Your Life *your choice* WORCESTERSHIRE

Provider Registration Guide

Table of Contents

Part 1: Background

The Your Life Your Choice is a new website for Worcestershire people which will include:

- Information and advice about how to stay healthy, independent and plan for getting older;
- Information about where to find support in local communities;
- An online contact assessment for adult social care with support to complete it if needed;
- An e-marketplace which will present information about the services available for people, including details about price, etc., the ability to purchase services online and, over time, feedback from people who use the services. A range of documents relating to the services will also be made available to users of the site, along with an outline of the checking processes which are undertaken prior to the information being published.

The objective of the e-marketplace is to improve customer choice and access in relation to goods and services which aim to improve the health and wellbeing of Worcestershire's residents and to support independent living.

We would suggest that you read Part 1 of this document before commencing registration. It aims to explain the basis of the process you will be following. Once registration commences, the system will automatically log off if there has been inactivity for more than 20 minutes and you will lose any unsaved data.

Aims

The aims of this process are to provide a straight-forward and user-friendly system by which providers are able to advertise their services / products whilst, at the same time, ensuring a level of assurance for users of the site / services / products in a way which is consistent with contractual processes utilised for services / products commissioned directly by Worcestershire County Council, following its standard tendering processes, but not too resource-intensive for either providers or those checking the submissions.

The process is based on a series of standard checking criteria applied to a range of services which have been categorised into Check Levels.

Preparation

All providers wishing to offer / advertise their services on the website are required to work through a series of steps, after which agreement for inclusion on the site may be requested. Your submitted request will be evaluated. If there are any concerns or queries about your application we will respond to you via the contact information you have provided. Otherwise your information will be published and we will inform you of this.

This guide should help you through these steps but if you have any queries, at any stage, please email emarketplaceregistration@worcestershire.gov.uk for advice or assistance. Only queries

relating to the registration process should be sent to this email address. General queries about Your Life Your Choice, and technical queries, should be sent to Futurelives@worcestershire.gov.uk.

During the process you will be asked for a number of items of information and documents, logos (optional), videos (optional), etc. The following list is not necessarily fully inclusive but should help you ensure that you have access to these beforehand:

- Your organisation's logo (optional)
- Contact information
- Insurance certificates
- Regulation / registration information if applicable
- Service information – including prices (optional), payment processes (optional)
- For some services you will need to be able to upload your safeguarding policy and medication policy
- For some services you will need to be able to upload your complaints procedure
- For all services you will have the facility to upload any policies you wish

Please note; policies and certificates which you upload, during the registration process, will be made available for viewing by users of the site irrespective of whether or not they form part of the checking process.

Our commitment to providers

Submissions for inclusion on the site can be made at any time. There are no cut-off dates by which submissions are required. The system will automatically acknowledge the submission of your registration. We will aim to ensure that full and accurate submissions which are received before 13th March 2015 are checked and published when the site goes live on 1st April 2015. However, it is difficult to gauge the level of demand at this time. After 1st April 2015 we will aim to complete the checking process, and notify you of the outcome, within 10 working days.

We will notify you if, as a result of the level of submissions being received at any time, it appears that it will not be possible to notify you of the outcome within the above timescale.

Steps to registration

You will find that the process comprises a number of steps.

Provider information

Firstly you will be asked for overarching information about you, as a provider. (At this stage, information is not service-specific.) You will be asked for a "username" (e.g. your email address) and a password. These two pieces of information will, once submitted, be the information you will use for future access ("logging in") to your record(s) on the website. You will only be able to enter this username once (i.e. if you provide a range of services, including any with different names, you will enter the service-specific information individually, but the overall provider access / management will be via the registration username and password you have entered).

You will then be asked for Provider information and to agree to the standard E-marketplace Terms and Conditions to use the site and to the Disclaimer.

After this stage you will be able to enter information about Services in any order which suits you.

Service information

Service information is the most critical aspect of the registration process as it largely determines the processes to be followed. This is because different Checking Processes relate to different types of service. Your submission(s) will be evaluated according to those requirements.

Following provider registration, you will be asked about the service(s) which you wish to offer / advertise. It may be the case that you, as a provider, have a range of services which you wish to include on the website.

You will be able to enter service-specific contact information which may differ from that entered for the over-arching provider registration information.

