

Adult Social Care Commissioning Strategy 2023+

How to apply for a 2024 Home Support or Quick Discharge Service contract



BE BOLD BE BIRMINGHAM



Before you start

- Download a copy of the CareMatch Portal User Guide

[User Guide for providers using Care Match Portal | Birmingham City Council](#)

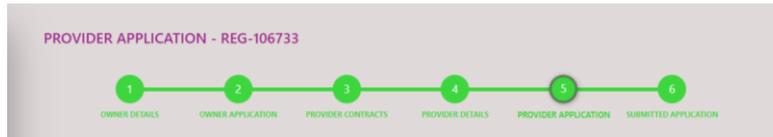
- Work out which route you need to use to apply for your contract – please refer to Section 3 of the User Guide, and find the heading –

‘Selecting the correct route to apply for a contract’

- The four contract routes are also explained in the following slides, A- 8 to 9, B-10, C-16 to 18, D-19

Before you start – make a note of your REG number

- Whichever contract route you are using, there will be a Registration number attached to your application, in the form REG-XXXXXX
- This number will be visible when you have the registration open



- Please make a note of the number - you will need it if you wish to return to a partially completed application to continue it, or if you need technical assistance.

Before you start – delete old partially completed “Contract” applications

- If you are already a user of the CareMatch Portal, go to your registrations table and delete any old “In-Registration” “Contract” applications you may have started in the past.
- The screen shot below shows how you can tell if your old application was to add a contract and how to delete it.

The screenshot shows the 'Registrations' table in the CareMatch Portal. The table has columns for OWNER, PROVIDER, TYPE, STATUS, REGISTERED BY, DATE/TIME CREATED, REFERENCE, and ACTION. Two red arrows point to the 'TYPE' and 'STATUS' columns of the first row, which shows 'Contract' and 'In-Registration'. A third red arrow points to the 'ACTION' column of the second row, which shows 'Q x'.

OWNER	PROVIDER	TYPE	STATUS	REGISTERED BY	DATE/TIME CREATED	REFERENCE	ACTION
		Contract	In-Registration		11 December 2022 13:21	REG-103617	Q x
		Contract	In-Registration		13 December 2022 22:53	REG-103630	Q x

Contract information

At the CareMatch Portal log in page, click 'New Provider – Register here' button



Contract information

Click either 'Home Support 2024' or 'Quick Discharge Service 2024' button to get a drop-down menu of contract information documents

The screenshot shows the CareMatch Portal interface. At the top, there are accessibility icons (A A A A) and a 'Settings' link. The main header reads 'CAREMATCH PORTAL'. Below this is a progress bar with seven steps: 1. INFORMATION (highlighted in green), 2. OWNER DETAILS, 3. OWNER APPLICATION, 4. PROVIDER CONTRACTS, 5. PROVIDER DETAILS, 6. PROVIDER APPLICATION, and 7. SUBMITTED APPLICATION. Under 'STEP 1: INFORMATION', a paragraph explains that the portal is for providers to apply for flexible contracting arrangements. Below the text are four buttons: 'Care Homes 2023', 'Supported Living 2023', 'Home Support 2024', and 'Quick Discharge Service 2024'. At the bottom of the main content area are two buttons: 'BACK' and 'New Owner'.

Applying for both Home Support and Quick Discharge Service contracts

If you wish to apply for both contracts for a particular Provider (CQC Location), please read the following:

- If you are using route 'C', make the two applications in the same way
- If you are using routes 'A', 'B' or 'D' make your first contract application (e.g. Home Support), following the steps in the chosen route.
- Then, before starting the second contract application (e.g. Quick Discharge Service), contact marketintelligence@birmingham.gov.uk who will provide technical advice on how to proceed

If you have never started a contract application with your CQC Provider ID (Contract application route 'A' – see User Guide)

