Essex Care Search

Provider Guide V2.2.3

Contents

1. **Introduction**

1.1. **What is Essex Care Search?**

Essex Care Search is a free secure web-based bed management tool that captures information about care home services. The system has an online search facility for people looking for available care beds throughout Essex.

1.2. **How it works**

Providers use the system to:

- enter information about their care home and the services provided
- enter and manage beds within their care home and facilities available
- mark beds that are available on local contract rates
- manage requests to book vacant beds from Essex County Council (ECC) and Essex Clinical Commissioning Groups (ECCG)

In the future, the Public will be able to use the system to search for care home information and vacant beds.

1.3. **Why use Essex Care Search**

Essex Care Search benefits Providers by:

- giving a free place to market their care home
- reducing the number of phone calls received from ECC and ECCGs to ask about vacancies, thereby freeing staff for other tasks
- enabling Providers to track bed booking requests from ECC and ECCGs

1.4. **Using this guidance**

This document provides guidance to Providers on all aspects of Essex Care Search. Including registering on the system, adding provider and bed information, managing requests to book vacant beds and booking beds for private clients.

This guide is separated into sections which start with registering to use Essex Care Search. If you have already registered and logged in, please see the contents page and skip ahead to the appropriate section.

2. **How to Access Training and Support**

You can access training and help to use Essex Care Search via the contact details below:

Email: support@essexcaresearch.org
Telephone: 03330 322 939
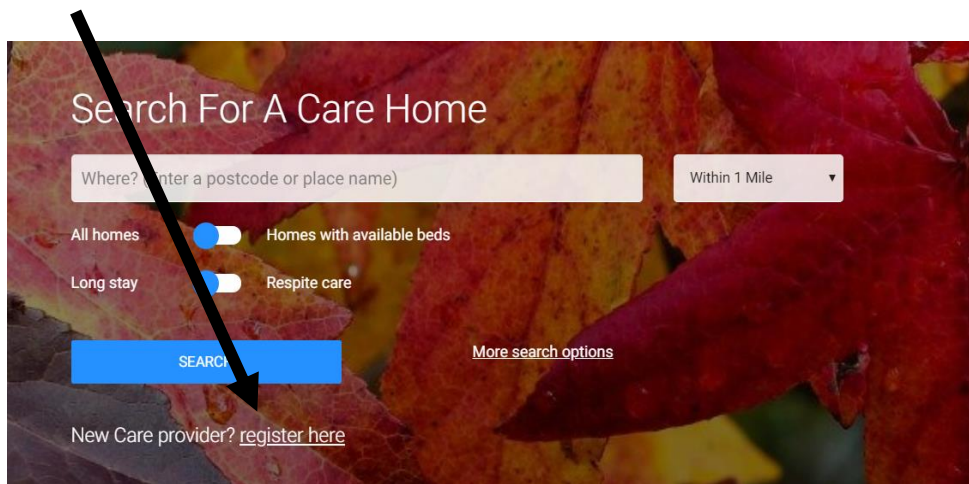
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3. **How to Register your Home**

Providers located in Essex, or near the Essex border, can register to use Essex Care Search in two ways:

A) Contact the Essex Care Search Support Team via:

Email: support@essexcaresearch.org
Telephone: 03330 322 939

B) Navigate to Essex Care Search www.essexcaresearch.org and click on the 'register here' text.

The following screen will be displayed.
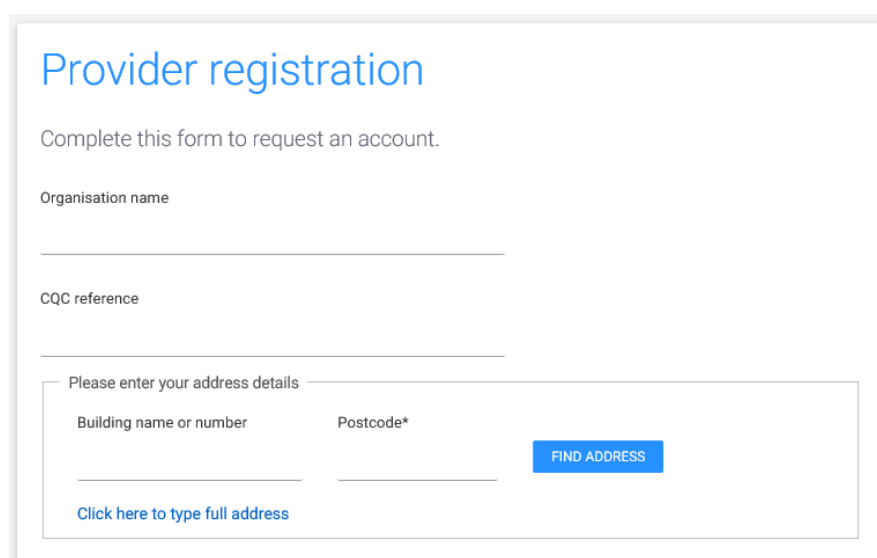
Please enter the email address of the person you would like to be the owner (or administrator) of your provider on Essex Care Search.

Please note that an Administrator login has additional permissions such as the ability to set up additional users (see section User roles and permissions for more details on the roles in Essex Care Search).

Once you have entered an email address, click once on the Continue button.

You will be taken to the Provider Registration screen.

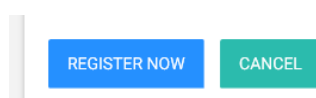## Provider registration

Complete this form to request an account.

Organisation name

CQC reference

Please enter your address details

Building name or number   Postcode*

[FIND ADDRESS]

Click here to type full address

Please enter your organisation's details. Any mandatory fields are marked with an asterisk *.

Once your care home is registered, anyone with administrator access will be able to access and update the details on this page (see section Manage Provider Information for information on updating your provider details).

[REGISTER NOW] [CANCEL]

Once you have completed the details and accepted the terms and conditions, click once on the Register Now button at the bottom of the page.

A screen confirming your registration will be displayed.

A member of the Essex Care Search Support Team will contact you to discuss next steps.

3.1. **Head Office Logins**

If you have a group of care homes, the group head office can be set up in Essex Care Search.

Head office logins will allow users to centrally manage and administrate Provider and bed information for all care homes within the group.

If you would like to set up your group head office and logins, please contact the Essex Care Search Support Team.

Please note individuals using a head office login to access Essex Care Search will only be able to set up new head office users. If you require a user to only have access to a specific care home within the parent organisation, then the new user will need to be setup using a 'local' login specific to the care home for which access is required. (See Manage System Users)

4. **Accessing Essex Care Search**

If your care home is not registered on Essex Care Search, please see section How to Register your Home.

If your organisation is already registered, please speak to the person responsible for Essex Care Search in your organisation for access to the system.

Once your organisation has registered your details on the system, you will receive an email with a link to set up your password. **The link in the email is only valid for 24 hours.**

Please note that passwords must contain one upper case, one lower case, one number and one special character (for example, a question mark '?').

Access Essex Care Search at the following web address: www.essexcaresearch.org.

4.1. **Accessibility Options**
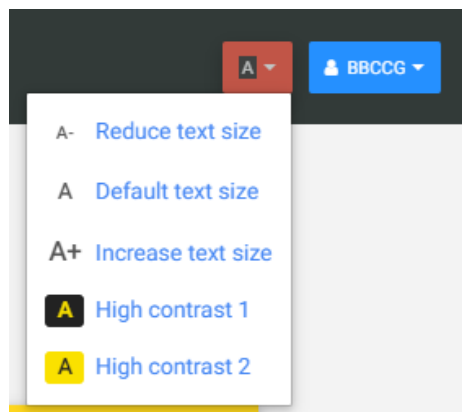
At the top right-hand side of the page (beside your name), there is a letter A. Click on this text to display a list of accessibility options to aid your viewing of the system.

You can increase and reduce the text size. You are also able to set different contrasts for the display.

4.2. **Log in to Essex Care Search**

Click once on the Sign in text at the top right corner of the home page.

Once you have clicked Sign in, the Log In screen will be displayed.

Enter your email and password (forgotten your password, see section Forgotten Password).

To save time when logging in, click once in the 'Remember me' tick box to enter a tick in the box. The system will automatically enter your email address when using the system in the future.

Click once on the Log in button.

If you have entered a correct email and password, your home page will be displayed.

The Manage Provider icon will only be displayed if you have Administrator permissions.

Please see section Home Page and Menu Access for an overview of the home page.

4.3. **Website Disclaimer, Cookies and Privacy Information**

If required, links are provided at the bottom of every page on the Essex Care Search website to the Disclaimer, Cookies and Privacy information. See screen images below.

