# Digital CHC – Provider Portal User Guide

20 March 2025

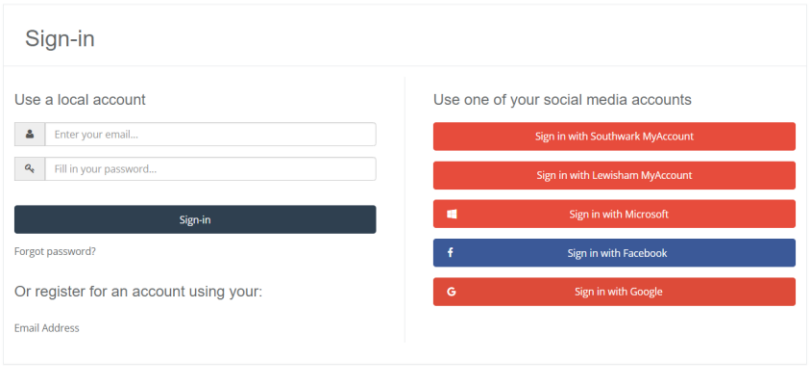
Document version 02

# Contents

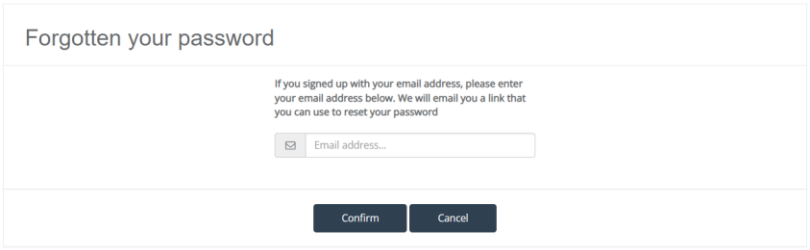
Signing In ..... 3
Service Confirmations ..... 4
Remittance Advice ..... 10
Patients ..... 12
Viewing, Downloading and Accepting IPA ..... 15
Manage Users ..... 17

## Signing In

Once the Care Provider's user's account has been verified they can sign in to the Provider Portal with their username (email address) and password.



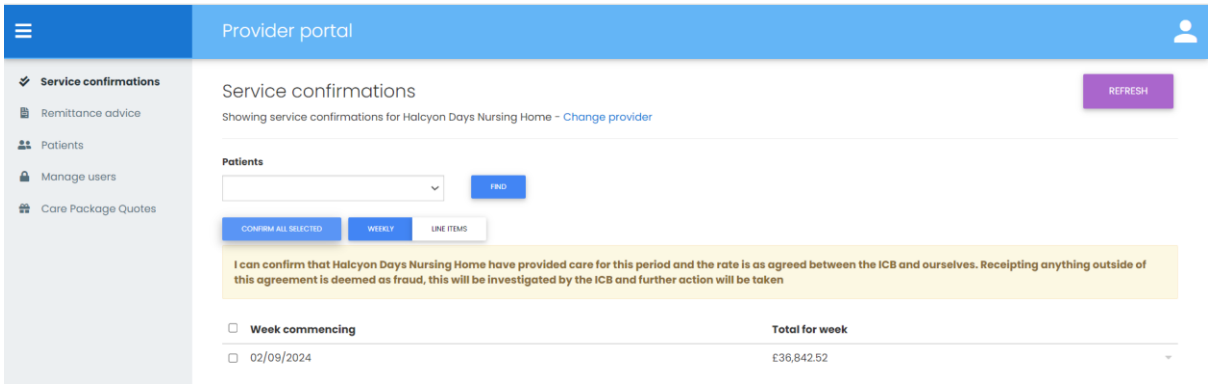

There is a "forgot password" option in the event that the user has forgotten their password:



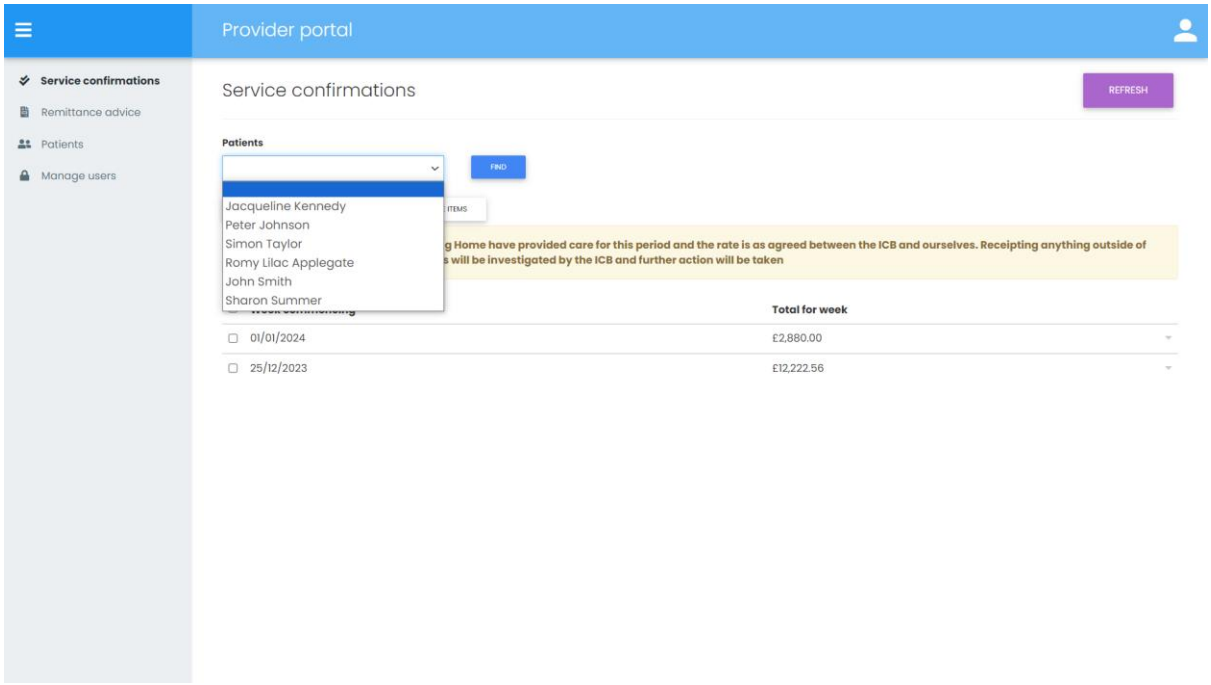

An email will then be sent with a link for the user to reset their password.

# Service Confirmations

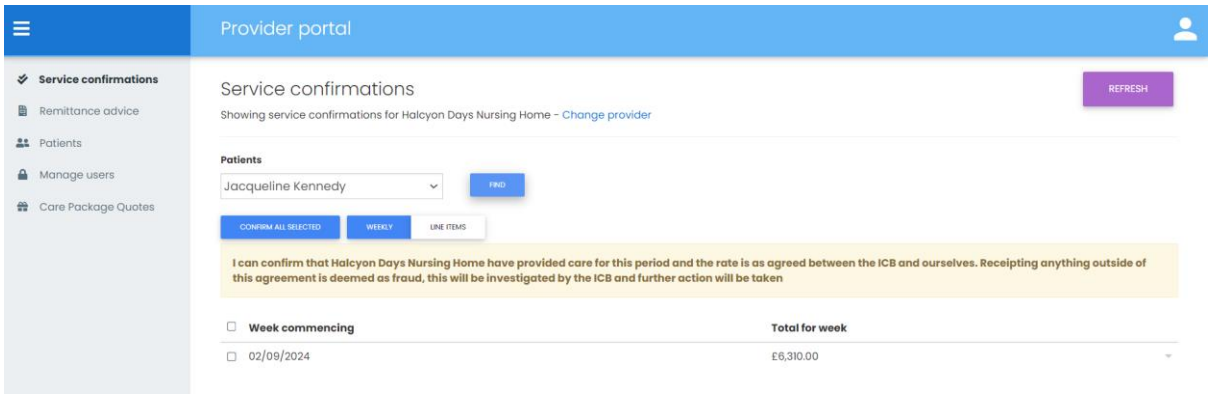
When you sign in you will automatically be taken to the “Service confirmations” page. This is where you are able to confirm the services that have been delivered for patients that have been placed with you from the ICB. This will include patients that receive FNC and full CHC services:




You can use the drop down option underneath the “Patients” field to filter for an individual patient:

