User Guide – Acute / Community Providers

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<th>Date</th>
<th>Author Title</th>
<th>Status</th>
<th>Comment/Reason for Issue/Approving Body</th>
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<td>22.3.20</td>
<td>Hannah Hope</td>
<td>Complete</td>
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<td>26.6.20</td>
<td>Hannah Hope / Heather Hayton</td>
<td>Final</td>
<td>Amended contact details and links to search for Care Home vacancies</td>
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Capacity Tracker User Guide

System Requirements
The following browsers are supported:

- **Desktop**: Internet Explorer 11/Edge, Firefox, Chrome, Safari
- **Mobile**: Chrome (iOS/Android), Safari (iOS)

Preferred browser is Google Chrome. Using an older version of internet explorer will result in a degraded/non-optimal experience. You can check which browser and version you’re using at [https://updatemybrowser.org/](https://updatemybrowser.org/)

User Types
When registering, users can choose either Standard or Approver permission access. Approvers have management rights over other users in their organisation. E.g.: An Approver for your Organisation can approve other users who register from your Organisation and also reset their passwords. They are also responsible for removing users who no longer should have access or who have left the organisation.

Approvers should apply due diligence when reviewing applications for access to the Tracker e.g.

- Is the applicant a current member of your organisation?
- Is their email address correct (i.e., is it aligned to your organisation, no typing mistakes, no personal email addresses)?
- Have they applied for the correct level of access (Approver/Standard)?
- Users who have left the organisation should have their access de-activated – send details of leavers to [necsu.capacitytracker@nhs.net](mailto:necsu.capacitytracker@nhs.net) for deactivation if there are issues with this.

Generic Accounts
These are intended for sharing between multiple users. Generic accounts are shown a disclaimer every time they login. Organisations who request a generic account should be aware that auditing of activity by that account will not be able to determine which user in the organisation logged in under that generic account (by definition, it’s generic). In the event of any queries about historical data changes made by that [generic] account holder, audits will therefore be limited.

1. Registering a New User Account
   a. Applications for a new user account must be made via [https://carehomes.necsu.nhs.uk/](https://carehomes.necsu.nhs.uk/)
   b. You can use a PC/Mac and mobile devices (iPad, tablet or smartphone) with internet access to use the system. Supported browsers are Google Chrome, Mozilla Firefox or IE 11+ on Windows and Safari on iOS.
   c. Use the ‘Register NOW’ link on the below screen and complete the application form.
d. It is important that new users complete the form fully and accurately as the details will be forwarded on for approval by an Approver form within your organisation. Where a current Approver for your organisation doesn’t currently exist your new user request will be reviewed by a member of the Capacity Tracker Team.
e. **Email Address**: this should be a unique email address that has not been registered with the Capacity Tracker previously. A warning will appear if the address is already registered

*Username taken!*

Should you receive this warning please contact the Capacity Tracker Service desk:

- For general user support, including account queries and password issues, please contact necs.servicedesk@nhs.net. Please do not remove [Capacity Tracker] from the subject line.
- For technical support, contact necsu.capacitytracker@nhs.net

**Note**: Check email address for accuracy as if this contains any inaccuracies new applicants will not receive passwords/automated responses from the system.

f. **Name, Contact Number and Job Title**: these fields should be completed so we can accurately capture your information.

g. **User Type**: Each Organisation needs to have a minimum of 2 Approvers in place to ensure there is adequate cover to update the Capacity Tracker during holiday periods or sickness.

   a. Examples of Approvers could be as follows:

   Discharge Managers, Operational Managers, Managers, Assistant Managers, Service Managers, Service Leads

The Approver will receive an automated email advising them when a new user from their organisation has requested access to the Capacity Tracker. The Approver will need to log on to the Capacity Tracker and from the Dashboard screen select the Users awaiting approval tile. Once selected An Approver will simply review the request select the appropriate button either approve / reject.

User Type is defaulted to a Standard user and shown in green. To change this to Approver simply select Approver – this will then turn green and the previous Standard defaulted selection will be deselected turning from green to grey.

h. **Provider Type**: This is defaulted to Care Home and is shown in green. If you are registering from Any Organisation other than a Care Home please select the organisation required e.g. **NHS Acute or Community** and this will then turn green and the previous Care Home defaulted selection will turn from green to grey. Then Click Next.

**NHS Acute**
### Community

#### Register New Account

**Your Details » Organisation Details » Finished**

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Email Address</td>
<td></td>
</tr>
<tr>
<td>Full Name</td>
<td></td>
</tr>
<tr>
<td>Contact Number</td>
<td></td>
</tr>
<tr>
<td>Job Title</td>
<td></td>
</tr>
<tr>
<td>User Type</td>
<td>Standard</td>
</tr>
</tbody>
</table>

**Provider Type**

- Care Home
- NHS Acute
- Community
- Hospice
- CCG
- Local Authority
- Local Authority (Regional / LRF)
- NHSE/DKHCSU
- Other

*Select “Approver” if you require permission to approve other users in your own organisation.*

[Previous] [Next]
i. **NHS Trust Provider:** In the box where the cursor is flashing, enter the postcode of the Acute Trust and select search. All Providers with that postcode will then be listed. From this list click on your Trust organisation and this will have a tick adjacent; if you wish to add multiple locations, please enter another postcode. **If you are an Acute Trust who has Community Beds in multiple sites, ensure you add each individual site by typing the postcode for each site.** Acute Providers automatically have access to search for Care Home vacancies.

