



Digital CHC – Provider Portal User Guide

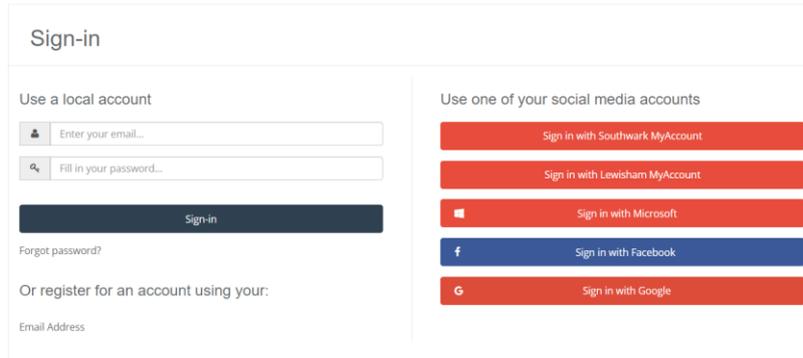


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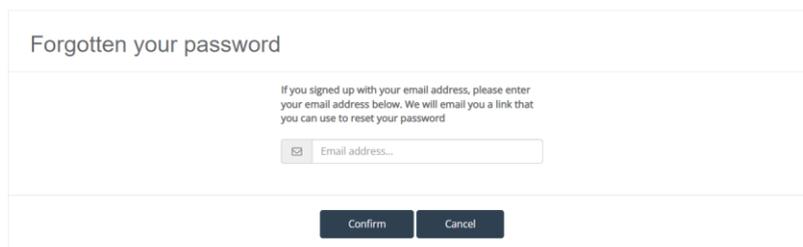
Signing In

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.



The screenshot shows a 'Sign-in' form with two main sections. The left section, 'Use a local account', contains an email input field with a person icon, a password input field with a key icon, a 'Sign-in' button, a 'Forgot password?' link, and a 'Register' section with an 'Email Address' label. The right section, 'Use one of your social media accounts', features five buttons: 'Sign in with Southwark MyAccount', 'Sign in with Lewisham MyAccount', 'Sign in with Microsoft', 'Sign in with Facebook', and 'Sign in with Google'.

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

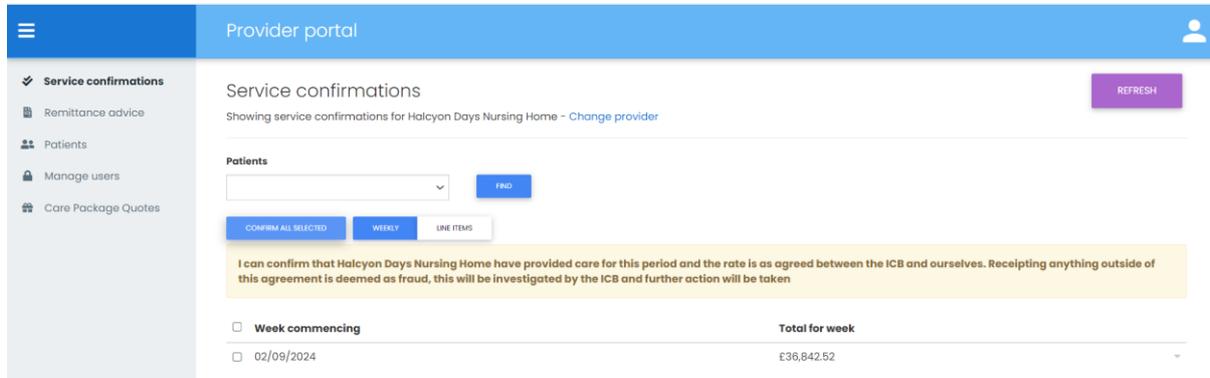


The screenshot shows a 'Forgotten your password' form. It includes a heading, a paragraph of instructions: 'If you signed up with your email address, please enter your email address below. We will email you a link that you can use to reset your password', an email input field with an envelope icon, and 'Confirm' and 'Cancel' buttons at the bottom.