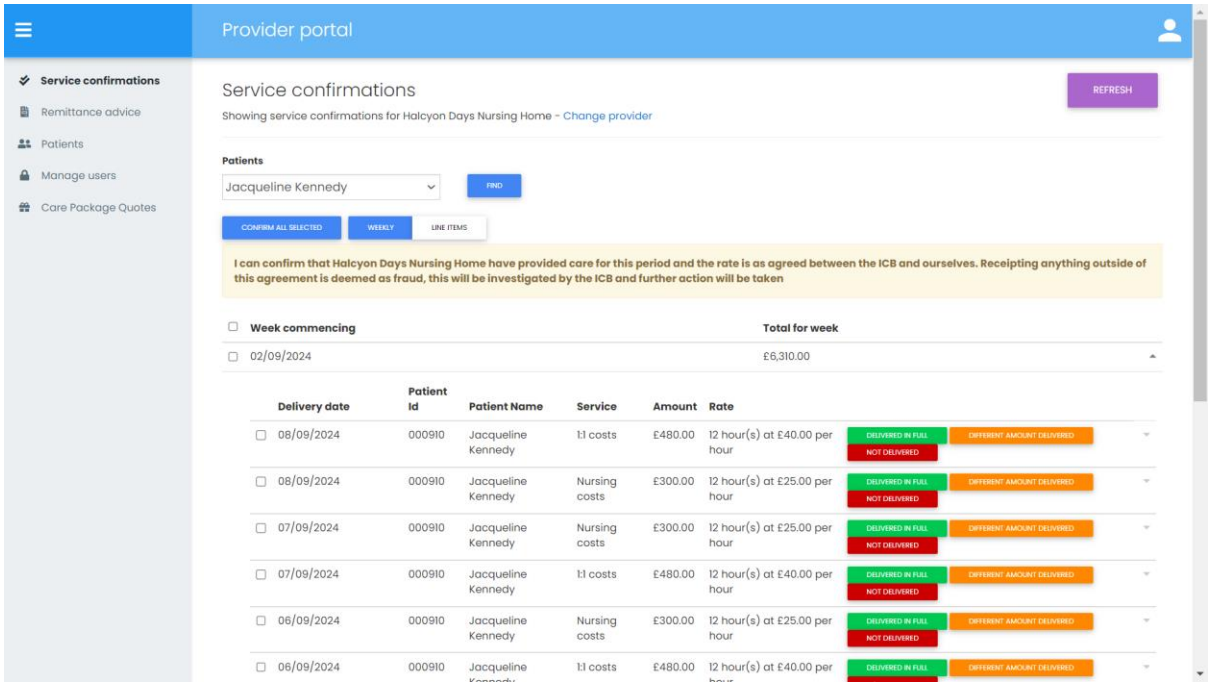


Click on any of the patient names and then click on the "**Find**" button. The screen will then show dates when services need to be confirmed as delivered for that patient:

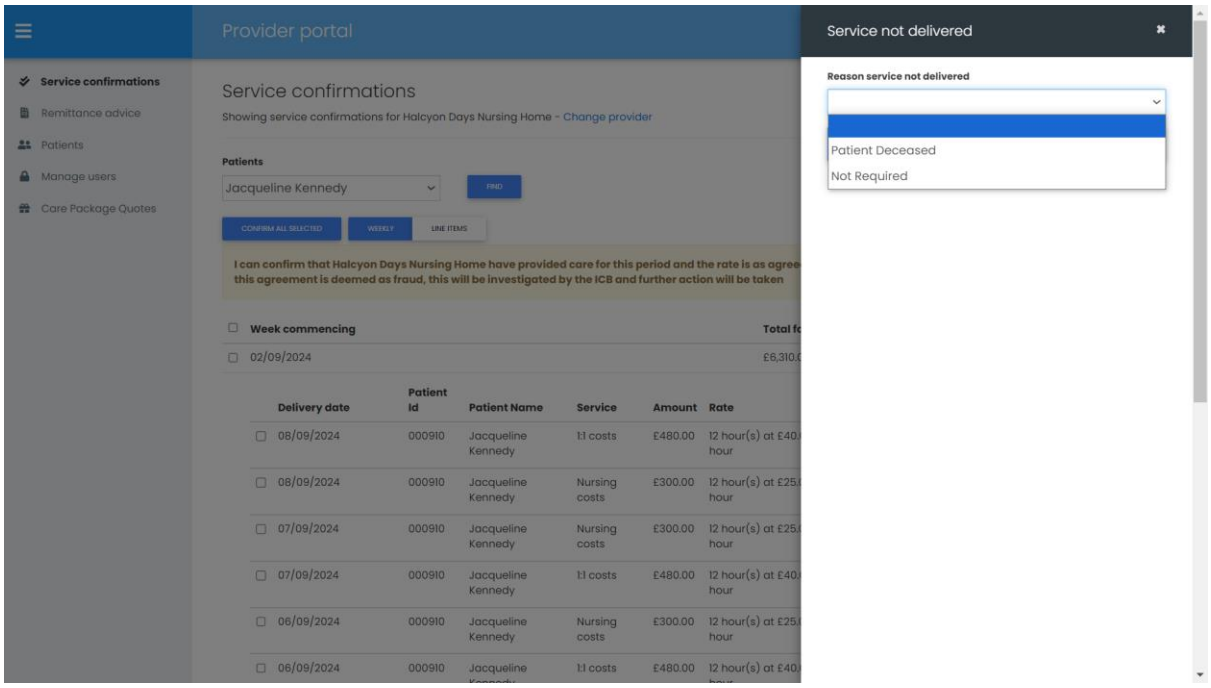



The dates are weekly dates with Mondays being the start date.

You can click to expand each week by clicking on the down arrow. The screen will then show the date range for that week:

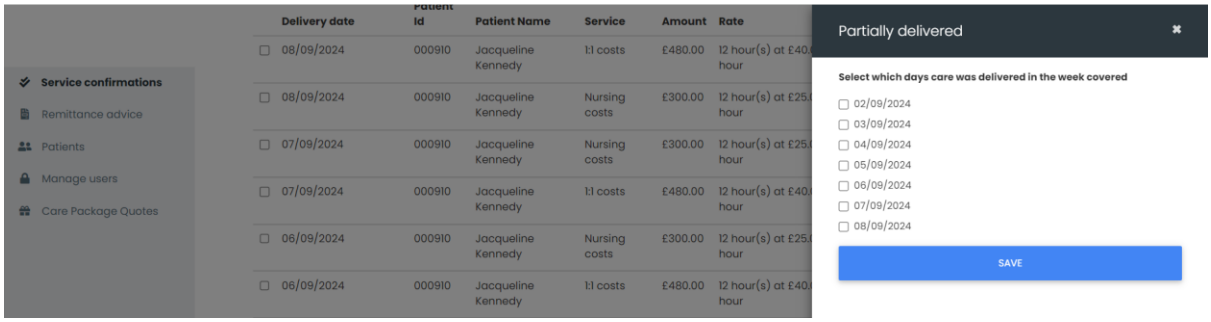


If services have **NOT** been delivered for any of the days then you can click on the "**Not Delivered**" button. You will then need to select the reason why the service was not delivered:




**Weekly Services – Partially Delivered**

If weekly services have been **partially** delivered for any of the days then you can click on the "**Partially Delivered**" button. You will then need to select the reason why the service was not delivered:



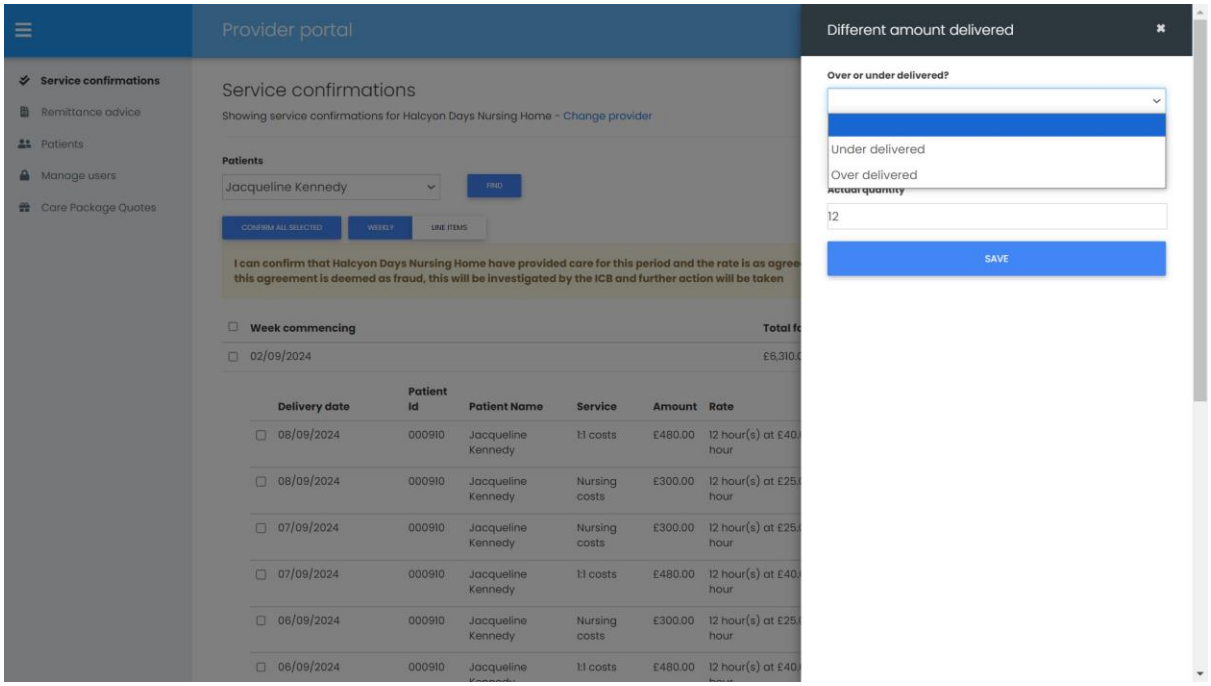

You can then select which days care was delivered during that week by ticking the specific days and then click on the Save button:

That week will then be removed from the screen as you have confirmed which days care was delivered.