Click the 'New Owner' button on this page

The screenshot shows the CareMatch Portal interface. At the top, there are navigation elements including 'Settings', a CQC Provider ID 'A A A A', and the 'CAREMATCH PORTAL' logo. Below this is a progress bar with seven steps: 1. INFORMATION (highlighted in green), 2. OWNER DETAILS, 3. OWNER APPLICATION, 4. PROVIDER CONTRACTS, 5. PROVIDER DETAILS, 6. PROVIDER APPLICATION, and 7. SUBMITTED APPLICATION. Under the progress bar, the text reads: 'STEP 1: INFORMATION' and 'The CareMatch portal is the system by which providers wishing to provide home support, supported living, residential care (including nursing) services to Birmingham citizens apply to join the Flexible Contracting Arrangement or Framework Agreement necessary to do so. Details of Flexible Contracting Arrangements or Framework Agreements that are currently open for tenders are shown below:'. Below this text are four white boxes representing tender opportunities: 'Care Homes 2023', 'Supported Living 2023', 'Home Support 2024', and 'Quick Discharge Service 2024'. At the bottom of these boxes are two purple buttons: 'BACK' and 'New Owner'. A red arrow points to the 'New Owner' button.

If you see the message below when you enter your CQC Provider ID, it means that an owner account has already been set up in CareMatch Portal.

You must then go to the log in page and enter the email address and password that was used to set up the account. If you don't know those credentials, please refer to the last three slides which give details about 'Technical Support'

Settings

CAREMATCH PORTAL

OWNER DETAILS

1 INFORMATION 2 OWNER DETAILS 3 OWNER APPLICATION 4 PROVIDER CONTRACTS 5 PROVIDER DETAILS 6 PROVIDER APPLICATION 7 SUBMITTED APPLICATION

STEP 2: OWNER DETAILS

Welcome to CareMatch, the system to match quality care for adults across Birmingham.
To register your interest in providing care services to adults within Birmingham, please complete this form.

Are you a Care Quality Commission registered provider? Yes No

CQC Provider ID Search: 1-101642132

CQC ID ALREADY REGISTERED
The CQC ID provided is already registered to an account.
CLOSE

Name of Provider:

Website:

Address Line 1:

Address Line 2:

Town/City:

CQC ID:

Contact Number:

County:

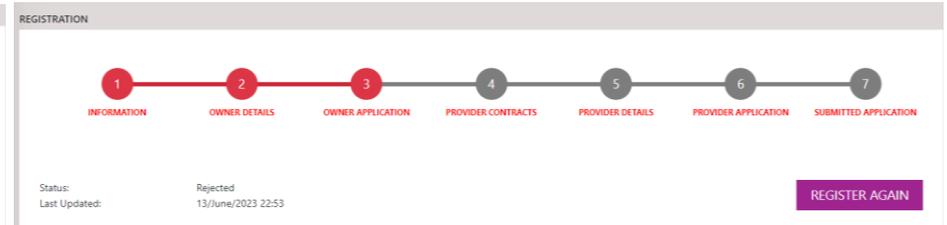
Region:

Provider Postcode:

Please tick to confirm these provider details are correct.

If you have previously started a contract application with your CQC Provider ID but have never been awarded a contract (Contract application route 'B' – see User Guide)

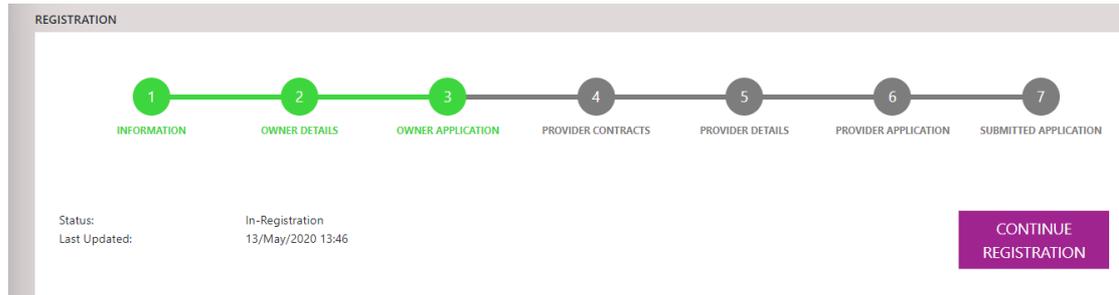
- Log into CareMatch Portal using the email address and password for your User account.
- Once logged in, you should be able to continue with a previously started (or completed and rejected) contract application.



