eBrokerage

Norfolk County Council

eBrokerage guidance for The Brokerage Service

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Contents

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Overview

This Guide is for the use of the Brokerage Service. It takes you through the process of using eBrokerage to source a Home Support package of care (POC).
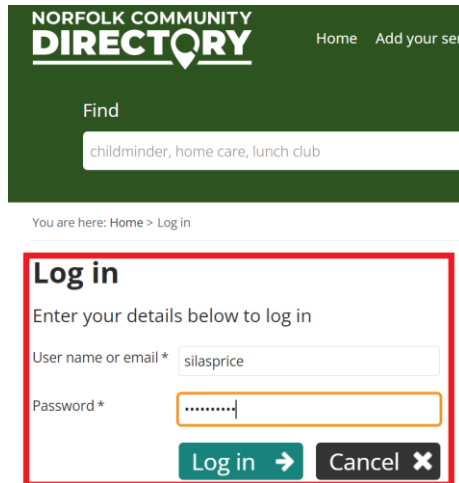
A separate Guide is available for sourcing Residential & Nursing Care.

Please visit the Marketplace eBrokerage webpage for more details of the project.

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Getting Started

Once you have been set up on the system, you can log in at https://norfolk-master.occsites.co.uk/

Bookmark the page in your web browser - Chrome is the recommended browser.
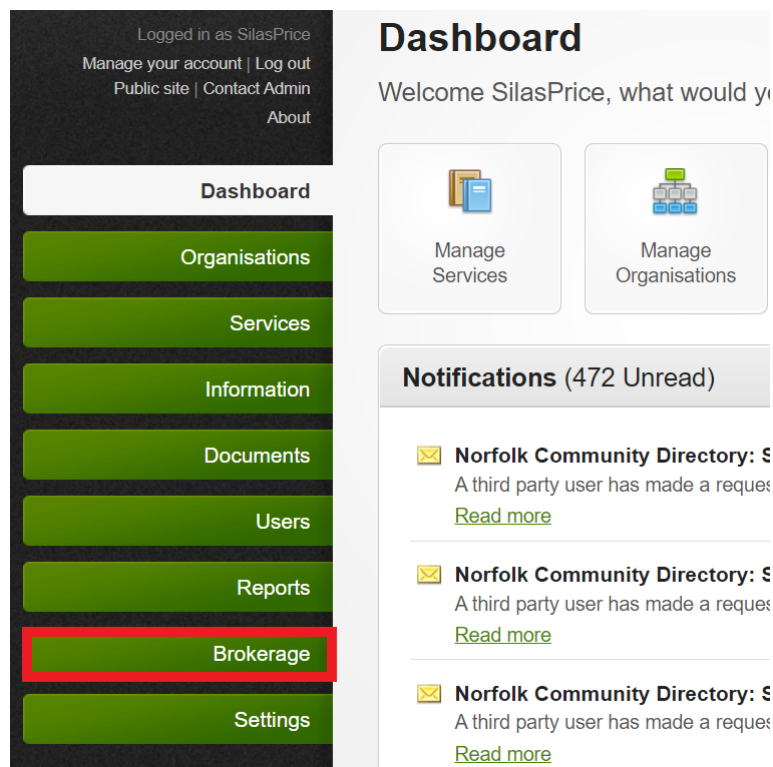
Once you log onto the system you will be taken to the Dashboard. There are menu options on the left-hand side of the page. The Sourcing Officers will mainly use the "Brokerage" tab, toward the bottom of the menu.

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Create a New Package

First Select "Brokerage" followed by "Manage Packages" directly beneath the Brokerage tab. This will open a new page, showing the list of packages that have been previously entered into the system.

To start the sourcing exercise, select the "Create a new package" tab, above the list.

A new page will open that will need to be populated, using the drop down menus

1. **Local Authority** – this will **always** be "Norfolk County Council".
2. **Service Type** – For Home Support Sourcing this will **always** be "Home care and help at home**.
3. **Service Level** – Select the relevant service level. There are 11 options to choose from depending upon the type of care required and whether block or framework.

