Dear Care and Support Provider,

Care and Support Providers Daily Update Wednesday 22nd April 2020.

Please note that there is also the Sefton website with a dedicated area for Care Providers, that will be regularly updated. https://www.sefton.gov.uk/social-care/adults/adult-social-care-providers.aspx

Capacity Tracker – Care Home User Guide
You will be aware that over the last few months care homes have been advised of the need to register up on the **nationally mandated** capacity tracker and we have seen an increase in Care Homes registering.

If you haven't registered yet, please note that registration will close on Friday 24th April 2020.

Please use the link below, to find out more about the Capacity Tracker and how to register.
https://www.necsu.nhs.uk/services/system-wide-transformation/capacity-tracker/

Below (Annex) is a User Guide to this update to support you with registration.

If you also still need to complete the NHS Net account registration form, please complete the registration form below (page 15) and return to
moira.harrison@southportandformbyccg.nhs.uk

Education and Training Programme for Care Providers
Sefton Council and South Sefton and Southport and Formby CCGs want to support you in whatever way we can during this crisis period and one of the ways was to develop the Education and Training Programme for Care Providers. This document highlights the key areas where there are free education and supporting resources available for you and your staff not only on a national level but what's available locally here in Sefton.
The resources contained within this document are also available online and can be accessed via Sefton Council's Learner Management System. Further information explaining how to access the online version can be found on page 8 of the document.
This document and the electronic version will be regularly reviewed to include updates as we receive them and will be shaped to meet your need. If you have any suggestions as to what else needs to be included please let us know by emailing Louise Kearney, Learning and Development Officer at louise.kearney@sefton.gov.uk
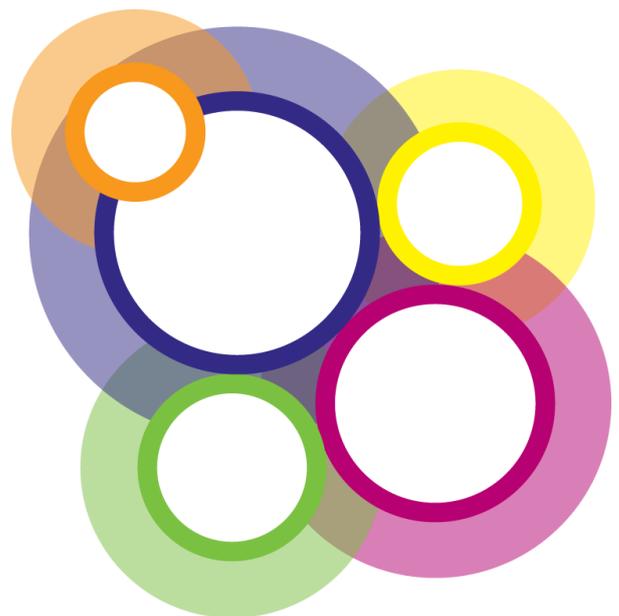
ANNEX

ANNEX – CAPACITY TRACKER USER GUIDE

User Guide for Care Homes

Version 1.6
22 March 2020

Capacity Tracker User Guide

System Requirements

The following browsers are supported:

- **Desktop**: Internet Explorer 11/Edge, Firefox, Chrome, Safari
- **Mobile**: Chrome (iOS/Android), Safari (iOS)

Preferred browser is Google Chrome. Using an older version of internet explorer will result in a degraded/non-optimal experience. You can check which browser and version you're using at https://updatemybrowser.org/

User Types

When registering, users can choose either S*tandard* or *Approver* permission access. *Approvers* have management rights over other users within their organisation. E.g.: An Approver for Care Home1 can approve other users who register from Care Home1and also reset their passwords. They are also responsible for removing users who no longer should have access or who have left their organisation. Prior to a care home having an Approver registered on the Capacity Tracker System Champions from either CCG or Local Authorities or the Capacity Tracker team will review any initial care home new user request and approve where appropriate. Approvers should apply due diligence when reviewing applications for access to the Tracker e.g.