- If you are not able to proceed with the application, please refer to the last three slides which gives details about Technical Support

Returning to a partially completed application (contract application routes 'A' and 'B')

- Log in to CareMatch Portal with the email address and password you entered when you started your application
- Click 'Continue Registration'.



User notifications – Contract Routes ‘A’ & ‘B’

- Your User account will have message email notifications turned on so that you can receive important time sensitive communications from our procurement team during the evaluation period.
- If you get an email notification, you will also be able to view the correspondence within the system. See section 3.3 of the user guide for further information.

Contract application route 'C' and 'D'

For approved owners with previous contracts

- Before starting your application, please identify which User Account you will be using
- Where more than one User Account has access to a Provider, each can start a contract application – **there is a risk of multiple applications.**
- If more than one application is submitted for the same CQC location, the latest amended version will be evaluated, see Document 001 – Instructions For Potential Suppliers; section 13.3'
- Users can apply for contracts for all Providers they can see on their dashboard (slide 16), and can add new Providers to an existing Owner (slide 19)
- You can add a new User by following the steps in Section 8.7 of the User Guide. Please note that you can only use an email address once for a User account.

User notifications route 'C' and 'D'

- The user who is completing the application for your location should check they have turned on receiving system notifications.
- This is so they can receive important time sensitive communications from our procurement team during the evaluation period.
- See section 4.5 of the user guide to check if your notifications are turned on.

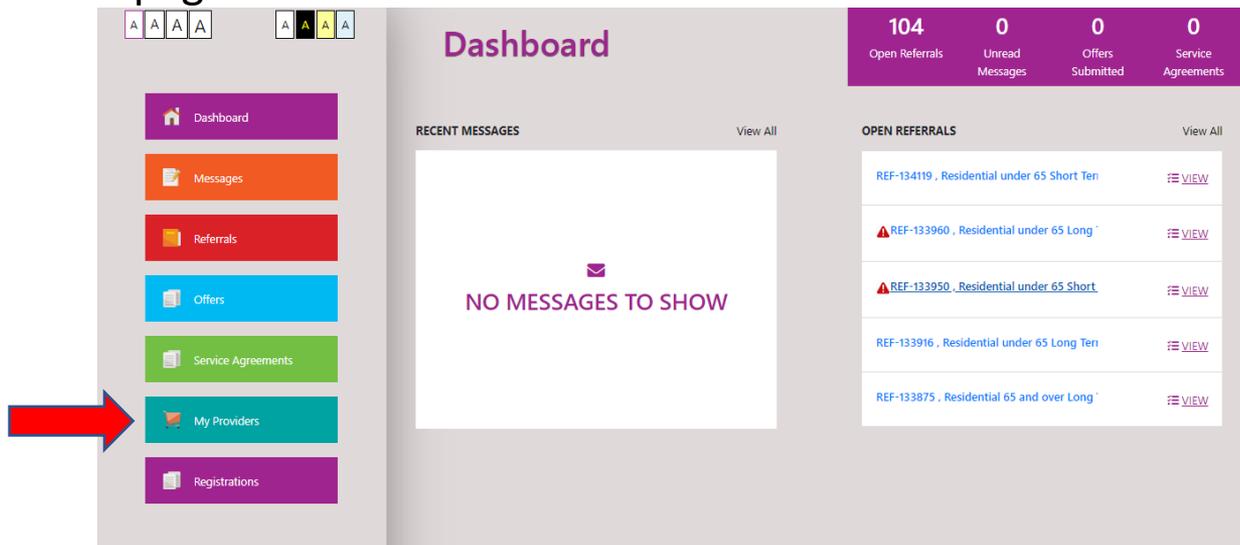
User notifications

To check that notifications are turned on, click on the down symbol next to your name at the top right of your dashboard, then click 'My details'. Notifications are turned on if you see 'Yes' and a green flag

The screenshot shows the Carematch Portal user interface. At the top, the text "CAREMATCH PORTAL" is displayed in purple. On the right side, there is a user profile dropdown menu with the name "Test Test" and a downward arrow. A red arrow points to this dropdown. Below the name, the menu options are "MY DETAILS" and "LOG OUT", with a red arrow pointing to "MY DETAILS". Below the menu, there are two notification settings sections. The first is "User Details" with the text "RECEIVE REFERRAL EMAIL NOTIFICATIONS" and two buttons: "YES" (grey) and "NO" (red). The second is "RECEIVE MESSAGE EMAIL NOTIFICATIONS" with two buttons: "YES" (green) and "NO" (grey). A red arrow points to the "YES" button in the second section.