Local Authority	*	Norfolk County Council	⌄
Service Type	*	Home care and help at home	⌄
Service Level	*	Home Support Framework	⌄

Check your service type and s... ...e after t

Home Support Block
Home Support Block - Double assist
Home Support Day sits
Home Support EHSS
Home Support Framework
Home Support Framework - Double assist
Home Support Live in Care
Home Support Mental Health Provision Specialism
Home Support Night Sit
Home Support Night Sleep
Home Support Self Funded

Package Reference *

Client Reference

Terms and Conditions

Client Accepts Terms And Conditions? *

4. **Package reference** is always structured as, for example: **SP 123456789 03/03/2022.** Your Initials (spacebar) LAS Number (spacebar) Date e.g., 03/03/2022 (always use the date format shown by your computer clock).
5. **Client Reference** is the LAS Number
6. Finally, accept the Terms and Conditions

Add a new package

Enter the basic details of a new brokerage package.

[Create this new package] Back to list

Profile

Local Authority	*	Norfolk County Council	⌄
Service Type	*	Home care and help at home	⌄
Service Level	*	Home Support Framework	⌄

Check your service type and service level selection before continuing as they can't be changed after t

Package Reference	*	SP 123456789 03/03/2022
Client Reference		123456789

Terms and Conditions

Client Accepts Terms And Conditions? * ☑

Data Protection & GDPR

Adding Groups and Users

Further down the page you will see the 'Subscriber List'. There is no need to add or change anything here as the system will do this automatically. All Sourcing Officers will automatically be subscribed to all packages. "Subscribed" means that the packages will be visible to everyone else, so if a Sourcing Officer is on leave, the packages that they have sent out can still be accessed and processed accordingly. (See Appendix 3 for more details).

Finally, select the "Create this new package" tab, at the bottom of the screen.

It is important to note that once you press "Create this new package" you will not be able to amend any of the selections you have made on this page. You will need to start again by clicking "Create a new package" or "Duplicate Package". (See Appendix 2 for further details on 'Duplicating Packages').

Edit Package

You will now see a new page with 9 tabs near the top. The four tabs most relevant to Brokerage are Profile, Requirements, Additional Information and Services.

We will now fill in each of these 4 tabs, starting with "Profile".

The "Profile" tab has data boxes to be completed. Enter the location (postcode) and start date. You can leave the remaining boxes blank. "Request offer?" is automatically filled in for you.

When you are ready select the "Save your changes from this tab" button above the Profile data.

Next, move on to the "Requirements" tab and select the "Add requirement(s)" button.

This will open a pop-up box with a drop-down list of 6 requirements to choose from. Most of these are optional. **However**, you **must** select and add "**Able to provide care from the selected start date**". This will allow you to negotiate a start date with the providers. (See Appendix 4 for further details).

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The requirement will appear within the "Requirements" tab. Enter the preferred start date for the package of care. You must click "**Negotiable**" – this will allow the providers to reply with a potential start date they can offer.

Package Details Profile Requirements Additional Information

Save your changes from this tab   Add requirement(s)…

Requirements

Able to provide care from the selected start date   10/03/2022

Negotiable ☑

Priority   Low

Remove requirement

You can then add any further requirements that are **essential** to the POC.

For example, if this POC needs a male or female carer, select "Gender-specific carers". In this example we will select "Female only". If the client would prefer female carers but is willing to accept male carers, if necessary, click the "Negotiable" box.

If you have made a mistake and no longer need a requirement, select "Remove requirement" button.

For a full list of all available "requirements" that can be chosen, see Appendix 5.

When you are ready, click "Save your changes from this tab" button above the Requirements data.

Package Details Profile Requirements Additional Info

Save your changes from this tab   Add requirement(s)…

Requirements

Gender-specific carers   Female only ⌄

Negotiable

Priority   Low

Remove requirement

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Now move on to the "Additional Information" tab.