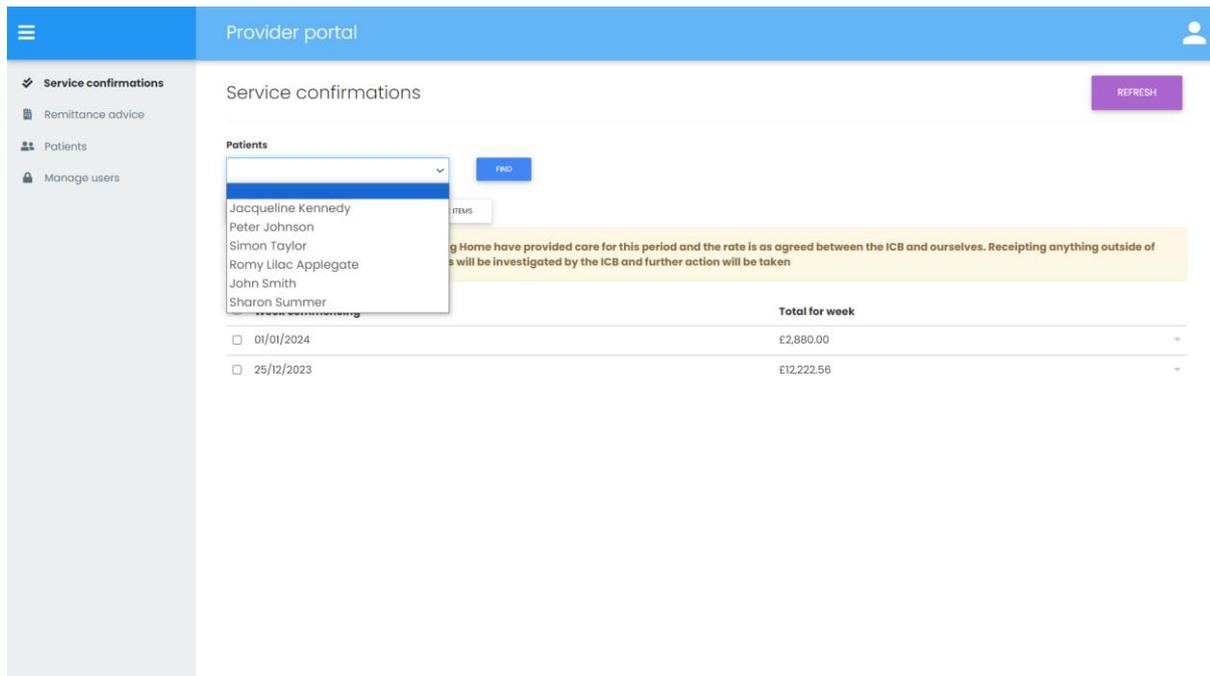
An email will then be sent with a link for the user to reset their password.

Service Confirmations

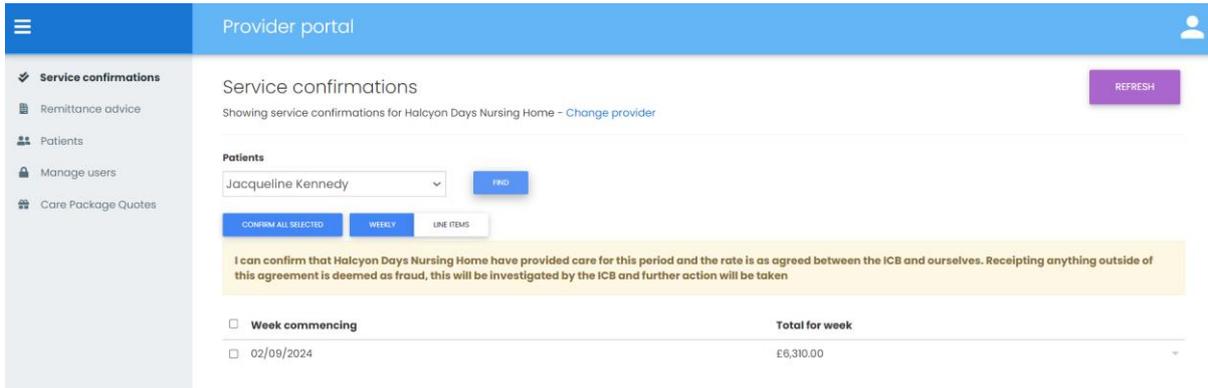
When you sign in you will automatically be taken to the “Service confirmations” page. This is where you are able to confirm the services that have been delivered for patients that have been placed with you from the ICB. This will include patients that receive FNC and full CHC services:



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

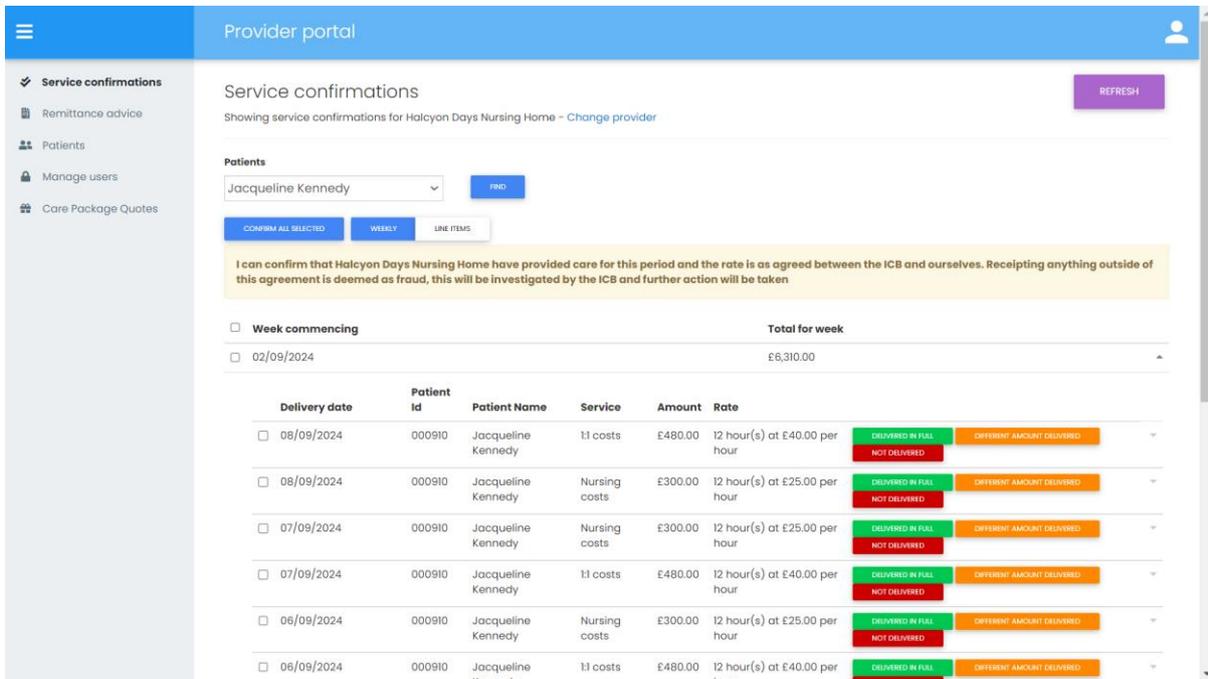


Click on any of the patient names and then click on the “Find” button. The screen will then show dates when services need to be confirmed as delivered for that patient:

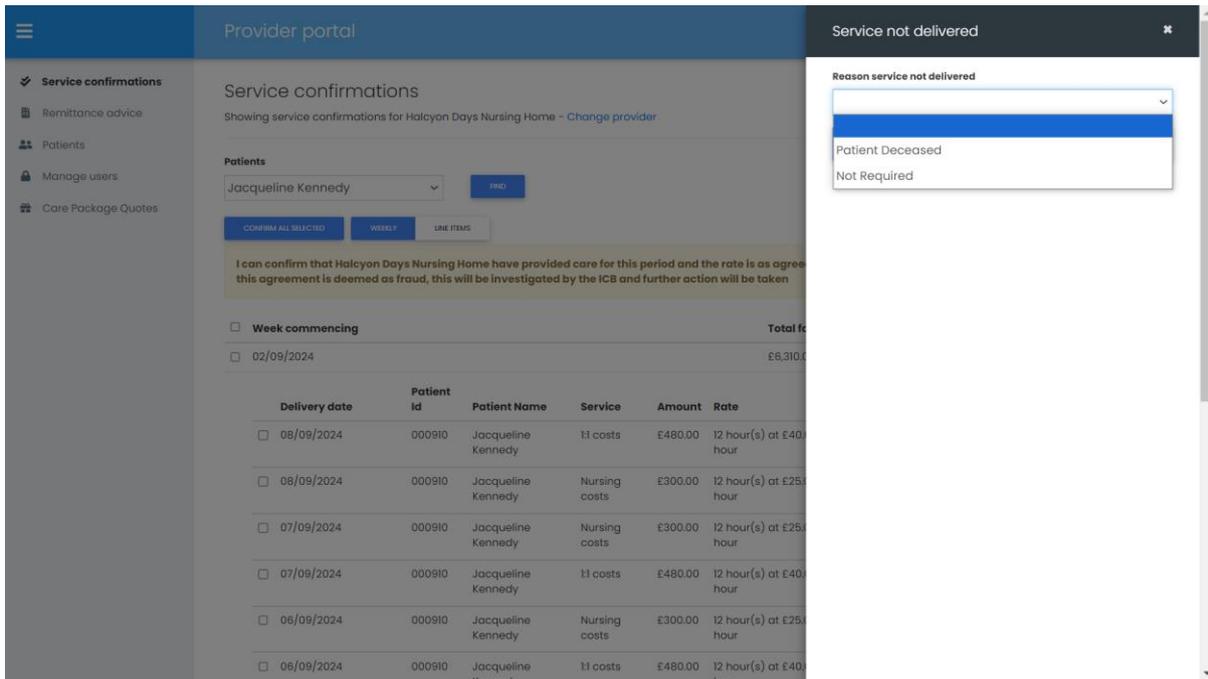


The dates are weekly dates with Mondays being the start date.