- Is the applicant a current member of your organisation?
- Is their email address correct (i.e., is it aligned to your organisation, no typing mistakes, no personal email addresses)?
- Have they applied for the correct level of access (Approver/Standard)?
- Users who have left the organisation should have their access de-activated – send details of leavers to necsu.capacitytracker@nhs.net for deactivation

Generic Accounts

Generic Accounts are intended for sharing between multiple users. These accounts are shown a disclaimer every time they login. Organisations who request a generic account should be aware that auditing of activity by that account will not be able to determine which user in the organisation logged in under that generic account (by definition, it's generic). In the event of any queries about historical data changes made by that [generic] account holder, audits will therefore be limited.

1. Registering a New User Account

a. Applications for a new user account must be made via https://carehomes.necsu.nhs.uk/

b. You can use a PC/Mac and mobile devices (iPad, tablet or smartphone) with internet access to use the system. Supported browsers are Google Chrome, Mozilla Firefox or IE 11+ on Windows and Safari on iOS.

c. Use the **'Register an Account'** link on the below screen and complete the application form.

d. It is important that new users complete the form fully and accurately as the details will be forwarded for approval to someone in the organisation they're applying to, for access. Note: Care Homes should have at least one User with 'Approver' permissions

e. For access to all care homes for an organisation, select the organisation and leave the '**My Care Home'** field blank.

f. Once approved, the system will email you your login details including a password which must be changed on first use to something more memorable. Your password must comply with NHS policy on password strength which will be advised on the change password screen.

g. Add the Capacity Tracker email address to your safe senders list and chose your version of Microsoft Office so alerts do not drop into your junk email – see link for advice: https://support.office.com/en-us/article/add-recipients-of-my-email-messages-to-the-safe-senders-list-be1baea0-beab-4a30-b968-9004332336ce

Our sending address is necsu.apps@nhs.net

h. For larger organisations with managed IT policies, ask IT to add the tracker address to your Trust Sites list https://carehomes.necsu.nhs.uk/?ReturnUrl=%2Fhome


2.   User Login

a. It is advisable to tick the **'Remember Me'** checkbox so that the system remembers your password, unless of course you are using a public computer/device to access the Portal.

b. Following a successful login you will be presented with the following **'Home Page'** screen or a variation of it depending upon your organisation type and/or level of permission.

Note: Care home users can only see their own data and will not have access to all reports.