You will find that, during the process, you are shown a list of "Services" for selection. If you provide more than one, you may choose to advertise each separately to give clarity for users of the site. We would recommend that this is the approach you follow. Following checking, if authorised, each will be shown with its own "homepage" and related information. You may feel that this gives you the maximum exposure to users of the site.

Alternatively, two Services may be selected from the list for combination into one record although this may lead to some complications if the services are not directly linked. It is not possible to select more than two Services for combination.

It should be noted, however, that the name of the Service selected from the list does not restrict the description you provide in the free text information about the service. You might, therefore, choose to select just one Service from the list and outline a range of different aspects of it through its description. For example: To advertise "ABC Care" you might select "Day Opportunities" from the list but explain in the free text description that the service "provides both respite and day care for people with learning disabilities and has staff who will not only escort and support service users to activities in the community but also provide assistance with the management of their finances and daily affairs……" As words used in this free text description are scanned in response to a service user's search, you should find that the service is included in a list of options presented to a service user searching for, for example, respite.

The only limitation to this approach is that you must ensure that the Checking Process is at highest level for the range.

In summary, any service which you provide will fall into one of the "Services" in the list defined by the system. If you feel that there is more than one Service which describes your service, please either:

- Chose the "best fit" or;
- Select the Services separately and submit information for each. This will result in two separate records or;
- Select two Services (maximum) for one record (as mentioned above and dependent upon respective Check levels).

The Service selected from the list, and the information you enter about a service, affects the list of options provided for the service user following their use of the search facility. You should therefore consider your approach carefully to maximise your impact. The search facility utilises metadata rather than keywords.

The Checking process

You will be asked to refer to the list of Services and identify the:

- Check Level which applies to the service you provide or;
- The highest Check Level which applies to the range of services you provide.

The Services are listed on the website during the registration process but, for information, you will also find them within this document.

There are three Check levels.

If you supply products, a single Check Level (3) applies irrespective of product type.

To help you find the Services, in preparation for registration, we have allocated each to one of eight Categories:

1. Accommodation
2. Support at home
3. Health and Wellbeing
4. Activities;
5. Advice and Advocacy
6. Transport
7. Carers
8. Equipment options
9. Keeping Safe
10. Understanding Adult Social Care

There may be different Check Levels applying to the Services within a Category. For example, within the category "Support at Home", the Service called "Personal Care and Support" (essentially domiciliary care) is at Check Level 1 because of the high level of personal contact whilst, in the same Category, "Support at Home", Services such as Shopping and Housework are in Check Level 2.

Services and Check Levels

All of this is detailed in the document "Services and Check Levels". It is also shown below but you should be aware that, if updates are made to the site they cannot be made to downloaded or printed documents:

Provider Registration Guide - Services and Check Levels				
Category	Service	Check Level		
		3	2	1
Accommodation	Care homes with nursing			1
	Care homes without nursing			1
	Accommodation with care provided			1
	Accommodation only	3		
	Away from home/respite			1
Support at home	Personal care and support			1
	Nursing care			1
	Shopping		2	
	Housework		2	
	Maintenance		2	
	Gardening	3		
	Food and meals		2	
	Meal delivery	3		
	Respite at home			1
	Adapting your home		2	
Health and Wellbeing	Drugs and alcohol		2	
	Stop smoking		2	
	Sexual health services			1
	Alternative therapies		2	
	Physical therapies		2	
	Stroke support		2	
	Dementia support		2	
	Sensory impairment		2	
	Emotional support / counselling		2	
	Mental health support		2	
	Health check services		2	
	Pregnancy and parenting		2	
	Medication management		2	
	Health conditions		2	
	Keeping warm		2	
	Recovery from illness or injury		2	
Activities	Day opportunities			1
	Fitness and exercise	3		
	Arts and crafts	3		
	Drama and music	3		
	Clubs and groups	3		
	Support groups	3		

