

HomeFirst Response Service

Guide for Providers

Quick Reference Guide – Manage referrals for service through the HomeFirst provider Portal

This quick reference guide is designed to inform those who are using the Provider Portal for managing referrals.

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V1 - June 2018.**

Welcome to the HomeFirst Portal

Over the last 6 months, an internet based electronic solution called the 'Home First Portal' has been developed by our internal ICT team and built for the use of our Home First Response Service provider - Carers Trust East Midlands.

The Home First Portal is designed to interact with the '*Home First Response Service – Hospital Discharge and Community*' Mosaic Workflow - exchanging customer information quickly, seamlessly and in accordance with the new GDPR Data Protection policy.

The Home First portal enables NCC staff to submit a Home First referral, receive responses within 2 hours and receive updates from the provider – while the service user is in their service. The Home First portal listens out for referral requests every few minutes and provides real-time updates between the provider and Mosaic.

The information provided by Carers Trust East Midlands is intended to help inform the Community Assessment and Support Plan.

Whilst the Portal has been developed to handle some communication between Carers Trust and Nottinghamshire County Council - is not intended to replace all communication.

'Need to knows' about The Portal

The Portal polls every 2 minutes and 'listens' for new referral requests

Some mandatory fields have been built into Notts County Councils referral form for example 'District'. If these fields are not completed by NCC, the form will not submit to the Portal.

To help promote best practice completion of referrals to the Portal, if you receive any referral requests with incorrect address and mismatching district – please reject these immediately making note in the free type areas of the reason for rejection.

Throughout the guide, all areas of 'best practice' are identified in red boxes. Here is an example of how they will look;

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Contents

Getting Started	Page x
Navigation around the Portal	Page x
Electronic referrals for service via the Portal – How to view referrals.	Page x
How do I accept or reject a referral for service	Page x

Getting Started

- In your inbox, you will have been sent a link to create a Microsoft account. You will need this to log into the Portal.
- Select the link and follow the on screen instructions.
- You will also have been sent a link to the Portal.
- Once you have created your Microsoft Account, select the link for the Portal and get started by using the 'Microsoft' button below.
- We recommend that you create a strong password (containing lower case, upper case, numbers and characters).



Be Secure

Please ensure to lock your screen when you are not using the Portal to ensure that sensitive data held within the Portal is kept confidential at all times.

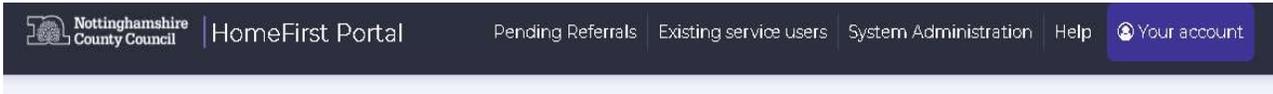
Do not share your log in or Password.

Trouble Shooting

- "The Portal will not display" – Contact your IT System Administration.
- I need/ a User Name and/Password / have forgotten my User Name and/or Password - Contact the Nott's County Council Central Partnership Office (CPO) Team asking for Adam Fraser on **01623 123456** who will assist you with this.
- "I do not have the right access to perform a task in the Portal" – Contact the CPO Team on the above number.

Navigating around the Portal

There are 4 key areas within the Landing Page of the Portal which we will refer to as 'Pending Referrals' page. These areas are detailed below and allow you to perform the following basic functions;



Pending Referrals

- View all referrals currently awaiting a service
- Search for pending referrals
- Check if you are close to missing the 2 hour reply window

Existing service users

- View all Service Users who have been 'accepted into Service'
- Check the status of Service Users 'accepted into 'service'

System Administration

- Area still under Development

Help

- Area still under Development

Your account

- Area still under Development

Electronic referrals for service via the HomeFirst Provider Portal

You can receive electronic referrals for service for any Service Users registered with Adult Social Care and Health via the provider portal.

How do I view referrals?



When you first log in, you will be taken to the Landing Page which we will now refer to as the 'Pending referrals' screen. However, if you are any other screen you can select the '**Pending referrals**' screen from the bar at the top of each page to view referrals. You are able to search for clients using their name and also filter all referrals by district.

The 'Pending referrals' page will display a list of incoming referrals i.e. those that have not been actioned/accepted into Service.