Cookie preferences can be viewed and changed at any time using the 'How do I change my cookie settings?' section at the bottom of the 'Cookies and Privacy' page.
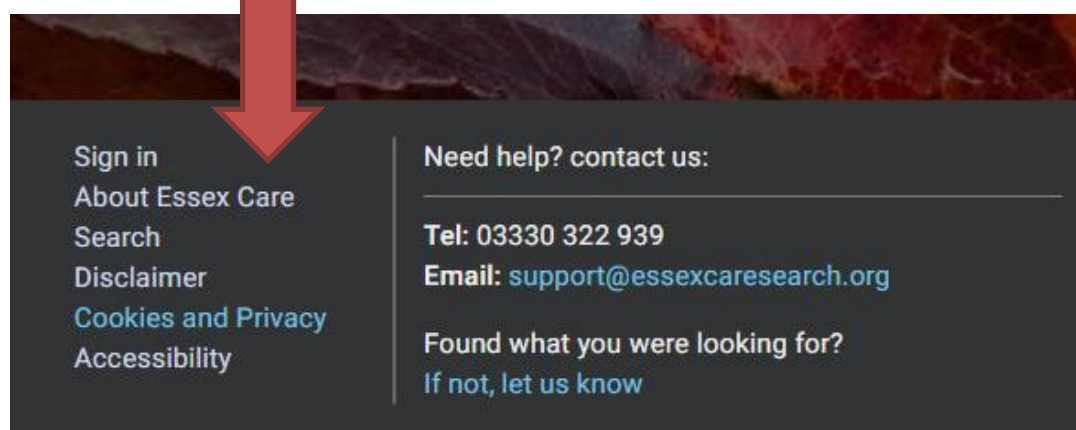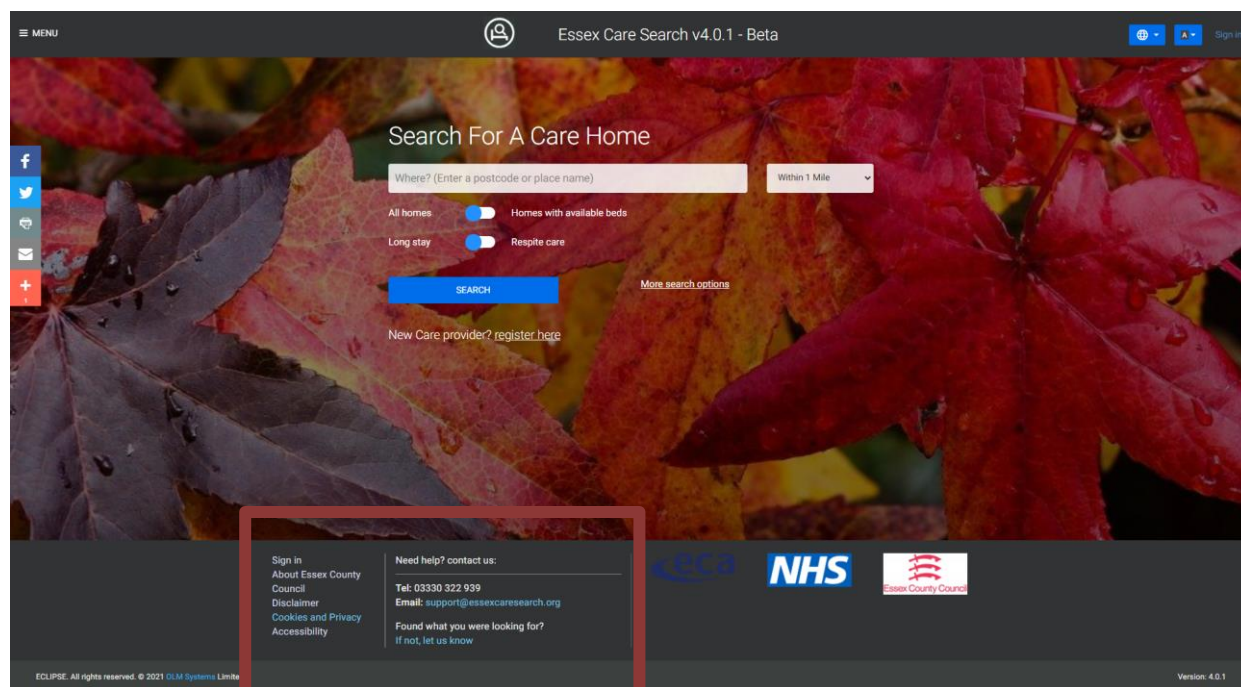
5. **Forgotten Password**

If you have forgotten your password, a new password can be requested from the Log In screen.

Click once on the 'Sign In' text so the Log In screen is displayed (see section Accessing Essex Care Search).

Click once on the 'Forgot your password?' text as shown below.
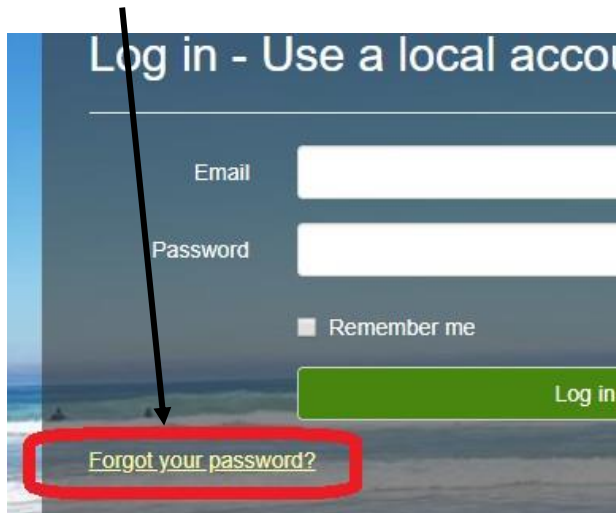
The Forgot your password? screen is displayed.

Enter the email address that you use to access the system, then click the Submit button.

If the email you have entered is registered, you will receive an email with a link to reset your password. This link is only valid for 24 hours.

If you do not receive an email, please check your email SPAM folder.

The link in the email will direct you to a Reset Password screen.

Enter your email address, then specify a new password. You will need to re-enter your new password in the Confirm Password field.

Once the information is entered, click once on the Reset button.

Please note that passwords must contain one upper case, one lower case, one number and one special character (for example, a question mark '?').

You will now be able to log into Essex Care Search using your new password.

6. **Home Page and Menu Access**

The Essex Care Search Home page will be displayed after you log in as shown below.

There are three main options that may be displayed, depending on your permissions:

- Manage Beds
- Booking Status
- Manage Provider(s)

Within the footer of the page there is further information such as support information.
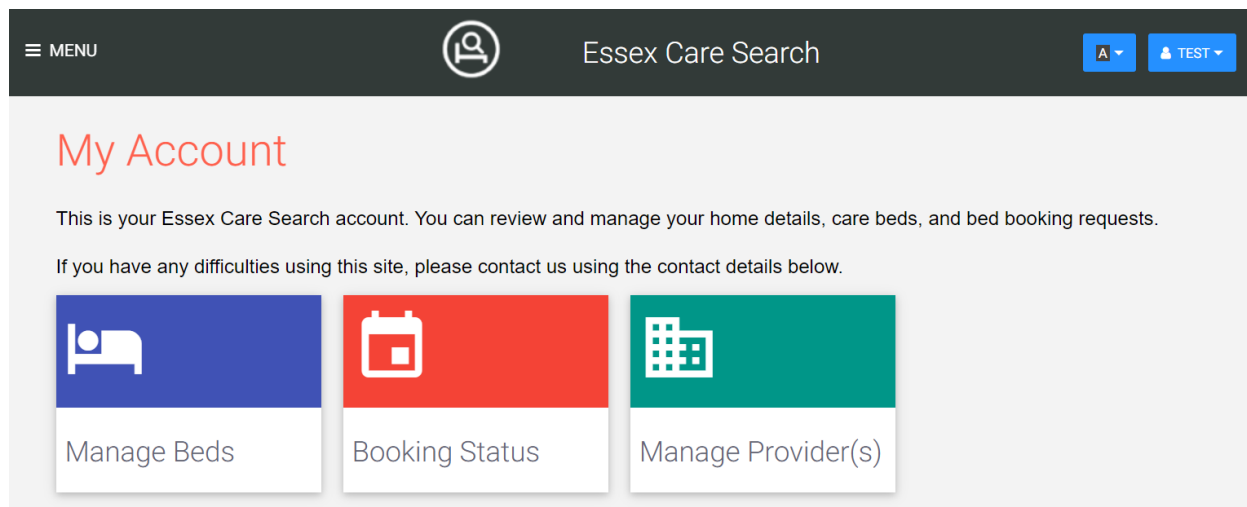
Manage Beds – View, add and update the beds in your home (see section Managing Beds).

Booking Status – View and manage the booking requests that have been sent to your home (see section Managing Booking Requests).

Manage Provider – Manage information about your home and the services it provides. You can also upload images for your home to assist with marketing. This option is only available if you have Administrator permissions. (see section Manage Provider Information)

 You can use the Menu (top left hand of the page) to access different areas in the system. Click once on the MENU text to access the list.
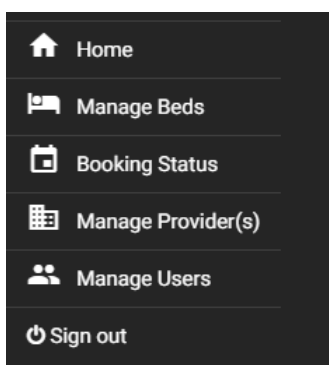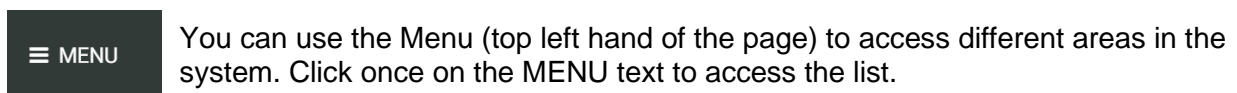
The list of functions you can access is shown.

To access a function, click once on the text of the function.

7. **Update your Details**

By clicking on your name in the top right hand of the page, you can access a My profile area via the drop-down menu, where you can edit your name and contact details.

You can also change your password and Sign out via this drop-down menu.

8. **Manage System Users**

Staff (or Users) with Administration permissions will be able to:

- add additional staff (users) so they have access to your organisation on Essex Care Search
- amend users already set up in Essex Care Search
- stop a user accessing your organisation on Essex Care Search

8.1. **User roles and permissions**

Before adding a new user to your organisation on Essex Care Search it is important to consider which permission level they should be given. There are 3 role types in the system. Below is an outline of the roles and the permissions linked to each role.

| System Role (Permission Level)	Summary of Role Permissions
Viewer	• Read only role • Can view bed and booking information
Manager	• Can create and amend beds • Can view booking requests • Can accept or reject booking requests for vacant beds
Administrator	• Can complete all Manager tasks • Can update Provider information • Can update marketing information and upload photos • Can add new users, edit user details and stop user access

8.2. **Add additional users**

We advise providers to add additional users to their Essex Care Search profiles to:

- ensure processing of booking requests if a staff member is unavailable
- ensure beds can be updated if a staff member is unavailable
- allow booking requests and confirmation emails to be sent to multiple staff members

To add a user, log onto Essex Care Search (see section Accessing Essex Care Search).

