Provider Handbook

for the

Provider Portal
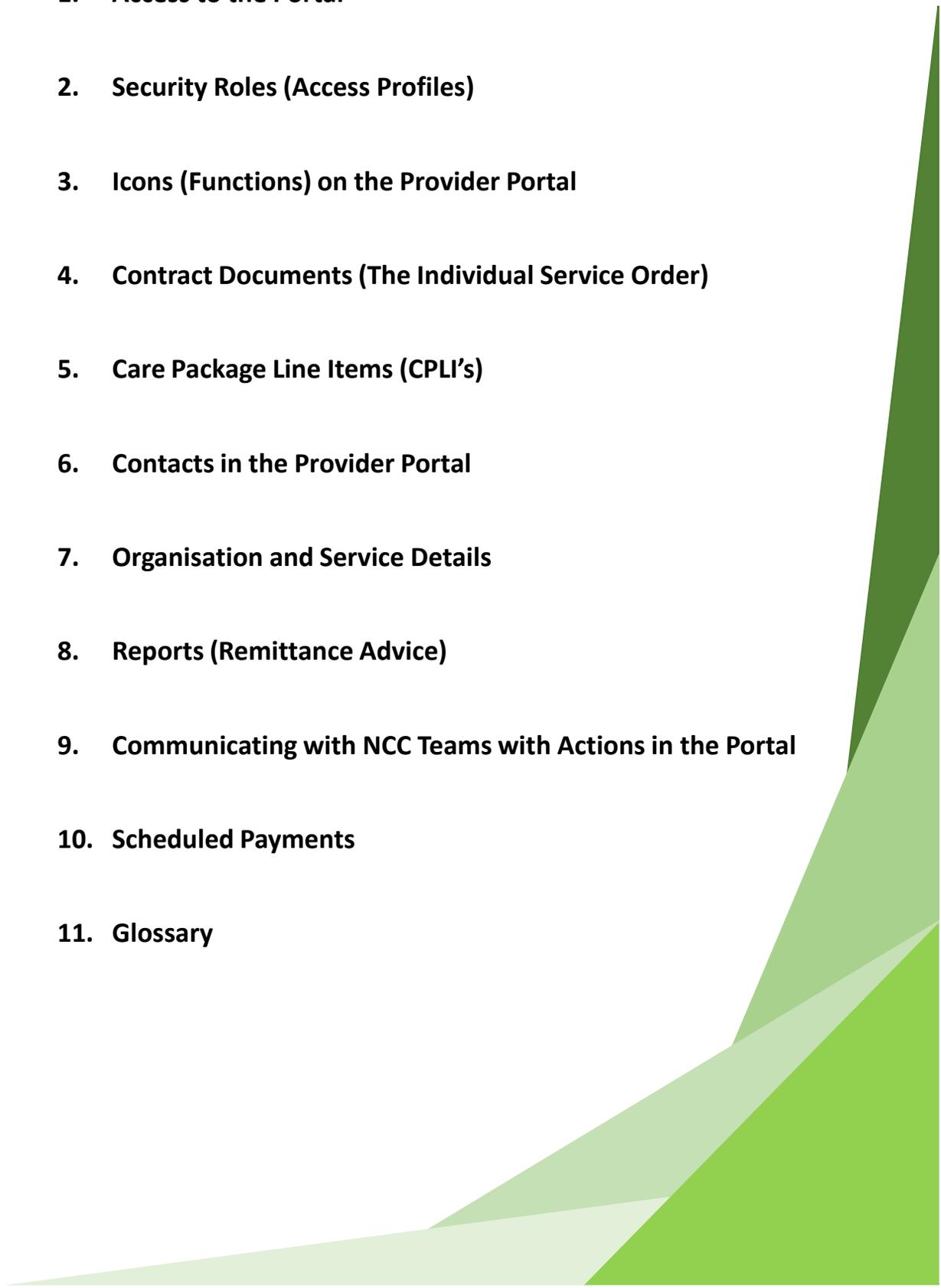
Residential Homes

Nursing Homes

Supported Living

Norfolk County Council

Contents

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1. Access to the Portal

You will receive an email with the Provider Portal Website Address (URL) with your Username which will be your email address.