You have previously been awarded a contract via CareMatch Portal for one of your Providers (CQC Locations), and you want to apply for a new contract for the same Provider (Contract application route 'C' – see User Guide)

Log in to your CareMatch Portal account to reach your dashboard and go to your 'My Providers' page



The screenshot shows the CareMatch Portal dashboard. On the left is a vertical navigation menu with the following items: Dashboard (purple), Messages (orange), Referrals (red), Offers (blue), Service Agreements (green), My Providers (teal), and Registrations (purple). A red arrow points to the 'My Providers' item. The main dashboard area is titled 'Dashboard' and contains three sections: 1. Summary statistics: Open Referrals (104), Unread Messages (0), Offers Submitted (0), and Service Agreements (0). 2. RECENT MESSAGES: A box with a purple envelope icon and the text 'NO MESSAGES TO SHOW'. 3. OPEN REFERRALS: A list of five referral entries, each with a reference number, description, and a 'VIEW' link. The entries are: REF-134119, Residential under 65 Short Ten; REF-133960, Residential under 65 Long; REF-133950, Residential under 65 Short; REF-133916, Residential under 65 Long Ten; and REF-133875, Residential 65 and over Long.

Choose the provider you want to apply for the contract for, by clicking on the magnifying glass next to the provider name

The screenshot shows a web application interface with a sidebar on the left and a main content area on the right. The sidebar contains navigation links: Dashboard, Messages, Referrals, Offices, Service Agreements, My Providers, and Registrations. The main content area is titled "My Providers / Locations" and features a "NEW PROVIDER" button and a search input field. Below the search field is a table with the following columns: PROVIDER NAME, LOCATION, STATUS, GEOGRAPHICAL AREAS, and ACTIONS. The table contains three rows, each with "Approved" in the STATUS column and a magnifying glass icon in the ACTIONS column. A search dropdown menu is open over the PROVIDER NAME column, listing "Provider 1", "Provider 2", and "Provider 3". A red arrow points to the magnifying glass icon in the ACTIONS column of the first row.

PROVIDER NAME	LOCATION	STATUS	GEOGRAPHICAL AREAS	ACTIONS
Provider 1		Approved		🔍
Provider 2		Approved		🔍
Provider 3		Approved		🔍

You will now see the Provider details page for your chosen provider.
Click on the 'Add Contract' button to start the application, and then follow the steps in the User Guide Section 8.3

Font size: A A A A A Theme: A A A A A

Dashboard
Messages
Referrals
Offers
Service Agreements
My Providers
Registrations

Provider Details

Contract: [Redacted]

Primary Number * [Redacted]

Email Address * [Redacted]

Address Line 1 [Redacted]

Address Line 2 [Redacted]

Town/City [Redacted]

Status: **Approved**

Website: [Redacted]

No. of Beds: 0

County: [Redacted]

Region: [Redacted]

Postal Code: [Redacted]

Contracts

BACK

SAVE

ADD CONTRACT

You are an approved Owner and have been awarded a contract for one of your Providers, and you want to apply for a contract for a different Provider that has not previously been awarded a contract (contract route 'D' – see User Guide)

Log into CareMatch Portal, go to your 'My Providers' page and click 'New Provider'.
Then follow the steps in Section 8.2 and 8.3 of the User Guide

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Dashboard
Messages
Referrals
Offers
Service Agreements
My Providers
Registrations