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:

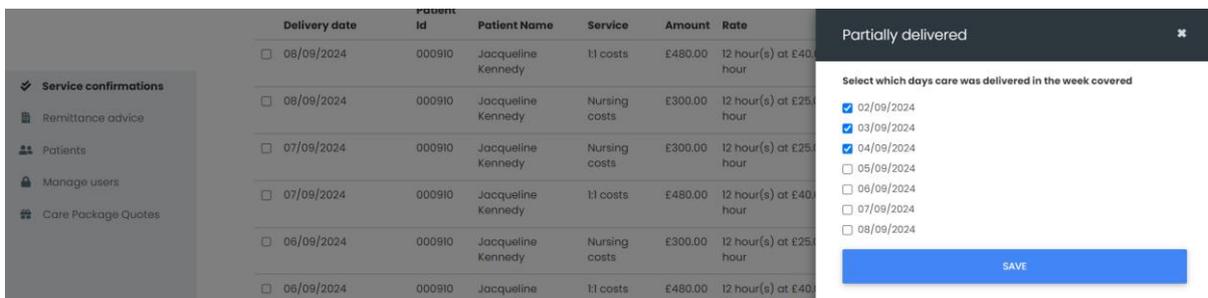


Weekly Services – Partially Delivered

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:

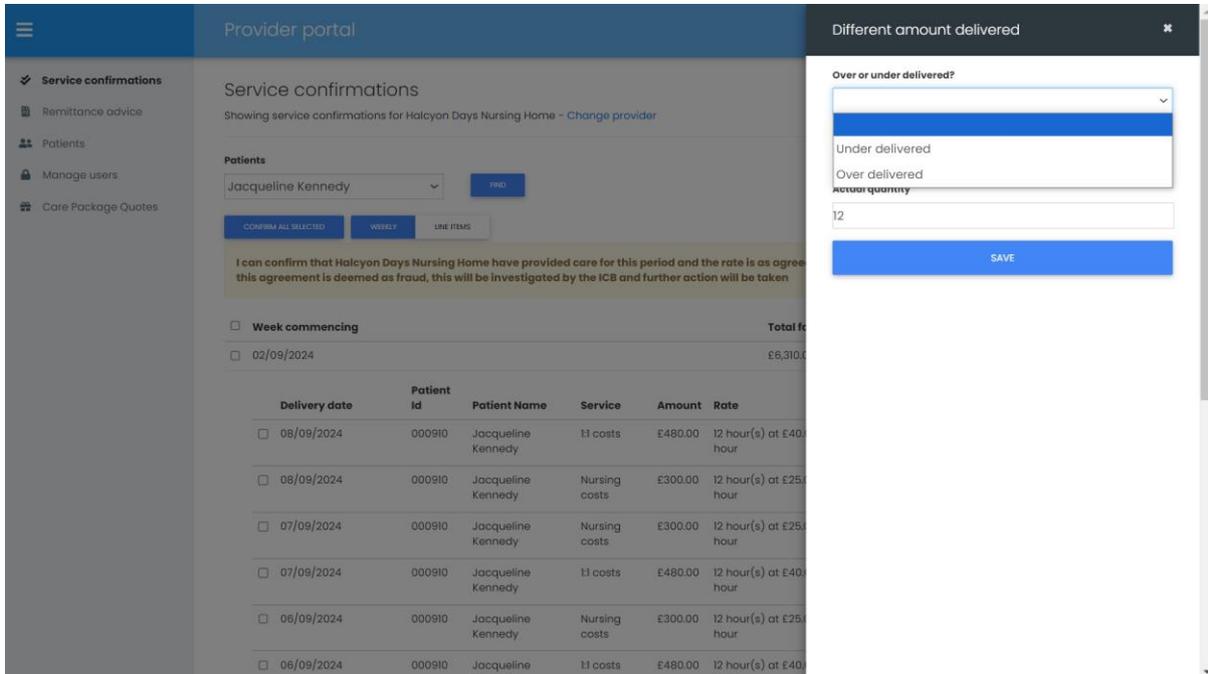


That week will then be removed from the screen as you have confirmed which days care was delivered.

