

Provider Training Manual

Residential & Nursing Brokerage Module

Version 2

Residential & Nursing Brokerage Module

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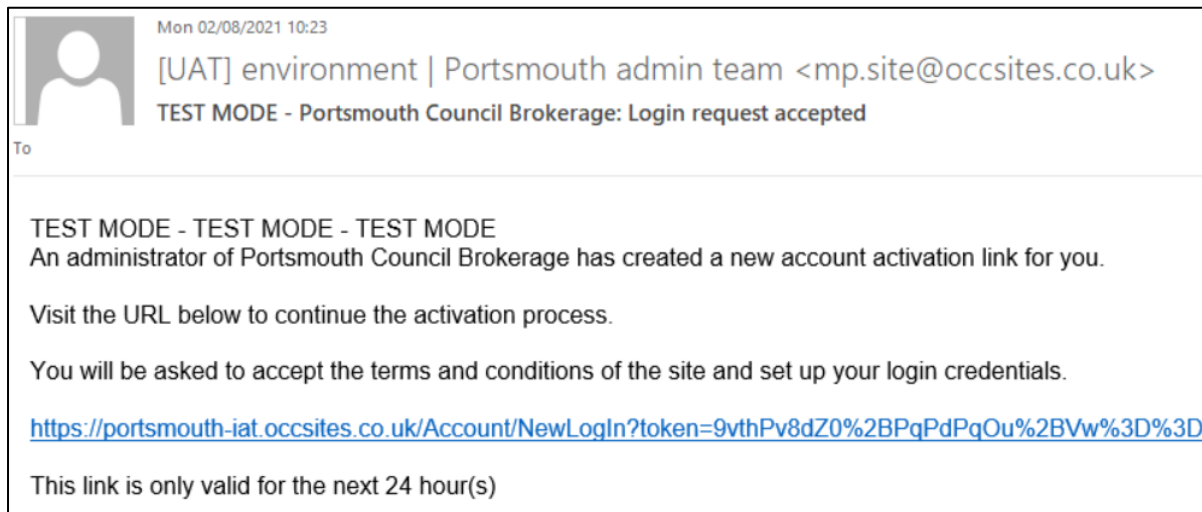
Brokerage Overview

A brokerage package comprises of the care requirements for an individual client who has been assessed to require a residential or nursing placement. The package details will be compared to information held on the Health & Care Portsmouth brokerage module about relevant providers. Providers that match the package's brokerage requirements and specific selection criteria will be notified that the Council would like them to bid for the residential or nursing placement.

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Activating your brokerage account

Once you have been set up as a user on the brokerage module you will receive an email requesting you to activate your account. **The link within the email is only valid for 24 hours.** You will not be able to access the brokerage module unless your account has been activated



New Login

User Details

User Name: Sunshine

Email: adults.adultsproviderportal@portsmouthcc.gov.uk

Password

New passwords must follow all of these rules:

- Have 8 or more characters
- Have a mixture of lower case and upper case letters
- Have 1 or more numbers
- Have 1 or more symbols, e.g. # or %
- Not be a password you've used recently

New Password *

Confirm New Password *

Secret Word

New secret words must follow all of these rules:

- Have 8 or more characters

Secret Word

Confirm Secret Word

Terms and Conditions

If you would like access or have any problems please send an email to: adultsbrokerage@portsmouthcc.gov.uk

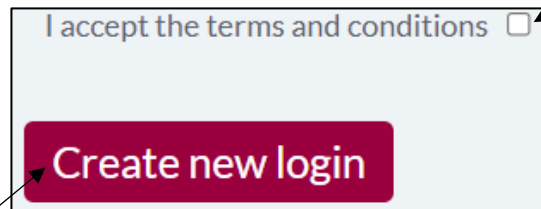
Click on the link to activate the account. You will now need to set a password and secret word for your account.

Create and confirm your password

Create and confirm a secret word

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Before your account is activated you will also need to accept the terms and conditions.



A screenshot of a registration form. At the top, it says "I accept the terms and conditions" followed by an unchecked checkbox. Below this is a red button with the text "Create new login". Two arrows point to the checkbox and the button from external text blocks.

Click on the 'Create new login' button.

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Logging in to Brokerage

Link: <https://portsmouth-live.occsites.co.uk/>

When you access the website you will be able to view the home page for the Health & Care Portsmouth Brokerage. From this screen you are able to navigate to the News and the Contact pages.

health&care portsmouth

Home News Contact

Log in View my shortlist

Welcome to OCC Market Place which is a seamless brokerage software solution that has been commissioned by PCC and CCG to help identify good quality, affordable services for the people of Portsmouth.