Once you are successfully logged in, the Essex Care Search home page will be displayed as shown below.
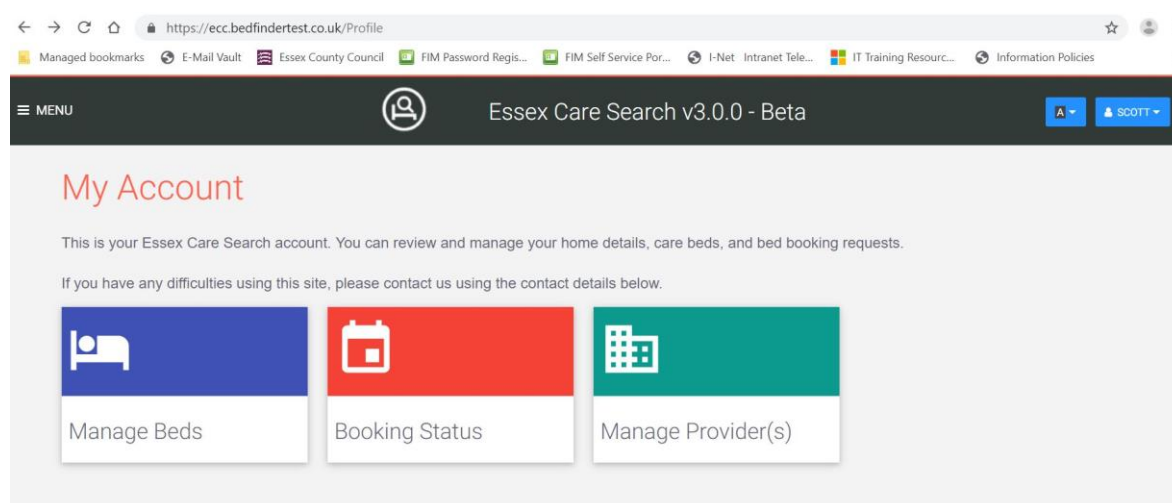
In the top left corner, click once on the 'Menu' text to display the menu shown below.
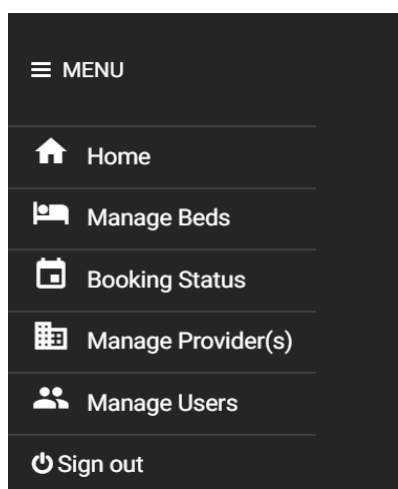
Click the 'Manage Users' text.

The View Users screen is displayed as shown on the following page.

Any users already set up for your organisation are listed here.

The Best Care Ltd - View users

NEW USER

Show 10 ▼ Rows

Search 🔍

Name	Email	Mobile	Is Active		
Bob Bobington	Test2019bedfinder@gmail.com	01234 567890	☑	EDIT	DELETE

To add a New User to your organisation, click once on the New User button as shown above.

The Create New User screen will be displayed.

All fields in this screen are mandatory.

Create new user

Organisation

Scotts Care Home ▼

Role

-- select role – ▼

First name   Last name

Email address   Confirm email address

Mobile phone

SAVE   CANCEL

This field will be the name of your home

Select the permission level for the user (see section User roles and permissions)

Enter the email address of the user you are setting up. **Please make sure you enter the correct email**. This is important as someone could access your account as a confirmation email will be sent to this address

Double check the email address is correct.

Once all information is entered, click once on the Save button.

Enter '00' if you do not wish to enter a user's mobile phone number

You will be returned to the View Users screen and the newly added user will be listed.

The new user will receive a welcome email (see the following page for details).

8.3. **New user email**

Once a new user has been setup in the system, they will receive an email with a link to set up their password. **The link in the email is only valid for 24 hours.**

New users must click on the link in the email to be taken to the screen below, where they enter and set up a password to ensure security of the system.


New users must:

- Enter their email address
- Choose and enter a password in the Password field **(the password must include a upper case letter, lower case letter, a number and a special character (e.g. $! M & \ £)**
- Re-enter their password in the Confirm Password field.
- Click once on the Reset button.

Once the new user has set up their password, they will be able to login to the system.

8.4. **Amend details of staff already set up**

Access the View Users screen.

Please note that you cannot amend users' details directly from the View User screen.
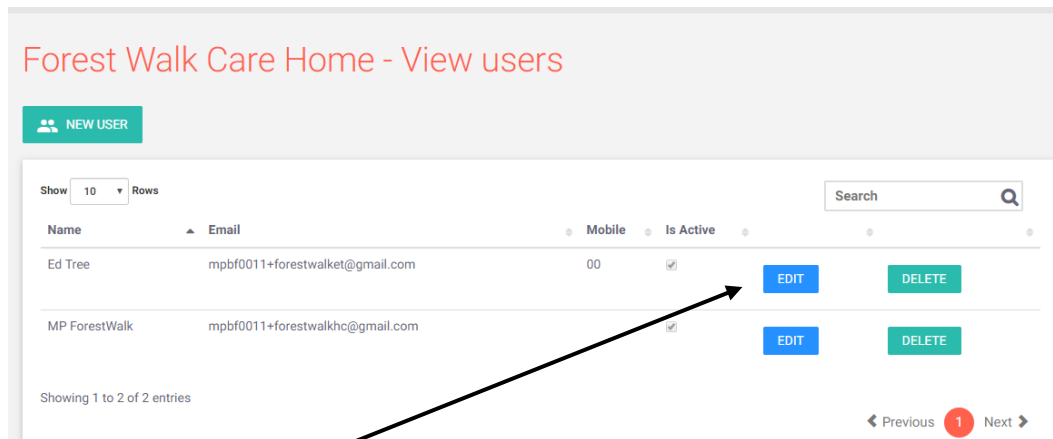
Click once on the Edit button beside the staff member you want to amend.

The Edit User screen is displayed.

Update the user details as required and click once on the Save button.

You will be returned to the View users screen.

8.5. **Stop a member of staff accessing the system**

To protect your organisation and ensure you meet data protection regulations, you must ensure that you stop staff that have left your organisation from accessing Essex Care Search.
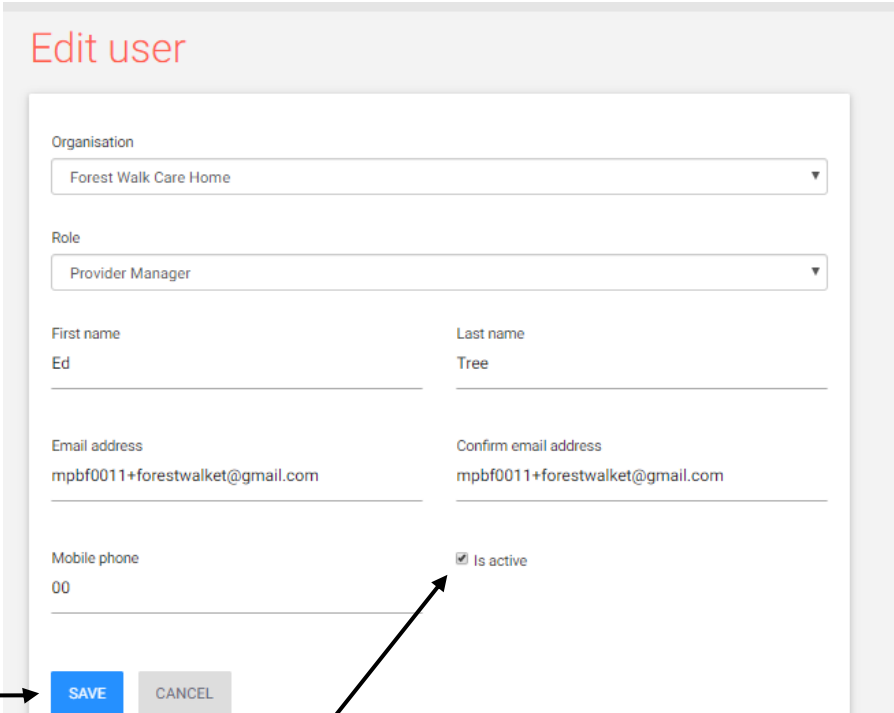
There are two ways to stop staff accessing the system:

1) Deactivate their account
(You may wish to temporarily deactivate an account if a staff member is taking an extended leave of absence)

Or

2) Delete their account
(If a staff member is leaving your organisation)

8.6. **Deactivate a user account**

Access the Edit User screen (see section Amend details of staff already set up for instructions).

Click once in the 'Is active' tick box. The tick in the box should be removed to leave an empty box.

Click once on the Save button.

A confirmation message stating the user has been updated will be displayed. Click once on the OK button.

You will be returned to the View Users screen as shown on the following page.

The 'Is Active' tick box against the user you amended will be empty.

To reactivate a user, click on the Edit button and re-tick the 'Is active' tick box.

Please note that you cannot deactivate or reactivate a user from the View user screen.

8.7. **Delete a user account**

Access the View User screen.

Click once on the Delete button beside the user you would like to delete.

A Confirmation message is displayed.

To delete the user, click once on the Yes button.

A confirmation that the user was deleted is displayed.
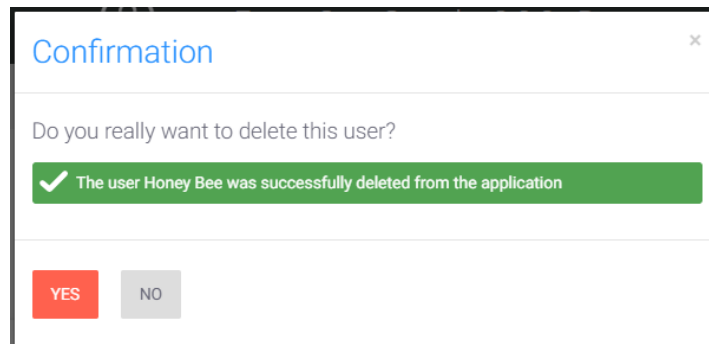
Click once on the Yes button to return to the View User screen.

The user you deleted has been removed from the list of users.

9. **Manage Provider Information**

9.1. **Overview**

The Manage Provider screen allows you to enter details about your home and enter marketing information that bed searchers, including the public will be able to view. Details you can enter include:

- Home name, address and contact details
- Facilities in the home e.g. garden, pets allowed etc.
- Description of the home
- Pictures and a video of the home

Only people with Administrator permissions can access this area of the system.

Please note that information entered on this screen will be available for bed searchers, including the public to view.

Access the Manage Provider area from the Home page or the Menu (see section Home Page and Menu Access).

The Manage Provider – Edit Details screen is displayed

Some information may already be completed in the form. Information on this form can be edited and updated at any time.

The form has expandable areas that you can access by clicking once on the arrow beside the text.

Note: Remember to save any changes made in this form by clicking once on the Save button at the bottom of the page, otherwise changes will not be saved (see section Saving changes).

9.2. **Adding care home details**

Enter or update the fields on this screen. Information about the fields and how to complete them are detailed below.

Manage Provider - Edit Details

Honey Bee Care Home

Last Updated: 07/05/2025 08:44:01 By Ian Hill

Name*
Honey Bee Care Home

Type
Care Home

CQC reference
1-126493008

Field Name	Information
Name	This should be the name of your care home.
Type	This should be the type of home as defined by the CQC. Options are: • Care Home • Care Home with Nursing
CQC reference	You should enter the CQC number assigned to your organisation by the CQC.