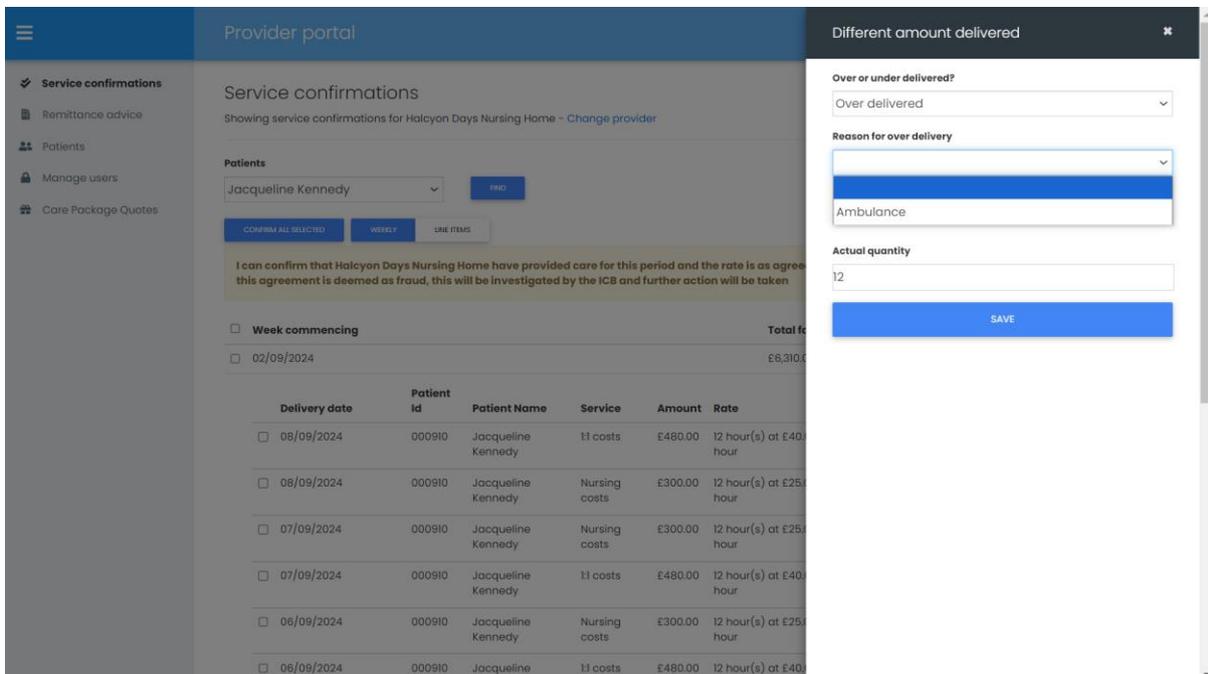
Daily Services – Different Amount Delivered

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:

Service confirmations

Showing service confirmations for Halcyon Days Nursing Home - [Change provider](#)

Patients

Jacqueline Kennedy

I can confirm that Halcyon Days Nursing Home have provided care for this period and the rate is as agreed between the ICB and ourselves. Recepting anything outside of this agreement is deemed as fraud, this will be investigated by the ICB and further action will be taken

<input type="checkbox"/> Week commencing	Total for week
<input checked="" type="checkbox"/> 02/09/2024	£8,310.00

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:

Service confirmations

Showing service confirmations for Prestbury House - [Change provider](#)

Patients

<input type="checkbox"/> Week commencing	Total for week
<input checked="" type="checkbox"/> 01/01/2023	£998.10
<input checked="" type="checkbox"/> 25/12/2022	£998.10
<input checked="" type="checkbox"/> 18/12/2022	£998.10
<input type="checkbox"/> 11/12/2022	£1,951.64
<input type="checkbox"/> 04/12/2022	£3,907.73
<input type="checkbox"/> 27/11/2022	£3,337.39
<input type="checkbox"/> 20/11/2022	£2,890.51
<input type="checkbox"/> 13/11/2022	£3,337.39
<input type="checkbox"/> 06/11/2022	£1,907.08

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

The screenshot shows the 'Service confirmations' page in the Provider Portal. The page title is 'Service confirmations' and it indicates 'Showing service confirmations for Prestbury House - Change provider'. There is a 'REFRESH' button in the top right. Below the title, there is a 'Patients' dropdown menu and a 'FIND' button. Below that, there are three buttons: 'CONFIRM ALL SELECTED', 'RESET', and 'LINE ITEMS'. The main content is a table with columns for 'Week commencing' and 'Total for week'. All rows in the table have a checked checkbox in the 'Week commencing' column.

Week commencing	Total for week
<input checked="" type="checkbox"/> 01/01/2023	£998.10
<input checked="" type="checkbox"/> 25/12/2022	£998.10
<input checked="" type="checkbox"/> 18/12/2022	£998.10
<input checked="" type="checkbox"/> 11/12/2022	£1,951.64
<input checked="" type="checkbox"/> 04/12/2022	£3,907.73
<input checked="" type="checkbox"/> 27/11/2022	£3,337.39
<input checked="" type="checkbox"/> 20/11/2022	£2,890.51
<input checked="" type="checkbox"/> 13/11/2022	£3,337.39
<input checked="" type="checkbox"/> 06/11/2022	£1,907.08

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	£28,809.88
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	Ii costs	£3,360.00
000938	James Taylor		26/08/2024	01/09/2024	Ii 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	Ii costs	£960.00
000953	John Joint-Funded		26/08/2024	01/09/2024	Ii 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:

Provider portal

Remittance advice

Generated on: 02/11/2022 | Generated by Cheshire CCG | Total amount: £4,850.00

Patient Id	Patient Name	Account No	From date	To date	Service	Amount
000269	Tina Turner	123456	03/10/2022	28/10/2022	IEG4 CHC Home Care	£4,800.00
000108	Ann Coates		24/10/2022	24/10/2022	Domiciliary care	£50.00

When you click on “Open Extract” you will see this in Excel:

Provider portal

Remittance advice

Generated on: 06/09/2024 | Generated by Jackie Test | Total amount: £40,060.43

Patient Id	Patient Name	Account No	From date	To date	Service	Amount
000910	Jacqueline Kennedy	15432	26/08/2024	01/09/2024	tl costs	£3,360.00
000938	James Taylor		26/08/2024	01/09/2024	tl 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	tl costs	£960.00
000953	John Joint-Funded		26/08/2024	01/09/2024	tl 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 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 screenshot shows the 'Patients' screen in the Provider portal. The page title is 'Patients' and it lists patients for 'Halcyon Days Nursing Home'. There are 'FILTER' and 'REFRESH' buttons in the top right. The table below lists 15 patients with their names, patient account numbers, and CHC patient references. Each row has a 'VIEW' button in the 'Patient account no.' column.

Name	Patient account no.	CHC patient ref
Mrs Jacqueline Kennedy	15432	000910
Mr. Peter Johnson		000913
Mr John Smith		000912
Ms Romy Lilac Applegate		000927
Mr. James Taylor		000938
Mrs Belinda Cardiff		000948
Mr. John Joint-Funded		000953
Miss Sharon Summer		000958
Miss Amy Young		000961
Mrs Catherine Cross		000962
Mrs Jackie Recharge		000964
Mrs Julie Fnc		000965
Mr. John Smith		000975
Mr. Tom Johnson		000977
Mr. Paul Smith		000978

The “Patient account no” column allows you to add in the Care Provider’s account number. Click on the edit icon:

The screenshot shows a modal form titled 'Edit patient account number'. It has a text input field labeled 'Account number' containing the value '15432'. Below the input field is a blue 'SAVE' button.

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

The screenshot shows the 'Patients' page in the Provider portal. The page title is 'Patients' and it lists patients for 'Halcyon Days Nursing Home'. There are 'FILTER' and 'REFRESH' buttons at the top right. The table below shows a list of patients with columns for Name, Patient account no., and CHC patient ref. Each row has a 'VIEW' button.

Name	Patient account no.	CHC patient ref
Mrs Jacqueline Kennedy	15432	000910
Mr. Peter Johnson		000913
Mr John Smith		000912
Ms Romy Lilac Applegate		000927
Mr. James Taylor		000938
Mrs Belinda Cardiff		000948
Mr. John Joint-Funded		000953
Miss Sharon Summer		000958
Miss Amy Young		000961
Mrs Catherine Cross		000962
Mrs Jackie Recharge		000964
Mrs Julie Fnc		000965
Mr. John Smith		000975
Mr. Tom Johnson		000977
Mr. Paul Smith		000978

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)

The screenshot shows the 'Patients' page with the 'Filter' dialog box open. The dialog box has input fields for 'Patient first name' and 'Patient last name', a checkbox for 'Active packages only' (which is checked), and a 'SEARCH' button.

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”**:

The screenshot shows the 'Provider portal' interface for Mr. Peter Wilson. On the left is a navigation menu with options: Service confirmations, Remittance advice, Patients, Manage users, and Care Package Quotes. The main content area displays 'Mr. Peter Wilson - Care packages' with a 'REPORT DECEASED' button in an orange box. Below this, a contract summary shows Contract ID: 1735, Acceptance needed: Yes, Accepted: Yes, Accepted by: Jackie Gill, and Accepted on: 12/07/2024. A table lists care packages with columns for Start date, End date, Package, Unit cost, Unit type, and Quantity.

Start date	End date	Package	Unit cost	Unit type	Quantity
12/07/2024		Joint - Care Home with Nursing	£950.00	per week	1

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

This screenshot shows the 'Notification of death' form overlaid on the patient details. The form has three input fields: 'Patient date of death (dd/mm/yyyy)', 'Notification date (dd/mm/yyyy)', and 'Any relevant information'. A blue 'REPORT PATIENT DECEASED' button is at the bottom of the form.

(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.

The screenshot shows the 'Provider portal' interface for Mr. Peter Wilson. The status 'Mr. Peter Wilson - PATIENT DECEASED' is now displayed. The 'REPORT DECEASED' button is no longer visible. The contract summary and table from the previous screenshot are still present.

