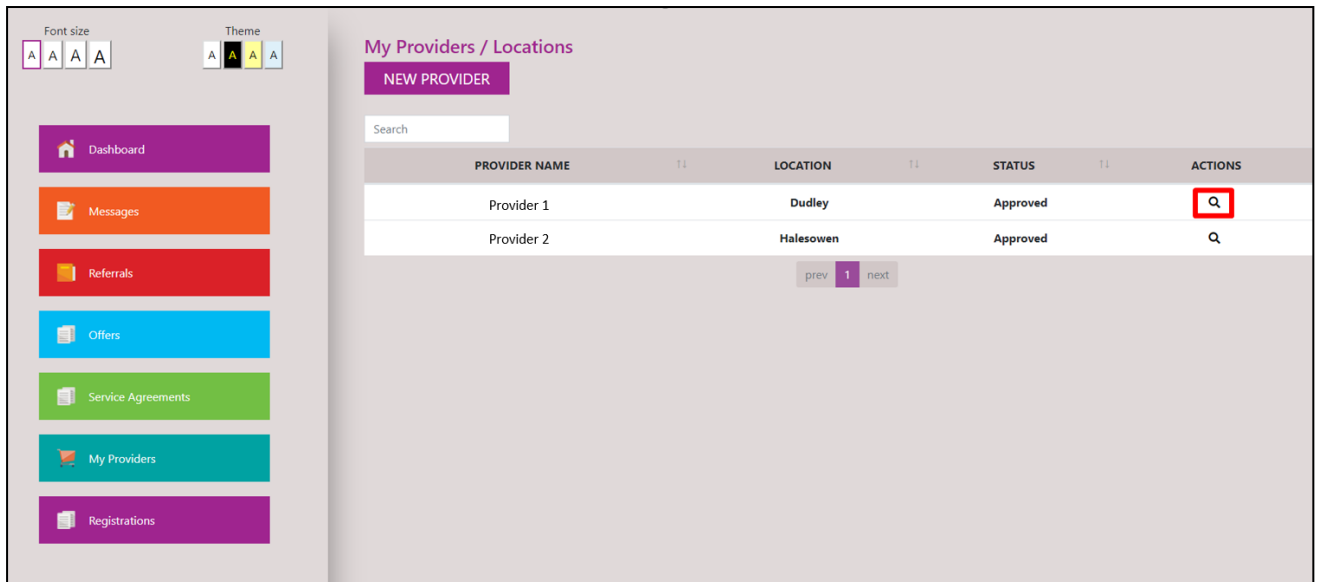
Figure 8.6.1 My Providers Page

Once the Providers Details page has loaded, you will be able to edit fields that don't link back to your Care Quality Commission registration details. Once you have completed any changes, please ensure to click on the 'Save' button to ensure that your changes have been saved (see highlighted section on Figure 8.6.2).

Figure 8.4.2 Provider Details Page

8.7 MANAGING USER ACCOUNTS (INCLUDING ADDING NEW USERS)

When an Owner's (CQC Provider) account is first set up on CareMatch Portal, it will have the one User account set up as part of the application process. As soon as a first contract has been awarded, additional User accounts can be added, by following the steps below. It is recommended that each Owner account has at least two User accounts, to enable access to CareMatch Portal if there is a problem using a particular account or to cover for staff on leave.

If an Owner (CQC Provider) account has two or more Providers (CQC Locations) registered on CareMatch Portal, new User accounts that are added can be set to view activity for any or all of the Providers.

When making new contract applications for an existing Provider (CQC Location) registration, any of the User accounts that have been set to view that Provider's activity can make the application if they have the Add Providers/s? (by following the steps in Section 8.3). See section 4.5 for a description of the different user permissions.

Once a new contract application has been started, it must be continued and submitted with the same User account.

ADDING A NEW USER ACCOUNT

New User Accounts can be added by any existing User Account that has the permission to Manage Users? See below for the permissions that a User account may have.

The permission 'Change provider details' allows the User to change the contact phone number,

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contact email address, website details and number of beds (care homes).

