CarePlace

Guide to Completing a Service Profile

Introduction:

This document explains how to configure a service profile in the CarePlace system. It is designed to take you through the process step-by-step, so if you navigate through it from top to bottom and update CarePlace as you go, by the time you reach the end you should have a complete profile that will help residents and care brokers make an informed choice about the services you offer. It can also act as a reference guide if you wish to update the profile in future.

Contents

Completing a Service Profile

1. CarePlace Accounts

1.1. Obtaining a CarePlace Account

If you do not already have one, you can request a CarePlace account by visiting the site https://www.careplace.org.uk and clicking the "Local Authority or Services Register" link.

This page contains a simple form that allows you to provide us with your personal details and the organisation that you work for. If your organisation is not featured in the pick-list then please type it into the "other organisation" box provided. If you are requesting a login for any specific purpose (e.g. an application such as the APC scheme) then please indicate this in the "notes" field.

Once we have received the login request we will process it as soon as possible (usually 1-3 working days). Once it has been accepted you should receive a system-generated e-mail containing your username and a link to the terms and conditions page. Once the T&C's have been accepted, the system will send another message containing your password, which will enable you to access CarePlace.

1.2. CarePlace Passwords and Secret Words

The system effectively requires two separate steps of identification, one is a regular password and the other is a secret word, which is like a password, but the difference is the system will only ever ask you for 3 characters from this word (or number) - this is for security purposes. The system will send out your password when your account is created and you will be asked to enter a new secret word the first time you access the system. (You can change both your password and secret word in the "manage your account" section).

If you forget either your password or your secret word then you can use the "forgot my..." links at each stage of the login process and the system will send you a new one. This is a combination of letters, numbers and characters and is case-sensitive so please ensure you type it carefully. If you forget both your password and your secret word at the same time then you will have to contact CarePlace support to reset your account.

1.3. Account Settings (including changing your password/secret word)

Once you have logged in to the system you can change certain account settings including your password or secret word, using the "manage your account" link in the top left hand corner (under the CarePlace logo). You can also use this section to set your preferences for e-mail notifications.

2. Understanding Organisations and Services:

Once your CarePlace account has been created you are able to view and update your Service profile. This is important, as when you first log in, it is likely that only basic information will be held within the system. The profiles are publicly available in the CarePlace Directory, so the information should be completed as fully as possible, and remain accurate at all times.

Before we look at how to create/modify a service profile it is important to understand the difference between an Organisation and a Service within the system.

Organisation: Is the legal entity that owns one or more services (or other organisations)
Service: This is the entity that actually provides the service to the citizens e.g. a residential/nursing home, a home care agency, or a day care centre.

Each service must be linked to an organisation within the system. For single (independent) services there may be very little difference between the service and organisation details, for example they may have the same contact name and address. E.G.
Organisation: Baxter Hall Ltd, 1 Uxbridge Road
Service: Baxter Hall Residential Home, 1 Uxbridge Road
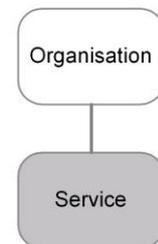
For grouped Services the organisation and service details are likely to be quite different. E.G.
**Organisation:** West London Care Providers Ltd, 1 Piccadilly, London
Service: Willow residential home, Ealing, London
Service: Birch nursing care, Hammersmith, London
Service: Oak retirement home, Hounslow, London
Service: Green Acres Home Care agency, Harrow, London