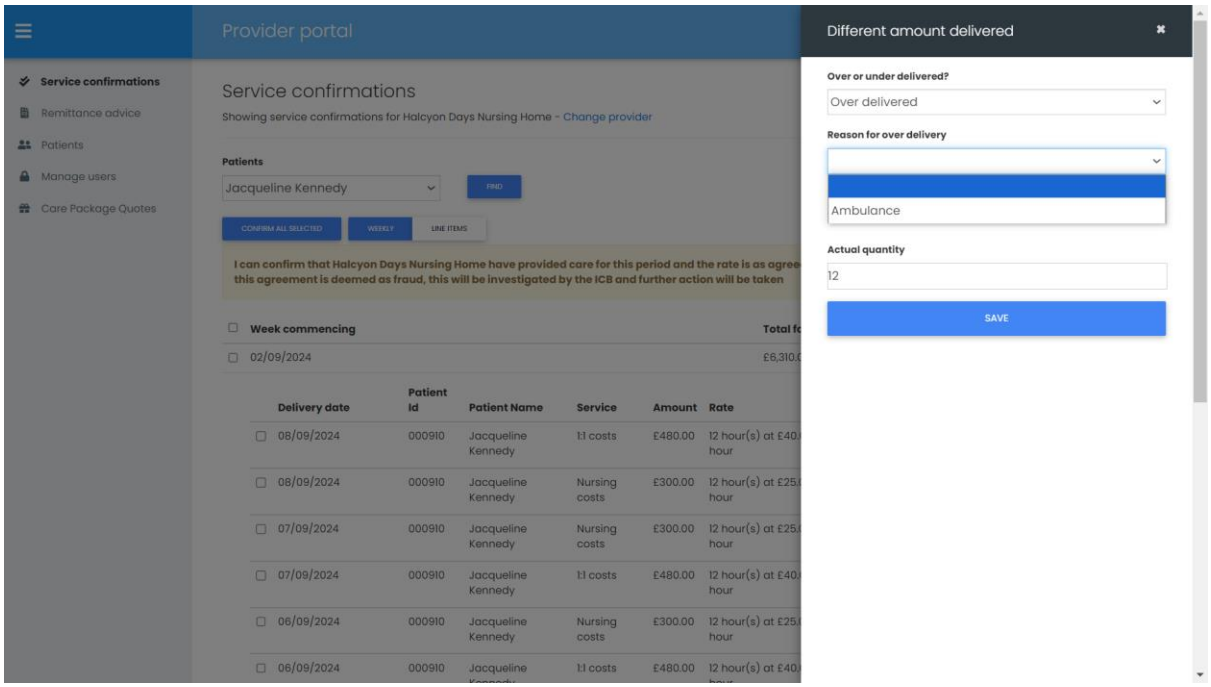
**Daily Services – Different Amount Delivered**

To record a different amount of the daily service delivered you can click on the **Different Amount Delivered** button.

You will then need to record if the amount was **under** or **over** delivered:




If the amount has been over delivered then you must record the reason why:

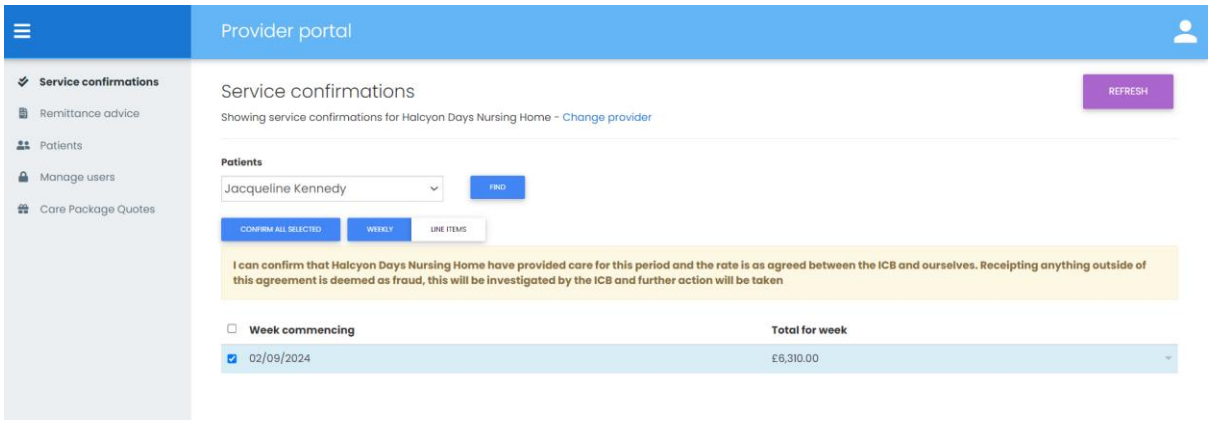



You must then record the “Actual quantity” and then click on the Save button.

The ICB will then be notified that you have claimed over delivery and they need to approve that before it can be paid.

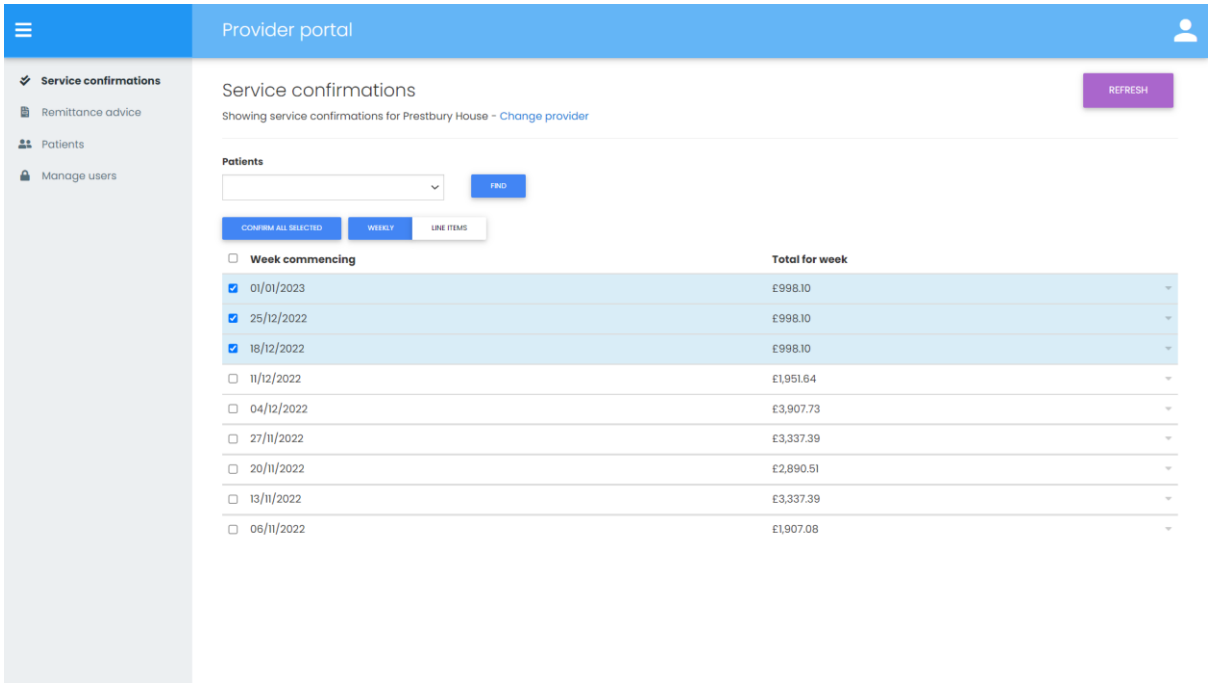
To confirm services that **have** been delivered you can either record this for a week or for several weeks.