1. In the "Care Required" box, enter the POC information. For example: AM 30 mins x 7.
2. Communicable diseases: for example, Covid. If there is no data required here, click the "Remove additional information" button. This box will then be removed.
3. If the request is for a Hospital Discharge, select "Acute" or "Non acute". If the request is not hospital related, you can click "Remove additional information" button. This box will then be removed.
4. Time Specific Care: as required or type in "n/a" or "not applicable".
5. Town/Village: for example, Norwich.

Finalising the Package

Now that we have finished building the package of care, we can click on the "Services" tab. This will open the "**Services**" page.

Then click on the "Initiate selection from Algorithm" button . This searches the system and identifies which providers work in the requested area and can also provide the "framework" services and other criteria selected on the previous tabs.

A list of possible providers who satisfy the criteria will appear in the centre of the screen. In this example, the "Professional Care Company (PCC)" has been identified as working in the Norwich area.

If we select the "Add Services" button, the "Manual Service Selection "will open. This lists any additional providers who may not be identified as working in the area but whom we may wish to contact in case they are able to put in an offer. Click the tick box to the right of the screen to select a provider (in this example "Care 4 all" will be selected) and then press "Back to package".

Manual Service Selection - Brokerage Packages

Tick/un-tick the box next to any service to add/remove it from the package with reference 'SP 12345678 03/03/2022'.

Back to package

Showing 1 to 2 of 2 entries

Search:

Service Name ▲	Organisation Name ⇅	Service Type ⇅	Primary Client Group ⇅	Selected?
Care 4 all	Love 4 Care Home Support	Home care and help at home		☐
We Really Care	Love 4 Care Home Support	Home care and help at home		☐

Show 10 entries

First   Previous   **1**   Next   Last

You will now be back on the "**Services**" page and will see that "Care 4 All" is now above "Professional Care Company (PCC)" in the list of providers.

Export Services | Initiate selection from Group… | Initiate selection from Algorithm | Add Service(s) | Finalise and send to providers…

Services

The list of services chosen by initiating from algorithm, along with any manually selected services.

Select all   Deselect all

Showing 1 to 2 of 2 entries

Details ▲	Indicative Cost	Comparisons ⇅	Ranking ⇅	Selected?
Care 4 all - Love 4 Care Home Support Any third party recipients for notification? ✔		N/A	0	☑
Professional Care Company (PCC) - Love 4 Care Home Support NR35 Any third party recipients for notification? ✔		0/0	0	☑

When the "**Finalise and send to providers**" button is clicked, a box will appear, asking to "Finalise Package". Here you can change the "**Response required by**" box to a different date and time.

Important: This is the amount of time Brokerage are giving the providers to respond. **You will not be able to accept any offers that are made until either this period of time has expired, or all the providers approached have responded.** So, for a hospital discharge you will need to set this response time for two hours hence. See Appendix for more details. You can also tick "Mark as high priority" if the request is urgent.

Press the "**Finalise and send to providers**" button.

This will generate an email with a link, which our selected providers will now receive. By clicking on the link, they will be taken to the provider portal side of eBrokerage where they will be able to look at the POC criteria and decide whether they would like to make an offer on the request or decline it.

Once you have clicked "Finalise and send to providers", you will be taken back to the "Services" page. The "Response Status" to the right of the provider details displays the current status of the providers responses.

Package Details Profile Requirements Additional Information Search Options Subscriber List Notes Documents Services Metadata

Export Services...

High Priority? No
Responses Required By 04/03/2022 16:16 Modify response deadline...

Services

The list of services that have been invited to respond and the current state of their response.

Showing 1 to 2 of 2 entries

Service	Selection Criteria	Reqs	Quality Score	Price	Price Score	Response Score	Response Status
Care 4 all - Love 4 Care Home Support	0	0/1	0.00%		N/A	N/A	Awaiting Response
Professional Care Company (PCC) - Love 4 Care Home Support	0	0/1	0.00%		N/A	N/A	Awaiting Response

Show 10 ∨ entries

First Previous 1 Next Last

Awaiting Responses

So, we have now sent the request and we now wait for responses to come back from the providers. If we click on the to the Brokerage tab and select "Manage Packages" in the main menu, on the left hand side of the page, the "Brokerage Packages" page will appear. The list of POC's that have been sent out to providers are listed on this page. On the right-hand side of the package reference details, the "Status" column is displayed.