For even larger organisations there may be several parent or holding companies, each owning child organisations (e.g. regional groupings), which in turn own the Services. This structure is referred to as the organisation hierarchy. The CarePlace directory **only** shows Services to the public, not organisations, therefore each home or agency should be listed as an individual service (grouped by the organisation if necessary), not all listed under one organisation.
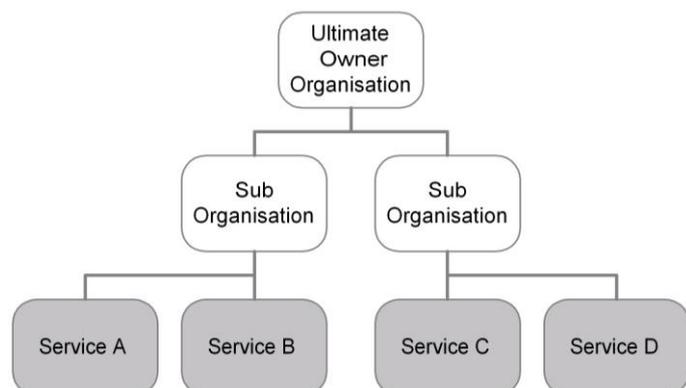
When your account is created you will be associated with one or more organisations or services.

To edit your organisation details click [Organisation] -> [*Manage Organisations*]. *Note: If you work directly for a Service (e.g. Care Home) you may not be linked to the owner organisation and therefore these details may be hidden from you.*

The organisation fields are similar to the service fields described below (except for one or two that should be self-explanatory e.g. Company Registration Number). For this reason this document will run through the service profile instead.

If you would like to create a new service for your organisation click.
[*Services*] -> [*Manage Services*] -> [*Create a New Service*]
and enter the appropriate details. If you don't see the [Create a new service] button then your account has only been associated with one or more services, not an organisation. Only user accounts linked to an organisation directly can create services. If you need to create new services for your organisation please contact CarePlace support and we will make the necessary changes to your account.

To edit an existing service profile click on [*Services*] -> [*Manage Services*]. This will present you with a list of all the services that you are associated with. (*see screenshot below*)
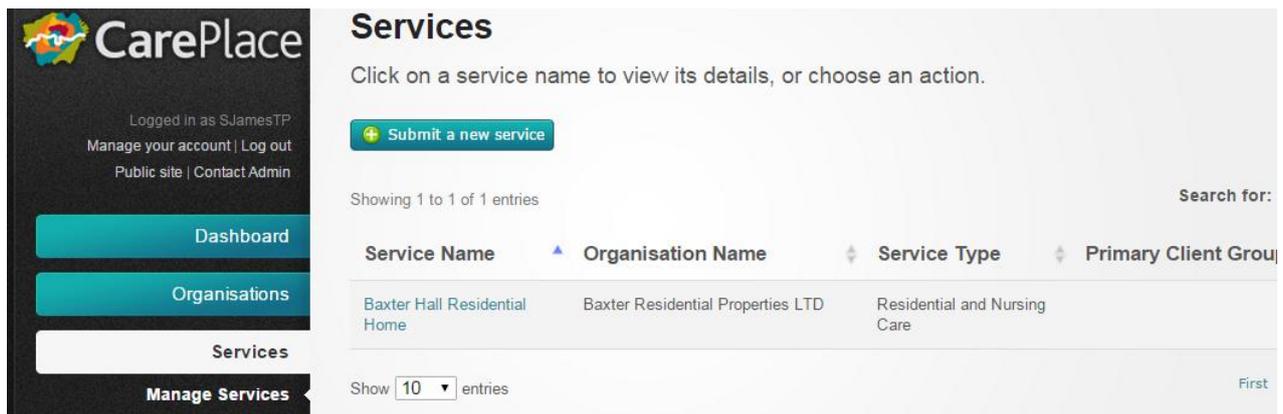
To edit a particular service, simply click on the name and you will be taken to the service details page (*an example of which is shown below*).
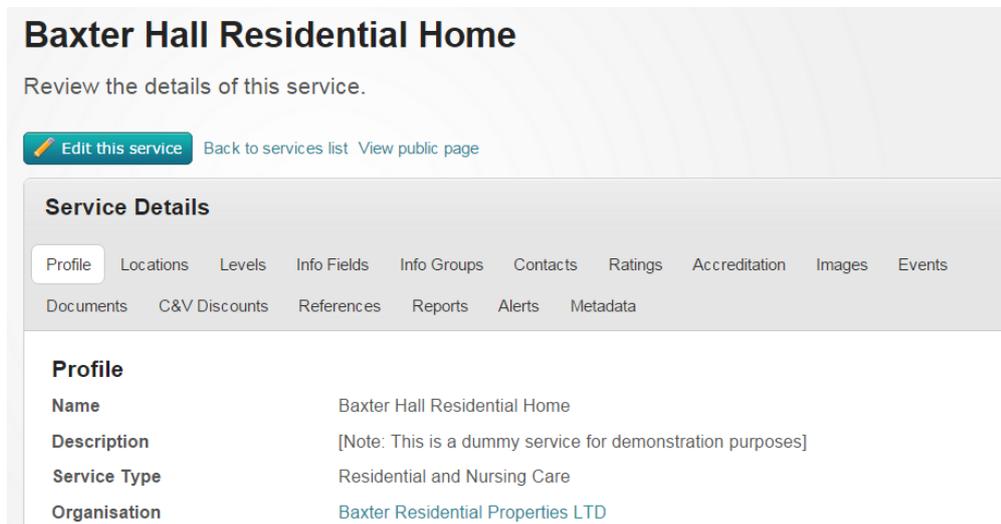
The service details screen shows a number of different tabs that store information about the service. This next section looks at each tab and explains some of the information that they can hold.