My Providers / Locations

NEW PROVIDER

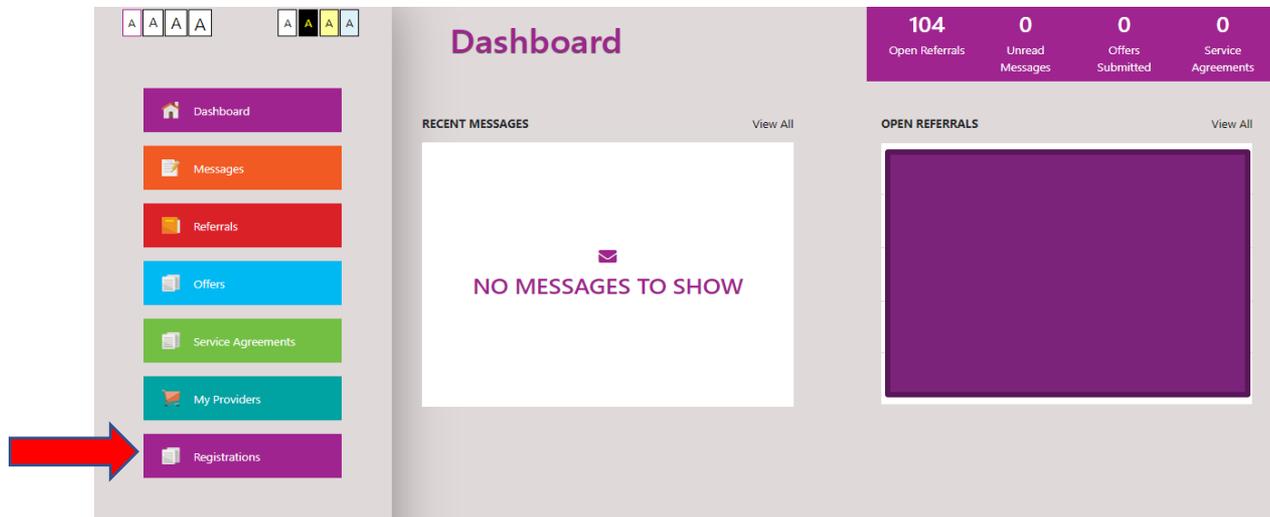
Search

PROVIDER NAME	LOCATION	STATUS	GEOGRAPHICAL AREAS	ACTIONS
Provider 1		Approved		Q
Provider 2		Approved		Q
Provider 3		Approved		Q

prev 1 next

Returning to a partially completed contract application - Approved Owners using contract application routes 'C' and 'D'

Provided you have saved the section you are working on, you can leave the application at any point and return to it later. To return to your application, log in to your CareMatch Portal account and, from the dashboard, go to your 'Registrations' page



Returning to a partially completed contract application

At the Registrations page you will see a list of all the registrations you have created.

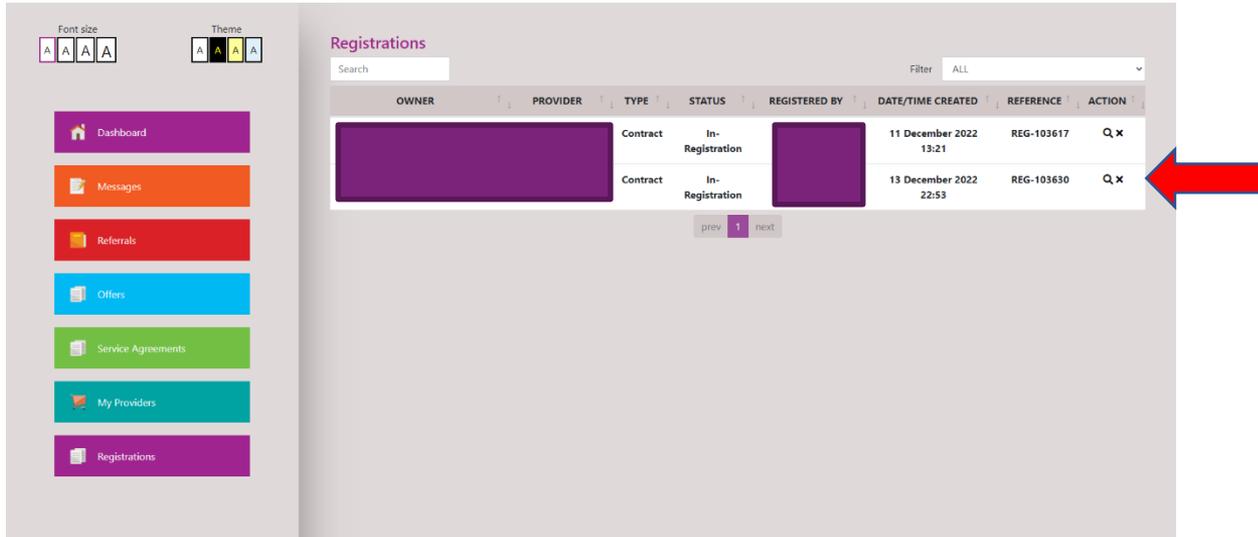
Open the application you wish to resume (check the REG reference column), by clicking on the magnifying glass next to it