Requests for care will be forwarded to providers to find the best match to meet our client's needs. The client's care and support requirements will be described and advertised to providers and providers can select which clients they can help. PCC is then able to select the best option for the client using a standard criteria.

Notification will be sent to all providers who have responded to the support requirements.

The homepage is where you will also find the Log in button - click on the Log in button.

Log in

Enter your details below to log in

User name or email *

Password *

Log in Cancel

Forgotten your password?

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

If you are having problems related to your login please contact Portsmouth City Council Health & Care Adults Brokerage on adultsbrokerage@portsmouthcc.gov.uk

Enter your username and password and then click on the Log In button.

Secret Word

To complete the login process enter the specified characters from your secret word.

1st 3rd 4th

Log in

Forgotten your secret word?

You will then need to enter specific letters from your secret word, once entered click on the Log in Button

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Manage your account

Click on the 'Manage your account' link to open the Your Account screen where you can make changes to the core details of your account e.g. Address, phone and email details.

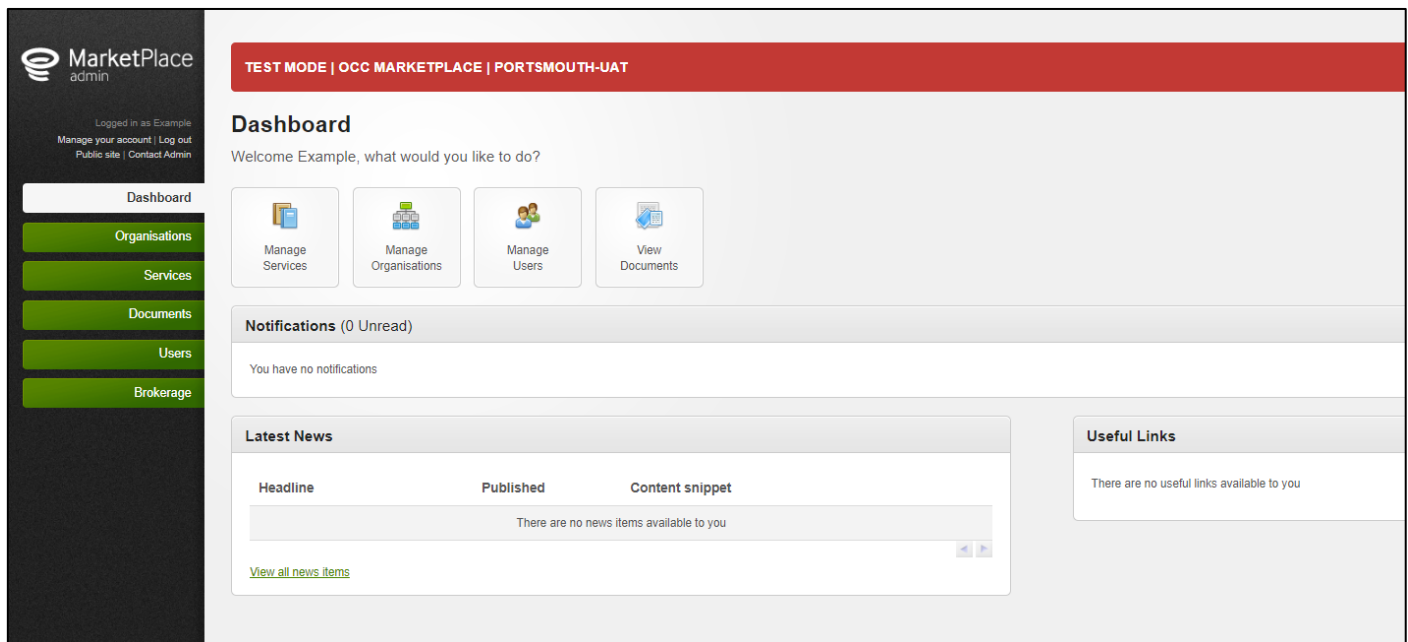


You are also able to change your password and/or your secret word.

You also have the option to configure your notification preferences however please ensure that you do not uncheck *Receive emails about brokerage requests*.

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The Brokerage Dashboard



Notifications

The three most recent read or unread notifications are shown. The display shows a snippet of the notification text; click on the Read more link to reveal the text in full on the View a notification page. Click on the view all notifications link to open the Notifications Inbox page listing all notifications.