∨ Integrated Residential Nursing Framework Ranking

IRN Nursing Score
65

IRN Residential Score
70

Field Name	Information
Integrated Residential Nursing Framework Ranking	This section is only applicable to care homes on the Essex County Council Older People Integrated Residential and Nursing Framework also known as the IRN framework. If applicable it will display the care home's ranking score out of 100 for residential and/or nursing care. These fields are for information only and cannot be edited by the care home. The ranking scores can only be viewed by Essex County Council users and selected partner users, for example, the NHS, and are not visible to the public.

Field Name	Information
Address Fields	Enter the address of your care home. Building name or number, Street, Town, Postcode are mandatory fields and must be completed. You can enter the postcode and search for the address or manually enter the address.

Field Name	Information
Area	Select the area where your home is located
Other Area	If your area is not listed, use the free text box

Field Name	Information
Phone Number	Enter the phone number you would like the public to call to enquire about your home
Email Address	Enter the email address you would like the public use to enquire about your home
Web Address	Enter the address of your website if you have one. You need to enter the full address including the https:// before the www as shown in the screenshot above.

Enter the details of your Organisational Directors if available. (Optional)

Facilities

Select all the facilities that are available within and near your care home.

To select or deselect a facility, click once in the relevant tick boxes.

You must ensure that the facilities you select are accurate and where appropriate, actively provided by your care home.

If there are any limitations to the facilities you offer, for example, pets are allowed but your care home can only accommodate a limited number, please state this in the Service Description.

Please update this section as soon as possible if there are any changes to the facilities provided by or near your care home.

Any selected field(s) can be used by people searching for a care home to refine their search (including the public).

See section Search results for more details on filtering in the Search Result page.

Selecting Service User categories

Select or de-select the user categories which are deemed suitable for the service of care provided. This relates to the primary needs your home provide care for.

Service description

The service description text box gives you a place to add information about your care home and could include a description of your home and services, your business vision and marketing information.
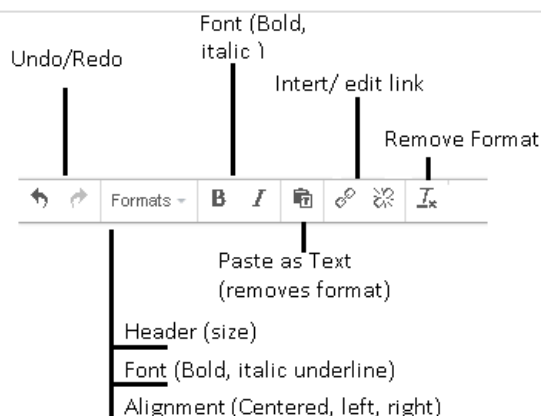
Service description tools

Above the text description, there are several tools to change the appearance of the text. If you are copying and pasting text from another source, the style and formatting can be kept or edited using these tools. See the image on the right for more information.

9.3. **Add images of your home**

You can add images of your home, under the Files section, that will be displayed to people searching for care homes, including the public (see section Search results for search information). There are three types of image:

- **Company Logo** – this image will be displayed on the Search Results page
- **Main home image** – this image is the main image displayed on your provider details page
- **Other home images** – you can add up to 5 images of your home to help you market your home and its facilities

Images can be added to the system by using the upload facility under the File section in the Manage Provider Information area.

To upload your company logo, click once on the first Browse button. A dialogue box that lets you search for images on your computer will open.

Click once on the second Browse button to find and upload the main image for your home. This image will be displayed in any search results.

Click once on the Add Files button to upload up to five additional images of your home.

Note: The order which you upload the images will be the order shown on the system.

If you would like help finding or uploading your photos, please contact us using the contact information in section How to Access Training and Support.

9.4. **Add a video of your home**

You can upload a video file or link to a video on a sharing platform, e.g. YouTube, under the Files section. Once uploaded or linked, the video will be available for the public to view from your care home's Provider Profile page.

It is only currently possible to upload or link one video using either of the following two methods.

A) Upload a Video File
To upload a video file, click the 'Choose Files' button. A dialogue box that lets you search for videos on your computer will open. Select the video you wish to upload and click the 'Open' button.

Videos can be uploaded in the following formats, .MOV, .MPEG4, .MP4, .AVI, and .WMV up to a maximum size of 50MB. Once uploaded a thumbnail of the video will be displayed.

B) Link to a Video on a Video Sharing Platform
To link a video from a sharing platform, type or paste the link in the text line and click the Add Source button.


Click 'Choose Files' button to upload a video file up to a maximum size of 50MB.

Type or paste the video link from the video sharing platform and click the 'Add Source' button.

9.5. **Saving changes**

If changes made to the form are not saved, then any changes will be lost.

To save your changes, click once on the Save button which can be found at the bottom of the Manage Provider screen.
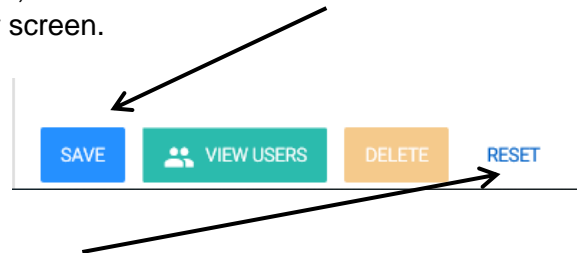
Clicking once on the Reset button will discard all changes made in the current session.

9.6. **Search results**

The following section is provided for <u>information purposes only</u> and the bed search feature is not included as part of a Provider access login.

This section briefly covers how people go about searching for a care home within Essex Care Search and how the results of a search are displayed.

People searching for a home or vacancy can view a list of homes that meet their selected search criteria. As shown in the image below, basic home information such as name, address and contact information are displayed. If uploaded, the company logo is also displayed.

Search results can be filtered by the care home features (section <u>Adding care home details</u>) or bed information (section <u>Bedroom fields</u> selected by a home e.g. caters for special diets, ensuite etc.

Clicking on a home name or the 'View care home details' text takes the searcher to the care home information page. This page includes the information and images that your home has entered on its Manage Provider page (see section 9). An example is shown to the right.

10. **Managing Beds**

The Manage Beds area is where providers can:

- view a summary of the bedrooms and bookings in their home
- add new bedrooms to their home
- manage bedrooms already set up in their home
  - o update details of a bedroom
  - o suspend the use of a bedroom
- add details of a private client to a bedroom
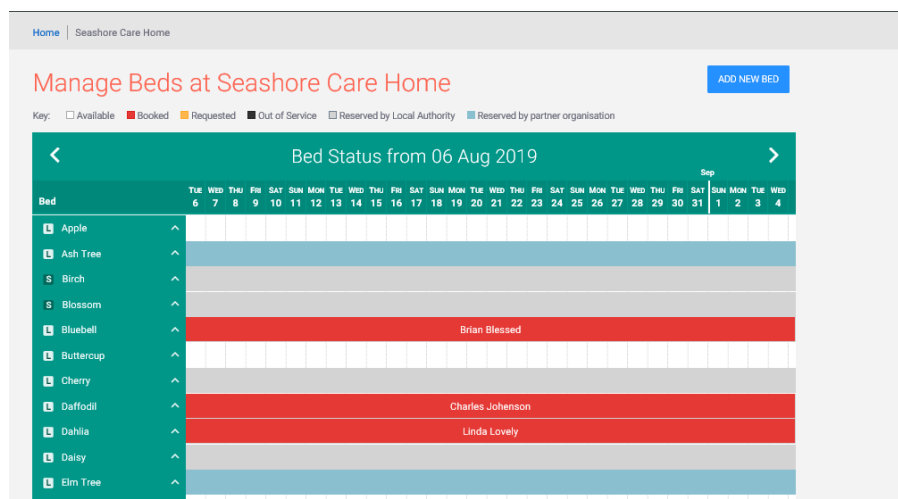
10.1. **Access the manage beds area**

Log into Essex Care Search.

The My Account screen is displayed.
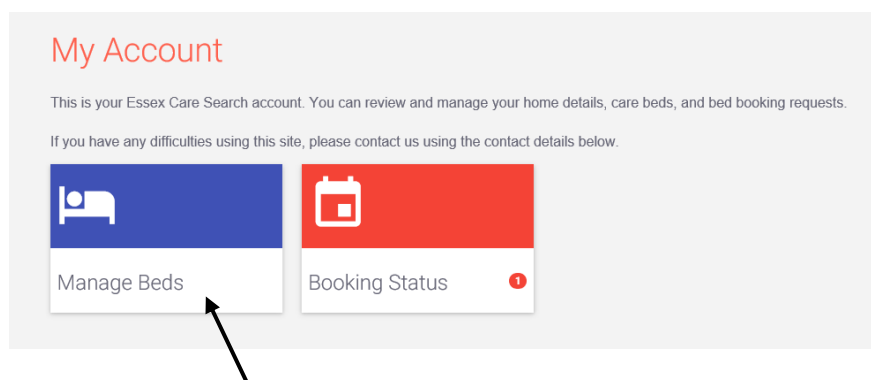
Click once on the Manage Beds icon.

The Manage Beds screen is displayed.

Please see the following information for more details on this screen.

10.2. **Manage beds overview**

The Manage Beds screen is where you can view the status of the beds in your home against a timeline. This includes, vacant beds, occupied beds, booking requests, beds allocated to block contracts and suspended beds.

Add New Bed: Click once on this button to open a form where a new bed can be added. See section 10.3 for details on adding bed/ bedroom details.

Bed List: All bedrooms which have been setup are listed here.
Click once on a bedroom name to open the Edit Bed screen. From this screen a bed can be edited, suspended e.g. if the room is being decorated, or the bed can be removed from the system. See sections 10.5, 10.6 and 10.7 for more details.

Timeline: This is a calendar view which shows if a bed is vacant, suspended, has a booking, has a request to book the room or is marked as being part of a block contract. The calendar view will always default to start on the current date.

Users can click on the timeline against a bedroom to book a bed for their private clients. See section Book a private client into a bed for more details. If a bed is booked, users can access the booking details by clicking once on the client's name.

Key: A bed shown in white in the timeline is vacant. Beds with a booking request against them will show as orange on the timeline. Once a provider has accepted a booking request, the booking will display as red on the timeline.

Beds shown in black have been suspended by the provider. (See section Suspend a bed)

Block contract beds will be blocked out on the timeline and shown in either grey or blue.

10.3. **Add a new bed**

From the Manage Beds screen, click once on the Add New Bed button.

The Add New Bed screen is displayed.

Add Bed button

Fill out the information for the bed/bedroom. See the following page (section Bedroom fields for information to complete the different fields.

Please note, the Bed screen must be completed based on the features and contract type available for the room when the room is vacant.