To the left of the "Status" column is the "Offers" column. This displays when an offer or rejection has been received.

The Green Tick means: "Responses Indicating Acceptance"

The Blue Arrow means: "Responses submitted"

The Red Arrow means: "Services sent to"

When all the providers have responded, the "Status" will change to "Awaiting Decision".

In the "**Package Ref**" column on the right side of the page, click on the package you wish to open and this will open the "Edit Package" page, listing the tabs we used earlier to select criteria.

To check the offers we have received, click the "Services" tab.

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The "Response Status" column, to the right-hand side, will display the providers responses. Clicking on the "View Response" button within the column, will open the response from the selected provider.

Services

The list of services that have been invited to respond and the current state of their response.

Showing 1 to 2 of 2 entries

Service	Selection Criteria	Reqs	Quality Score	Price	Price Score	Response Score	Response Status
Care 4 all - Love 4 Care Home Support	0	0/1	0.00%		N/A	N/A	**Completed With Rejection** View Response
Professional Care Company (PCC) - Love 4 Care Home Support Last awarded Home Support Framework package: 02/03/2022 Awarded packages in last year: 1	0	1/1	100.00%		N/A	N/A	**Completed With Acceptance** View Response

Show 10 ∨ entries   First   Previous   **1**   Next   Last

Toward the top of this page there are three tabs. Click on "Service Response" tab and the details of the providers response will be displayed.

In the "Requirements" section, if there are any "Negotiation Notes" these are displayed to the right of the requirement details.

The "Placement Response" decision on whether the service can provide to the client is located at the bottom of the page.

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Making a Decision

Select "Back to brokerage package" at the top of the screen, to return to the "Edit Package" page and select the "Make decision" button above the "Package Details".
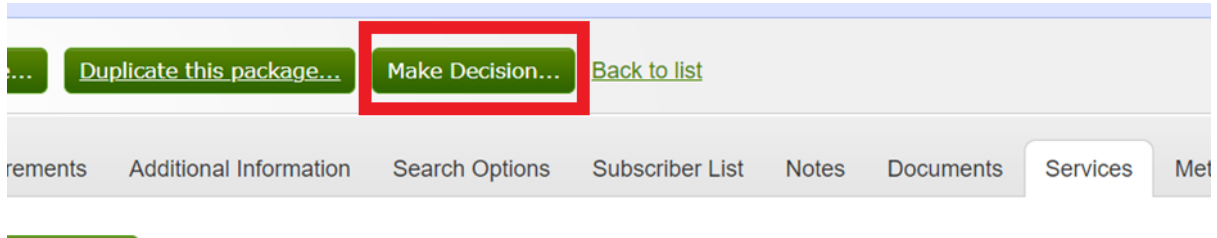
A new box will appear.

- In the "Service To Accept" drop down box, select the service that has been chosen.
- In the "Decision Source" drop down box, select the appropriate decision maker.
- In the "Primary Decision Reason" drop down box, select the primary reason for the award.
- If there are additional reasons for the decision, these can be selected in the "Additional Decision Reasons" section. Multiple reasons can be selected by holding the Ctrl button on your keyboard and clicking on the appropriate reasons.

Finally, click the "Make Decision" button at the bottom of the box.

Important: Note that the "Make Decision" will not be available to click unless all providers have responded (either yes/no) or the response time has expired. (See Appendix 1 for further details).

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The eBrokerage system will generate an email to confirm with the awarded provider that they have successfully won the package.

If we click on the to the Brokerage tab and select "Manage Packages" in the main menu, on the left-hand side of the page, the "Brokerage Packages" page will appear. The "Status" of the package will change to display "Complete".

The sourcing exercise using eBrokerage has now concluded.

To request a contract, a case note can now be added to LAS and a notification sent to Brokerage Contracting, as per the current Brokerage process. The contract and assessment will be added to the Provider Portal, as per the current Brokerage process.