To select a single week click the checkbox alongside the week:

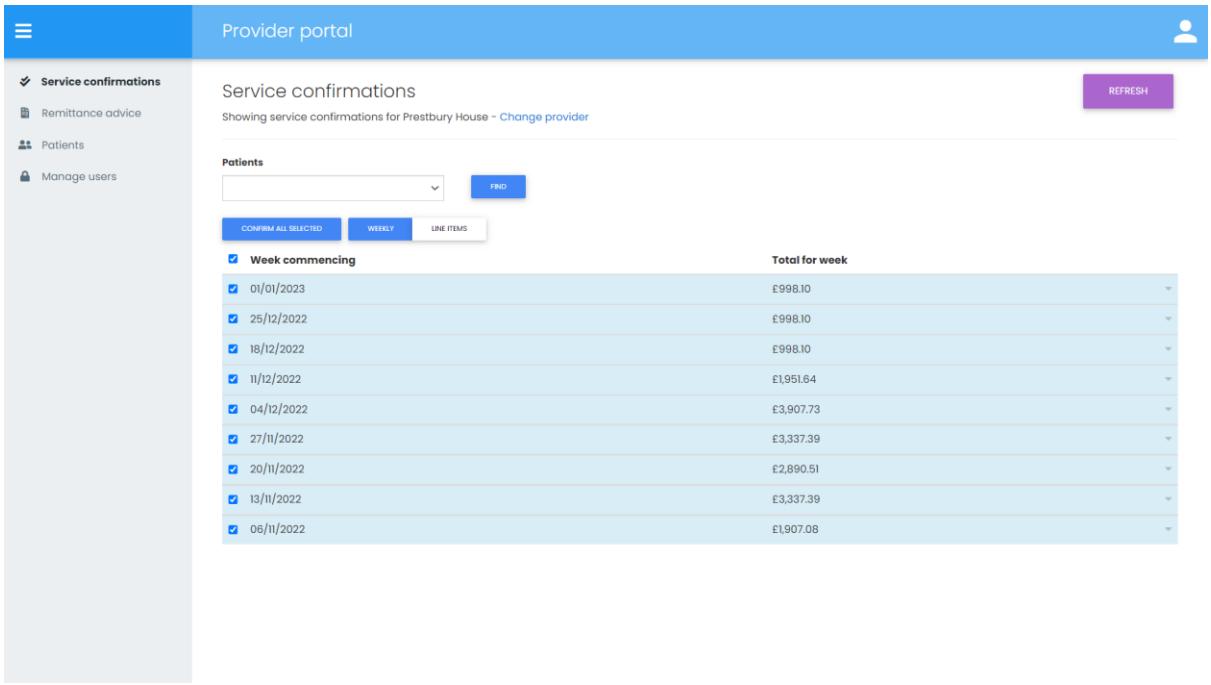



To confirm services have been delivered for that week click on the "**Confirm All Selected**" button and those services will then be confirmed. That week will then disappear from the list as you have confirmed services have been delivered and you don't need to do that again.

To confirm services have been delivered for several weeks click the checkbox alongside each week:



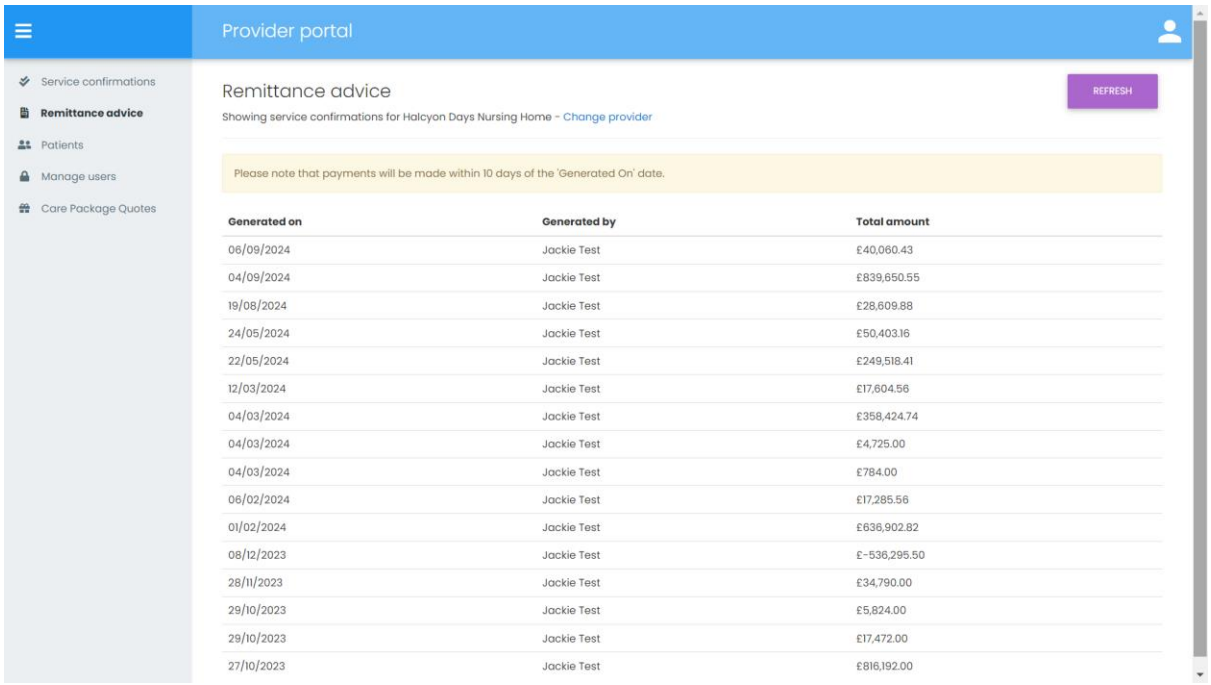
You can also select all weeks displayed by ticking the checkbox alongside the “Week commencing field”:




Once you have the relevant weeks selected click on the “**Confirm All Selected**” button and all of those services will be confirmed as having been delivered. They will then disappear from the list as you have confirmed services have been delivered and you don’t need to do that again.

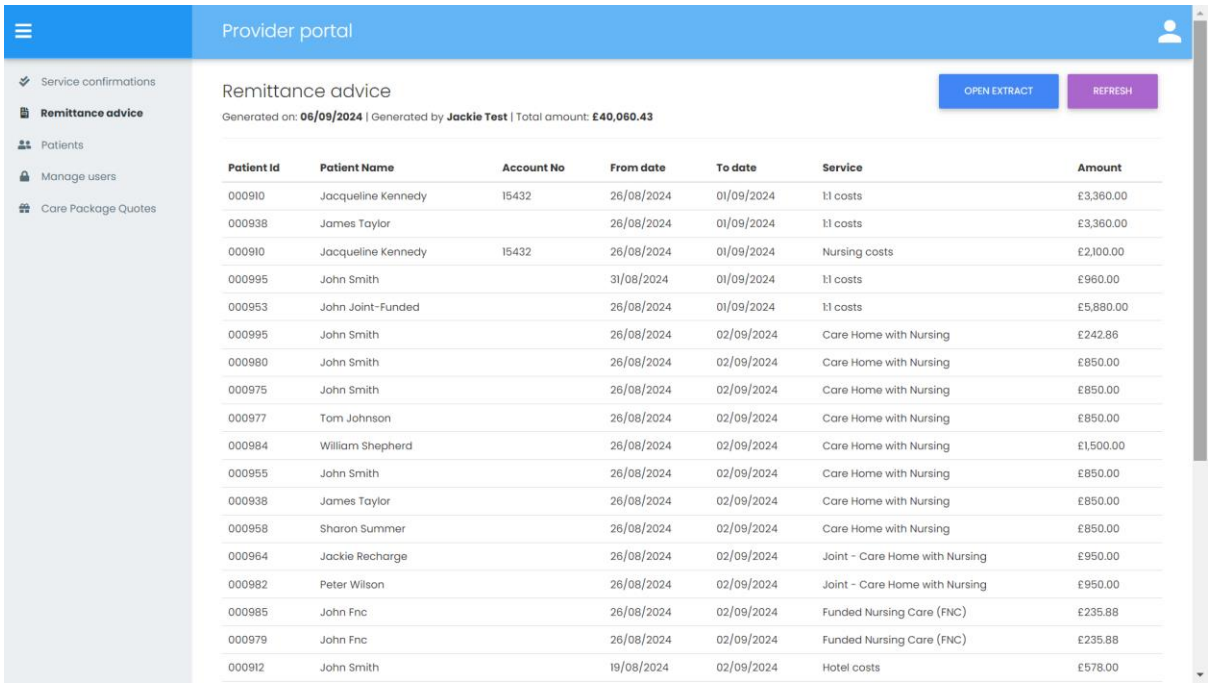
# Remittance Advice

The Remittance Advice screen will list any payment runs that the ICB have approved for payment:




| Generated on | Generated by | Total amount |
|---|---|---|
| 06/09/2024 | Jackie Test | £40,060.43 |
| 04/09/2024 | Jackie Test | £839,650.55 |
| 19/08/2024 | Jackie Test | £28,609.88 |
| 24/05/2024 | Jackie Test | £50,403.16 |
| 22/05/2024 | Jackie Test | £249,518.41 |
| 12/03/2024 | Jackie Test | £17,604.56 |
| 04/03/2024 | Jackie Test | £358,424.74 |
| 04/03/2024 | Jackie Test | £4,725.00 |
| 04/03/2024 | Jackie Test | £784.00 |
| 06/02/2024 | Jackie Test | £17,285.56 |
| 01/02/2024 | Jackie Test | £636,902.82 |
| 08/12/2023 | Jackie Test | £-536,295.50 |
| 28/11/2023 | Jackie Test | £34,790.00 |
| 29/10/2023 | Jackie Test | £5,824.00 |
| 29/10/2023 | Jackie Test | £17,472.00 |
| 27/10/2023 | Jackie Test | £816,192.00 |

Click on any of rows and you will see details of what has been approved for payment:

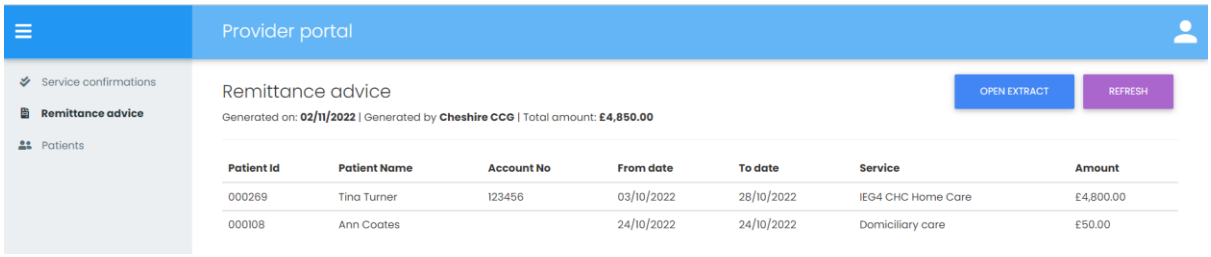



| Patient Id | Patient Name | Account No | From date | To date | Service | Amount |
|---|---|---|---|---|---|---|
| 000910 | Jacqueline Kennedy | 15432 | 26/08/2024 | 01/09/2024 | 1:1 costs | £3,360.00 |
| 000938 | James Taylor | | 26/08/2024 | 01/09/2024 | 1:1 costs | £3,360.00 |
| 000910 | Jacqueline Kennedy | 15432 | 26/08/2024 | 01/09/2024 | Nursing costs | £2,100.00 |
| 000995 | John Smith | | 31/08/2024 | 01/09/2024 | 1:1 costs | £960.00 |
| 000953 | John Joint-Funded | | 26/08/2024 | 01/09/2024 | 1:1 costs | £5,880.00 |
| 000995 | John Smith | | 26/08/2024 | 02/09/2024 | Care Home with Nursing | £242.86 |
| 000980 | John Smith | | 26/08/2024 | 02/09/2024 | Care Home with Nursing | £850.00 |
| 000975 | John Smith | | 26/08/2024 | 02/09/2024 | Care Home with Nursing | £850.00 |
| 000977 | Tom Johnson | | 26/08/2024 | 02/09/2024 | Care Home with Nursing | £850.00 |
| 000984 | William Shepherd | | 26/08/2024 | 02/09/2024 | Care Home with Nursing | £1,500.00 |
| 000955 | John Smith | | 26/08/2024 | 02/09/2024 | Care Home with Nursing | £850.00 |
| 000938 | James Taylor | | 26/08/2024 | 02/09/2024 | Care Home with Nursing | £850.00 |
| 000958 | Sharon Summer | | 26/08/2024 | 02/09/2024 | Care Home with Nursing | £850.00 |
| 000964 | Jackie Recharge | | 26/08/2024 | 02/09/2024 | Joint - Care Home with Nursing | £950.00 |
| 000982 | Peter Wilson | | 26/08/2024 | 02/09/2024 | Joint - Care Home with Nursing | £950.00 |
| 000985 | John Fnc | | 26/08/2024 | 02/09/2024 | Funded Nursing Care (FNC) | £235.88 |
| 000979 | John Fnc | | 26/08/2024 | 02/09/2024 | Funded Nursing Care (FNC) | £235.88 |
| 000912 | John Smith | | 19/08/2024 | 02/09/2024 | Hotel costs | £578.00 |

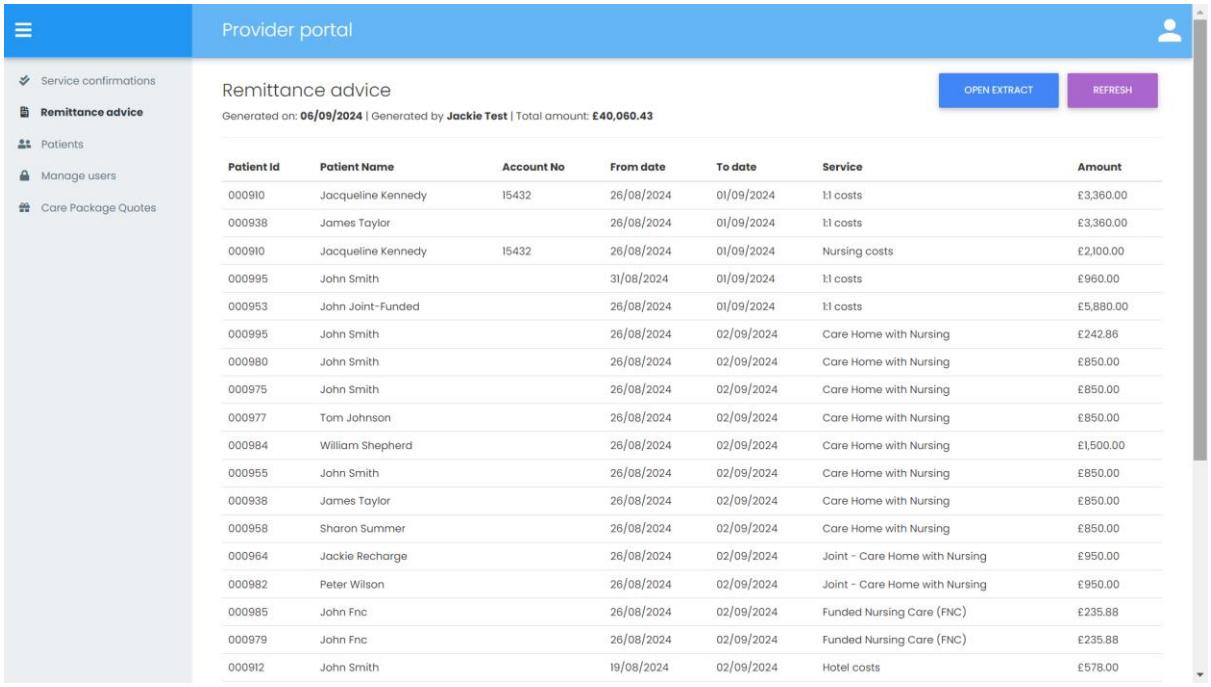
You will see a list of the patients, date range, service and amount you have been paid.

A remittance advice can be for multiple patients, different date range and different services.