It should not be completed based on the needs/status of the current or potential occupant.

Click once on the Add Bed button to save the information and add the bed to the system.
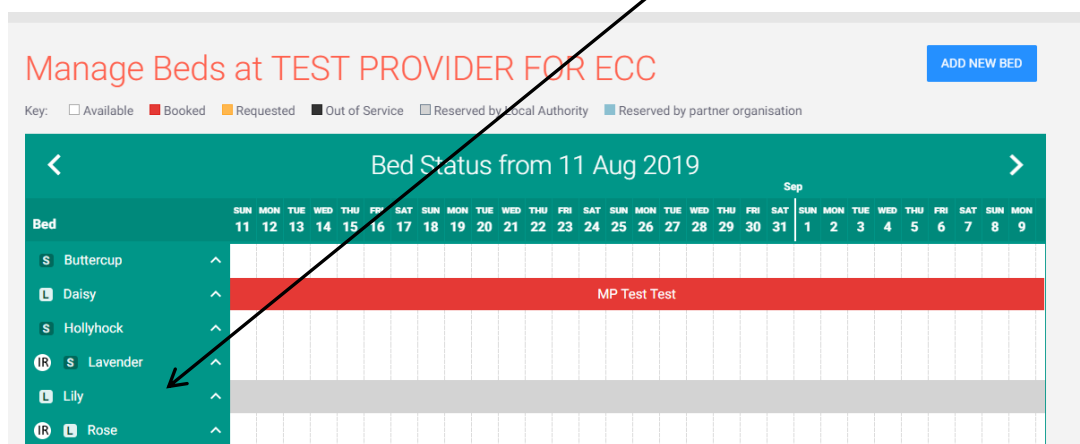
10.4. **Bedroom fields**

ID	Field Name	Information
A	Bed Name	Enter the name of the bedroom. The bed name can be anything up to 16 characters, if the bed is a block contract bed - the name will be predetermined by the local authority or health commissioner. Note: Numbers must be 2 digits e.g. 01, 02, 03 etc. To make sure your rooms are listed in numerical order.
B	Type	Use the drop-down list to select the type of care delivered in this bed.
C	Room Type	Use the drop-down list to select the type of room. Options are: • Single • Double • Shared • Flat
D	Type of Stay	Use the drop down to select if the room is used for Short or Long Stays. At this time only one option can be selected. Where a room can be considered for either type of stay, select Long Term and note that the bed is also available for short term stays in the notes field (See item M).
E	Bed Features	Select the bedroom/bed features available. The bed features refer to when the room is vacant. People searching for vacant beds can filter search results based on features selected. Note: Please note that the dementia checkbox should only be ticked if the accommodation is within a segregated dementia unit.
F	Gender	Tick the check boxes to show if the room is available to Female and/or Male Clients. It is advised to select both Female and Male unless you offer gender specific accommodation.
G	Contract Type	This field indicates the contract type and who can search for the bed. Options are: Block • Use this option for beds that are contracted to an organisation such as Essex County Council. • Only the organisation that has purchased the bed will be able to search for and book the bed. IRN: • If you have signed up to the IRN (Integrated Residential Nursing) Framework, use this option for available IRN beds. • These beds will be searchable by Local Authority and Health Partners but also the public (like SPOT contracts). SPOT: • Use this option for all non-Block or non-IRN beds. • These beds will be searchable by everyone. Please note that when adding a new bed, the contract type will default to IRN.

ID	Field Name	Information
H	Contract Owner Organisation	This option is only available if you select Block under Contract Type. Use the drop down to select the organisation the bed is contracted to e.g. Essex County Council. These beds will only be visible and bookable to the contracting organisation.
I	Price Band	The price band displays to the public when they are searching for vacant beds. Select a price band to indicate the price of the bed. Drop down options are: • Less than £700 per week • £700 - £1,000 per week • £1001 - £1,999 per week • £2000 upwards per week • Please contact us for a price **IMPORTANT:** If you do not select a price band, the system will automatically set a default price band based on any weekly price you enter, so please remember to select an appropriate price band if different from the entered weekly price.
J	Weekly Fee £	The Weekly Fee £ field is only displayed to local authority or health partners and should be used to indicate the agreed basic price of an IRN Framework bed. This should be the basic cost submitted in your IRN Framework bid and will be used for the IRN ranking **IMPORTANT:** If you do not select a price band, the system will automatically set a default price band based on the weekly price you enter. When entering your weekly IRN price, ensure you enter a price band if different to the weekly price.
K	May accept Local Authority rates	This field indicates if the care home will consider Local Authority rates for the bed if it is not already in a contract with Essex County Council, for example a Spot contract bed. This field does not need to be ticked for: • beds that are supplied to Essex County Council under a block contract. • your home is signed up to the Essex County Council Integrated Residential and Nursing (IRN) Framework, and the bed would be available under the IRN Framework. (The contract type should be set to IRN. Any vacant beds marked as IRN will be visible to all searchers including the public).
L	May accept 3rd Party Top-ups	Use this check box for bed that are SPOT contract beds where your home would consider 3rd party top up against the bed

ID	Field Name	Information
M	Notes	Any notes entered here will be displayed against the bed when people are searching for vacant beds. Use this field to provide information about the bedroom that you would like them to know. For example: If you have marked a bed as a long term stay but would consider using the bed for short term stays, you could enter this in the notes field to inform bed searchers.

10.5.   **Edit a bedroom**

From the Manage Beds screen, click once on the name of the bed you would like to edit.

The Edit Bed screen is displayed

Update Bed button

Update the relevant fields (See the section Bedroom fields for information regarding the different fields).
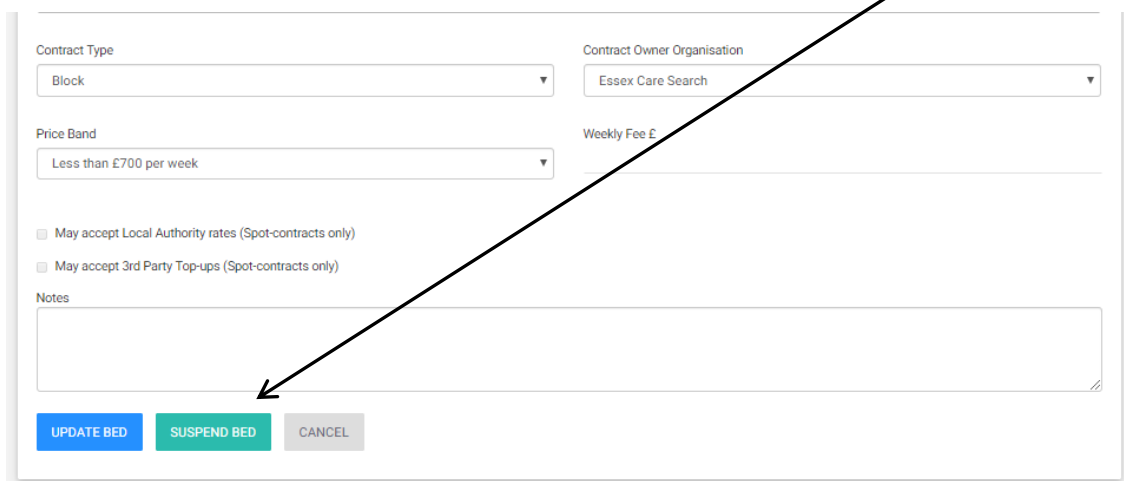
Click once on the Update Bed button.

You will be returned to the Manage Bed screen.

10.6. **Suspend a bed**

If a bed is not available for any reason, e.g. decoration, then the bed can be suspended so the bed does not show in search results for vacant beds.

From the bottom of the Edit Beds screen, click once on the Suspend Bed button.

The Suspend Bed screen is displayed.

Enter the start date of the suspension (First Night) and the end date (Last Night). If there is not a planned end date you can leave the Last Night field clear.
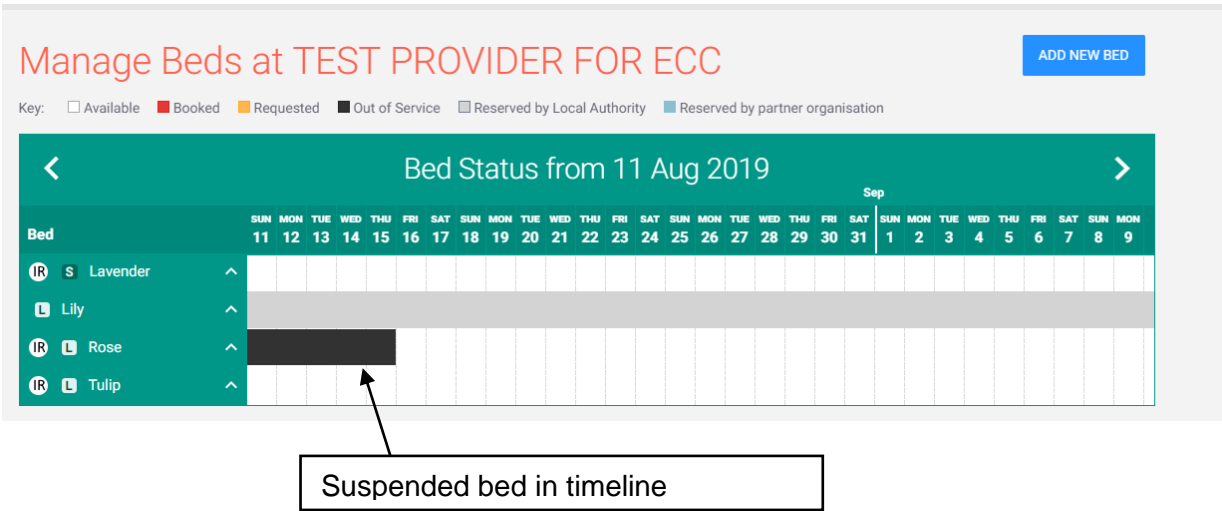
Use the drop-down list to select a reason for the suspension.

A notes field is available for you to add notes. These notes are only displayed to provider users.

Click once on the Suspend Bed button.

You are returned to the Manage Beds screen (screen shot over page).