Category	Service	Check Level		
		3	2	1
Advice and advocacy	Advocacy		2	
	Benefits and financial matters	3		
	Future care costs planning		2	
	Managing bills		2	
	Education and training	3		
	Employment services	3		
	Volunteering	3		
	Housing	3		
	Legal matters	3		
	Managing correspondence		2	
Transport	Public transport	3		
	Community transport	3		
	Private hire	3		
	Permits and passes	3		
Carers	Training for carers		2	
	Advice for carers		2	
	Advice and support groups	3		
	Breaks			1
Equipment options	Bathroom	3		
	Bedroom	3		
	Grab rails	3		
	Household	3		
	Kitchen	3		
	Mobility	3		
	Hearing	3		
	Visual	3		
	Alarms	3		
	Medication	3		
Keeping Safe	At home		2	
	Out and about		2	
	Falls prevention		2	
	Domestic abuse and sexual violence		2	
	Community safety	3		
Understanding Adult Social Care	Planning and buying your care		2	
	Direct payments		2	
	Personal budgets and grants		2	
S&CL1 2015-02				

Information required from all providers

All providers will be required to:

- Agree to the E-marketplace Terms and Conditions – you will find these during the registration process. You will be asked to read and accept these;
- Agree to the E-marketplace Disclaimer - – you will find this during the registration process. You will be asked to read and accept these;
- Enter information and upload certificates to evidence appropriate insurance details relating to services. Users of the site will be able to view this information;
- If applicable to the service, enter information, and / or upload documents as requested, to evidence any registration or regulation information relating to services. Users of the site will be able to view this information;
- If you wish, enter information to describe your care home

The section below shows how the subsequent process is reduced for holders of appropriate contracts with Worcestershire County Council.

Otherwise the process is service-dependent. This is outlined in part 2 of this document

Finding documents

When you have logged into the website you will find documents you need to support the Registration Process (and a copy of this Guide) by selecting Approval/Documents from the New Provider Check-list and clicking on the Worcestershire County Council link as shown below (just above the words "Upload Document"):

Uploading / submitting documents for the Registration Process

To upload a document during the registration process, go to the tab Approval/Documents on your New Provider Check-list. There is a section called "Upload Document". You will be able to upload multiple documents, clicking on "submit" after each one such that a table of documents builds. This can be edited as necessary.

Please ensure that all documents clearly identify you as the provider of the service / supplier of the products to be advertised.

If you are unable to submit any documents electronically (if, for example, you only have paper copies and no access to scanning facilities, or you have completed a Check Level Document by hand and have no access to scanning facilities) we will accept photocopies by fax or post. Please fax them to 01905 728993 or post them to Contracts and Quality Assurance Team, DASH, Worcestershire County Council, County Hall, Spetchley Road, Worcester WR5 2NP. However, in view of the risks associated with faxing or posting important information please only do this as a last resort and ensure that EVERY document is clearly identifiable.

Current Worcestershire County Council contractors

As you work through the process for your services you will find that you are asked whether or not you hold a current contract with Worcestershire County Council for that service. If you do, with the exception of holders of a care home contract only, you will be able to apply to advertise all services of an equal or lower Check Level without further information being required other than insurance, registration/regulation information and anything else which is service-specific.

Care home providers

The only exception to this is that holders of the Council's current contract for care home services will not automatically be passported through this part of the process for other services unless a contract is also held for another service. This is because the contracting process for care home services (which is based on CQC registration only) differs from that for all other Check Level 1 services for which a range of policies are required to meet set standards. This ensures that the processes followed for the e-marketplace are fair to all providers and consistent.

However, as a care home provider you may choose to enter specific details of the care home (only) by using a different route through the initial registration process.

If you do hold a contract for a service you should enter that service information separately from any other services so as to make the process clearer.

The fact that you hold a current contract for the service will be evident to users of the website through display of an icon – a black pear:

Providers without contracts for the services will be required to provide further information and documents.

Flowchart - Quick Guide to the Registration Process

The first flowchart below summarises this process. This is also available to download from the site as described in "Finding Documents" on page 7 of this Guide. It is available in both A4 and A3 sizes.

Flowchart - Check Levels and the Checking Process

The second flowchart below gives greater detail of Check Levels and the processes to be followed with or without a relevant Worcestershire County Council contract. This is also available to download.