Pending Referrals - Outstanding homecare requests

Current Time - 3:12pm | 22/05/2018

Mr Yusuf Test Hospital: Highbury Referral time: 4:57pm, 21/05/2018 Requested service start date: 19/05/2018 District: Ashfield	Respond by 9:27am 22/05/2018	Details
Mr Lowe Ham Hospital: Kings Mill Referral time: 11:57am, 22/05/2018 Requested service start date: 23/05/2018 District: Mansfield	Respond by 1:57pm 22/05/2018	Details
Maisy Goddard Source: District team Referral time: 1:23pm, 22/05/2018 Requested service start date: 23/05/2018 District: Newark	Respond by 3:23pm 22/05/2018	Details

Once a referral is accepted, It is important to note that the Portal will send an automatic acknowledgement to Notts County Council confirming receipt of the referral into the Portal, which is when the **2 hours response time** target starts.

Carers Trust East Midlands are contractually obligated to confirm acceptance (or non acceptance into service within 2 hours of receipt of the referral.

Replying to service requests – on time !

As a quick reference guide, a helpful **Red/Amber/Green** colour coding system has been applied to the 'requested by' column in the Pending Referrals screen which highlights when you are either ;

- close to missing the 2 hour response window or
- have exceeded the 2 hour response window.

This is demonstrated in the box on the right;



Pending Screen - Searching for Client referrals

To refine the list, enter the Service User first or last name into the 'search this list' field and 'select OK'.

Search by -- District -- ▾

Alternatively, you can use the 'Search District' fields to expand search parameters. This will return a list of clients to the options you have selected/specified.

You may also 'sort referrals by' Oldest or Newest fields as shown below. This will sort the current referrals into chronological order depending the date they were received in the portal.

Note: The Search fields will only return information regarding data contained in the 'pending referrals' screen.

How do I accept or reject a referral for service?

Alongside each client is a button labelled 'Details'

Maisy Goddard

Source: **District team** Referral time: **1:23pm, 22/05/2018**
Requested service start date: **23/05/2018** District: **Newark**

Respond by

3:23pm
22/05/2018

Details

Click on the 'Details'  button of the referral you wish to view and this will display more information about the Service User.

This screen allows you to view all available referral information.

Care referral details - Outstanding homecare requests

Maisy Goddard

Date of birth
23/04/2010 (8 years old)

Address
44 Whinney Lane
New Ollerton
NEWARK
Nottinghamshire NG22 9TE

District
Newark

NHS Number
—

Home phone number
—

Mobile telephone number
07842039859 Mum

GP details
—

Referral time
1:23pm
22/05/2018

Respond by
3:23pm
22/05/2018

Jump to...

- Person information
- Next of Kin Details
- Referral details
- Consent
- Requirements
- Completed By

Next of Kin Details

Address
—

Telephone Number
—

The **‘Jump to’** box is a useful feature and allows you to go directly to areas of interest on the page displayed i.e. ‘Admission details’ or ‘Summary of Support required’.

You can accept or refuse this referral request based on the displayed information by using either of the buttons underneath the ‘Jump to’ Navigation Box on the right hand side of the screen.

You can also access these buttons at the bottom of the Care Referral details screen.



Accepting a referral

It is critical that you carefully review the referral and Service User information provided and that you have decided to provide services to the Service Users prior to accepting the referral.

Once a referral has been accepted, service delivery must be provided within 48 hours as agreed with the provider.

Best Practice:: Only accept the referral if both you and the Service User agree to commence services.

Select 'accept this request'



Home / Care referral details / Accept care referral

Date of 1st visit E.g. 01/03/2018 <input type="text" value="2018-05-22"/>	Time of 1st visit E.g. 14:00 <input type="text" value="00:00:00.000"/>
--	---

Service user details

Maisy Goddard
Born on 23/04/2010

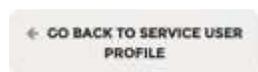
Source
District team

Requested service start date
23/05/2018

District
Newark

Referral time
1:23pm, 22/05/2018

To the right hand side of the screen is a 'Service User details' pane that provides a summary of the client details and a link that will allow you to ;



Click 'Accept this request' and the referral will now appear in the 'Existing service users' page of the Portal.

Best Practice:: Remember to click buttons only once then wait for the information to process. Clicking twice might create issues within the Portal.