Latest News

Shows the Headline, Date and the first 150 characters of such news items the current user has permission to view. Click on the Read more link to show the news item in full. Click on the view all link to view all news items.

Useful Links

Hyperlinks to external websites can be found here

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Managing Brokerage Responses

Click on the Brokerage button using the menu on the left of the administration screen and you will be taken to the Manage Responses page.

Packages details

Awaiting Response (1)

Response Complete (2)

Awaiting Decision (1)

Not Awarded

Awarded

All

Awaiting Response

Response sent within the last 12 months with the Awaiting Response or Response In Progress status are shown on this tab. The table lists all responses that are yet to be started or are in progress. Ideally you would complete each response.

Showing 1 to 1 of 1 entries, last refreshed: 22/10/2025, 15:55:26

Search:

Package Ref	Client Ref	Service Level	Service Name	Status	Brokerage Expiry	Priority?
01.12.24\00000000\AC&S\Res\Perm	000000000	Residential Placement	Kinross Residential Care Home	Awaiting Response	23/10/2025 15:54	No

The page contains a number of tabs, each of which presents a different view of the responses within a grouping. Certain tabs have a number in brackets that denote how many packages are listed on that tab.

Tab	Description
Awaiting Response	responses that are outstanding and you have not accepted or rejected the package
Response Complete	responses that you have either accepted or rejected but are waiting for the package deadline to pass
Awaiting Decision	responses that you have accepted and where the local authority is making a decision on who to award the placement to
Not Awarded	responses listed on this page include:- - ones that you have declined - the placement was awarded to another provider - the placement request expired before you accepted it
Awarded	All placements that you have been awarded are listed on this tab

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On each tab, you will find a list of all the packages that you have been asked to respond to. By default, the list will show the packages that are expiring soonest at the top.

If you manage more than one service that have been selected to receive this package then each service will appear as a row in the responses table with the same Package Ref.

Brokerage Response Filters

The brokerage responses are presented in a standard tabular list. The list can be filtered by entering your search criteria in the Search input box (found above the table) and ordered by any column by clicking on the column name.

Packages marked as high priority are shown on a row with a yellow background and with the Priority column containing "Yes". The user can choose to only show priority packages by ticking the "Show only high priority packages?" checkbox under the list.

Response Status filter

On the All tab by default, all packages are displayed regardless of whether they have expired. The list can be filtered by any response status by selecting from the drop-down list that appears in the field labelled "Show only responses with status" below the table of packages.

You could select any number of statuses, for example if you wanted to see all "Awaiting Response" or "Response in Progress" responses.

There are 8 possible statuses for a response:

Tab	Description
Awaiting Decision	Set when the brokerage expiry time has been reached, or when all providers have marked their response as complete
Awaiting Response	Set when the request is sent to the provider
Awarded	Set when the local authority has made a decision and the placement was chosen
Declined	Set when the provider has chosen not to offer their service to this client or the provider has withdrawn
Expired without response	Set when the package has expired and the provider did not complete a response

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Not Awarded	Set when the local authority has made their decision and the provider was not chosen.
Response Complete	Set when the provider marks their response as complete
Response in Progress	Set when the provider first saves their response. This status will remain in this state if the provider has not completed or withdrawn their response up until a decision has been made

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Review or Update a brokerage request

To update or review a package click on the package reference and you will be taken to a Brokerage Response page and presented with three tabs that are described in the following sections.

Response		Package Details	Our Response	Metadata
Local authority	Portsmouth City Council			
Package reference	01.12.24\00000000\AC&S\Res\Perm			
Client reference	000000000			
Service level	Residential Placement			
Expected start date	01/12/2025			
Beds required	1.00			
Frequency	Weekly			
Location				
Responses required by	23/10/2025 15:54			

Package Details

The Package details tab provides read only information of the placement request

Field	Description
Package Reference	Placement start date\clients nhs number\funding source\service category
Client Reference	Clients nhs number
Service Level	The level of service required for this client - Residential or Nursing
Expected Start Date	This is the start date that the council is working towards. This field may be blank
Beds Required	This is a system requirement and will show as 1
Frequency	This is a system requirement and will show as Weekly
Location	This field will be blank
Response required by	This is the date at which the package will expire, and providers must give a completed response by this date if they are able to offer a placement

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Our Response

The “*Our Response*” tab will detail the main package requirements together with supporting documentation and notes

Response Package Details **Our Response** Metadata

[Save your changes](#) [Save and Mark Response Complete](#)

Essential Requirements

These are a list of the essential requirements for the service to be delivered. If you can fulfil the requirement, answer "Yes". Any other requirements for the service will be based on the eligibility of your responses.