Note: You must click [Edit this Service] before you are able to update any of the information. At any point you can click the "View Public Page" link to see the results of your changes in the public directory. Some information (such as addresses) can be changed and the results will be immediately viewable in the CarePlace Directory. Others (such as Name/Description/Images etc.) must be approved by CarePlace support and therefore may take a short amount of time to become live.

3. Updating Service Details:

3.1. Profile Tab:

> **Note:** *Any changes made to this tab require approval from CarePlace support before they are made live. This offers us a level of protection from inappropriate content. We aim to process these requests within one working day, but sometimes it may take longer. Changes will not display in your public profile until they have been approved.*

Name: This is the name of your service and will appear at the very top of the page in the public directory

Description: This is a free-text description intended to provide some background about you as a service provider, and perhaps an overview of the services offered. You can style the content to some extent using the HTML toolbar above the field and can also insert links if necessary. The contents of the description field are included in the directory search so if you cater for specific client groups (e.g. Urdu speakers) then it is important to include this information in the description.

Type: This is a pre-defined list of the general type of services you provide.

Primary Client Group: This describes the primary group of clients that you provide services for. (E.G. Older People, or Mental Health)

Website URL: This displays on the directory as a link to your main website (if you have one)

Referral URL: This displays on the directory as a link where members of the public can navigate to, to find out how to purchase services from you.

CQC ID: If you are registered with the CQC, this field establishes a link between CarePlace and the CQC website and will place a widget on your service profile. The number you need to enter is the CQC ID (or HSCA ID) e.g. "1-123456789"

See right for an example of how the CQC widget looks on the service profile.
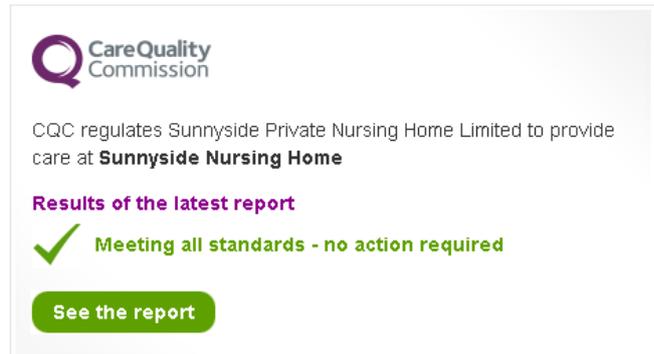
Ofsted Reference Number: If you are registered with Ofsted, this field establishes a link between CarePlace and Ofsted to display a rating widget on your service profile.