Best Practice: Once you have Accepted a referral, the portal will not allow you to reject it. YOU CAN USE THE DELAY SERVICE START OR SERVICE FAILED BUTTONS.

Rejecting a referral

To reject the referral, select the 'Refuse this request' field.

X REFUSE THIS REQUEST

You will be asked to enter a reason for rejecting the referral.

Reason for refusing this referral

This is some set text that might explain the rules or repercussions around rejecting any referrals, perhaps with a link to an external page?

Reason for refusal

Reason for rejection

Details about this refusal

Please give additional reasons for refusing this referral...

Service user details

Mrs. Amanda Tinker
Born on 19/04/1986
Hospital
Nottingham QMC
Discharged from Hospital
09/01/2018
District
Nottinghamshire
Referral time
8:47am
14/12/17

← GO BACK TO SERVICE USER PROFILE

X REFUSE THIS REFERRAL

Enter the reason for rejecting the referral from the list displayed.

Comments regarding the reason for rejection can also be entered if necessary into the free type field.

Then select 'Refuse this referral'.

X REFUSE THIS REFERRAL

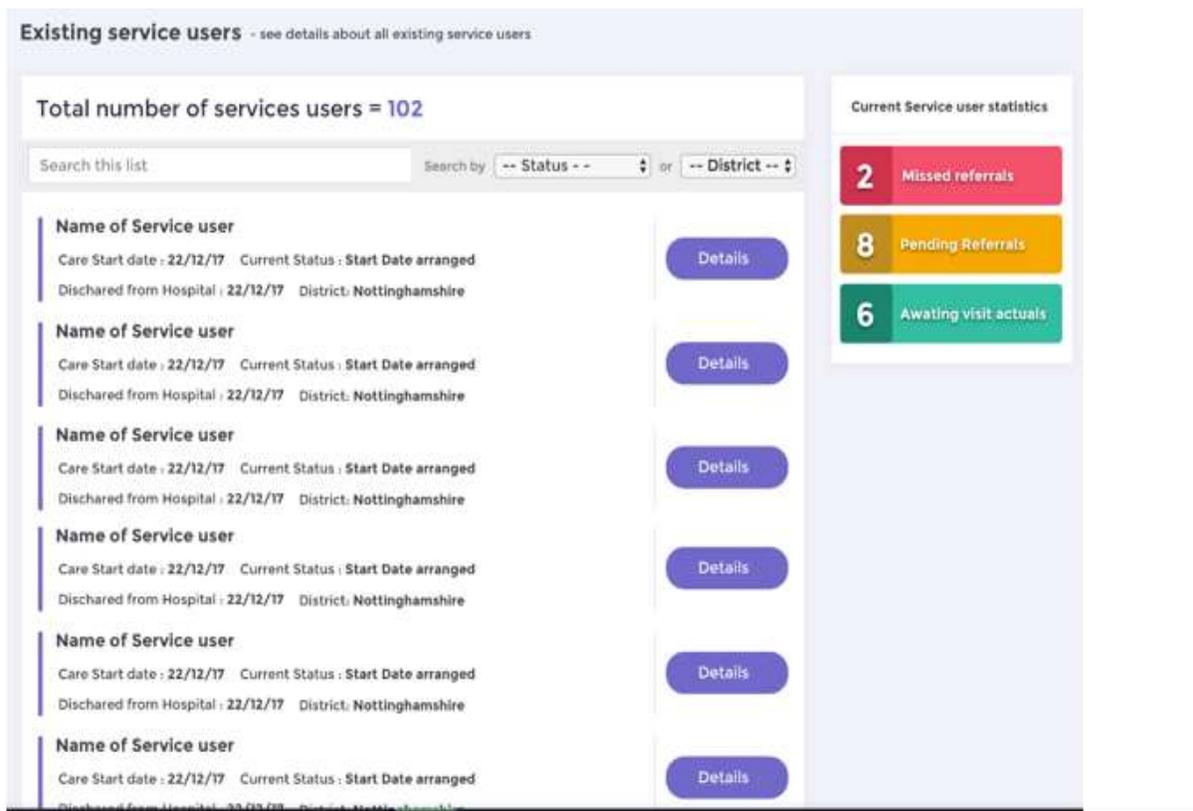
Best Practice – When you reject a referral, the client is automatically removed from the portal.