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Appendices

Appendix 1 – "Response required by" & "Modify response time"

In order to give all providers an equal chance to offer on packages, a response time is created by the system and amended by the Sourcing Officer. This is the amount of time that the providers have in which to respond and should correspond to the Service Request sent through in LAS. Such as a 2 hour response time for a Hospital Discharge POC, or a 24 hour response time for a General Home Support POC.

Note: You will **not** be able to accept any of the offers that come in until either all the providers have responded (regardless of whether accepting or declining the offer) or the response time has expired. This eliminates the "first come first served" approach of the Sourcing Officer accepting the first offer they receive. Also, even if no offers are received, the POC will remain active on eBrokerage until the response time has expired. Therefore, please be careful to set the correct response time when sending out the request.

……….

If you have sent out the request with the wrong response time, or you need to adjust the response time for some reason, you can use the "Modify response time" setting, in the "Edit Packages" page, to change the allotted time. However, this will result in all the providers receiving another email for the same POC, which may cause confusion.

In the "Services" tab, click the "Modify response deadline" button to open a pop-up box. Here, you can adjust the "Response required by" and then press "Modify response deadline". This will send out a new email to all the providers in the original list.

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The provider will now receive an email, with the original package reference and an additional note advising them that the response time has been modified.

Norfolk County Council <onlineforms@directory.norfolk.gov.uk>   10:30 (0 r

to ▾

TEST MODE - TEST MODE - TEST MODE
The package 'SP 123456789 11/03/2022' response deadline has been modified.
The new deadline is 14/03/2022 12:21

You are being notified because the following services are involved in the brokerage process for this package.
To view your responses use the following URLs

Professional Care Company (PCC) (Love 4 Care Home Support)
https://norfolk-master.occsites.co.uk/Admin/Brokerage/Responses/65022

Appendix 2 - How to Duplicate Packages

If for some reason you need to amend and re-send the request – for example, the practitioner has changed the POC to 3 calls per day instead of 2, or if you have noticed that you made a mistake or an omission on the original sending, then you can use the "Duplicate this package" option. In the "Edit Package" page, click on the "Duplicate this package" button.
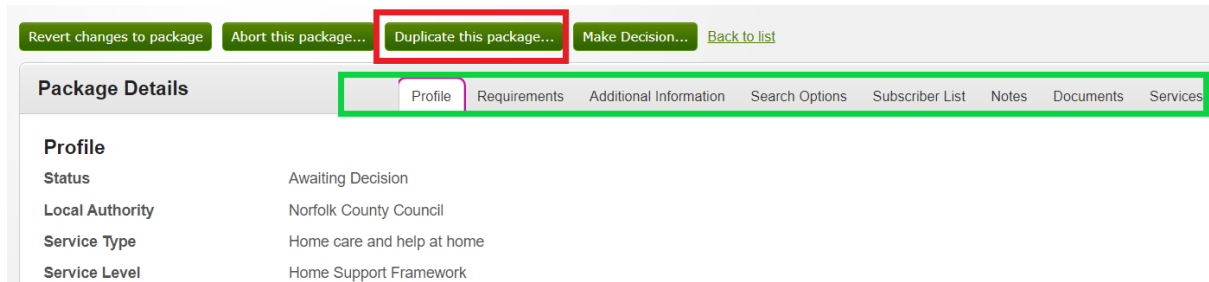
This will open a pop-up box, which allows you to amend the "Local authority", "Service type", "Service level" and "Package reference", using the drop down boxes.
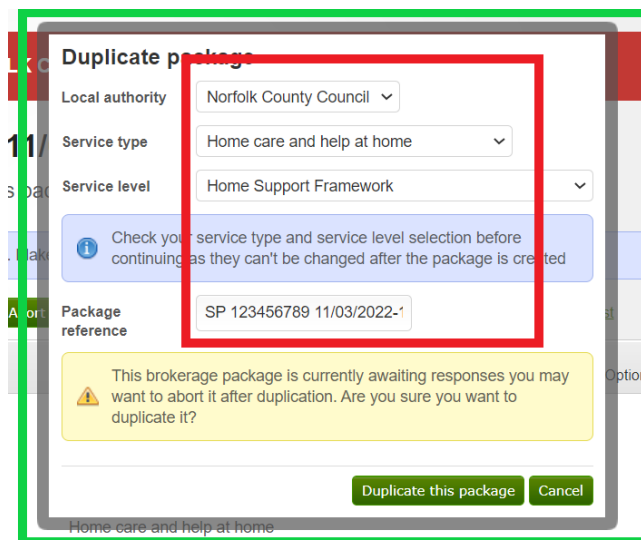
Once you click to confirm the "Duplicate this package" button, at the bottom of the box, you will be back at the start of the process. This is essentially as if you have just clicked on the "Create a new package" button, as we did at the start of the sourcing process on page 5 above.