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:

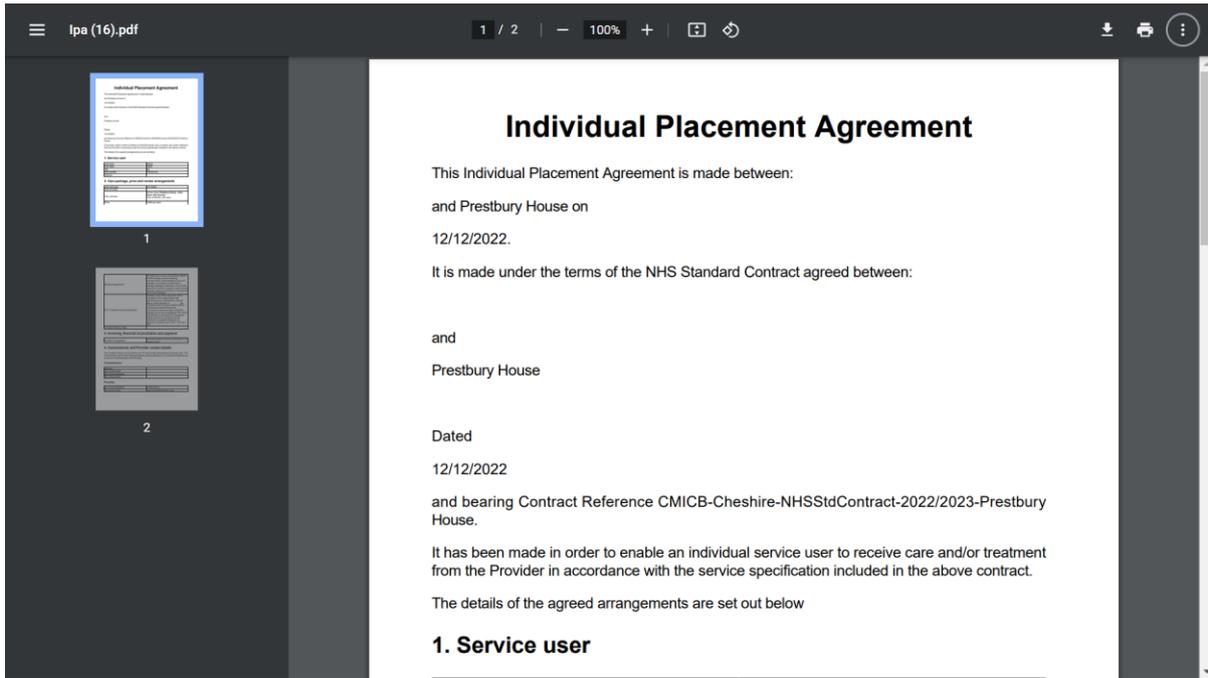
The screenshot shows the 'Provider portal' interface. On the left is a navigation menu with options: Service confirmations, Remittance advice, Patients (selected), and Manage users. The main content area is titled 'Patients' and has a 'REFRESH' button. Below this, there are two tabs: 'PATIENTS' and 'OUTSTANDING IPAS' (which is active). A patient summary card is displayed with the following information: Patient ID: 000926, Name: Mr Wilbur Kelman, Provider: Halcyon Days Nursing Home, Contract ID: 1551. It also shows 'Acceptance needed: Yes' and 'Accepted: No'. A 'MORE' button is on the right of the card. Below the card is a table of IPAs:

Start date	End date	Package	Unit cost	Unit type	Quantity
01/12/2023		Care Home with Nursing	£784.00	per week	1
01/12/2023		1:1 costs	£37.50	per hour	2

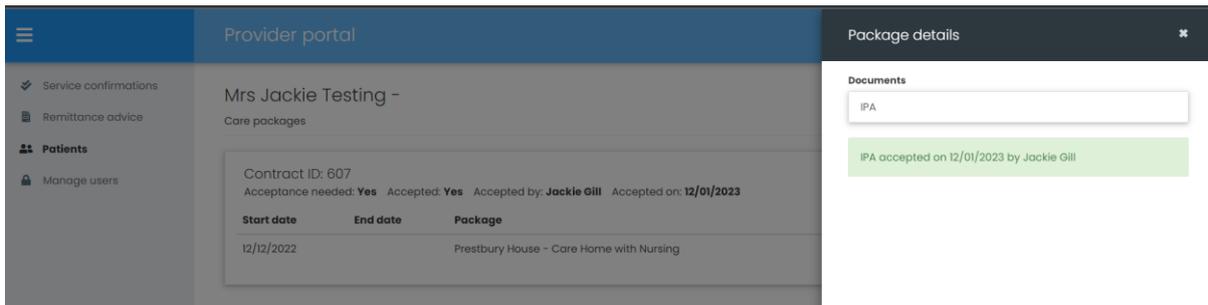
To view, download and accept the IPA click on the **More** button:

This screenshot shows the 'Package details' modal window. The background is dimmed, showing the same 'Patients' screen as the previous image. The modal has a title 'Package details' and a close button. Under the heading 'Documents', there is a search bar containing 'IPA'. Below the search bar is a yellow warning box with the following text: 'Please confirm acceptance of the IPA/contract. We need this in order to pay you. By clicking on "Confirm Acceptance" below you acknowledge and confirm that you are entering into and are bound by the provisions of the NHS Standard Contract and that the individual Placement Agreement being entered into between Cheshire and Merseyside ICB and yourselves through this portal is also subject to the NHS Standard Contract terms and conditions.' At the bottom of the modal is a blue button labeled 'CONFIRM ACCEPTANCE'.