If the service is still required, a new referral request must be submitted by the Notts County Council.

Existing Service Users

This screen provides a summary of all Service Users accepted into service that require further action. There are a number of filters to enable you to view Service Users either by their name, current status (I.e. First Visit Booked, Awaiting Actuals etc. For a full list, please see page XX) and district.

Selecting the  field alongside each Service User will direct you to further information and allow you to complete further actions to the referral.



Existing service users - see details about all existing service users

Total number of services users = 102

Search this list Search by -- Status -- or -- District --

Name of Service user
Care Start date : 22/12/17 Current Status : Start Date arranged
Discharged from Hospital : 22/12/17 District: Nottinghamshire

Name of Service user
Care Start date : 22/12/17 Current Status : Start Date arranged
Discharged from Hospital : 22/12/17 District: Nottinghamshire

Name of Service user
Care Start date : 22/12/17 Current Status : Start Date arranged
Discharged from Hospital : 22/12/17 District: Nottinghamshire

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Discharged from Hospital : 22/12/17 District: Nottinghamshire

Name of Service user
Care Start date : 22/12/17 Current Status : Start Date arranged
Discharged from Hospital : 22/12/17 District: Nottinghamshire

Name of Service user
Care Start date : 22/12/17 Current Status : Start Date arranged
Discharged from Hospital : 22/12/17 District: Nottinghamshire

Current Service user statistics

- 2 Missed referrals
- 8 Pending Referrals
- 6 Awaiting visit actuals

Note: The Current Service Statistics panel on the right is still under development and will not be available in the Live Portal at this time. Once live, this will enable you to filter on certain Service Users based on **their specific status** criteria to help;

- locate them more easily and
- respond appropriately.

The accepted referral will now feature in the list of existing Service Users with the status of **'First Visit Booked'**.

Existing services users - see details about all existing service users

Total number of service users = 3

Vikki Test Care Start date: 5:00pm, 16/05/2018 Current status: Awaiting actuals District: Broxtowe	Details
Mr Yusuf Test Care Start date: 12:00am, 22/05/2018 Current status: Awaiting actuals District: Ashfield	Details
Maisy Goddard Care Start date: 12:00am, 22/05/2018 Current status: First visit booked District: Newark	Details

When you are ready to resume working on the Service Users record, find the accepted referral you wish to start work on and select the  button.

This screen will display all of the referral information for the Service User including the accepted Date and Time for the first visit.

 / **Existing service users / Maisy Goddard**

Submit...    

Before we focus on the screen in more detail, there are 4 buttons at the top of the page that enable you to carry out the following actions;

- **Provider Update** – Submit an updated to Notts County Council 72 hours after service has commenced and you are in a better position to advice of care required.
- **Visit Actuals** – Confirm actual hours of care provided on last day of Service.
- **Service Start Delay** – Notify Notts County Council if there has been a delay to service being delivered.
- **Failed Service Start** – Notify Notts County Council if the service is to be suspended.

Existing service users / Maisy Goddard

Submit... Provider Update Visit Actuals Service Start Delay Failed Service Start

Maisy Goddard

Current Status: First visit booked [VIEW UPDATE LOG](#)

Date and time of initial referral
22/05/2018 01:23PM

Date and time of first visit
Starts at 12:00am on Tuesday 22nd May 2018

Born on 23/04/2010 (8 years old)

Address [Home phone number](#)
44 Whinney Lane New Ollerton NEWARK
Nottinghamshire NG22 9TE

GP details [Mobile telephone number](#)
07842039859 Mum

Initial referral information

Next of Kin Details

Address [Telephone Number](#)

Referral details

Team form completed by District team **Date of referral** 22/05/2018

Service start date 23/05/2018

Consent

Consent to share information
Yes

MCA Best Interest

Requirements

Health Needs

Home Circumstances

Mobility / Transfers

- Information on this page is populated from the initial referral.
- Here you can perform the next required actions for the Service User to progress, finalise or terminate the service.

Home Circumstances

—

Mobility / Transfers

—

Summary of needs / Support required

—

Risks

—

Carers Required

—

Approximately how many visits per day will be required?