However, note that the system has filled in all the tabs for you, as originally completed, except that the "Package reference" box, in the "Profile page" now has two date stamps – the original date and today's date. You can now amend the other tabs as required and go through the process outline from the start of this guide.

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Appendix 3 – Subscriber List

The subscriber list is important. Subscribers can see the packages that have been added to the system. This section will be automatically completed by the system so there is no need to add/change any details here.

If you need to add a new user, Click on the "Subscriber" tab, in the "Edit Packages" page. This will open the "Subscriber List" page. At the bottom of this page, click on the "Add LA users" button A pop-up box will appear. In the "Foreman" box, type the name of the person you are looking for. Click the "Search for LA users" button within the box. A list of names will be displayed, select the name of the user you would like to add from the list and then click the"Add selected LA Users" button at the bottom of the box.

Appendix 4 – Add Requirements – "Able to provide care from the selected start date"

As most LAS Service Requests are sent with a start date of "today" or "tomorrow" (essentially asking for care to start "As Soon As Possible") and as it is often very unlikely to find a provider able to offer such a rapid start, almost all start dates become a matter of negotiation. Often a provider will offer a start date of the following Monday or even the Monday after. We therefore need eBrokerage to allow us to negotiate a start date with the providers – by allowing each provider to confirm that they can either offer the required start date (unlikely because of rapid start) or offer the best start date they can provide. If multiple offers are received, these start dates may become important factors in deciding the winning offer.

Appendix 5 – Matrix of Requirements

The following is a list of all the "Requirements" that can added.

Type of Requirement	Specific Requirements
Start Date	Able to provide care from the selected start date
Specific Times	Able to provide care within the specified times
Gender- specific carers	Female only Male only Mixed
Known hazards	Risk to self Risk to others History of violence History of sex offence Other (see notes)
Medical requirements	Parkinson's Stoma care Peg-feed Other (see notes)
Additional Requirement	Any other requirement

Note that to select more than one requirement from a list at time at the same time, press CTRL + Click as you click on each option you wish to add.

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Appendix 6 – Rejection Reasons Including Block Refusals

If the provider is unable to offer on the package, they will select a "Rejection Reason". This will bring up a pop-up box with a list of 9 reasons to choose from. The first three are the universal reasons for Framework providers. The following 6 are the Block Refusal reasons for the Home Support Block providers, as listed in the Block contracts. When following the current Block Refusal process on ContrOCC, you will be able to add the reason given by the provider.

Documents

These are a list of files attached to the package (that all respondents can see) or that you have added to this response (that only you and the Loca

Add document…

1) The person does not meet our eligibility criteria
2) We cannot accept the placement due to its complexity
3) We do not currently have any availability
Block Refusal HS) Insufficient capacity at this time.
Block Refusal HS) Only able to offer partial/alternative package unacceptable to NCC.
Block Refusal HS) Over block hours.
Block Refusal HS) Unable to commence package by a set date.
Block Refusal HS) Unable to provide calls within stipulated time frames.
Block Refusal HS) Unable to provide time critical calls.
(Resi) Test 1
(Resi) Test 2
(Resi) Test 3
(Resi) Test 4
(Resi) Test 5
(Resi) Test 6

Notes

These are a list of notes attached to t   is response (

Add a new note

Placement Response

Your decision on whether your serv

Placement Response   *

Rejection Reason

Rejection Note