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”:

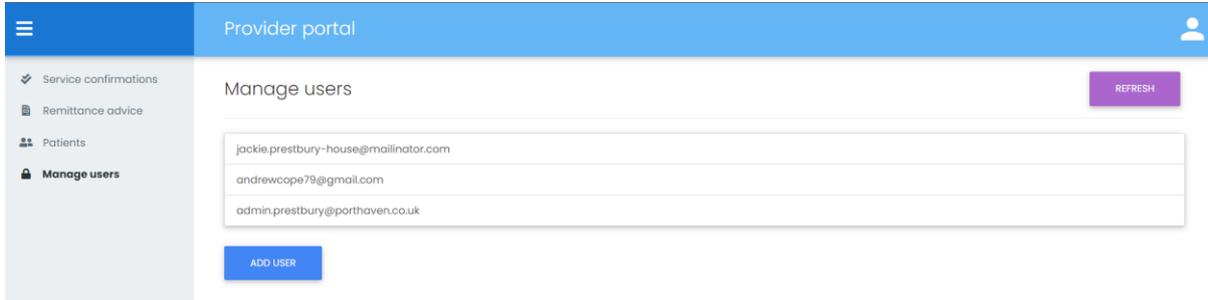


You can then see that Acceptance has been Accepted, who by and when.

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

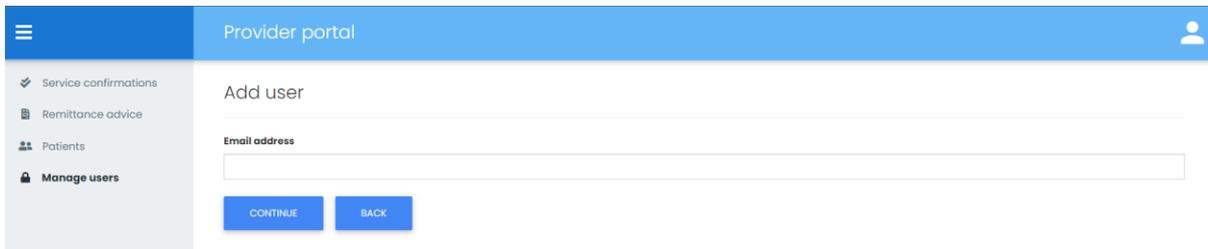
Manage Users

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

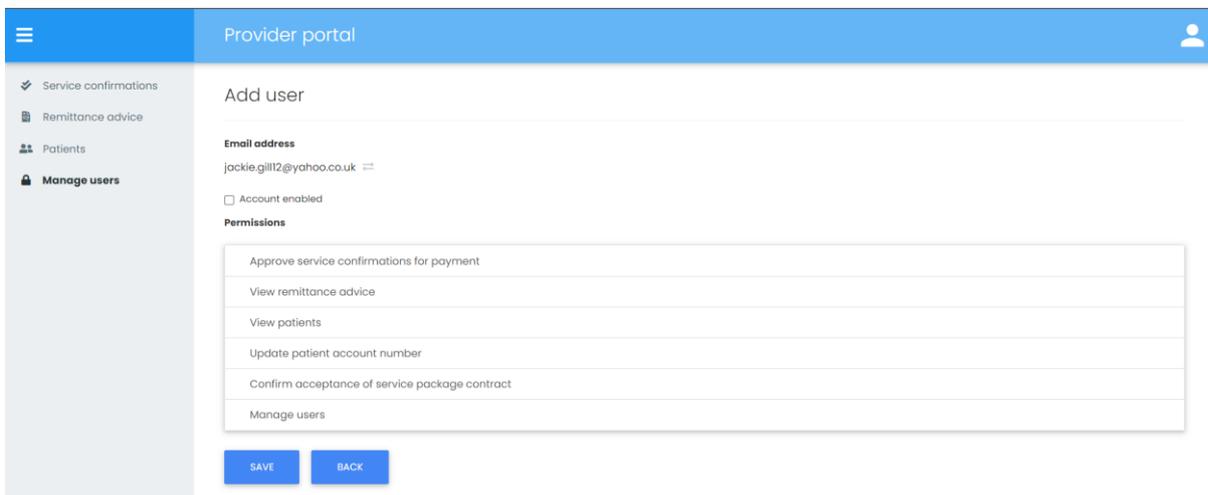


You will see a list of existing Users that have access to the Provider Portal for that Provider.

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 screenshot shows the 'Edit user' interface in the Provider portal. On the left is a navigation menu with options: Service confirmations, Remittance advice, Patients, **Manage users**, and Care Package Quotes. The main content area is titled 'Edit user' and contains the following fields and options:

- Email address:** jackie.halcyan@mailinator.com
- Account enabled
- Permissions:** A list of seven permissions, each with a checked checkbox:
 - 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

At the bottom of the form are two buttons: 'SAVE' and 'BACK'.

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