Registrations

OWNER	PROVIDER	TYPE	STATUS	REGISTERED BY	DATE/TIME CREATED	REFERENCE	ACTION
		Contract	In-Registration		11 December 2022 13:21	REG-103617	Q X
		Contract	In-Registration		13 December 2022 22:53	REG-103630	Q X

Returning to a partially completed contract application

If you wish to delete any unsubmitted registration you have created, you can do so by clicking the 'X' next to it.

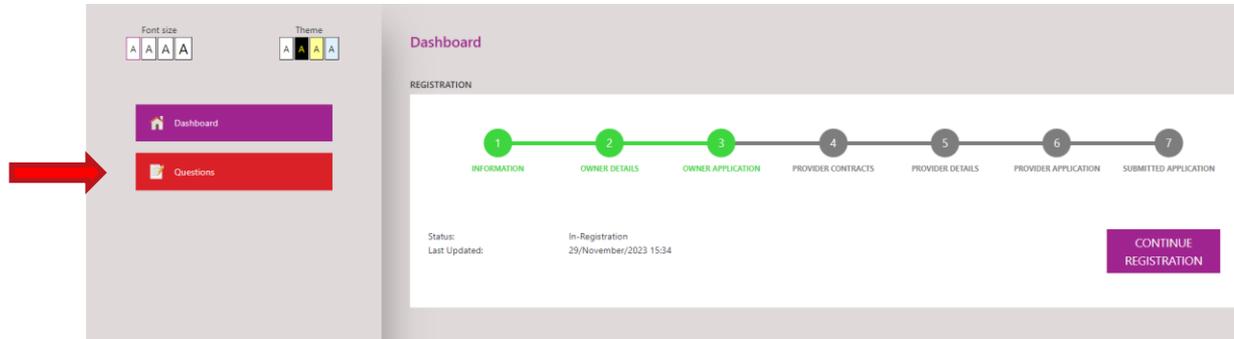


Questions during the contract application – this is the Clarification process for gaining procurement support

1. Should you have questions about the procurement exercise or how to complete the Questionnaire, you should check the relevant guidance document which is available from the list of dropdown documents under each contract heading on the CareMatch Portal (see Slide 6): [Contract information](#)
2. Check the Clarification Log to see if your question has already been asked and answered: [Tender opportunities | Tender opportunities | Birmingham City Council](#)
3. Raise a clarification via the Questions function in the CareMatch Portal. The answers to these questions will be published regularly here: [Tender opportunities | Tender opportunities | Birmingham City Council](#)

Questions during the contract application (Route A and B)

- These should be raised via the 'Questions' page, reached from your menu on the left hand side whilst you are working on a registration. The use of the Question function is explained in Section 3.2 of the User Guide



Questions during the contract application (Route C and D)

These should be raised via the 'Questions' page, reached from your menu on the Dashboard whilst you are working on a registration. The use of the Question function is explained in Section 3.2 of the User Guide