You will then receive a phone call from the Provider Portal Helpdesk with your Password.

Once you log in to the portal with your email address and NCC generated password, you will be prompted to change your password.

- Please use a strong password. Your Password must contain a minimum of 9 characters, a capital letter, at least one alphabetic character and two numeric value characters.
- You will then need to create a 6 digit numeric passcode as a second line of security. You are unable to use ascending numbers of more than three or descending numbers of more than three. Please do not use your birthday or easily guessed dates, make it secure.

Passwords protect your business – Never share your login IDs or passwords, never write them down.

Make it harder to guess – Reduce the level of risk by using random words. Don't use names and ages that make it easy to guess, think outside the box.

Act on suspicions – If you suspect that someone knows your password, change it immediately on all systems.

Never store on your system – Every time you are prompted to store a password reject it. If your initial login details are hacked it then becomes easier to access these systems.

If you enter an incorrect password 3 times you will be locked out of the portal and you will need to request your password to be reset.

Your password will expire after 12 months and you will need to choose a new password (system prompt)

If you do not use the Portal for 60 days, your access will be suspended.

For Password and Security code resets you can either:

Telephone: 01603 495702 and select Option 1

Email: adults.providerportal@norfolk.gov.uk

Each Contact that is added to the system for Provider Portal Access has a Security role which is based on what functions (Icons) they can use in the Portal.

2. Security Roles (Access Profiles)

The Security Roles available to you in the Portal are:

1. **Super User (Actuals) –** Edit access to all functions except Scheduled Payments

2. **Super User (Scheduled)** – Edit access to all functions except Actuals

3. **Payments** – Edit access to Actuals, Invoice/Credit Notes, One-Off Claims, Contract Documents and Actions/Change Requests

4. **Administration –** Edit access to Organisation & Service Details, Contacts, Care Package Line Items, Contract Documents, Actions & Change Requests

5. **Reports –** Edit access to Organisation & Service Details. Reports, Actions & Change Requests

6. **Invoice Only –** Edit access to Invoice/Credit Notes

7. **Read Only –** Read only access to all functions

If you have a Security Role of Super User or Administration, you will be in control of the Security roles for your Organisation and you will need to ensure that you send Change Requests to amend and remove access to users in the Provider Portal.

3. Icons (Functions) on the Provider Portal

Press the hyperlink to view the Training Video that accompanies the function.

1. Contract Documents (ISO's)

The Ability to view and manage ISO's. There is a function to download into a PDF document and the ability to Accept and Reject authorisation.

2. Care Package Line Items (Service Agreements)

The ability to view all Care Package Line Items and download into an Excel Spreadsheet displaying cost and breakdown of care.

3. Contacts

The ability to add/amend/remove employees to use various functions of the Portal for information and payment.

4. Organisation & Service Details

The ability to manage contact information like address, phone and email details for your Organisation and Services.

5. Reports

The ability to view and download a detailed Remittance Advice for services provided after the payment has been processed.

6. Actions and Change Requests

The ability to communicate with various Norfolk County Council teams regarding payments, Care Documentation and Procurement Contracts.

7. Scheduled Payments

The ability to view a scheduled payment (automatic payment every 4 weeks) a few days before receiving payment to communicate any amendments.

4. Contract Documents (The Individual Service Order)

You will receive new ISO's from within the Provider Portal. By using the filters you can view all the latest ISO's that have been activated by selecting the status *Published* and removing the date in the *Updated Since* fields.

To view the ISO you need to press the *NCC ISO* link to the document. All Published ISO's will have the option to be Agreed or Rejected. The Rejected ISO function is to communicate errors on the document and not to refuse Care Packages. You reject an ISO by pressing the *Reject* button.