Organisation: This is the legal entity that owns the service. If you are independent it is likely to be your company name. If you are owned by a larger, or regional organisation, the name should be displayed here. If you have a complex organisation hierarchy (i.e. lots of regional/holding companies) please contact us and we will assist you with this.

3.1.1 Payment Type Images & Wi-Fi

You can display the logos for any relevant payment methods you accept or the Wi-Fi symbol by following the instructions below:

1: Open the service profile you wish to modify, click to edit the service and navigate to the Description field on the Profile tab.
2: Put the cursor where you would like the image to appear in the text.
3: Click the "image" icon on the description toolbar (see below)
4: Delete the "http://" that appears in the URL box and copy and paste the address of the logo from the table below to link to the appropriate image.

This guide can be downloaded from https://www.careplace.org.uk/Admin/Documents/435/Completing-a-Service

DIRECT Debit	/Documents/Download/421/Direct-Debit-Logo
MasterCard	/Documents/Download/422/Mastercard-Logo
PayPal	/Documents/Download/423/Paypal-Logo
VISA	/Documents/Download/424/Visa-Logo
AMERICAN EXPRESS	/Documents/Download/425/American-Express-Log
WiFi Available	/Documents/Download/1730/

3.1.2 Video embedding

You can attach a video from YouTube or Vimeo to your profile by following the instructions below:

1: Open the service profile you wish to modify, click to edit the service and navigate to the Description field on the Profile tab.
2: Put the cursor where you would like the video to appear in the text.
3: Click the "video" icon on the description toolbar (see below)
4: Copy and paste the embed code from YouTube or Vimeo to link to the video in your profile.

Once saved and accepted by Care Place Support, the video will show on your profile as below:
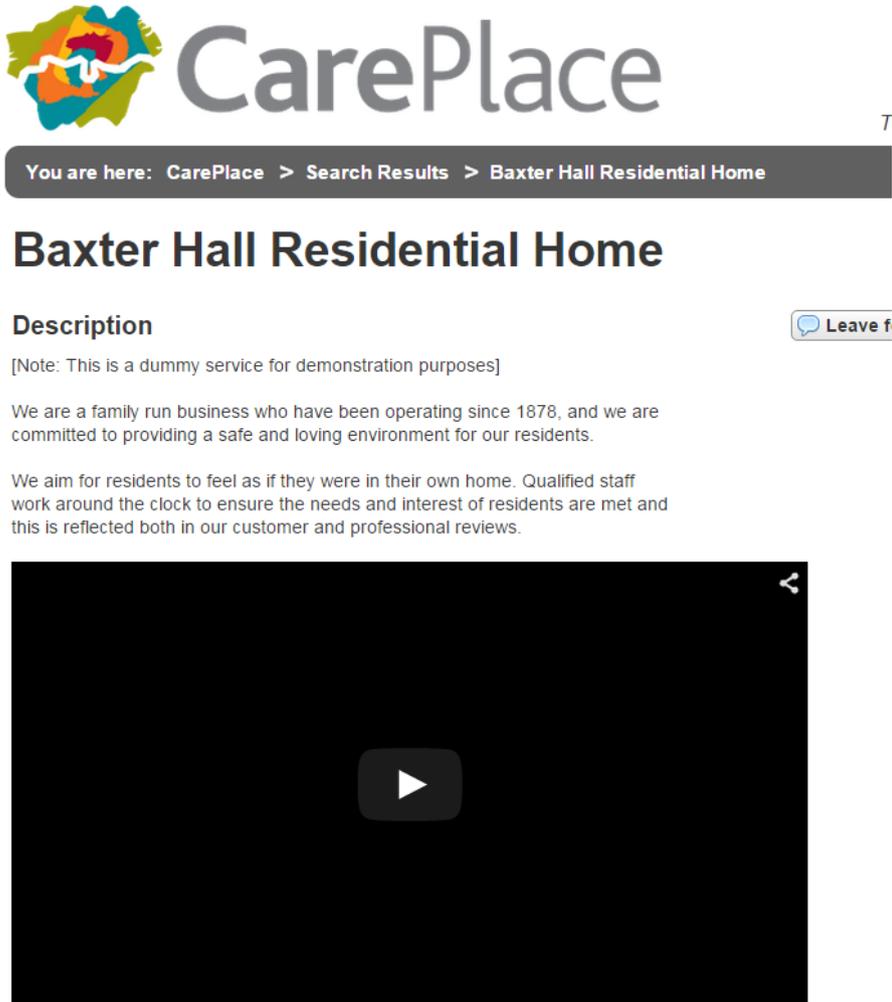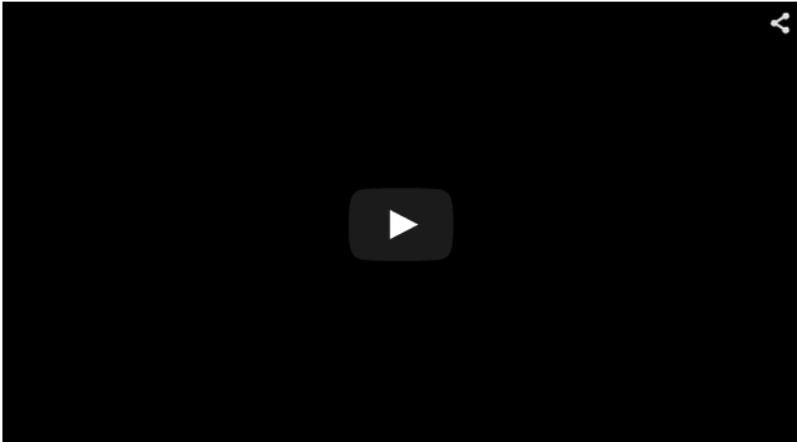
3.1.3 MarketPlace Settings:

These settings control how the service is categorised in the directory where members of the public search for services. In virtually all cases, the system will maintain a service's categories automatically without any problems. For this reason you should leave the "Maintain this service's categories automatically" option checked. If you feel that your service is not categorised correctly then please contact CarePlace support and we will assist you.

3.2 Locations:

Address: The address of your service. You can store multiple addresses for a particular service but generally this is an indication were a separate service entity is required. E.G. If a care home provider lists two care homes as separate locations, these should be set up as two separate

services within the system. This allows them to be rated/accredited/assessed individually, which is appropriate.

Manually Define Location Coordinates: This should only be used if the coordinates generated from your postcode incorrectly place the service on the directory map.

To obtain the correct longitude and latitude for your service, visit the site http://ctrlq.org/maps/address/ and enter in the service address. Drag and drop the pin on the map to the correct location and the latitude and longitude values will be provided.

On the Care Place profile tab, select manually define location coordinates and enter the new longitude and latitude.

Fixed Location: This means your service is provided at a fixed location (e.g. Residential Home)

Area Based: This means your service is a mobile service (e.g. home care agency or mobile library)

Catchment Radius: This is for area based services only and is the radius in miles that the service operates within. (E.G. 5 miles from a home care agency office)

Postcode Boundary: This allows you to indicate if your service only serves specific postcodes in an area.

Show in public: If an address is provided, and the option to show in public is set to no, the service will show up in area based searches, but the address will not be visible on site and the map will not be displayed.