Whilst on the Provider Details page, please click on the "Add User" button located on the lower right-hand side of the page (see highlighted section on Figure 8.5.1).
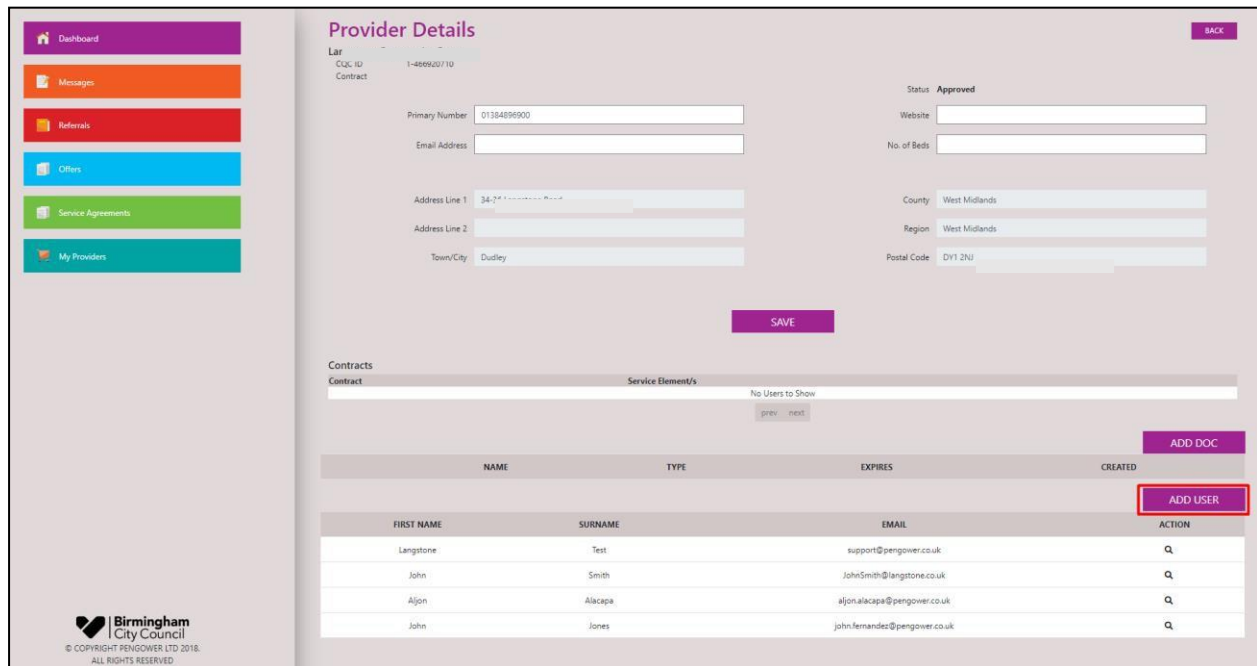
Figure 8.7.1 Provider Details Page

Once you have clicked on the button you will be presented with a 'Add User' page. Here you will be able to enter all the user's details and assign them to one or more provider locations (see Figure 8.7.2 - 1). Once you have entered all the relevant details, please click on the "Add" button to ensure that this user is saved to the system (see Figure 8.7.2 - 2).

You can set the new User account to receive (Yes) or not receive (No) two different kind of notification emails. These are both set by default to not receive notifications (No)

Referral email notifications will alert you that a new referral has been received for one or more your providers, and you will then find that referral on your dashboard.

Message email notifications will alert you that a new message has arrived. You can access the message from the 'Message' tab on your dashboard (see Figure 8.7.1)

You can also set User permissions by choosing one or more of the permission options (see Figure 8.7.2)
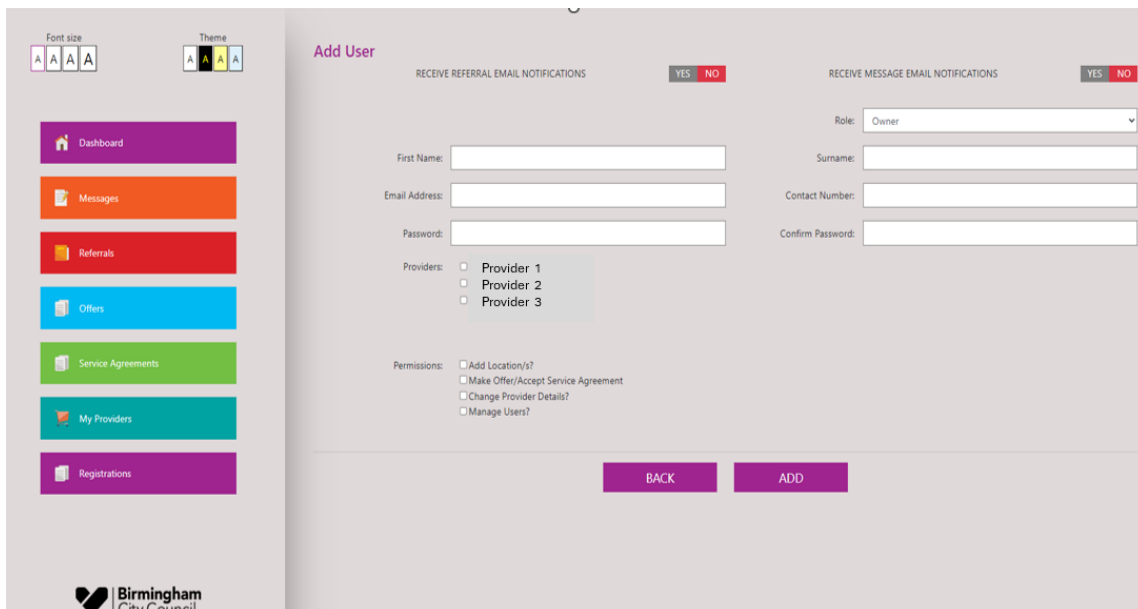
Figure 8.7.2 Add User Page