Care Home Provider view:
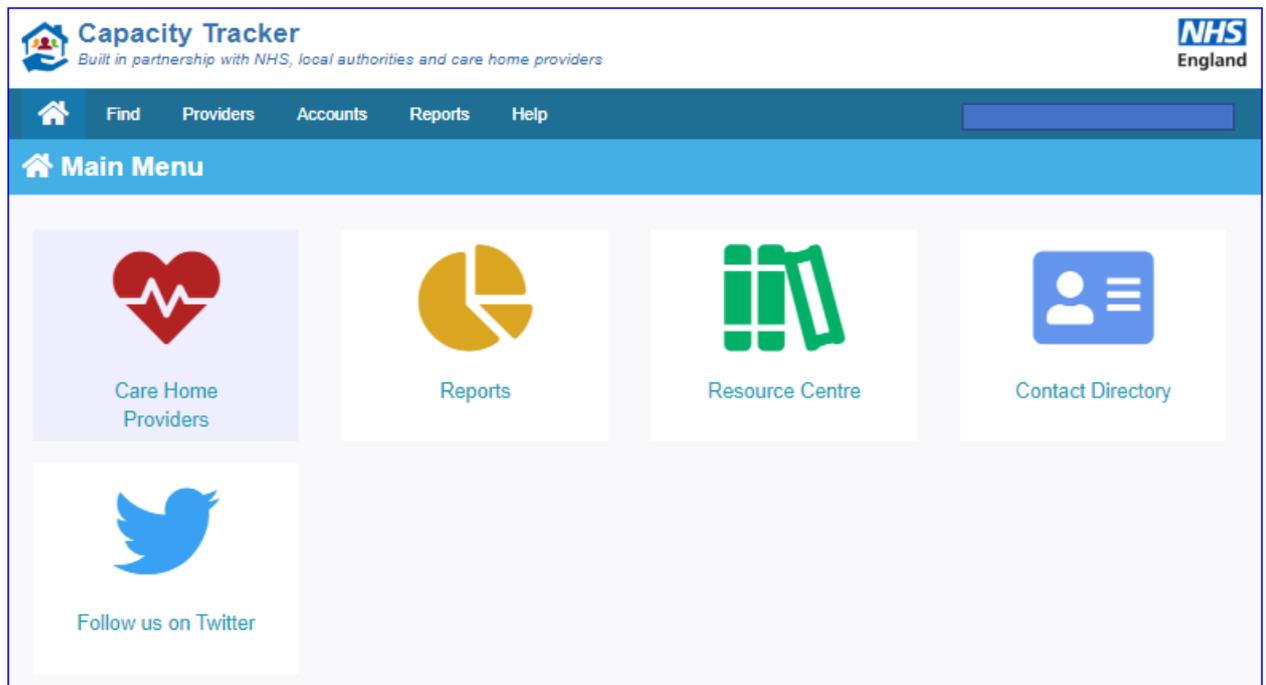
Account Lockout

If the wrong password is entered **5** times, the account will be locked. To resolve this issue you should contact the Capacity Tracker helpdesk on 0300 555 0340 for password reset support.
Note: Passwords expire after 90 days and must be changed – a reminder email will be sent prior to this expiry date.

3.   Initial Care Home Setup

Please note that you can select [home icon] in the top left of the Menu bar from anywhere in the Portal and this will take you back to the Home Page/Main Menu.

Step 1: Edit Care Home

a. The first step is to ensure your care home is correctly setup in the system. This is done by selecting the 'Care Home Providers' tile on the Main Menu, you will then be presented with the following screen.

The setup involves working through each of the respective links associated with your Care Home:

    i.   Edit Provider Details (Address etc.)

    ii.   Business Continuity Services offered which include:

          i.   Short Stay Services

          ii.   Long Term Vacancy Types

          iii. Languages spoken

    iii.   Room Costs

    iv.   Total Capacity

    v.   Vacancies (Once fully registered this is the only screen care home needs to update as and when vacancies change, and at least every 24hrs if there's been no change.

    vi.   Contracts – select as appropriate those CCG's and Local Authorities a care home has contracts with

Step 1: Provider Details

First click the **'Edit'** link next to the provider name. This will take you into the Edit Provider Page which allows you to review and update the main details regarding your organisation covering:

    i.   Provider Name

    ii.   Address

    iii.   Postcode (very important that this is entered this correctly)

    iv.   Classification and Funding

          i.   Review the information pre-populated as this has been imported from the CQC.

          ii.   Care Type defaults to your care home providing both residential and nursing care. To change either just click on the relevant option. . Green means the

option is selected and service is offered, Clicking on again turns the selection Grey, means it is de-selected and that service not offered

  iii. Confirm the Funding Sources you accept by selecting and turning Green those funding sources accepted and turning Grey those funding sources not accepted .

 v. Misc. Details including CQC report URL, Public URL for your specific care home

  i. The system imports your latest CQC Report URL and Public URL directly from the CQC and this enables other users of the Capacity Tracker to quickly link to these places on the Internet.

  ii. Please indicate whether you accept out of hours admissions. Out of hours means outside of 9 to 5 Monday to Friday. By checking this box a tick will appear in the box and this indicates that you accept out of hours admissions. Leaving unchecked means you do not offer this option.