—

Completed By

Worker Name

Michelle Beswick

Work Telephone Number

—

Worker Team

Resources Worker - Level 3

Work Mobile Telephone Number

—

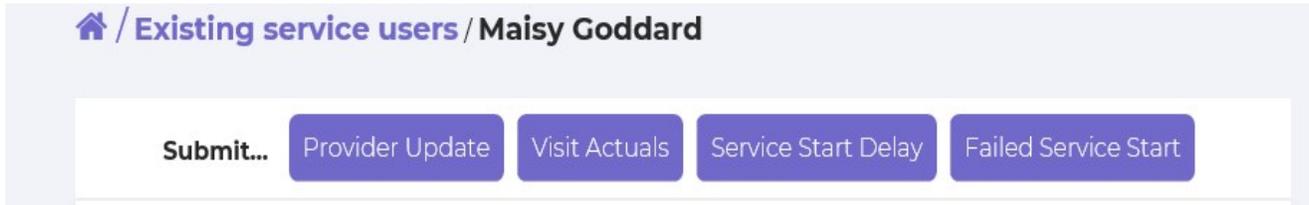
Date

23/05/2018

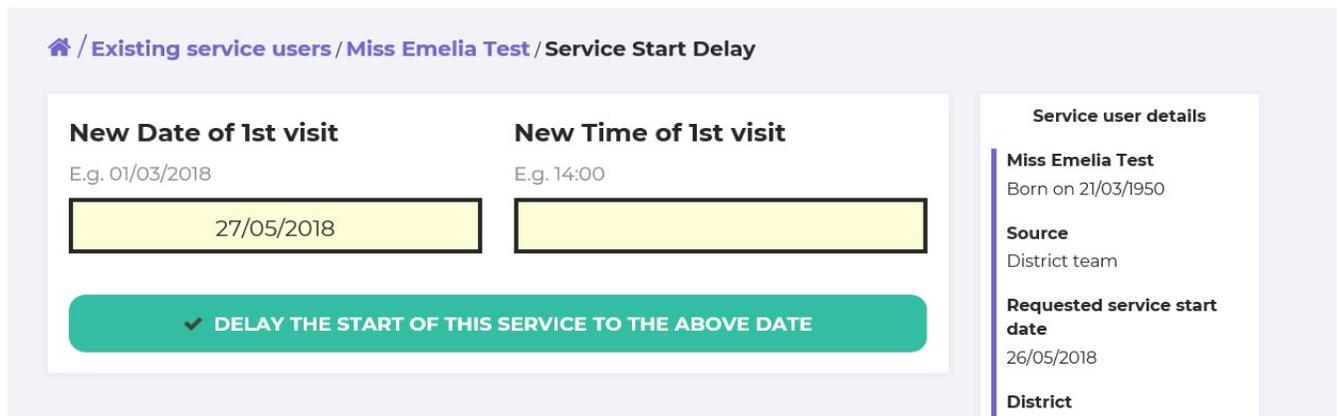
Service Start Delay

This screen enables you to notify Notts County council of a delay to service for examples such as delayed hospital discharges etc.

On the 'Existing Service Users' details screen – click 'Service Start Delay'.



The following screen and options will display.



The screenshot shows the "Service Start Delay" screen for "Miss Emelia Test". The breadcrumb trail is "/ Existing service users / Miss Emelia Test / Service Start Delay". The main content area has two input fields: "New Date of 1st visit" with a placeholder "E.g. 01/03/2018" and a value of "27/05/2018"; and "New Time of 1st visit" with a placeholder "E.g. 14:00". Below these fields is a green button with a checkmark and the text "DELAY THE START OF THIS SERVICE TO THE ABOVE DATE". To the right is a "Service user details" sidebar with the following information: "Miss Emelia Test", "Born on 21/03/1950", "Source: District team", "Requested service start date: 26/05/2018", and "District".

Input the 'New Date of the 1st visit' and 'New time of 1st visit and click the 'Delay The Start Of This Service To The Above Date' Button. This will notify Notts County Council of the delay.

The referral will remain in the 'Pending Referrals' screen.

Best Practice: You may only submit 2 delays to the service date.