The "**Open Extract**" button allows you to download the Remittance Advice data into Excel:



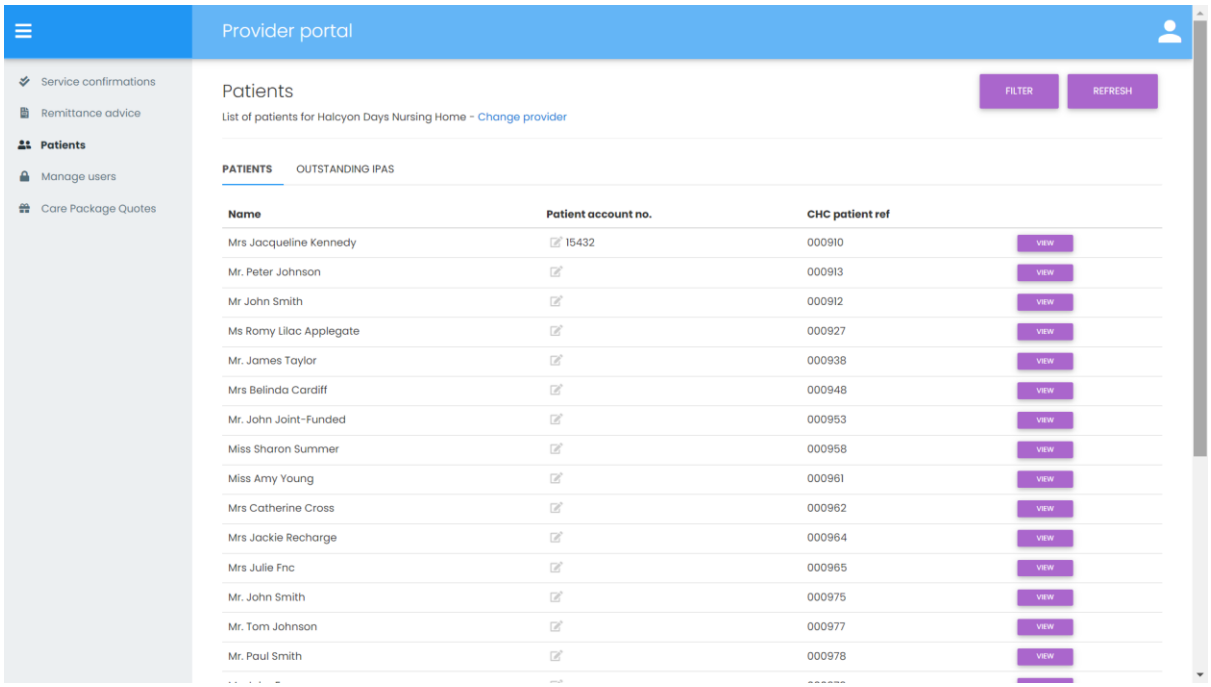

When you click on "**Open Extract**" you will see this in Excel:



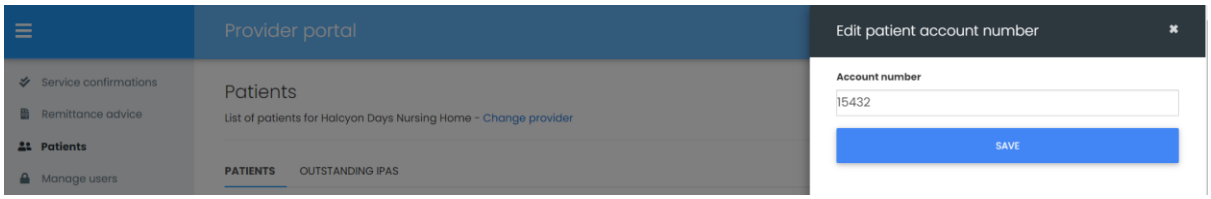

You can use that Excel file for your own records.

# Patients

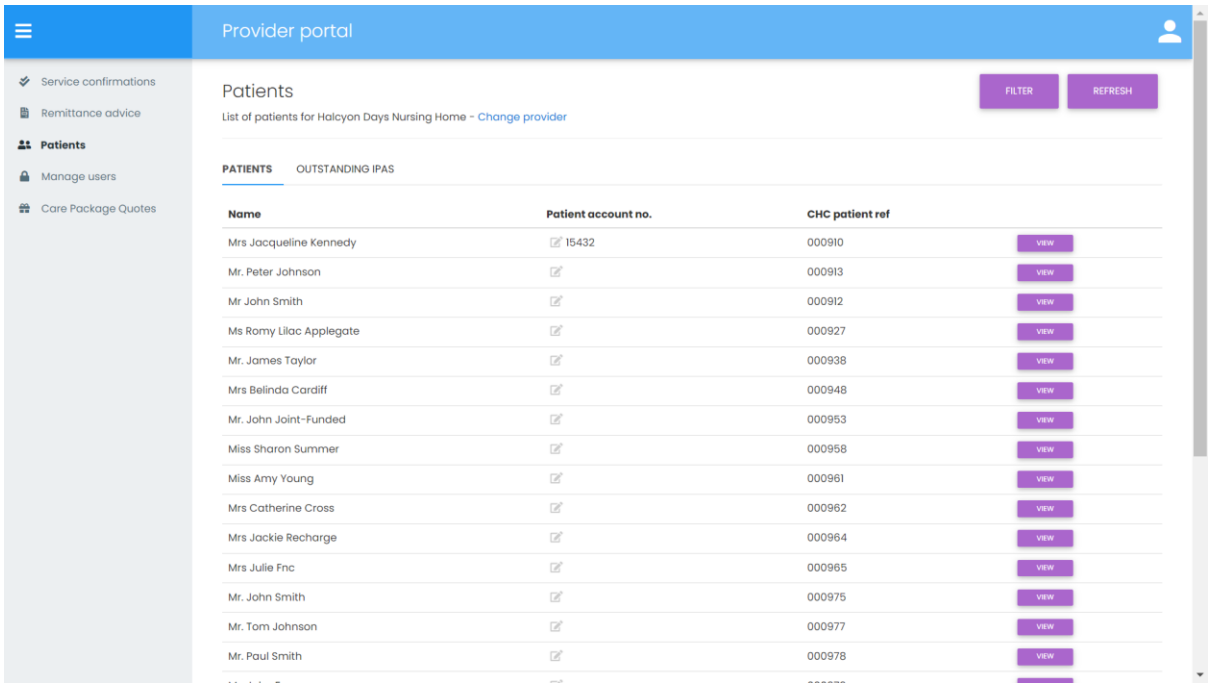
The Patients screen will list all patients that are being funded by the ICB:




The "**Patient account no**" column allows you to add in the Care Provider's account number. Click on the edit icon:



Type in the account number and then click on the **Save** button. The account number will then be displayed:

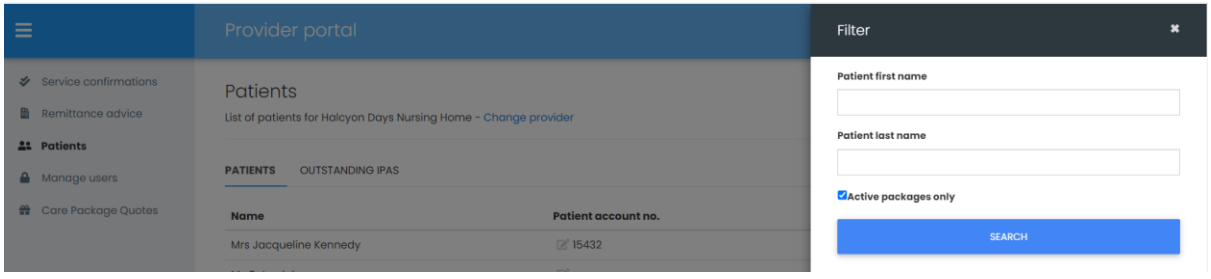



The Patient account number will then be included in the function that allows you to "Open Extract" on the **Remittance Advice** screen.

## Patients - Filter

You can click on the **Filter** button to search for specific Patients by:

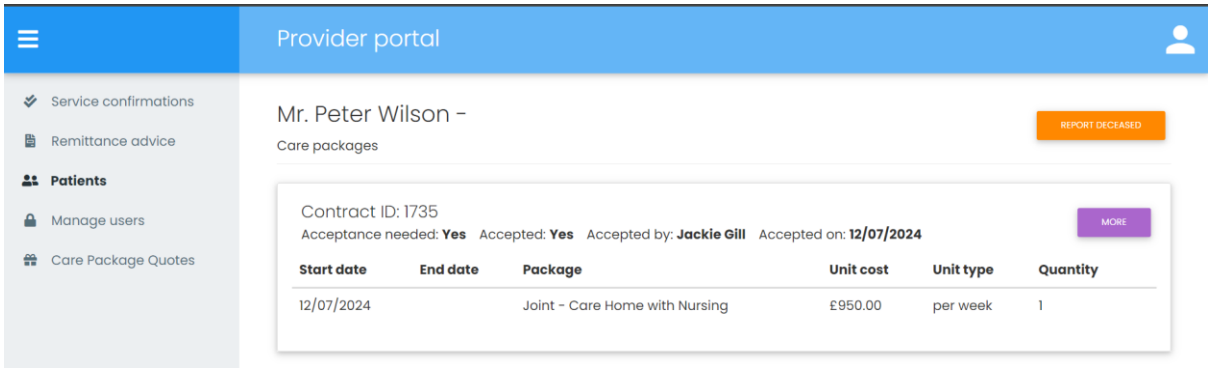
- First name
- Last name
- Active packages (this is the default, but can be unticked so you can see Patients with ended care packages)