Any suspended beds will display in the timeline with a black block colour.
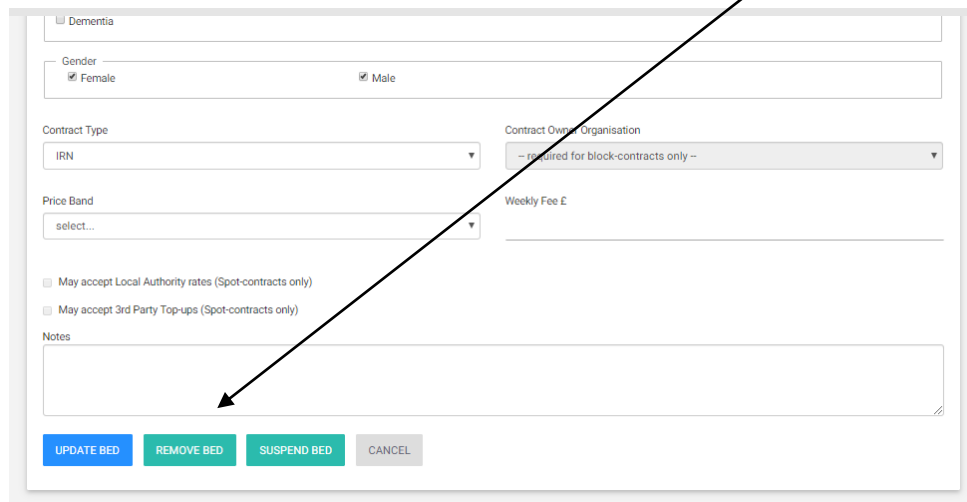

Suspended bed in timeline

10.7. **Remove a bed**

It is only possible to remove a bed if you have Administrator permission and no bookings, either past or future, have been made against the bed you wish to remove.

The purpose of this feature is to enable care homes to remove beds that may have been created in error.
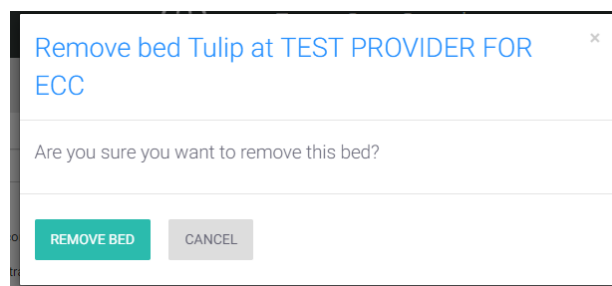
Once a bed is removed, this action cannot be undone.

From the bottom of the Edit Beds screen, click once on the Remove Bed button.

A confirmation screen is displayed.

Check that you are removing the right bed as **this action cannot be undone** once completed.

If the right room has been selected and you would like to proceed then click once on the Remove Bed button.

If there are any open bookings against the bed, then you will be returned to the Edit Bed screen and a message will be displayed at the top of the screen.


If there are no open bookings, you will be returned to the Manage Beds screen and the

bed is no longer listed.

10.8.   **Book a private client into a bed**

Beds in your home can be booked out for private clients. The details of private clients are only displayed to provider users.

On the Manage Beds screen, hover your mouse over the timeline of the bed you would like to book. The timeline for that bed is highlighted.
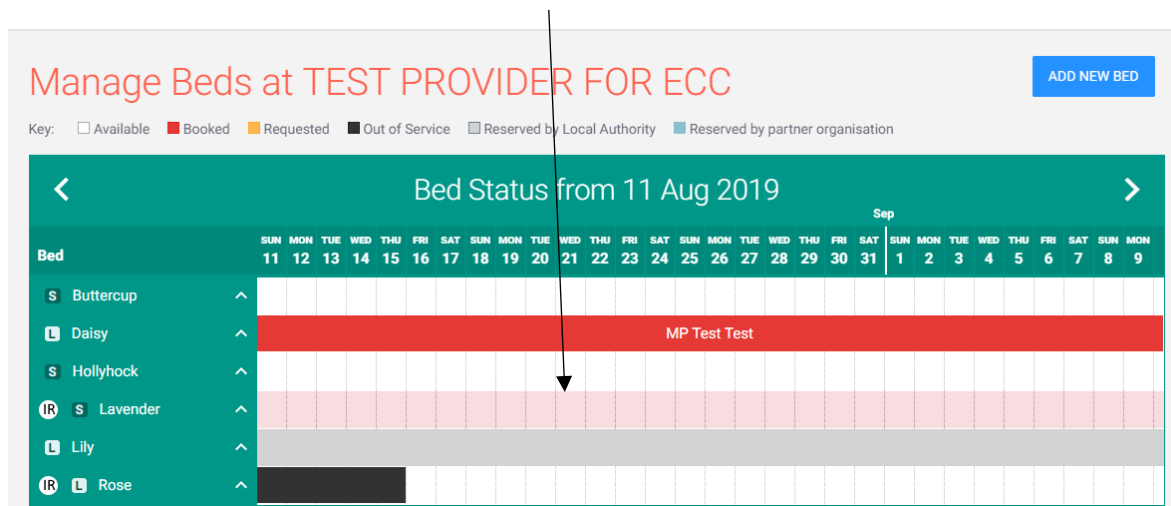
Click once in the highlighted area.

The Book Bed screen is displayed as shown on the following page.

The Client Firstname and Client Lastname fields are mandatory, so must be completed.

We recommend putting (P) after the surname of your client so you can easily identify your private clients in any list. E.g. 'Smith (P)'

For Short stay beds there will be both First Night and Last Night fields to complete as shown in the above screen shot. Long stay beds will only display a First Night field.

Enter the dates that your private client will be in the room and click once on the Book button.
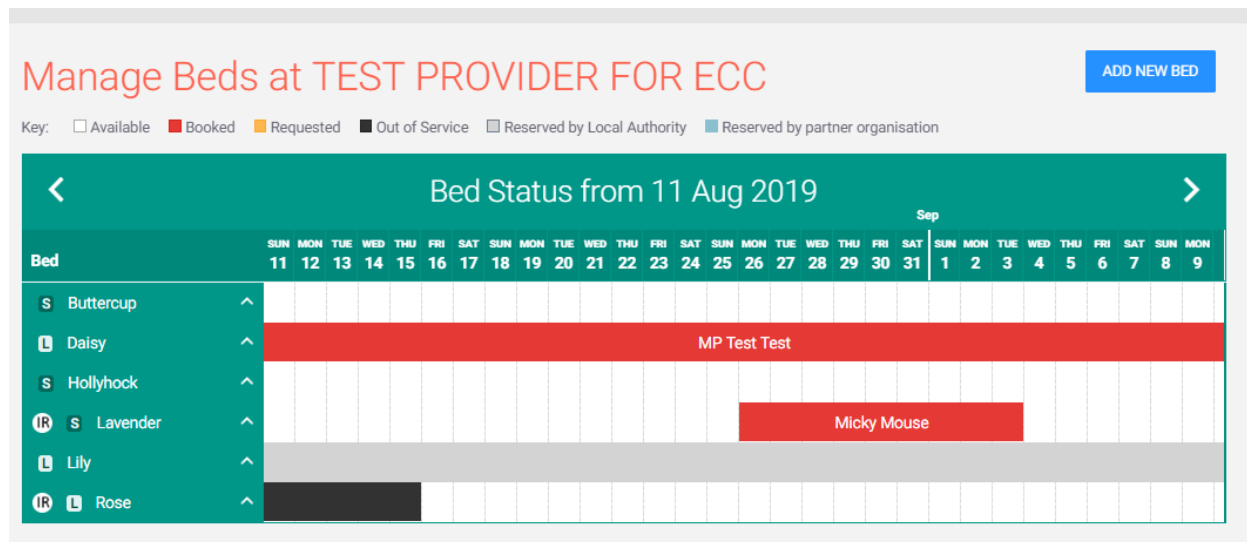
A Confirmation screen is displayed.
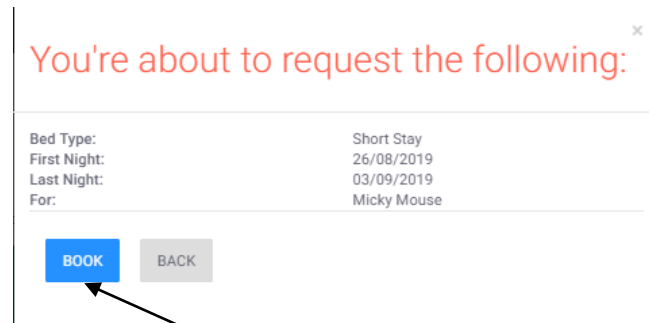
Check the details and click once on the Book button to confirm the booking.

A confirmation screen is displayed.

Click on the Close button.

You are returned to the Manage Beds screen and your booking is displayed in the timeline.

10.9. Room Summary

To allow Care Providers to easily manage the rooms setup in Essex Care Search, we have added a Room Summary page which allows Administrator and Manager users to view and edit the settings/features on existing rooms setup in Essex Care Search without having to go into each room individually.

Navigate to the Manage Beds section and click the Room Summary button to open the Room Summary page

Bed Type tab.

The Room Summary section is split into 4 tabs, Bed Type, Bed Features, Bed Contract and Bed Notes, where you can view and edit the setup for each room.

Bed Features tab.

Due to the number of options listed on the Bed Features tab, it is not possible to show them all on the screen at the same time, therefore users need to pan the table either right or left to see the additional options, see description on how to do this below. Currently it is not possible to keep the column headers in view when scrolling down the page, we plan to fix this in a future development.

Users can pan right and left on the Bed Features table to view additional options. To pan, move the cursor over the table until it changes to an open hand symbol like the one shown below.

Hold down the left mouse button and move the mouse right or left to pan. Release the left mouse button to stop panning.

Bed Contract tab.

Click Discard Changes button to undo any changes you have made during the current session. This will return all the room settings back to their previous status up to the point the Save button was last clicked.

Home | Honey Bee Care Home | Manage Beds - Honey Bee Care Home

Honey Bee Care Home

SAVE   ADD NEW BED   DISCARD CHANGES

Bed Name	Bed Type Contract Type	Bed Features Contract Owner Organisation	Bed Contract Price Band	Bed Notes Weekly Fee	LA Rates	3rd Party
Room 01	Block	Essex County Council	Less than £700 per week	0.00	☐	☐
Room 02	IRN	– required for block-contracts only	Please contact us for a price	0.00	☐	☐
Room 03	IRN	– required for block-contracts only	Please contact us for a price	1.00	☐	☐
Room 04	IRN	– required for block-contracts only	Less than £700 per week	1.00	☐	☐
Room 05	IRN	– required for block-contracts only	£1,001 - £1,999 per week	500.00	☐	☐

> If you select Block as the Contract Type, you must enter the room owner in the Contract Owner Organisation column.

> If you select IRN as the Contract Type, you must enter the basic weekly rate, as agreed with ECC for that room type, in the Weekly Fee column.

Bed Notes tab.

> Click the care home's name shown in blue to return to the Manage Beds page.