Quick Guide to Provider Registration Process – outline with Check Level documents before Services / Products

Note: for detail please refer to the Provider Registration Guide

Provider registration

Access site and select "Register" → Select "Register as a Provider" (Or "As a Care Home") → Enter username and password → **Account Name** Enter information requested → **Ts and Cs (site)** Read & accept E-markeplace Ts & Cs & Disclaimer → Provider registration complete → Receive email and click on link

Further provider information

Select "Login" → Login using your username and password → **Business Details** Select and enter Business Details → Submit your information → **Ts and Cs (provider)** Select Terms and Conditions and upload (optional) → Submit your information

All applications (Checking Process)

Select Checking Process → **Insurances and Warranties** Enter and upload information required for all Services/Provision of Products → **Registration and Regulation (if applicable)** Enter and upload information required for all Services/Provision of Products → Do you have a WGC contract for **ALL** Services/Provision of products you will be advertising?

- Y → Submit your information → Go to 3
- N → Establish the Check Level for each Service → Multiple Check Levels?
  - Y → Commence highest level
  - N → Commence Check Level 1, 2 or 3

Check Level 3

Download the document "Check Level 3" → Complete Check Level 3 document → Upload completed Check Level 3 document → Submit your information → Do you provide a Service(s)?
- Y → Go to 1
- N → You supply products → Go to 2

Check Level 2

Download the document "Check Level 2" → Complete ~Check Level 2 document → Upload completed Check Level 2 document → Submit your information → Do you provide a Service(s)?
- Y → Go to 1
- N → You supply products → Go to 2

Check Level 1

Download the document "Check Level 1" → Complete Check Level 1 document → Upload completed Check Level 1 document → Submit your information → Do you provide a Service(s)?
- Y → Go to 1
- N → You supply products → Go to 2

1. Services

Select Catalogue - Services → **For each Service** Enter the information about your service(s) → Submit your information → Another service to enter?
- Y → (back to Enter information)
- N → Do you also supply Products?
  - Y → Have you entered these?
    - N → Go to 2
    - Y → Process complete. Submit
  - N → Process complete. Submit

2. Products

Select Catalogue - Products → Enter the information about your product(s) → Submit your information → Another product to enter?
- Y → (back to Enter information)
- N → Do you also supply Services?
  - Y → Have you entered these?
    - N → Go to 1
    - Y → Process complete. Submit
  - N → Process complete. Submit

3. Post submission

Submission received → Submission acknowledged → Submission checked → Response and actions as necessary

You know what you plan to advertise

Services and products

N ← Service(s) only?

N ← Supply of products only?

Y → Supply of products is on Check Level 3

Find the service on the List of Categories and Services

Just one?

Y

Tick Check Level 3 in Registration Process

Supply of products is Check Level 3

Find all the services on the List of Categories and Services

N

Find the service on the List of Categories and Services

WCC Contract covering supply of some or all?

All Check Level 3?

Y

Tick Check Level 3 in Registration Process

N

Note the Check Levels

Note the Check Level

N

Complete Approval/ Documents and Check Level 3

Y

WCC Contract for at least one Check Level 3 service?

All the same Check Level?

Y → Tick this Check Level in Registration Process

Tick this Check Level in Registration Process

WCC contract for this service?

Y → Complete Approval/ Documents

Y

N

Tick to show this on the relevant Service information for which you have contract(s)

Tick the highest Check Level for your services in the Registration Process

WCC Contract for one / more services at this level?

N

Complete Approval/ Documents

WCC Contract for a service **at the highest Check Level for your services?**

Y → Tick WCC contract in Catalogue - Service for service(s) with contract(s)

N

Complete Approval/ Documents and Check Level 1, 2 or 3 as appropriate

Tick WCC contract in Catalogue – Products or Services (as appropriate)

Complete Approval/ Documents

N

N

Complete Approval/ Documents and Check Level 3

Complete Approval/ Documents and Check Level 1, 2 or 3 as appropriate (the highest one for your services)

Do you have a care homes' contract?

Y → Are you applying for other services at Check Level 1?

Submit

N

N

Y

Submit

Submit

Complete Approval/ Documents

Y ← Do you have a WCC contract for one of more of these?