3.3 Levels: (Contracted Service Levels)

Please ensure there is one for each of the services that you provide)

Service Level: This is the service levels that you provide (e.g. residential care or nursing care with dementia)

Client Group Category: This is the type of clients that you cater for (e.g. older people or mental health)

Client Group: This is a sub-category of clients that you cater for. *Note – only one of either client group category or client group should be provided. In virtually all cases the broader client group category should be supplied.*

Start/End Dates: The start and end dates of the contracted service level (this will allow us to track contract values over time)

Price Per Unit: This is the price that the WLA boroughs may purchase this service level at. (*Note: this price is not visible on the public directory*)

Public Price Description: This is a public price description that will be displayed on the CarePlace Directory. *Note: This field does not necessarily have to be a numeric value – you may wish to enter something like "please contact us for price details"*

Capacity: This is the total capacity you have to provide this service level (e.g. Number of beds if you are a residential/nursing service)

Total Number of Units: This is the total number of units out of the above capacity that you are making available to the WLA. (E.G. If you have a capacity of 10 beds, 7 may be available to the WLA and 3 reserved for private clients.)

Provider Specified Availability: This is the number of units that you currently have available. If you have no availability for this service level, this field should be set to 0 (zero). If you have availability, then you should record it here because brokers looking to make placements will be notified and may contact you to try and arrange a placement. (E.g. If you have 2 empty beds which can be used for residential care, please set the provider specified availability for this service level to 2)

3.4 Information Fields:

This tab has a number of structured pieces of additional information. We may add fields to this list and request that you complete them from time to time. There are separate lists of attributes for each service type so if your service is any one of the following types you should complete this tab:

- Residential and Nursing Care
- Support at home
- Supported Living / Sheltered Accommodation
- Leisure and Community
- Advice and Advocacy

To add the information:

1: Click [Add a new field] and add an attribute that relates to your service (e.g. Languages spoken).
2: Enter the details of the attribute. Note: for multi-select lists like languages or dietary requirements, hold down [ctrl] and click each different value that you want to add.
3: Repeat steps 1 and 2 for each attribute that applies.
4: Click [Save your changes from this tab]

3.4 Info Groups

This tab is used to add a group of linked information fields to a service profile. These are configured by Care Place Support and new groups can be added on request. For example, a list of ratings can be added to a group, so that all selected fields must be completed at one.

3.5 Contacts:

This tab stores the contact details for people related to your Service (e.g. employees)
List as MarketPlace Contact: This checkbox determines whether the contact details (name, e-mail address and phone number) are displayed in the public directory. If you do not wish to display these details please leave this option un-checked.
Receives Enquiries: This checkbox determines whether the contact directly receives an e-mail if a member of the public (or a broker) uses the *[Enquire about this Service]* button in the directory.

3.6 Images:

Note: *Any changes made to this tab require approval from CarePlace support before they are made live. This offers us a level of protection from inappropriate content. We aim to process these requests within one working day, but sometimes it may take longer. Changes will not display in your public profile until they have been approved.*

Logo: This section allows you to upload your company logo so that your profile is consistent with your branding/corporate identity.

Accreditation Logo: This sections allows you to upload accreditation images, however, before this is approved, documentation must be provided proving accreditation status.

Image: This section allows you to upload images to further enhance your profile (e.g. images you may have on your website or in a brochure/leaflet)

3.7 Documents:

> **Note:** *Any changes made to this tab require approval from CarePlace support before they are made live. This offers us a level of protection from inappropriate content. We aim to process these requests within one working day, but sometimes it may take longer. Changes will not display in your public profile until they have been approved.*

This tab displays any documents that have been uploaded to the system and linked to your service profile.

To add a new document to your service profile:

1. Click 'Submit new document' which will open a new page for you to upload the document

2. Click 'Browse' to find and select the document you are uploading (this must be less then 10Mb in size).

3. You will then need to fill in some basic information before submitting the document.
   *All fields that have a red asterisk(s) must be completed to continue.

   - *Title:** the name shown in the system
   - **Summary:** describe the document's contents
   - *Document Type:** you must select this from one of the options
   - **Expiry date:** If a date is specified then when it is reached the document will no longer be displayed to public users. Local authority users will still be able to view and open it from the admin side of the site, though it will be marked as 'Expired' wherever it is shown.

4. Once you have filled in the document information, click submit document.

5. You will receive confirmation that the document has been submitted.

6. The document will need to be approved before being published to your profile