> Should you wish to setup a new room from the Room Summary page, this can be done by clicking the Add New Bed button. See section Add a new bed for further guidance.

Home | Honey Bee Care Home | Manage Beds - Honey Bee Care Home

Honey Bee Care Home

SAVE   ADD NEW BED   DISCARD CHANGES

Bed Name	Bed Type	Bed Features	Bed Contract	Bed Notes
				Bed Notes
Room 01	Test			
Room 02	Test notes.			
Room 03				
Room 04				
Room 05				

> The Bed Notes tab allows you to enter any information about the room you would like to covey which is not covered by the selectable options in previous tabs. Please note any Bed Notes entered will be visible to the public.

11. **Managing Booking Requests**

11.1. **Booking request overview**

Local Authority and Health Users can search for vacant beds and then send a request to book a vacant bed through the system.

A request for a vacant bed that is sent to a provider is called a booking request.

New booking requests can be rejected, acknowledged, or accepted.

Once a booking request has been accepted by a provider the request becomes a booking (see Section Manage Bookings for more information on bookings).

The diagram below shows an overview of the provider booking request process in Essex Care Search:
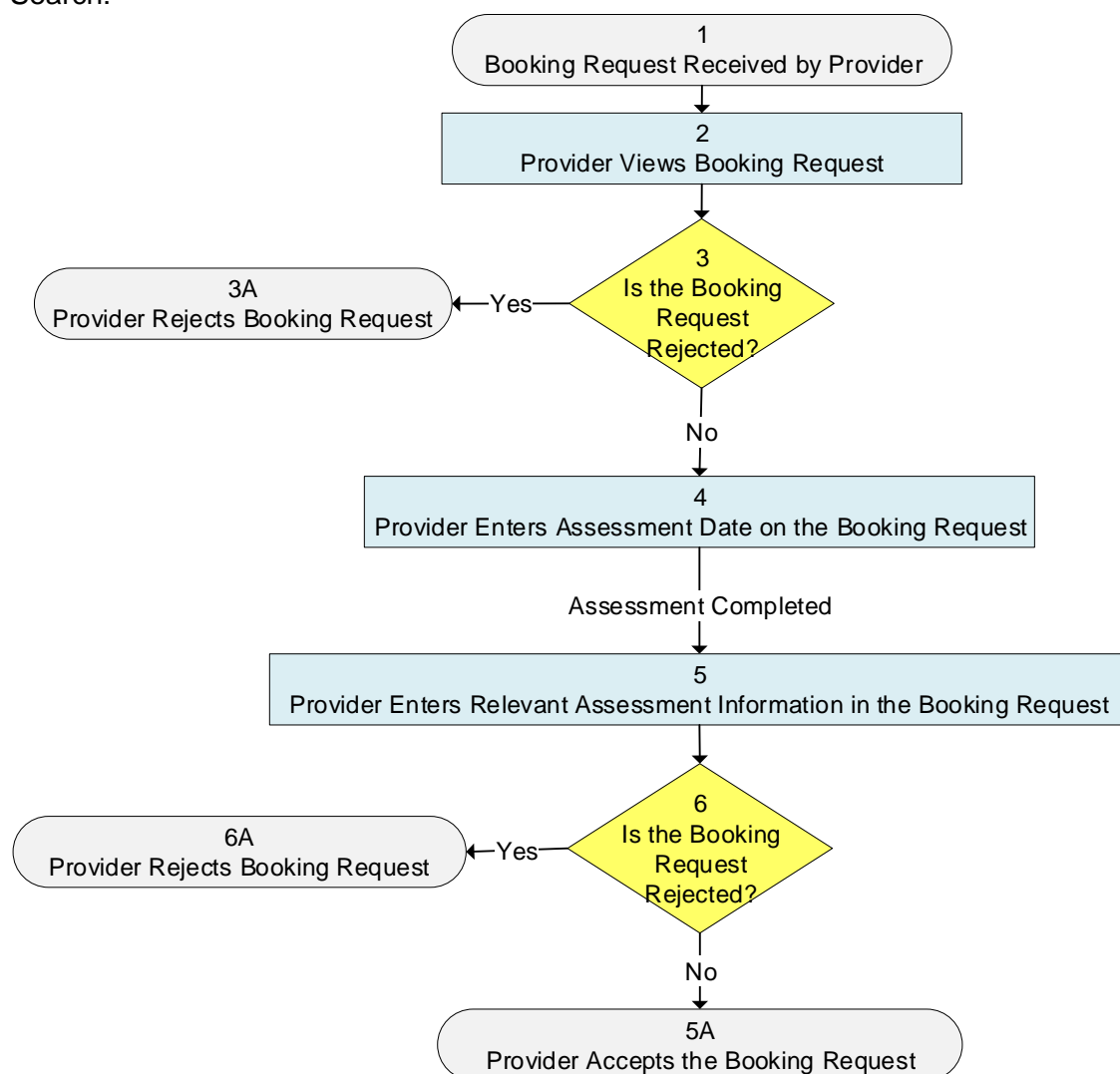
All Booking requests can be viewed in the Booking Status screen where you can:

- View new booking requests and enter assessment dates
- Accept or reject new booking requests
- View accepted current and future bookings
- View past accepted bookings

11.2. **Access the booking status screen**

The Booking Status screen can be accessed from the Menu or the Booking Status icon on the Home Page.
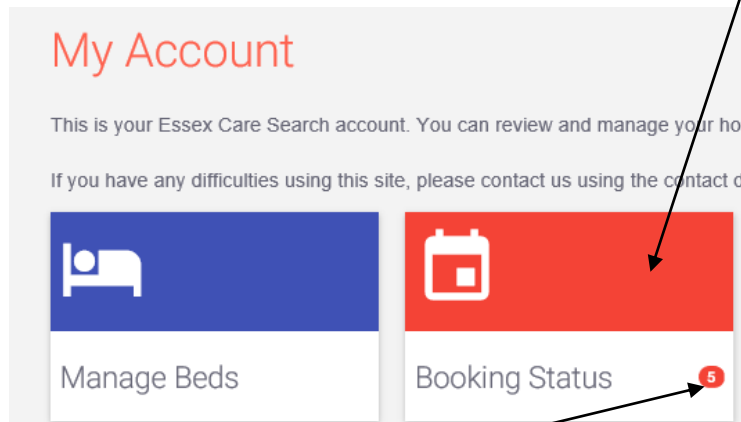
A notification of any new booking requests is displayed on Booking Status Icon.

See the following information for details of the Booking Status screen.

11.3. **Booking status screen overview**

Access the Booking Status screen from the Home Page or the Menu.

A - Tabs
There are 4 tabs that display booking requests based on the status and time of booking:

- **Requested** – displays booking requests that have been sent to your home and have not been accepted or rejected.
- **Current** – displays the booking requests accepted by your home where the booking has started.
- **Future** – displays the booking requests accepted by your home where the booking starts in the future.
- **Archive** – displays all accepted booking requests where the stay has ended.

Click once on each the appropriate tab to select the type of bookings you want to view.

B - Display Count
Use this drop down to select how many booking requests you would like to view on the page at any one time.

C - Search Box
Use the Search Box to help find a booking request. Any of the fields can be searched against including client name, referrer, bed name, reference and stay dates.

The search only works in the tab you have selected. If the booking you are looking for is not found, try searching under other tabs.

D - Table Headers
Each header identifies the type of information displayed in the corresponding column.

Each column can be sorted by clicking to the side of the text.

E – Review Button

Click once on the Review button to open the Booking Details screen and progress the booking request (see section Viewing and progressing booking requests).

F – Reference

Each Booking Request has a reference number. Clicking once on the reference number will open the Booking Details Screen.

Booking requests for your organisation can also be cancelled (or rejected) from this screen. Please see section Reject a booking request. (Bookings that are cancelled before starting will be deleted from the system. An email notification will be sent to the requester).

Currently members of the public cannot request a bed booking through the system.

11.4. Viewing and progressing booking requests

Access the Bookings Screen (see section Access the booking status screen), find the booking you require and click once on the Review button.

The Booking Details Screen is displayed.

Review the details of the booking. You can then decide to:

- Acknowledge the booking (see section Acknowledge a booking request)
  Or
- Reject the Booking (see section Reject a booking request).

11.5. **Reject a booking request**

Click once on the Reject button to reject the booking.

The screen below will be displayed.

Request for bed 'Apple' at 'Seashore Care Home' for 'Sarah Skittle'

Reason for Cancellation*

Adult choice

 → Reason for Cancellation

Notes

 ← Notes Field

CANCEL BOOKING   CLOSE

Use the 'Reason for Cancellation' drop down menu to record a reason for rejecting the booking. This field must be completed.

Enter any relevant notes in the Notes field.

Click once on the Cancel Booking button.

You will be returned to the Booking Request Screen and the rejected booking will no longer be displayed.

A rejection confirmation email will be sent to you and the requester, but the booking can no longer be viewed in the system.

11.6. **Acknowledge a booking request**

Click the Acknowledge button to acknowledge a booking request, the system will then ask for a client assessment date.

Enter the date you will be assessing the client.

Please ensure you enter the correct date as the date cannot be changed once entered. Requesters will also be able to see this date and may use this date when communicating with hospitals and family members.

Once the assessment date is entered, click once on the Save button.

An email will be sent to the requester to confirm your acknowledgement of the booking request and the assessment date.

12. **Notification Emails**

When certain changes happen in the system, emails are automatically sent to the relevant provider users and/or the requester as required. Email notifications are sent when:

- a new booking request is sent
- a provider rejects a booking request
- a provider adds an assessment date
- a provider accepts a booking

Below are some examples of the email notifications sent from the system

12.1. **Booking request notification**

When a booking request is sent to a provider, the provider receives a notification to let them know they have a new request to book a room.
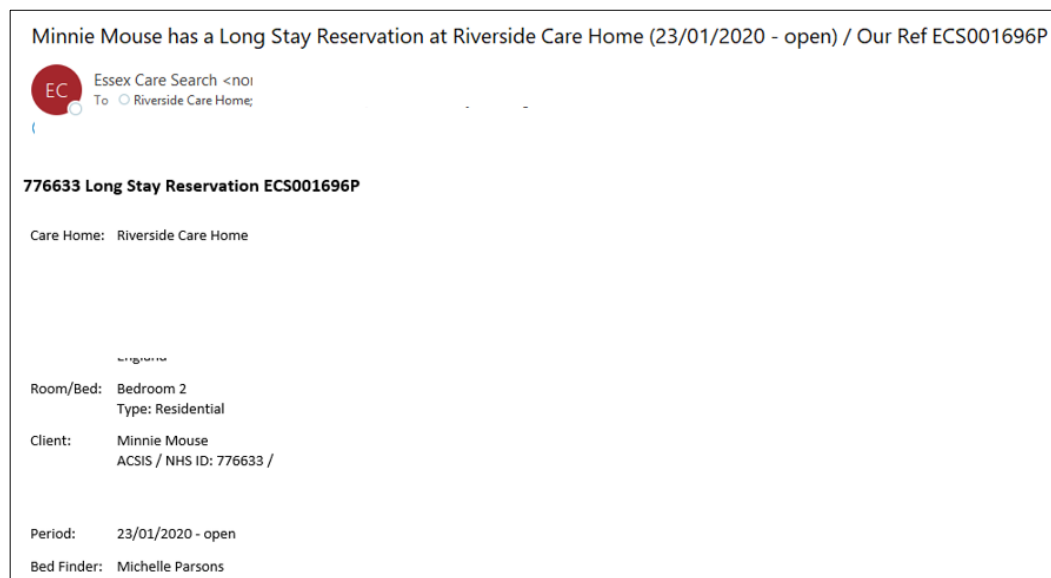
12.2. Assessment date entered in a booking

When a provider enters the date of an assessment in a booking request, an email is sent to the requester confirming the assessment.