You will then need to enter a *Rejection Reason* and your password. The reasons to reject an ISO would be: Service Level, Start or End Date of Service, Cost or Quantity of Care. Once a ISO has been rejected it will appear on a Service Brokerage report to amend and re-publish. ISO are published to the Portal when they start and when an end date is recorded.

You can use the *Status* field to view all Published, Accepted or Rejected ISO's.

Please clear the date in the *Updated Since* fields to view data.

5. Care Package Line Items

In the Portal the ISO translates to a Care Package Line Item (CPLI). These can be viewed in bulk by selecting the Care Package Line Item Icon.

SSRef	Client	Service	Service Level	Start Date	End Date	Cost	Pricing	CarePackageRef	
2750571	Kent, Karl	Oasis Residential Home	Residential Long Term Standard Rate	09/04/2018	-	£536.49 Weekly	1 x Placement at £536.49 (Spot)	AP2750571	Submit Action
9170468	Land, Lucy	Oasis Residential Home	Residential Long Term Standard Rate	09/04/2018	-	£536.49 Weekly	1 x Placement at £536.49 (Spot)	AP9170468	Submit Action
3088761	Mitchell, Mike	Oasis Residential Home	Residential Long Term Standard Rate	09/04/2018	-	£536.49 Weekly	1 x Placement at £536.49 (Spot)	AP3088761	Submit Action
100025821	Nunn, Nellie	Oasis Residential Home	Residential Long Term Standard Rate	09/04/2018	-	£536.49 Weekly	1 x Placement at £536.49 (Spot)	AP100025821	Submit Action
100025822	Osman, Oscar	Oasis Residential Home	Residential Long Term Standard Rate	09/04/2018	-	£536.49 Weekly	1 x Placement at £536.49 (Spot)	AP100025822	Submit Action

The screen above is how you can keep track of all the Services you are providing NCC. The CPLI is what the system uses to record and pay for the services that you provide. The default setting is to display all current CPLI's. By ticking the *Include Historical* box all CPLI's with an end date will also be displayed.

6. Contacts in the Provider Portal

Adding / Amending / Removing Contacts

The Security Roles of Super User and Administration will allow you to Add, Amend and Remove Contacts for your Organisation.

When adding a new Contact you will need to provide:

Name   Address   Telephone Numbers   Email address   Security Role

Please put the your email address in both the *Email* and *Provider Portal Email Address* boxes.

Please use the *UPRN* or *USRN* field to select what Security Role you wish to allocate the Contact. Please see **Section 2** for Profiles and the number associated with Profile required.

Once a Contact is listed to your Organisation you can update any details that change by using the Edit function.

If an Employee leaves the Organisation or does not require access to the Portal you need to select the *Removal Role* function. It is the Providers responsibility to request the removal of employees. The Provider Portal Helpline staff will remove the Contacts access from the Provider Portal from the Change Request received once the *Role Removal* button has been pressed.

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7. Organisation and Service Details

You have the ability to update your Organisation and Service Details.

Oasis Residential Care Home - Organisation Details

Edit

Name	Oasis Residential Care Home
Address 1	123 Mirage Road
Address 2	
Address 3	
Town	Sahara
County	
Postcode	
Country	
UPRN	
USRN	
Mobile	
Telephone	
Fax	
Email	

By pressing *Edit*, you can then add or change the details on the screen. Then press *Update*. This will send a Change request through to the Procurement Team to accept the changes.

Oasis Residential Care Home - Organisation Details

Update   Cancel

Name	Oasis Residential Care Home
Address 1	123 Mirage Road
Address 2	
Address 3	
Town	Sahara
County	
Postcode	OA1 1HT
Country	

As a guide the Organisation Level is the company that owns the Residence and the Service is the Residential/Nursing Home name.

8. Reports – (Remittance Advice)

The Reports function is where you will find a detailed Remittance Advice after payment has been made. Click the *Reports* Icon and then the *Remittance Advice Provider Payments* link.