 vi. Manager Details. It is extremely important that you check or enter your Manager details as they appear in the search results and are also used to send key communications to your care home and update reminder prompts. You should also include your NHS net Email address as soon as practicably possible as this will be support direct NHS Acute Trusts to care homes. This email address should be in addition to the managers email address; it is important that these details are kept up to date.

 vii. Extended Room Detail – these details can be added as appropriate and will be available in search results

  i. En-suite facilities – select details of bathroom facilities available

  ii. Equipment – select the available equipment e.g. none/Bariatric/Hoist

  iii. Accessibility   –   various   selections   are   available   e.g. stairs/lifts/wheelchair/Level Access

Please note your CQC registered services are listed here alongside the miscellaneous details (Misc. Details). These are imported from CQC so should there be any error here, you will need to contact CQC to have any anomalies corrected. Once CQC have updated any incorrect information this will then be imported into the Capacity Tracker.

Always remember to press the **'Save'** button when you've updated information on any screen. Don't worry if you forget as you will receive a reminder prompt prior to leaving the page

 b. Whilst you are on this page, you have the option to add as many notes as you want about your care home / services. This is not essential and you may choose to not add any notes. An

example is given below of the sort of information you may wish to include but please remember these need to be kept up-to-date. If added, notes appear in the search results when users search for capacity. Some homes include information about top-up fees, accessibility, whether you don't accept admissions after a certain time – the choice is yours.

Note Log

⊕ Add a Note for this Care Home

Date: 25/10/2018	Added By: **Stuart Flanagan**	✎ Edit	🗑 Delete

No pets allowed

Current building work restricts access . Please access via the side entrance

Additional top up fees may apply

All vacant bed types can flex across the stated bed types offered

Step 2: Business Continuity

Business Continuity details are being captured in response to Covid-19 support and like current vacancies should be updated   as and when things change and at least every 24hrs if there's been no change.

a. Current Status:

Provider details | **Business continuity** | Care quality | Edit services | Edit costs | Edit total capacity | Edit vacancies | Edit contracts

Current Status

Admission Status	Open	**Partially Closed**	Closed

Vacancy Types Status	Dementia Residential		Open
	General Residential		Open
	Transitional		Open

Overall Care Home Status	**Green** ⊘	Amber ⊙	Red ⊗

COVID-19 Resident Count   `0`

Last Updated   Never

Workforce

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    i. Admissions Status should be declared. If partially closed is selected, Care Homes can select which vacancy type is closed by clicking on the applicable green open button. This will then change to red and show as closed. To change simply click on closed to change back to open.

    ii. For any change to the status of a vacancy a care home will need to then realign those capacities and vacancies accordingly via the following tabs:

        1. Edit Total Capacity

        2. Edit Vacancies

        iii.   Overall Care Homes Status should be declared by selecting Green/Amber/Red – guidance of each status type is available by hovering over each Green/Amber/Red buttons

        iv.   Covid-19 Resident Count – this needs to be updated as and when vacancies change, and at least every 24hrs if there's been no change – guidance is available by hovering over the number field

        v.   Last updated – this indicates when the information was last updated

b. Workforce

        i.   Under the employed column, enter the number of Care Workers and Non-Care workers employed at the Care Home along with the number of workers absent due to sickness on that day. ***NOTE: that Care Workers refers to those employed in any capacity for providing Care within the location, i.e. nurses, care assistants. Non-Care Workers relates to those working in support roles, i.e. administration, maintenance etc.***

        ii.   Workforce status – please select Green/Amber/Red to reflect your care home status– guidance is available by hovering over each button

c. Availability of PPE

        i.   PPE Status - select Green/Amber/Red to reflect your care home status – guidance is available by hovering over each button

        ii.   **SAVE DETAILS** – this must be selected to update the system with any information added with this page

d. **Contact Directory** - is an optional section – this enables key contact details to be recorded that may help during business continuity or emergency incident where key personnel and organisations need to be contacted i.e. Plumber details, Electrician etc.

        i.   To add contacts select the 'Add Contact' button and complete each column then press 'Add'

        ii.   When completed please select the green 'Save Details' again and this will save the additional changes made to the page

Step 3: Care Quality

      No action is required for this section; it contains CQC ratings imported from the CQC report.