(a) Referral Can you meet all of the assessed care needs for this client based on the attached referral?

Can meet requirement?

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 Local Authority can see).

[Add document...](#)

Package Documents

- Test referral from [Download](#)

Notes

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

[Add a new note](#)

Referral Form

To access the referral go to to **Package Documents** and select **Download**

Requirements

The referral question has now been marked as Essential and will be displayed first and all other sections of the response will be hidden.

If you indicate that you **cannot** fulfil this requirement a popup will be displayed informing you that no further information is required and you can complete your response.

 You have indicated that you cannot meet one or more essential requirements, which means no further information is required and you can complete your response.

 Choose 'Change response' to change your response to those requirements or 'Complete response' to save and complete your response.

[Change response](#) [Complete response](#)

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If you indicate that you **can** fulfil this requirement then the rest of the response section will be displayed including any other requirements

For each of the Requirements you will need to select **Yes** or **No** from the dropdowns to indicate whether you are able to fulfil the placement request.

Save your changes

Save and Mark Response Complete

Essential Requirements
These are a list of the essential requirements for the service to be delivered. If you can fulfil the requirement, answer "Yes". Any other requirements for the service will be based on the eligibility of your responses.
(a) Referral
Can you meet all of the assessed care needs for this client based on the attached referral?
Can meet requirement? Yes

Other Requirements
These are a list of additional requirements beyond those that are essential. If you can fulfil the requirement answer "Yes". If you answer "No" and the requirement is negotiable, a comment box will be shown so that you can enter a message explaining whether you could fulfil the requirement with minor changes or if there are mitigating factors.
(b) Admission Date
01/12/2025
Can meet requirement? Yes
(c) Assessment Date
27/10/2025
Can meet requirement? No
Negotiation note
28th Oct pm
(d) Room Requirements
Single Room
Can meet requirement? Yes

If you answer "No" and the requirement has been deemed negotiable a note field will be displayed. You can enter a brief message that describes changes to the package that would allow you to fulfil the requirement or if you feel there are mitigating factors why you cannot satisfy this particular requirement.

Placement Response

When you have completed your response you are able to accept or reject the placement request from the Placement response drop down list.

If you accept the package you will be asked to accept the Council's Brokerage terms & conditions

If you reject the package, then you will be asked to provide an outline reason for the rejection and some text for further explanation.

Evaluation
Your response will be evaluated by the Local Authority using a number of factors, including those below. If a response is required, a box will be provided for you to add your comments, if no box is shown this is for information only.

Placements will be awarded based on a provider's ability to meet an individual's needs and placement cost (in line with the Care Act), evidenced by information given via the Brokerage process. The award will be subject to any further assessment a provider may need to undertake. Should the placement cost change after further assessment then the placement may need to go back through Brokerage as this may change the original evaluation. This will ensure that PCC remains open, transparent, and fair.

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

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Offer pricing

Offer

Details of the service you are offering to meet the client's needs as described. These fields may be pre-populated with values from the package details, however you can change them if appropriate.

Frequency

Weekly

Beds required

1.00

Unit price

Core price

Supplementary units

Supplementary unit price

Supplementary price

Response price

Supplementary costs explanation

B I U S X₂ X² " I_x

Paragraph

Expiry date

dd/mm/yyyy

Field	Details
Frequency	This will default to weekly please do not change
Beds Required	This will default to 1 please do not change
Unit Price	Enter the weekly <u>core</u> cost
Supplementary units	Enter the number of hours that you calculate you will need to supply over and above the core costs
Supplementary units price	Enter the unit price for delivering the supplementary service (eg additional support)
Supplementary costs explanation	Please enter information as to why you have included supplementary costs
Response Price	The response price is not editable but calculated by the system as the sum of

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	the Core Price and the Supplementary Price
Expiry Date	Please enter the date your offer expires

Once all selections have been completed scroll to the top of your screen and select **Mark response complete**

Once your response has been completed, then the “*Mark Response Complete*” button will be replaced by a “*Withdraw Response*” button that will allow you to alter your decision in the case where circumstances change.

Metadata tab

This tab displays details of when a package was created and by whom and also when it was last updated and by whom.

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