N → Complete Approval/ Documents and Check Levels 2 or 3 as appropriate (highest excluding care homes)

N

Submit

Complete Approval/ Documents and Check Level 1

Submit ← Submit

Submit

Part 2: The Process

Step 1 – Register as a Provider

For information	•If you have already registered as a provider, go straight the New Provider Check-list to add services or manage your records etc

1. Access the "Your Life Your Choice" website

2. This will take you to the Homepage for the "Your Life Your Choice" website.

3. Click on "Register" in the top right-hand corner.

4. This will take you to the Registration page

Registration page

For information	•If you select "<u>Further Information</u>" you will see a list of sections about which you can find more details. Exit this by closing the window using x

5. **Either** scroll down the page and click on

> Register as a provider

6. **Or** scroll down the page and click on

> Register as a care home

7. This will take you to the Provider Registration page: Account Name tab (for all providers or for care homes)

For information	•If you select "Register as a care home" the process is the same as for "Register as a provider" except that you will be able to enter details about your home. This is not mandatory. You may register as a provider and include the information in your service description if you prefer.

Provider Registration page: Acccount Name tab

8. Enter your Username

For information	•Once registered, you will use this each time you login into the site. Most providers use their email address. You will only be able to enter this username once (i.e. if you provide a range of services, including any with different names, you will enter the service-specific information individually, but the overall provider access to, and management of your provider records, will be via this username

9. Enter a Password (twice)

For information	•Once registered, you will require this password in order to login into the site.

10. Scroll down the page and click on   **Continue**

11. This should take you to the Provider Registration page: Business Details tab – Provider Details (if any of the data entered is not acceptable to the system you will be asked to re-enter it)

Provider Registration page: Business Details tab

12. Enter the information requested.

For information	•Information entered should relate to the main contact for the provider and, for an organisation, be for the person authorised to sign contracts on behalf of that organisation •"Business address" should be the main office of any organisation which provides services from multiple locations •Fields marked * are mandatory. Others are optional

13. Scroll down the page and click on   **Next step**

Provider Registration page: Terms and Conditions tab (for use of site)

14. Read and ensure that you understand the Disclaimer

For information	•You must ensure that you have read, understood and accept the Disclaimer

15. Read and ensure that you understand the Terms and Conditions in detail.

For information	•You must ensure that you have understood, accept and comply with, all aspects of the Terms and Conditions.

16. Tick the check box as indicated to accept the Disclaimer and Terms and Conditions in full

For information	•You will not be able to proceed without accepting the Terms and Conditions •The Terms and Conditions must be accepted by a member of an organisation authorised to do so

17. Scroll down the page and click on   **Complete Registration**

18. This completes the initial registration process.

For information	•Please note that any logged-in session that has been inactive for more than 20 minutes is automatically terminated and any unsaved data lost

19. You will receive an email confirming receipt of your registration details and you will be asked to click on a link to enable further use of the site.

20. For future access, select Login (top right-hand corner) and login using the username and password you entered during the registration process.

21. Click on   **Submit**

22. This should take you to the New Provider Checklist page

Your account homepage and ongoing use of the site

Your "account homepage" will be displayed as a "New Provider Checklist" whilst you are working through the Checking Process.   Once completed, some of the account details will be editable directly by you at any time by clicking on the appropriate links.

For information	•To return to your homepage, click on the "My Account" button when you have logged in using your username and password

For information	•You will also be able to access messages, quotes, requests and call backs from this screen whilst you are logged in

To log out at any time, click on Logout in the top right-hand corner of the screen.

Step 2 – More business details plus services information

Once you have completed Step 1, you will be able to enter more business details and information for your provider homepage and for your services.   Service information will be displayed on separate screens from your provider homepage.

A. If you are already on the New Provider Checklist page, go to the section called "New Provider Checklist" below.
B. Otherwise, to start entering this information access the website, select Login and login with your username and password
C. This will take you to the New Provider Check-list

New Provider Check-list

This is the list which needs to be completed before you can complete your homepage and apply for services / products to be included on the website.   There are six sections.

The first three sections help you to set up your homepage. The remainder guide you through the setting up of pages advertising your services / products. If, at any time, you require information about services please refer back to Part 1 Background of this document: Register as a Provider – Steps to Registration or to the separate document "Services and Check Levels". You will find a list of documents available for you to use by selecting the Approval/Documents tab in the New Provider Check-list and clicking on the link to Worcestershire County Council.