Font size: A A A A Theme: A A A A

Dashboard

Questions

Messages

Referrals

Offers

Service Agreements

My Providers

Registrations

REGISTRATION

1 2 3 4 5 6

OWNER DETAILS OWNER APPLICATION PROVIDER CONTRACTS PROVIDER DETAILS PROVIDER APPLICATION SUBMITTED APPLICATION

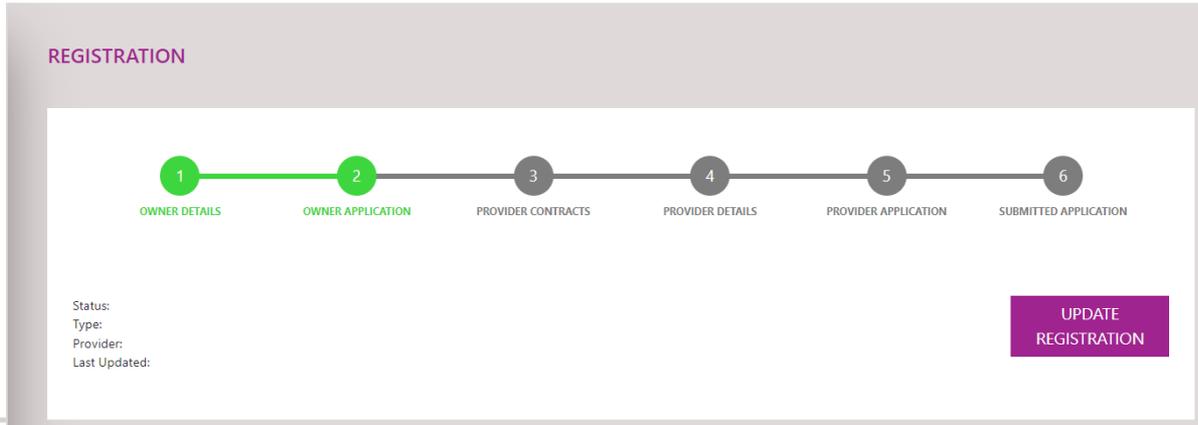
Status:
Type:
Provider:
Last Updated:

CONTINUE REGISTRATION

<https://test.carematchportal.com/Staging/RegistrationOverview.aspx#>

Amending your contract application after you have submitted it (routes A and B)

- Until the tender closes, you can still amend your application, which will have the status 'Awaiting Approval'
- Log into your account and click 'Update Registration'



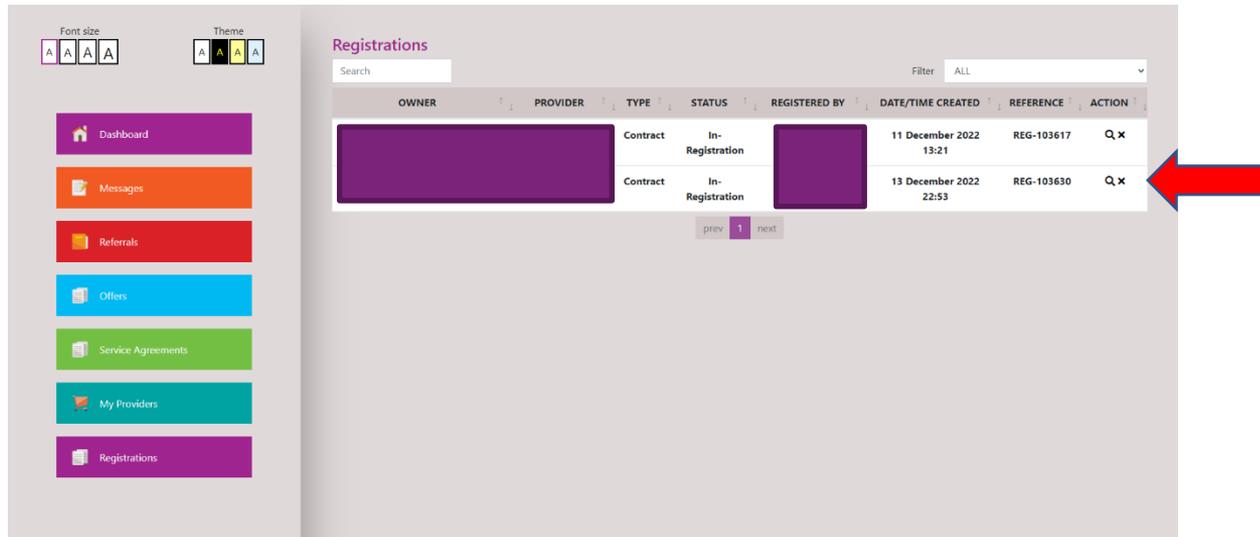
Amending your contract application after you have submitted it (routes C and D)

- Go to your 'Registrations' page



Amending your contract application after you have submitted it (routes C and D)