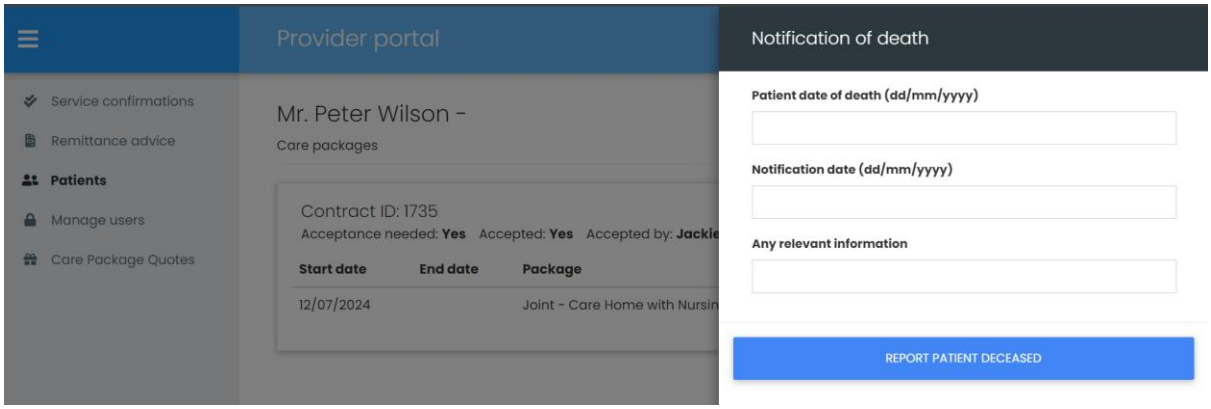
## Patients - Report Deceased

There is a function that enables Provider Portal users to record where a patient has deceased.

When viewing patient details there is a button to "**Report Deceased**":




To report the patient is deceased click on the "**Report Deceased**" button and complete all three mandatory fields:




(Please note that in the next release we will making a change so that only "Patient date of death (dd/mm/yyyy)" will be required to be completed, we will be removing the other two fields).

When the three fields have been completed, click on the "Report Patient Deceased" button.

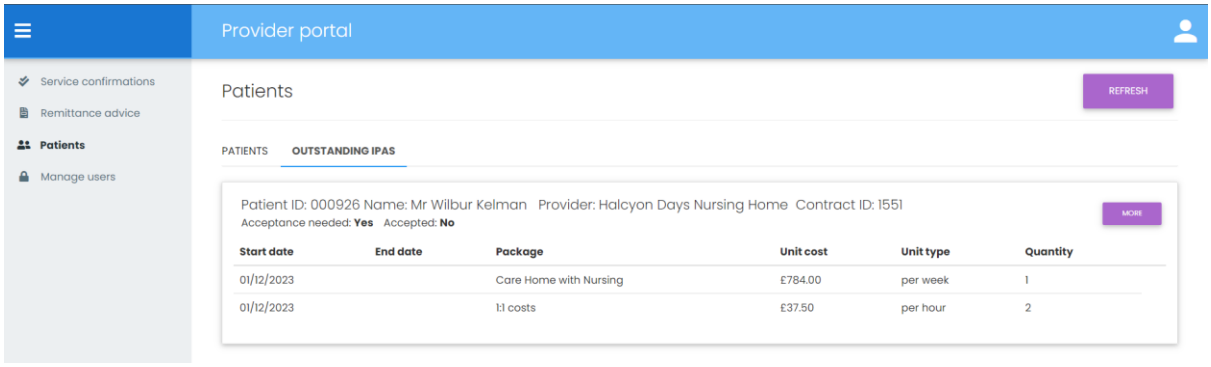
PATIENT DECEASED will then appear alongside the patient's name. The Digital CHC system is updated with this detail immediately.

# Viewing, Downloading and Accepting IPA

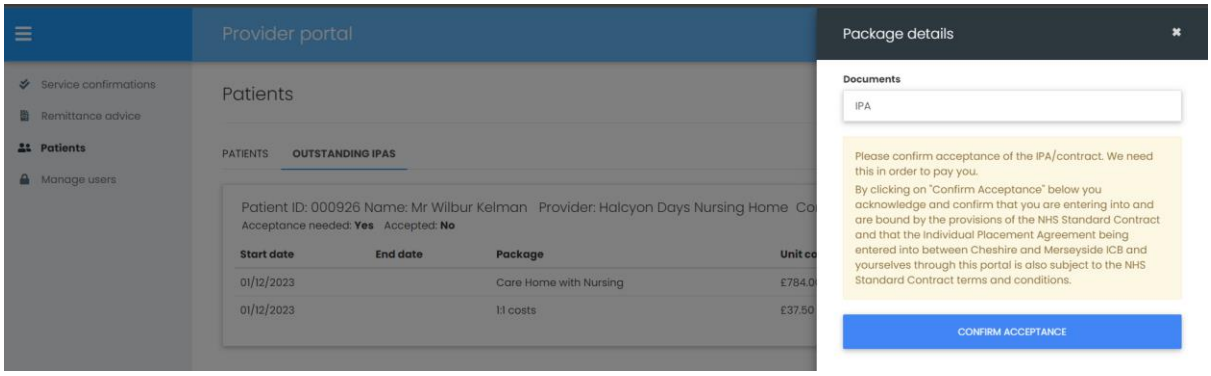
When a new patient is placed with a Care Provider, you will need to view, download and accept the IPA. **This does not apply to FNC patients**.

Service confirmations will not be generated until the IPA has been accepted (where Acceptance is needed).

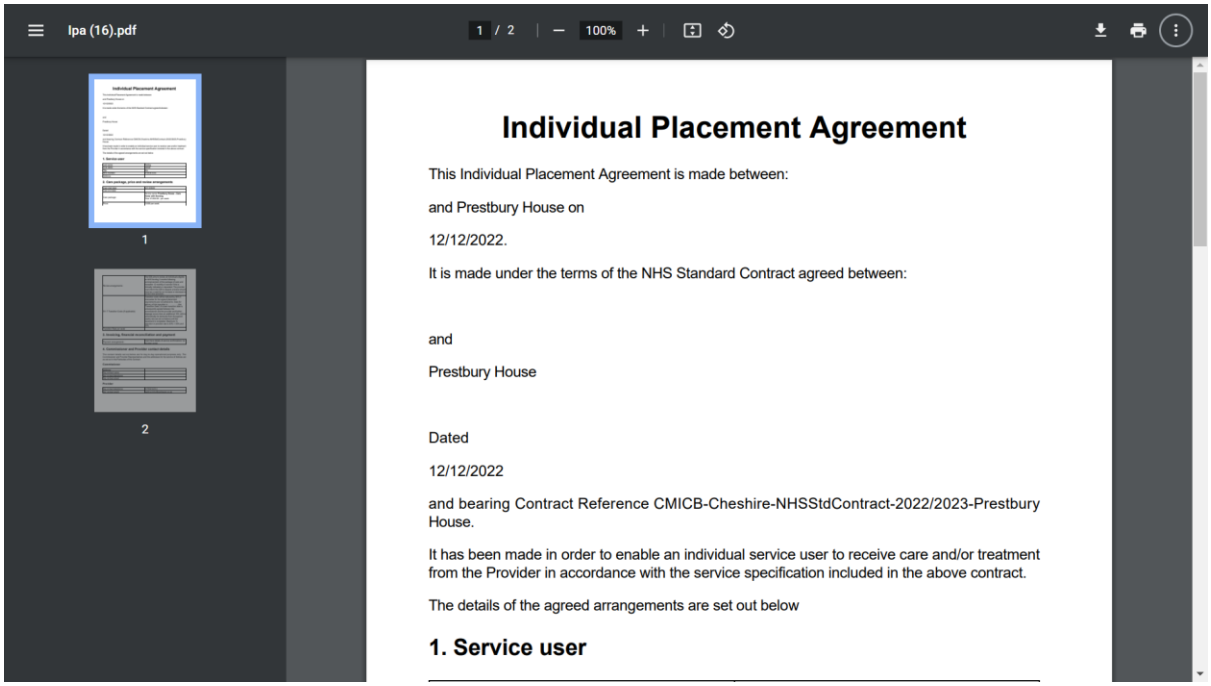
From the Patients screen, click on the **Outstanding IPAs** tab:



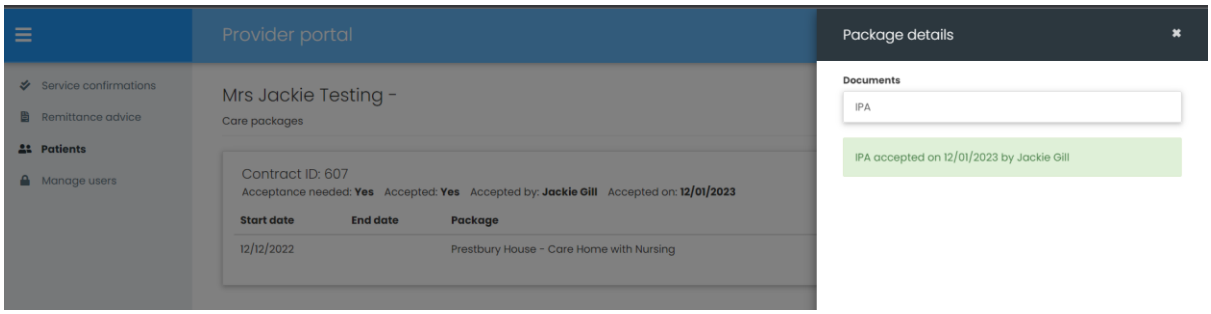

To view, download and accept the IPA click on the **More** button:




Click on **IPA** and that will allow you to view and download the IPA as a PDF:




You can close down the IPA and then click on “Confirm Acceptance”:

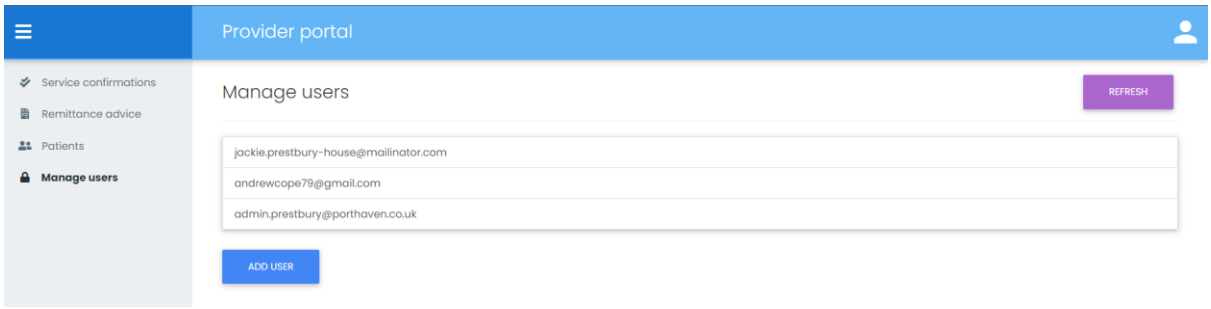



You can then see that Acceptance has been Accepted, who by and when.

Once the IPA has been accepted service confirmations will then be generated.

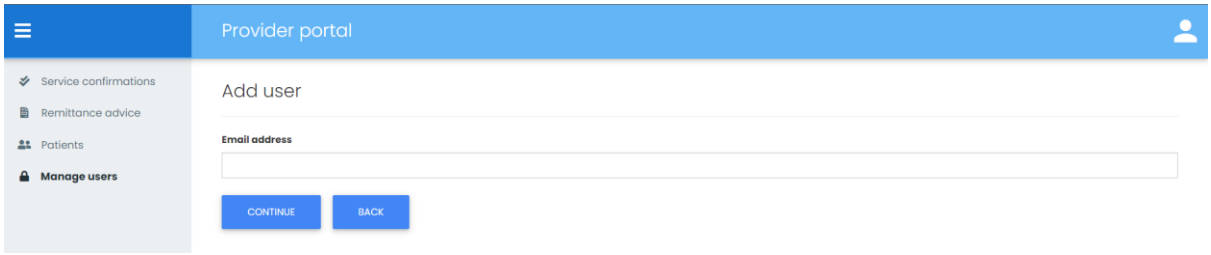
# Manage Users

This area enables the provider to add and manage user accounts.

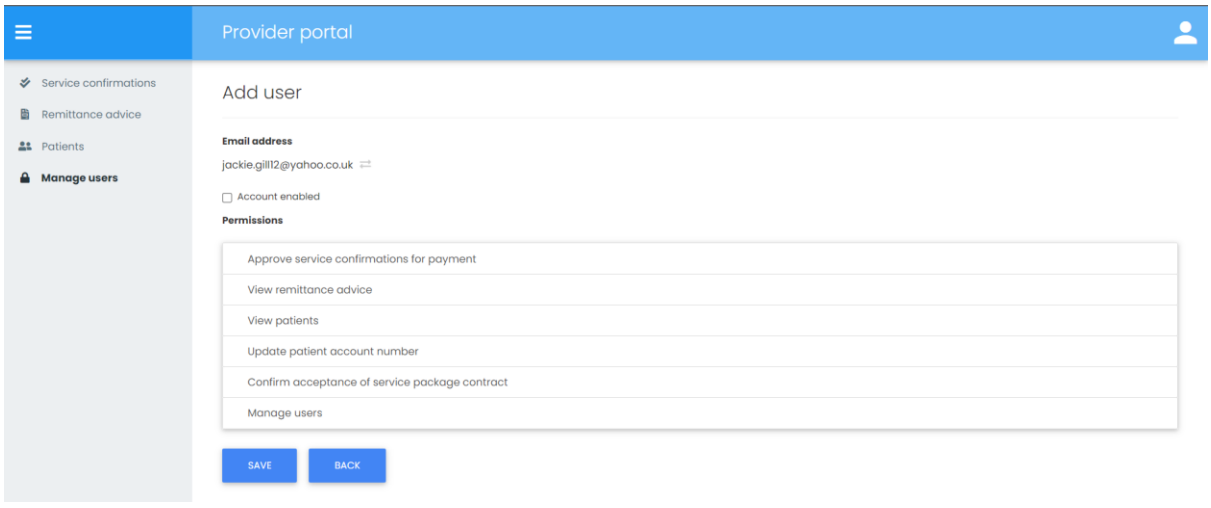



You will see a list of existing Users that have access to the Provider Portal for that Provider.

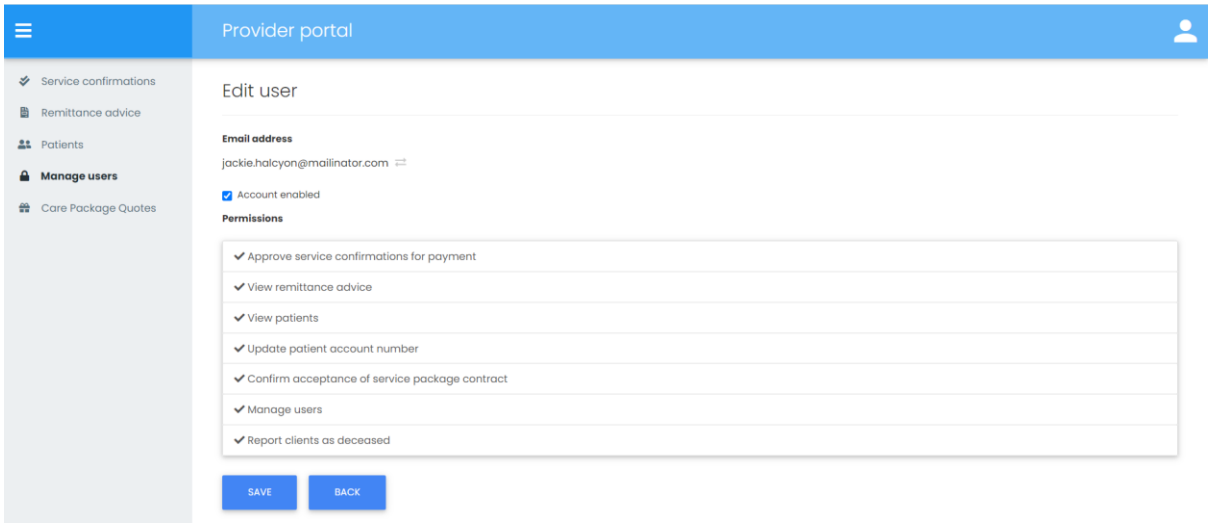
To add a new user who will have access to the Provider Portal for the specific Provider, click on "**Add User**":




Type in the user's email address and click on "Continue":



You can then tick the Permissions that you want to give to that user:




The Permissions are used to control which users can:

- Approve service confirmations for payment
- View remittance advice
- View patients
- Update patient account number
- Confirm acceptance of service package contract
- Manage users
- Report clients as deceased