By selecting the *Contract* (if multiple) and the *Period*, click on *View* and a detailed Remittance Advice will appear in a scrolled window.

You will still receive a Remittance Advice from our Corporate Payments system when your payment has been processed. The Remittance Advice report on the Portal should allow you to self serve any queries you have regarding the payments you have received.

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9. Communicating with NCC Teams with Actions in the Portal

Actions and Change Requests is where you will receive the Care Documentation (Care and Support Plans and Reviews) from the Service Brokerage Team.

The *Actions* functionality allows you to communicate with various NCC Teams around a range of topics. When Creating a new *Action*, you will need to select a *Type*

Below is a guide to using the different Types:

To pass on Death Notification details

Type: Death Notification
Related to: Client
Entity: Service User Name
Assign to: Service Brokerage Team

To share information with NCC Teams

Type: Information
Related to: The options are: Contract, Service, Contact & Provider
Entity: This is linked to the Related to field and the options will relate to what is chosen above.
Assign to: The teams that you can communicate within the Portal.

To raise a query relating to functions of the Portal

Type: Query
Related to: Options are: Contract, Client, Service, Contact & Provider
Entity: This is linked to the Related to field and the options will relate to what is chosen above.
Assign to: The teams that you can communicate within the Portal.

To pass on Respite Stay details

Type: Respite Stay
Related to: Client
Entity: Service User Name
Assign to: Service Brokerage Team

The *Related to* and *Entity* fields are linked and work in tandem to what you select in Related to.

Selecting *Contract* will give you the option to select the different Contracts you have with the Procurement Team.

Selecting *Client* will allow to select a Service User you are providing service for.

Selecting *Service* will allow you to select the Services you provide that sit under the Contract level.

Selecting *Contact* will allow you to select any contact name you have given access to the Portal.

Selecting Provider will allow you to select your Organisation name.

The Teams that you can send conversations to are:

Payments Team - Residential

Procurement Team

Service Brokerage Team

FES System Administration Team (For sending Request Closure)

Please **DO NOT** assign any Conversations to **Z Information Messaging – Internal Use Only** as these conversations will not be read. This function is for the Service Brokerage Team to send through the Care documentation forms to you from the Liquid Logic System. If you need to reply to these conversations, please select the Service Brokerage Team in the Assign to: drop down list.

When you no longer need an Action in your inbox, please can you press the *Request Closure* button and Assign it to the FES System Administration Team.

10. Scheduled Payments

Scheduled Payments is a function that allows the Provider to view a pending payment and communicate an amendment (Service Users stay at home) before receiving the payment. By selecting the financial year and the Contract (if multiple) the next pending payment will appear under the Organisation name and the status will be *Unconfirmed*.

By selecting the link for the next *Unconfirmed* payment you have the ability to confirm or reject payment.

By clicking Confirm/Reject the screen displays the Care Package Line items you will be paid for.

The type of amendment you can send is solely to do with the Service User's stay at the Home. If they are deceased or move out you can communicate this so the Payments Team will be able to amend to payments to avoid an overpayment scenario. Simply enter details of the Service Users end and click *Reject*.

By pressing the *Reject* button you are passing information to the Payments Team, it will not stop any payments being made. You will still need to send a Death Notification Conversation through to the Brokerage Team, but by passing on this information to the Payments Team, it will prevent you being overpaid.

11. Glossary

Care Package Line Item – Service Agreement

Change Requests – When a Provider updates a Contact, Organisation or Service details that are sent through to NCC staff to accept or reject

Contract – The Overarching Contract for Services provided issued by the Procurement Team

Contract Documents – Where the ISO appears in the Portal

Conversations – The method to communicate in the Portal with various NCC Teams with Actions

Scheduled Payments – 4 weekly automatic payment paid 2 weeks in advanced and 2 weeks in arrears

Service Level – The different levels in which services are provided – Residential Long Term, Nursing Long Term, Residential Long Term NCC Top Up, Nursing Long Term Physically Disabled.

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