Colour coding is used to show the status of the sections in the New Provider Check-list:

• Green – the minimum required information has been provided;
• Amber – some information which is required is outstanding;
• Red – no information provided

You need not enter all the information in one session. Information "submitted" will be saved on the system and you will be able to continue the process at another time. The New Provider Check-list page looks like this:

Business details	1
Approval / Documents	2
Homepage	3
Terms and Conditions	4
Delivery Price	5

Catalogue – Services and Products	6

> **For information**
> - The information you enter in the first three sections above will be used for your provider homepage
> - Information entered in the subsequent sections will be service / product information

You do not need to complete all the sections in the order shown on the site. You will be able to select some of them in the order which suits you and return to them as you wish.

1.   Click on

Business details	1

2.   This will take you to the Provider Details page

Provider details

3.   Your Provider name will have been copied forward from the Provider registration screen. Select the relevant Provider type.

Business details, Contact information, Website, CQC

4.   Enter the information requested as applicable

> **For information**
> - If you have a main office, and provide services from other locations, this information should relate to the main office.

> **For information**
> - CQC information is only applicable if you have one service and it is registered with CQC. If you have multiple services, some or all of which are registered, you will be able to enter CQC information for each of them at a later stage

Areas you cover, Worcestershire County Council

5.   Simply tick "I wish to operate in Worcestershire County Council"

Select the Check Level required

6.   Tick the Check Level at which you wish to apply (see outline below)

There are three Check Levels. You can see the lists by downloading in this document or in the separate document "Services and Check Levels" at Further Information either on your Registration Page or your Provider Profile Page.

Check Level 3

These are services which are not regulated by CQC and do not involve a high level of personal contact. Services are generally provided remotely to the service user / carer at home (e.g. by telephone, online, delivery services etc.) or outside the home in groups. If provided at a service user's / carer's home address, the service is generally provided without the provider / staff entering the home.

Check Level 2

These are services which may be delivered in the service user's / carer's home and / or on a 1:1 basis. They comprise services which are not regulated by CQC but may be delivered, for at least part of the time, in the service user's / carer's home and / or on a 1:1 basis. The services do not involve the delivery of personal care. A submission at Check Level 2 also covers services in Check Level 3 unless service-specific information is required for those services.

Check Level 1

These are services which involve, or may involve, the delivery of personal care and / or a high level of 1:1 contact. During the delivery of these services, the service user / carer spends time with the provider / staff during which time the provider is responsible for their welfare. Therefore most, but not all, are regulated by CQC. All require a range of policies, including those for safeguarding and medication etc., to be in place. A submission at Check Level 1 also covers services in Check Levels 2 and 3 unless service-specific information is required for those services.

For information	•Identify the Check Level for your Service or the highest Check Level which applies to all of your Services. You may wish to refer to the lists of services in each Check Level in this document or in the separate document "Services and Check Levels"

If you find that different Check Levels apply for your services, you only need to complete the information for the highest although there may be some service- or product-specific information requested for the others. The flowchart on page 11 will help.

Select the postcodes you can cover

7. Tick the postcodes covered by your service(s). The website is for services provided within the boundaries of Worcestershire County Council only. If you provide more than one service you will be able to describe this in greater details when you enter information the services.

For information	•If your service is based at a set location, and service users may access it from across the county, *tick* "Select All"

8. Scroll down the page and click on **Submit**

9. This will return you to the New Provider Checklist screen

Step 3 – Approval / Documents

1.   Click on

Approval / Documents	2

2. This will take you to the Provider Approval / Documents screen which is the basis of the Checking Process. The information and documents required in this section relate to the services / products you wish to advertise and about which you will enter information via another section in the New Provider Check-list. You will have already established the Check Level, or highest Check Level, previously (you entered it during the initial registration process).

3. To continue the process there are some requirements which apply to all Check Levels (A - B below).

A Insurance

For all three Check Levels you are required to provide information about insurances which may be applicable for the service(s). There are very few specific services for which this is not necessary.