12.3. Booking acceptance

Once a request is accepted, a booking confirmation email will be sent to the care home and the original requester. Below is an example of the booking confirmation email.
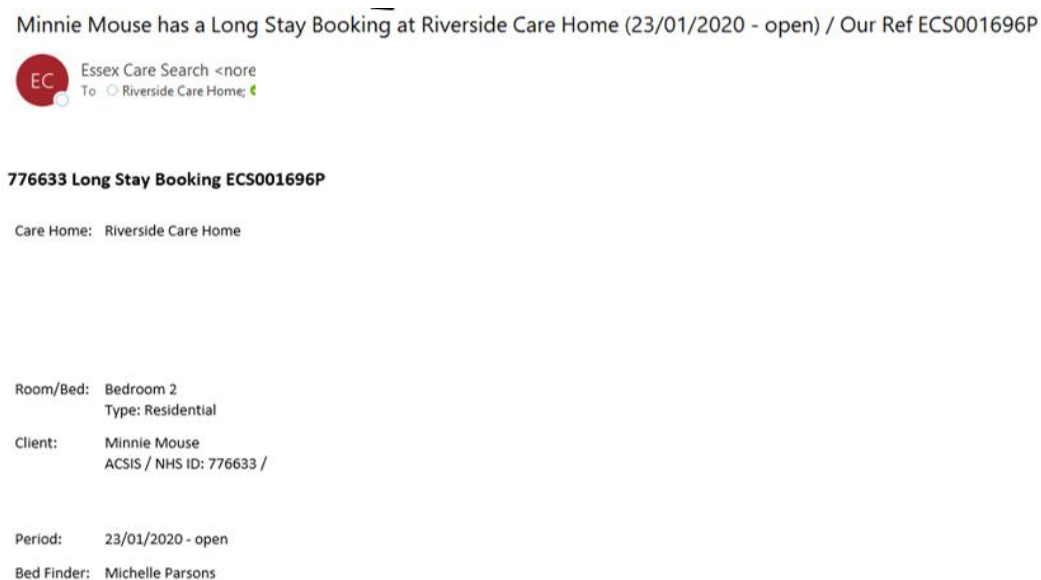
12.4. **Booking rejection**

After a request is rejected, a confirmation email will be sent to the care home and the original requester. Below is an example of the booking rejection/cancellation email.

13. **Manage Bookings**

13.1. **Amend a booking**

A booking is a booking request that has been accepted by a home. A booking may need to be amended to change a start date or extend a stay.

To amend a booking, access the Manage Beds screen (see section Access the manage beds area).

Accepted bookings are displayed in the timeline as red blocks.
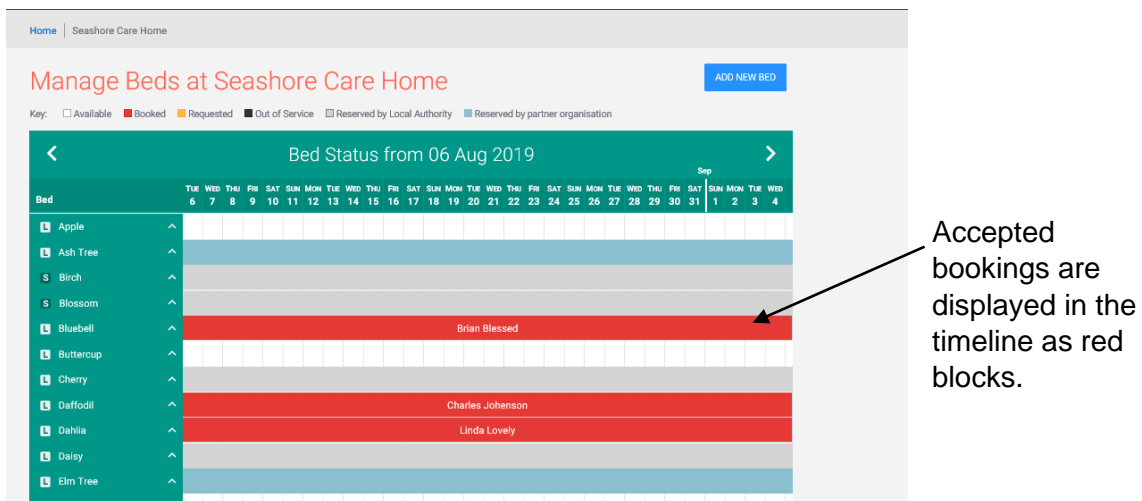
Click once on the booking to be amended.

The Booking Screen is displayed

Date Field

Update Booking

Date Fields:
Long stay bookings (as shown above) only have a First Night date that can be amended.

Short stay bookings have a First Night and Last night field that can be amended.

Update Booking: Click once on the Update Booking button to save the changes and return to the Manage Bed Screen.

Change Bed: Use this button to move a service user to another bed. Please see section Move a client to a different bedroom for details.

13.2. **End a booking**

For long stay bookings, there is no end date displayed on the Booking.

If a booking is time limited (e.g. 6-week hospital discharge), you will have to end the booking on the date on the contract.

When a service user vacates a bed, the provider is responsible for ending the booking. To end a booking, go to the Manage Beds area (see section Access the manage beds area) and click once on the booking.

The Booking Screen is displayed.

Click once on the End Booking button.

The screen below is displayed.

Select an 'Ending Reason' and enter the 'Last Night' date.

Click once on the End Booking button.

You are returned to the Manage Beds screen and the Booking will show as closing on the Last Night date.

13.3. **Move a client to a different bedroom**

There may occasions when your need to move a client to different bedroom within your care home.

When this happens the booking in Essex Care Search must be moved to the new bedroom.

There are two options to action this:

- Change the booking to another bedroom using the 'Change Bed' function. (see section Move a client to a different bedroom using the change bed function)

Or

- Create a new booking in the new bedroom and end the booking in the original room. (see section Move a client to a different bedroom by creating a new booking)

13.4. **Move a client to a different bedroom using the change bed function**

You can only move a client into a different bedroom that is setup with the same contract type as their existing room. For instance:

IRN→IRN
SPOT→SPOT
BLOCK→BLOCK

When moving a client, their booking has to 'slot' into a vacant bedroom. This means the vacant bedroom must have been available for the entirety of the client's original booking.

In the example below, Reece Smith and Clive Hayes can 'slot' into two other bedrooms. However, Jill Dunn cannot move into bed two or three as her original booking period overlaps.
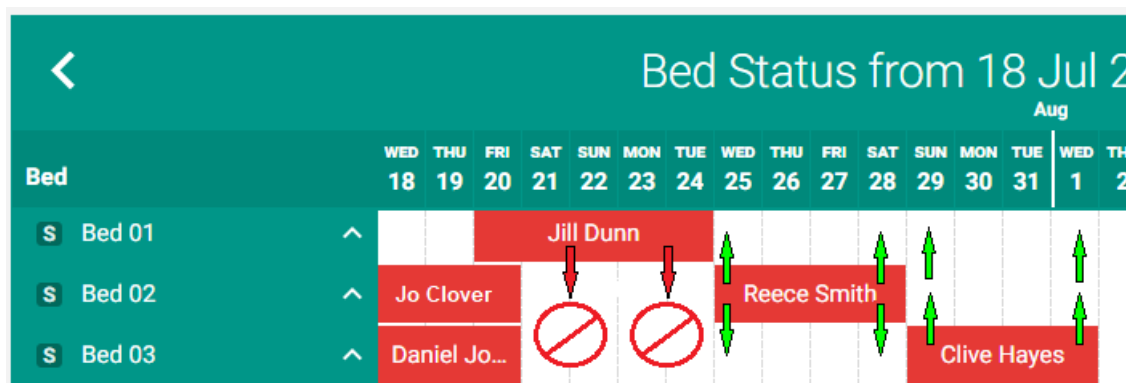
To move a client to a different bedroom using the 'Change Bed' function, open the Manage Beds section and click the client's booking under the timeline.

From the booking information window, click the 'Change Bed' button.

Booking ECS01478P   ×

Client:	Linda Lovely
Date of Birth:	
NHS Number:	
Address:	
Care Home:	Seashore Care Home
Bed:	Dahlia
Placement Type:	Long Stay
Referrer:	John Smith
	mpbf0011+providertest@gmail.com

First Night

20/03/2019   📅   ← Change Bed button

[UPDATE BOOKING]   [END BOOKING]   [CHANGE BED]   [GO BACK]

The screen below is displayed.

Review request for bed 'Dahlia' at 'Seashore Care Home' for 'Linda Lovely'   ×

Available beds

Apple   ▼

[SAVE]   [GO BACK]

Use the available beds drop-down menu to select the bedroom the client is moving to.

Once selected, click once on the save button and the client's booking will be moved to the selected bedroom.

If the bedroom you require is not shown in the drop-down menu, please follow the instructions given in section Move a client to a different bedroom by creating a new booking.

13.5.   **Move a client to a different bedroom by creating a new booking**

a.   Private Client
If the resident is a private client, create a new booking on the bedroom the client is moving into starting from the date they moved in. Once complete end the booking on the old bedroom using the date they moved out.

b.   Essex County Council Adult
If the client has been placed by Essex County Council or a partner organisation, contact that organisation and ask them to send through a new booking request against the vacant bedroom you wish to move the client into.

Once the booking in the new bedroom has been confirmed, the booking in the original room can be ended.