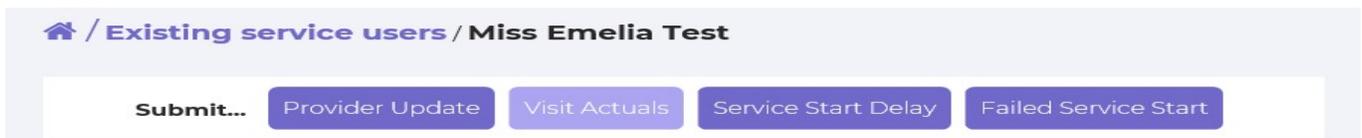
Service Failed to Start

This screen enables you to notify Notts County council of a where a Service User has been accepted into service but the service failed to start for examples such as the Service User has declined the Service or it may come to your attention via the Hospital Discharge Planning Team or other non NCC worker that a SU is no longer leaving hospital.

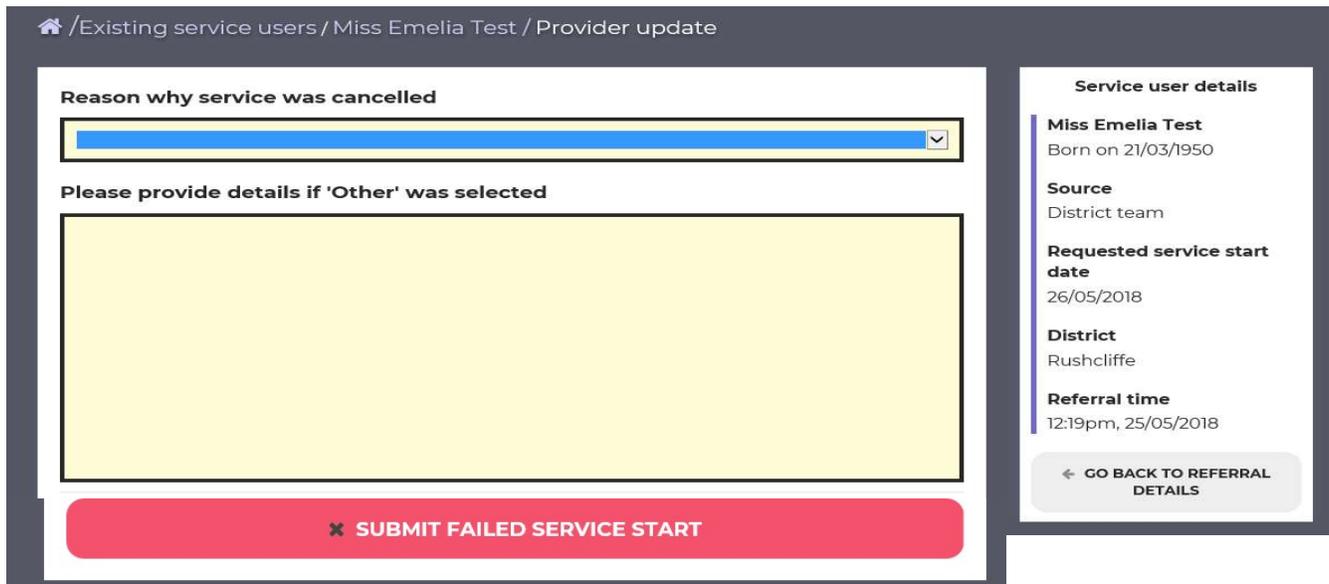
In these scenarios, you will be contacted and asked to confirm this update via the Portal.

On the 'Existing Service Users' details screen – click 'Failed Service Start'.

Service failed to start screen - If the provider has accepted a client but the client then doesn't start the service, then the provider will use 'Service Failed to Start' screen. Carers trust might find out that SU isn't leaving as part of their discharge planning. Non NCC worker can ring Carers trust to update system



The following screen and options will display.

A screenshot of a web application form titled 'Existing service users / Miss Emelia Test / Provider update'. The form is divided into two main sections. The left section is titled 'Reason why service was cancelled' and contains a dropdown menu with a blue bar and a small downward arrow. Below this is a text area with the prompt 'Please provide details if 'Other' was selected' and a large yellow rectangular box. At the bottom of this section is a prominent red button with white text that reads 'x SUBMIT FAILED SERVICE START'. The right section is titled 'Service user details' and lists information for 'Miss Emelia Test': 'Born on 21/03/1950', 'Source: District team', 'Requested service start date: 26/05/2018', 'District: Rushcliffe', and 'Referral time: 12:19pm, 25/05/2018'. At the bottom of this section is a grey button with a left-pointing arrow and the text 'GO BACK TO REFERRAL DETAILS'.