1. Go to the Approval / Documents tab on the New Provider Check-list and click on the link to Worcestershire County Council to find and read the document "Insurances" to find the level and type of insurance required for each type of service / delivery of products

2. Remaining on the Approval/Documents page, enter information about insurance for **all** of the services / products you wish to advertise. For each relevant insurance:

    a. For each insurance required, enter the type of insurance in "Title"
    b. Upload a copy of the appropriate document via the browse function in "Select a document"
    c. Select "Insurance" from the drop-down menu in "Tag this document"
    d. Tick "Allow document to be viewed"

    > *For information*   •This enables users of the site to be sure that the services in which they are interested are appropriately insured

    e. Enter the dates "from" and "to" in the section "Valid Dates"
    f. Scroll down the page and click on   **Submit**

    > *For information*   •A list showing this document will be displayed and you will now be able to enter further documents if appropriate.

3. All insurance information needs to be kept up to date

B Regulation and Registration information (where applicable)

Note: this is the section where you will upload a range of documents in addition to those for regulation and registration

Current Worcestershire County Council contractors

If you have a contract with Worcestershire County Council for a service <u>at the Check Level at which you are applying</u> please read the document "Regulation and Registration" which can be accessed at via the link to Worcestershire County Council on the Approval/Documents tab (or see page 7 of this document). This lists any service-specific documents which might be required to support your application.

1. Follow the process outlined in A above (for insurance) to provide any information required for regulation and registration information for the services / delivery of products you wish to advertise. If validity dates do not apply, these fields should be left blank.
2. All registration / regulation information needs to be kept up to date if expiry dates apply

Holders of care home contracts (only)

If you are making an application at Check Level 1 and you have a current care homes contract with Worcestershire County Council, but no other contract for a Level 1 service, you must also provide Safeguarding and Medication policies using the process above.

Providers without current contracts with Worcestershire County Council (or without current contracts at the appropriate Check Level)
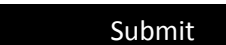
1. Go to the New Provider Check-list, select the Approval/Documents tab and click on the link to Worcestershire County Council for a list of documents.
2. Download the Check Level Document for the Level at which you are making an application.

> | *For information* | •You will find these at the link to Worcestershire County Council on the Approval / Documents tab in the New Provider Check-list |

> | *For information* | •Either download the "pdf" version which you will be able to print and complete by hand (or see Uploading / Submitting documents on page 8 of this Guide
•Or download the excel version for completion electronically |

3. Complete the Check Level Document.

4. Sign the Check Level Document. You may use an electronic signature for this document if you are completing it electronically. An electronic signature is a scanned representation of your actual signature. The signature must be that of a person authorised to agree to the Terms and Conditions of the website and that the information submitted is accurate.

5. Return to the Approval / Documents section of the New Provider Check-list

6. Upload your completed Check Level Document.

7. Upload any documents which are required (as listed in the Check Level Document)

8. Upload any other documents which you wish to make available for users to view.

9. Scroll down the page and click on   Submit

This should return you to the New Provider Check-list.

Homepage (Provider homepage)

1. Click on | **Homepage** | 3 |

2. This will take you to Homepage

3. Enter the information requested.   There are some details below about some of the information requested.

| *For information* | •If you have a main office, and provide services from other locations, this information should relate to the main office. |

Business description

4. You may write a description about your organisation (or yourself if you operate alone) as an introduction. This should include any information which you feel will help individuals to decide whether or not they would like to find out more about your services and what you offer.

| *For information* | •The information you enter here will be checked to ensure that it is appropriate for the website |

| *For information* | •You will be able to describe your services and / or products later |

Vendor image (optional)

5. You can upload an image that represents your business or organisation by clicking on "Choose file", browsing your files to locate it and then double-clicking on the relevant file.

| *For information* | •You are advised to take care with the quality of any image uploaded as this may affect the opinion of users of the site |

Display address and map (optional)

6. Select the box if you would like to display your address and map on the homepage

| *For information* | •Remember that this will be the address of your main office and this may not be appropriate if you provide services from other locations
•You may not wish to advertise your address if you are, for example, an individual offering a service.   You should take care to consider the implications of this too |

7. Scroll down the page and click on   **Submit**

8. This should take you back to New Provider Checklist

Terms and Conditions (Provider's) (optional)

If you wish to make available, to users of the site, the Terms and Conditions which you will be asking them to sign if they use your services:

1. Click on

Terms and Conditions	4

2. This will take you to the Terms and Conditions screen

3. This screen relates to the Terms and Conditions which <u>you require your customers to sign</u>. It is optional.

4. Enter / upload your Terms and Conditions if you wish.

> *For information*
> - By displaying your Terms and Conditions, users of the site will be able to understand how any arrangement between you will operate
> - You are advised to have your own Terms and Conditions (this is a requirement of many regulated services anyway)

5. If you don't have your own Terms and Conditions, and would like to use the default ones provided by the site, please click on the Set Default Terms button. The default Terms and Conditions will be displayed in the textbox for you to amend as necessary.   When you have amended them, click "Submit". Service users will have to accept these Terms and Conditions when they purchase your services or products.