NOTE: **These are imported from CQC so should there be any error here, you will need to contact CQC directly to have any anomalies corrected**.

Step 4: Define the Services that you offer

a. Select **'Edit Services** and you will be taken to the screen below.

b. Short Stay Services – where you are willing to consider one or more Short Stay Services from the list for any of your Vacancies, select as appropriate. If you do not wish to offer Short Stay Services select Short stay services not provided. In selecting a short stay service you are saying that you are willing to consider any placement from this service for any of your declared long term vacancies.

c. Simply click on the relevant Short Stay Services and Long Term Vacancy Types you offer. These will turn green to confirm your selection.

d. Languages gives the care home an option to promote whether they can offer any specific language in addition to English as this is sometimes an important decision for some patients looking for a care home with a particular language need. To add additional languages, just start typing and select each language

e. Once finished, you should press **'Save Services**.

Note: The services offered must be in accordance as per your CQC Statement of Purpose.

Step 5: Set the cost of each Long Term Vacancy Type & Short Stay Service

Each Vacancy Type offered must have an indicative 'Price per Week' assigned.

If one or more Short Stay Service is selected then an indicative price for that service(s) must be input.

Please Note: If a cost is not assigned to any of these, your Care Home will not have fully completed its registration and will not appear in any search for vacancies.

Step 6: Enter TOTAL capacity for each Long Term Vacancy Type

    a. Select **"Edit total capacity"** and you will be taken to the screen below

    b. For each of the Long Term vacancy types defined on the previous screen you will be presented with a row of boxes to enter the TOTAL Capacity. It's therefore important that this is done before moving to the next step and declaring your current Vacancies.

    c. This is the TOTAL number <u>if full capacity were available (i.e. your care home was completely empty)</u>. Current vacancies will be entered on the next screen so please do not get the two mixed up.

    d. The system will automatically calculate the difference between your Total Capacity and the Vacancies which is entered on the next screen (this will be the number of USED beds and will be used for reporting purposes).

    e. After entering total capacities, click **'Save'**

    f. **Please note the number of Beds the care home has registered with the CQC is automatically populated. The TOTAL capacity entered should NOT exceed the capacity registered with the CQC.**
    If you try to do this you will be presented with a warning on the screen asking if you're sure. This will be monitored by your System Champion(s).

    g. **If vacancy numbers are not populated, your Care Home will not have fully completed its registration and will not appear in any search for vacancies.**

Step 7: Enter Vacancies for each Long Term vacancy type

    a. Select "Edit Vacancies" and you will be taken to the screen below.

    b. For each of the vacancy types chosen, you will be presented with a row of boxes to enter the Current Vacancies.

c. This is the number of VACANCIES which you are currently able to provide <u>i.e., if you were contacted today</u>.

d. Simply enter the VACANCY number against each vacancy type.

e. **Flexible option**:

    i. If you are able to flex your vacancies across differing vacancy types, check the box against the vacancy type. E.g. you only have ONE available bed and it could be used for any of the vacancy types it's essential that tick the box next to it to identify if the vacancy is flexible.

    ii. Don't add 1 in each bed type as this would suggest that the home had more vacancies than it actually does. Instead, select one vacancy type that you want to offer and put a 1 next to it, tick the flexible option and place a 0 in the others.

    iii. The system will not allow you to save more vacant capacity than you have told the system you have as TOTAL capacity for obvious reasons. Helpfully, the system will display the TOTAL capacity that you've entered from the previous screen.