When you have completed the fields on the 'Add User' page, click 'Add' to add the new User account

8.8 HOW DO I ADD A DOCUMENT (INCLUDING RENEWING MY INSURANCE)?

Whilst on the Provider Details page, please click on the "Add Doc" button (see highlighted section on Figure 8.6.1). Please note that if your User account does not have permission to change Provider details, you will not see the 'Add Doc' button. You will need to ask another User in your organisation who does have this permission to carry out the task.

Figure 8.8.1 Provider Details Page

You will then be presented with an 'Add Document' page. Here you can enter a name for the document, it's type and the expiry date for your document (if the document has an expiry date).
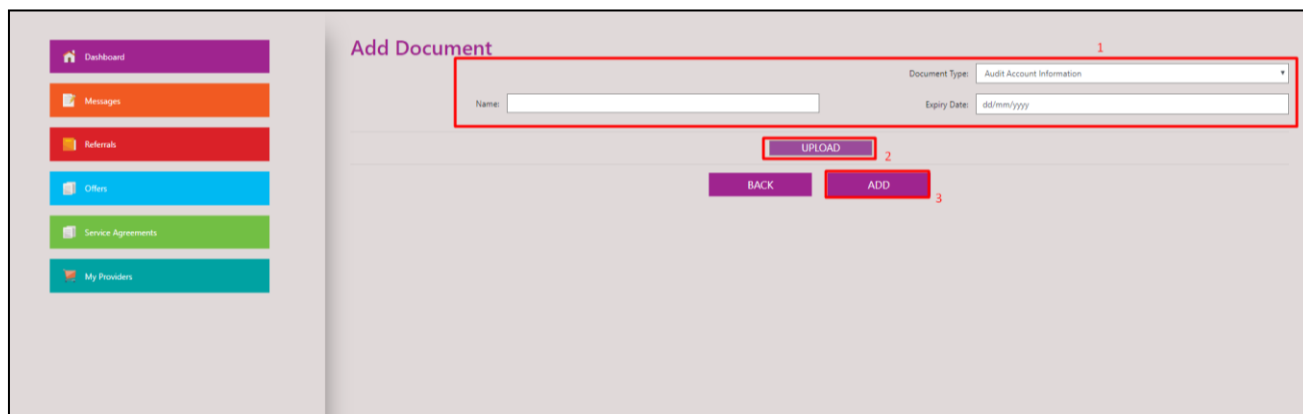
Figure 8.8.2 Add Document Page

After entering the document Name, please select the correct 'Document Type' from the drop-down list.

Uploading renewed insurance documents

If you have more than one Care Quality Commission (CQC) location contracted with Birmingham City Council (BCC) under the same CQC owner *and* your insurance policies cover *all* of the contracted locations, you only need to do the steps below for *one* of those locations.

If you have more than one CQC location contracted with BCC under the same CQC owner *but* you have *separate* insurance policies for the different locations, the steps below need to be done for *each* of those locations.

Enter the document Name, then select the 'Document Type' from the drop-down list.

You will need to ensure you select from the following document types;
- 'Employer Liability Insurance'
- 'Public Liability Insurance'
- For a care home with nursing, you will need to upload a third document and select the document type 'Professional Indemnity/Treatment Cover Insurance'.

If you have one document that covers more than one of the insurance types above, please upload it for *each* of the insurance types it relates to.

Ensure you input the correct insurance expiry date, this will be used to send automatic notifications to you 30 days before the documents expiry that it requires updating. The system will then notify you 7 days prior and on the date of expiry. If new documentation is not updated by the expiry date your Area Commissioner will be alerted.

Please note that if your Public Liability insurance cover consists of a base policy providing £5 million cover and an excess policy raising this to £10 million, you should enter the expiry date of the policy that runs out first.

Checking your documents before uploading

Before uploading insurance documents, please check that each document includes your company/organisation details and the insurance policy details (including; insurance provider details, policy number, type(s) of insurance, limit of cover and expiry date).