6. Scroll down the page and click on   Submit

7. This will return you to the New Provider Checklist

8. If you supply products and wish to enter information about your prices, select Delivery Price

Delivery Price

1. Click on

Delivery Price	5

2. This will take you to the Delivery Price screen

3. Complete information as applicable.

4. If you offer Services:

Catalogue - Services

1. Click on   **Catalogue - <u>Services</u>**   ⑥

2. This will take you to the Catalogue – Services screen. You need to complete this for each service you wish to advertise. When completing this page you will be asked to select the Service(s) as outlined in Categories and Services please refer back to Part 1 Background of this document: Steps to Registration and to the separate document "Services and Check Levels" available via the Worcestershire County Council link on the Approval / Documents tab in the New Provider Check-list.

3. Complete Title and Service Code

4. Use the free text box with formatting tools to describe your service. You may use up to 2000 characters. This will be read as part of the checking process prior to publication and, if necessary, amendments may be required.

> *For information*   • This is the information which will appear on the homepage for your service so you should consider carefully how you wish to advertise it.

5. Enter pricing and VAT information as applicable

6. You may wish to upload an image to include on your homepage for this service

7. Select any appropriate "Options" but ensure that "Display in Catalogue" remains ticked in order to enable the advertisement to be published

8. Enter the address of your service if different from the default address

9. Select the service from the "Services" list. You may select two from the list if you feel two are applicable although it is recommended that you select a single Service unless the two are very closely related. You will not be able to select more than two.

10. Enter information to show the service user group(s), gender and sexuality and age groups for which the service is provided.

> *For information*   • This information will influence the results of searches by users of the site

11. Do you hold a contract for this Service with Worcestershire County Council?

    a. If you hold a current contract with Worcestershire County Council for this service tick the box. This will be checked.

    b. You will not be required to provide any further information or documents about any services at the same or at a lower Check Level of one for which you hold a current contract with Worcestershire County Council unless that contract is for a care home service only.

c. If, as part of the checking process, it is agreed that the contract is relevant for the service being advertised, an icon will be displayed on that service's homepage so that users of the site are aware of this. The icon will be:

12. Scroll down the page and click on

Add Service

13. This will return you to the New Provider Checklist

14. Repeat the process for Catalogue – Services for each of the services you wish to advertise

15. If you offer Products:

Catalogue - Products

1. Click on

| Catalogue - **Products** | 6 |

2. This will take you to the Catalogue – Products screen

3. You need to complete this for the delivery of products which you wish to advertise.

4. When completing this page you will be asked to select the Product(s) as outlined in Products.

    You will see a list from which you will be able to select a maximum of two for this application. If you wish to create a homepage for them individually or, if you provide more than two, you will be able to do so by repeating the Catalogue – Products stage for each.

5. Complete the information requested by following the process outlined for Catalogue – Services, substituting "Products" for "Services" in the instructions as applicable.

For information	• The section about whether or not you have a contract with Worcestershire County Council applies to supply of products as well as to services

For information	• If you provide products you will be required to complete the process at Check Level 3 unless you also provide some higher level services. • If, as part of the supply of the product(s), you also provide a service e.g. fitting, maintenance, etc., you will be required to register also to provide a service and complete the process at Check Level 2.

6. Scroll down the page and click on **Add Product**

7. This will return you to the New Provider Checklist

8. Repeat the process for Catalogue – Products for each of the products you wish to advertise.

9. Click on **Submit**

If you do not need to provide information via the Checking Process (other than Insurance and Registration information already entered) you have completed your application.

Step 4 - Completion of process

1. Return to the New Provider Check-list screen

2. Click on

Apply for Approval

3. You will be asked some questions and to confirm that you wish to apply