- Go to the registration by clicking on the magnifying glass next to it

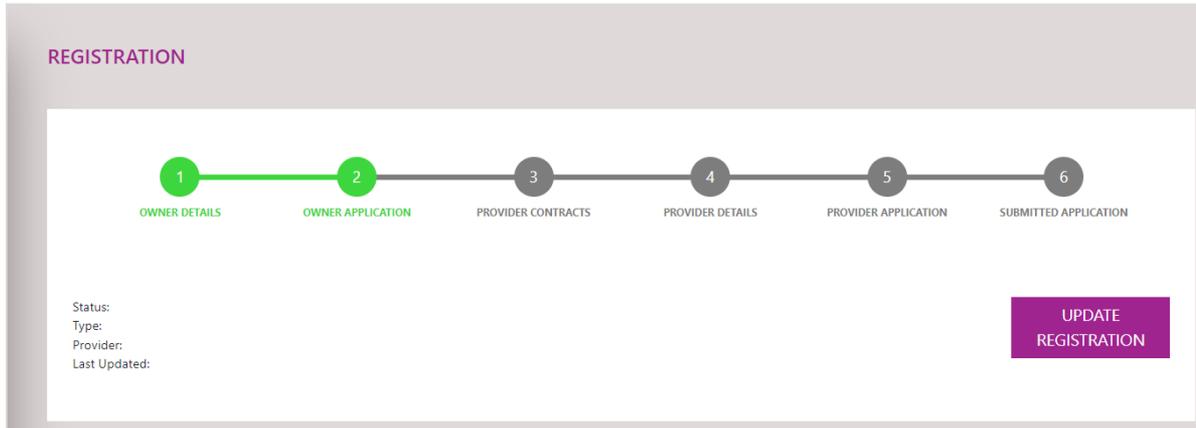


The screenshot displays a web interface with a sidebar on the left and a main content area. The sidebar contains navigation links: Dashboard, Messages, Referrals, Offers, Service Agreements, My Providers, and Registrations. The main content area is titled 'Registrations' and features a search bar, a filter dropdown set to 'ALL', and a table. The table has columns for OWNER, PROVIDER, TYPE, STATUS, REGISTERED BY, DATE/TIME CREATED, REFERENCE, and ACTION. Two rows are visible, both with 'Contract' as the type and 'In-Registration' as the status. The second row is highlighted, and a red arrow points to the magnifying glass icon in its ACTION column.

OWNER	PROVIDER	TYPE	STATUS	REGISTERED BY	DATE/TIME CREATED	REFERENCE	ACTION
		Contract	In-Registration		11 December 2022 13:21	REG-103617	Q X
		Contract	In-Registration		13 December 2022 22:53	REG-103630	Q X

Amending your contract application after you have submitted it (routes C and D)

- Click 'Update Registration' to open it



Amending your contract application after you have submitted it

- Make your amendments and save them.
- You do not need to resubmit the application.
- You can continue to make amendments at any time until the tender closes.
- You should only submit one contract application of the same type for the same provider.
- If more than one application is submitted for the same CQC location, the latest amended version will be evaluated, see Document 001 – Instructions For Potential Suppliers; section 13.3'

Technical Support

- If you can't log into your CareMatch Portal account
 - If something is preventing you from starting a registration
 - If something is preventing you from returning to a partially completed registration
 - If you have any other problem making CareMatch Portal work
1. Review the tender instructions document and any guidance in the CareMatch Portal, to check you are entering the correct type of information.
 2. Review the CareMatch Portal User guide for instructions

Technical Support

3. Check the Clarification Log and bulletins, as we may have published some further information already to support you:

[Tender opportunities](#) | [Tender opportunities](#) | [Birmingham City Council](#)

4. Only after you have attempted to resolve your technical issue using the above support, should you contact the Council's Market Intelligence Team via email at:

marketintelligence@birmingham.gov.uk

In your email requesting technical help, please include the email address you are using to log in to CareMatch Portal and, if applicable, the Registration number of the contract application you are having problems with (you can find the number on your Registrations page). Please ensure you give as much detail as possible in your email, including screenshots where possible and which stage of the process you are stuck at.

Technical Support

- Please be aware the Market Intelligence Team can only answer technical questions relating to the CareMatch Portal and not about any other aspect of the tender process.
- Please see slides 23-25 for how to raise procurement/tender related questions.