Once the 'Submit Failed Service Start' button has been selected – this will remove the referral from the Portal.

The Provider Update Form

This information is critical to Notts County Council workers who are arranging ongoing care or planning discharge from the service.

The Update Form must be submitted within 72 hours of entering/being accepted into the service.

The Portal will does not allow you to complete the 'Actuals' form until the 'Provider Update Form' has been completed. Attempting to do so will generate the following error message;

The selected referral is currently in the state Accepted, but needs to be in the state Updated in order for actuals to be sent.

Complete the information below in the '**Provider Update**' Form and click the 'Submit Provider Update' button.

[/Existing service users / Maisy Goddard / Provider update](#)

Start Date	Predicted End Date (if known)
<input type="text" value="22/05/2018"/>	<input type="text" value="25/05/2018"/>
Was the service terminated within 72 hours?	
<input type="text" value="No"/>	
Have there been any changes to the needs / package?	
<input type="text" value="No"/>	
Completed By	Date
<input type="text" value="Michelle Beswick"/>	<input type="text" value="22/05/2018"/>

[← GO BACK TO REFERRAL DETAILS](#)

The Service Users referral will still remain on the 'Pending' page until you are ready to submit 'Actuals'. The status of the referral will also update to reflect the current position;

Maisy Goddard

Care Start date: **12:00am, 22/05/2018** Current status: **Awaiting actuals** District: **Newark**

[Details](#)

Submitting 'Actuals'

- This screen enables you to confirm and submit the actual visits and hours of service commissioned.

Best Practice: Actuals must be provided on the last day of Service for the Service User. This notifies Notts County Council that the service has now finished.

- Once you have 'submitted the visit actuals' this will remove the Service User from the Portal.

Home / Existing service users / Maisy Goddard / Submit Visit Actuals

Start Date	End Date
24/05/2018	30/05/2018
Total Number of Visits Delivered	Total Number of Hours Delivered
6	15 ×
Number of Carer's on Commencement of Service	Number of Carer's at End of Service
1	1

[← GO BACK TO REFERRAL DETAILS](#)

Service user details
Maisy Goddard
Born on 23/04/2010
Source
District team
First visit date
22/05/2018
District
Newark
Referral time
1:23pm, 22/05/2018

Update Log

<place Holder – not in sprint yet – button to be removed whilst html link being sourced from Carl. Screen has been designed)

Existing service users / Maisy Goddard

Submit... Provider Update Visit Actuals Service Start Delay Failed Service Start

Maisy Goddard

Current Status:
Awaiting actuals

VIEW UPDATE LOG

Jump to...

- Service User Status
- Personal information
- Next of Kin Details
- Referral details

NOTES:

Missed referrals should be red
Awaiting update should be amber
Awaiting actuals should be green

Missed referrals link to pending referral page
Pending referrals link to pending referrals page
Update required – links to SU page and filter by update required
Awaiting visit actuals – link to SU page and filter by awaiting visit actuals.

SU TIME LINE/Update Log contd....

<INSERT PLACE HOLDER – STILL UNDER DEVELOPMENT

- This screen provides you with a summary at a view of status of referral.
- It enables you to see what referrals are outstanding and what still needs completing outstanding/still to complete.

← Update log for: Mrs Amanda Tinker

Submitted at 11:32am 02/02/2018 by Username

Visit actuals submitted [See Details](#)

Submitted at 11:32am 02/02/2018 by Username

Provider update submitted [See Details](#)

Submitted at 11:32am 02/02/2018 by Username

Referral Refused [See Details](#)

Submitted at 11:32am 02/02/2018 by Username

Referral accepted [See Details](#)

Added at 11:32am 02/02/2018 by NCC Social Care Team

Referral added to the system [See Details](#)
09:32am | 01/01/2018

Submit...

- PROVIDER UPDATE
- VISIT ACTUALS
- SERVICE START DELAY
- FAILED DISCHARGE
- [Return to user profile](#)

For more information or support

Further information is available from the xxxx document . The latest versions of the document are available on the Notts County Council [website](#)

Technical Support is available by calling NCC Community Partnership Office (CPO) number on 0115 8040693 and asking for Adam Fraser.