f. **Please note that this is the screen that you are asked to update as and when things change, and at least every 24hrs if there's been no change.(Parent Companies/Organisations with multiple care homes see important notes in Step 9)** and this information will be used to determine whether your organisation appears in the search results when an NHS provider / Local Authority / CCG etc. tries to find spare capacity which is why it is essential to keep your information up-to-date .Once Saved the update is date stamped. If you update daily your vacancy will be listed on all 3 vacancy reports that are produced, providing no other filtering is applied. It is therefore in your interest to update as frequently as possible. This can simply take just 30 seconds and can be updated on the go via mobile phone or tablet with Wi-Fi access.

g. When you're finished, press **'Save '**

Please note for care homes to appear in the search results and any vacancy listings, they must have:

1.   Set up their services

2.   Defined at least one Long Term Vacancy type cost

3.   Where Short Stay Services are offered, included an indicative cost

4.   Declared vacant capacity

5.   Specified at least one funding source

6.   Specified at least one care type

Step 8: Enter Contracts the Care Home has in place with Local Authorities and CCGs

It's easier to transfer a patient / client between organisations that already have a contract with each other. As part of the care home setup process, just select the Edit Contracts link below the Menu Bar and you will be presented with all Local Authorities and CCGs across England grouped by geographical sub-region.

Just click on the relevant organisations to specify the ones which your care home has an existing contract with and they will turn green; save when complete.

Taking the above action sends notifications to the CCG and Local Authority who will need to approve the Contract is in place prior to it being visible to those discharge teams searching for vacancies and have selected this filter.

Step 9: Updating Capacity details

Regular updates of your vacancies will help organisations searching for availability, should reduce the number of unnecessary calls to your care homes asking if you have a vacancy and produce more targeted calls regarding your actual vacancies. You should update in line with the National guidance

below Providing you have entered an up to date email address in the Manager Details within the first step in the process Edit Provider Details Section email reminders to update your vacancies will be automatically sent if your data is not update as required.

If your vacancies have not changed, simply go to the edit vacancies page and select the save button at the bottom of the page. This refreshes the date of the data so any organisation searching for capacity is reassured that this is the most up-to-date information available.

In line with National Guidance, Care Homes are being asked to update their vacancy/Business Continuity details as soon as they change and at <u>least every 24 HOURS</u>

Daily update reminder emails will be sent to you from the system

IMPORTANT NOTE FOR PARENT COMPANIES/ORGANISTION S WITH MULTIPLE CARE HOMES:

BULK CAPACITY UPDATE FEATURE

For the owners of multiple care homes or Parent Organisations we have simplified updating your care home vacancies via the bulk capacity update functionality within the Capacity Tracker.

To do this from the main screen simply select the **Providers** tab and from the drop down box select the **Bulk Capacity Update** option.

You will then be presented with a screen showing all care homes aligned to your user profile.

From this you will quickly be able to update Vacancy Type, by its

- Cost,
- Total Capacity
- Vacancies
- Once completed simply select the green **SAVE button**

ADDING FURTHER CARE HOMES

If you need to add further care homes to your account, follow the steps below:

- go to the **Main Menu**
- select the **Accounts** tab
- within **My Access** simply add the postcode of the care home, then click search
- From the list produced click on the required care home and a tick will be then be displayed.
- Repeat this process for each new home required
- Once completed click on the green update button.

Your requested additional new access will then be reviewed by either the Approver that is in place for your care home or the Capacity Tracker team.

CARE PROVIDER NHSMAIL SIGN UP FORM

Provider information – Please complete all fields below	
Organisation Type:	Social Care
Social Care Site name:	
Name of Town: (Max 11 characters)	
ODS Site Code: https://odsportal.hscic.gov.uk/Organisation/Search	
User information Please complete the information below for 2 staff members in your service.	

	First Name	**Surname**	**Role**	**Current/ personal e-mail address**	**Current/ personal mobile number**	**shared mailbox access type (member/ owner)**
Shared Mailbox Owner						
User						