Ensure the limit of cover is that required by your contract:

Employers Liability insurance – a minimum of £5 million
Public Liability insurance – a minimum of £10 million
Professional Indemnity, Treatment Cover, and Negligence – a minimum of £5 million.

To upload the document, you may click on the "Upload" button (see Figure 8.8.2 – 2). A new window should open, allowing you to explore your local directory in order to find the relevant file.

Once you have located the document on your computer, you may click on the file, and then on the "Open" button to upload the document (see Figure 8.8.3). Once the form has been completed, and all relevant documentation has been uploaded, you may click on the "Add" button to add it to the system (see Figure 8.8.2 – 3). You will then be taken back to the "My Providers" page, and you will be able to see your documents under the "Documents" heading.
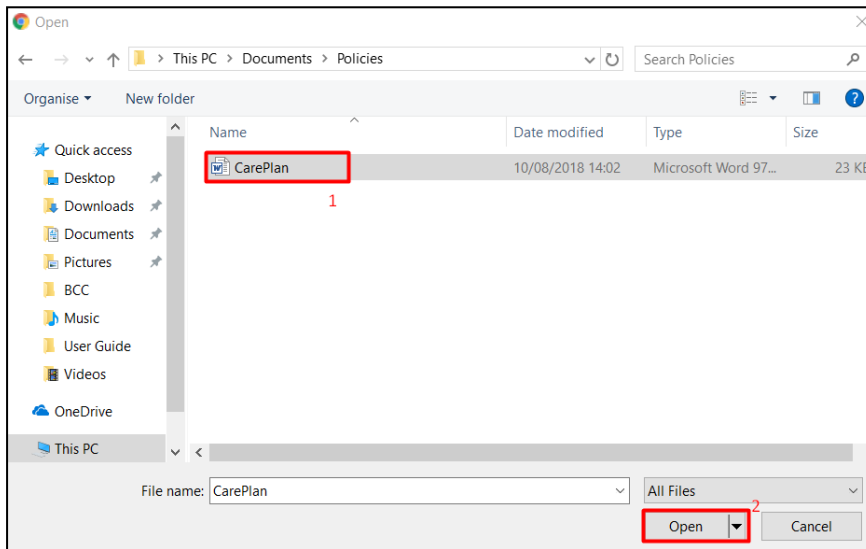

Figure 8.8.3 Upload Document Window

9 GLOSSARY

Term	Definition
Application	The process a provider must complete to apply to join an open contract. The application will be reviewed by BCC and the provider will be informed of the outcome. If the application is approved, the provider will begin to receive referrals under that particular contract.
Documents	A document is a file which relates to a specific policy and contract. For example, this can be an insurance certificate that a provider must upload.
Question	A question is the term Care Match uses for queries asked by providers whilst completing an application or during the referral process. Questions can be asked prior to an application being submitted, or regarding an open referral.
Correspondence	Communication between BCC Procurement Team and the provider about a submitted application.
Dashboard	The dashboard refers to the home page on the provider view. It contains a summary of all the latest referrals and communications. You can also access service agreements, offers, provider details, documents and other records using the side navigation menu.
Owner	The term owner, as used in this document, is the equivalent of the Care Quality Commission's definition of "provider". Provider; an individual person, partnership or organisation registered with CQC to provide health and/or social care services to service users. A provider is responsible for one or more provider locations.
Provider/Provider location	The term provider, as used in this document, is the equivalent of the Care Quality Commission's definition of "location"; a location is a place in which, or from which, regulated activities are provided or managed. For example, the registered office from which home support packages are delivered or the address of a nursing or residential home.
Contract	The contract identifies the service type required by the citizen (for example, supported living or home support) in the procurement process. During the application process, providers will be able to select to join contracts that are open for applications and in line with their owner's CQC regulated activity
Service Type	Further information about the services required by the citizen under a specific contract, such as

	the length of the service need (long term, short term or temporary).
Specialism	A categorization of the citizen's needs; e.g. over 65, learning disability, mental health
Referral	Detail of a service user's social care needs and the service they require, which is sent to providers under a specific contract to review and determine if they can offer a service.
Notifications	Notifications relate to alerts and emails received by users of Care Match. They can relate to the outcome of an application, new referrals, service agreements and messages, or questions received or responded to. Users have the ability to change their settings in relation to notifications.
Offer	The positive response from a provider to a referral stating they have capacity and can meet the needs of the Citizen as described in the referral.
Service Agreement	A service agreement is the call off to the contract the provider has successfully applied for in relation to the individual package of care described in the referral for which their offer has been successful.