NHS Trust

If you are a Community Provider and wish to use the Capacity Tracker to search for vacancies to support the discharge of people into Care/Residential Homes from your sites, select YES button next to **Care Home Search**? Then select the blue Next button.

j. **Terms and Conditions and Communications Policy:** Will then be displayed - Please read these prior to clicking on the” I agree” box for each element and the blue Complete button.
Once approved, the system will email you your login details including a password which must be changed on first use to something more memorable. In the unlikely event that you don’t receive an email directly, please check your spam folders in case it has been diverted there. Your password must comply with NHS policy on password strength which will be advised on the change password screen.

Add the Capacity Tracker email address to your safe senders list and chose your version of Microsoft Office so alerts do not drop into your junk email – see link for advice:

https://support.office.com/en-us/article/add-recipients-of-my-email-messages-to-the-safe-senders-list-be1baea0-beab-4a30-b968-9004332336ce

Our sending address is necsu.apps@nhs.net

For larger organisations with managed IT policies, ask IT to add the tracker address to your Trust Sites list

https://carehomes.necsu.nhs.uk/?ReturnUrl=%2Fhome

2. User Login

a. It is advisable to tick the ‘Remember Me’ checkbox so that the system remembers your password, unless of course you are using a public computer/device to access the Portal.

b. Following a successful login you will be presented with the following ‘Home Page/Main Menu’ screen or a variation of it depending upon your organisation type and/or level of permission.

Note: Organisations can only see their own data and will not have access to all reports.
Account Lockout

If the wrong password is entered 5 times, the account will be locked for 24 hours. After this, you can attempt to log in again with your current password or reset your password. If you experience further issues please contact
For general user support, including account queries and password issues, please contact necs.servicedesk@nhs.net. Please do not remove [Capacity Tracker] from the subject line.

For technical support, contact necsu.capacitytracker@nhs.net

Note: Passwords expire after 365 days and must then be changed – a reminder email will be sent.

3. Initial Organisation Setup

Please note that you can select the home icon in the top left of the Menu bar from anywhere in the Portal and this will take you back to the Home Page/Main Menu screen.

Step 1: Edit and update your information

a. The first step is to ensure your Organisation is correctly setup in the system. This is done by selecting the appropriate Providers tile on the Main Menu:

![NHS Acute Providers](image)

b. You will be presented with the following screen.

NHS Acute

![NHS Acute](image)
The setup involves working through each of the respective 4 links associated with your Organisation (this is the same for Acute and Community Providers):

i. Edit Provider Details (Address etc.)

ii. Edit Bed Types:

iii. Edit Maximum Capacity

iv. Edit Vacancies (Once fully set up This is the only screen which Organisations needs to routinely enter to update their spare capacity) The current expectation is now that you will update your vacancies as and when things change, and at least every 24hrs if there’s been no change.

c. First click the ‘Edit’ link next to the Organisation name. This will take you into the form which allows you to review and update the main details about your organisation covering:

Address Details
i. Provider Name

ii. Address
iii. Postcode (very important that this is entered this correctly)

**Contact Directory**

**Manager Details** - It is extremely important that you input your Manager details in the Contact Directory. This information will appear in the search results and is also used to send key communications to your location and update reminder prompts.

The **Contact Directory** can be completed to capture details of organisations that you may need in an emergency or to support with Business Continuity.

To add a contact simply click add a contact. The sections are free text to input the name of the person, organization name and contact details. These may be useful if an emergency arises.

There is a list of pre-defined roles that will appear (see below) or free text can be input for other key contacts (e.g. Estates/IT etc.)

<table>
<thead>
<tr>
<th>Role</th>
<th>Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>Lead Clinician</td>
<td>Lead OP*</td>
</tr>
<tr>
<td>Local Authority</td>
<td>Manager</td>
</tr>
<tr>
<td>NHS Email</td>
<td>Pharmacy</td>
</tr>
<tr>
<td>Physio</td>
<td>Social Worker</td>
</tr>
<tr>
<td>Trusted Assessor</td>
<td></td>
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</table>

Note: These details can be made public by clicking the Tick Box. Public entries will be shown on the Find Capacity page to commissioners.
**Misc. Details** including CQC report URL, Public URL for your Organisation

Please note your CQC registered services are listed here alongside the miscellaneous details (Misc. Details). These are imported from CQC so should there be any error here, you will need to contact CQC to have any anomalies corrected.

**Classification and Funding data**

Review the information pre-populated as this has been imported from the CQC and includes the Local Authority, CCG, STP and NHS Region as well as the Parent Organisation for the location.

**Note Log**

There is the option to add as many notes as you wish about your Organisation. This is not essential and you may choose to not add any notes. An example is given below of the sort of information you may wish to include but please remember these need to be kept up-to-date. If added, notes appear in the search results when users search for capacity. Key words with notes can also be searched on when looking for vacancies i.e. Bariatric Equipment, Hoists, visiting hours etc.

![Note Log](image)

**Users with Access**

This section outlines all of users who have access to the Capacity Tracker within your Care Home. Approvers have (Approver) next to their name. Always remember to press the green ‘Save’ button when you’ve finished changing anything on any screen but you will be reminded if you forget before you leave the page.

**Step 2: Define the Bed Types that you offer**

a. Select **Edit Bed Types** and you will be taken to the screen below.

b. Select Community Rehabilitation or End of Life check boxes for the bed types for offer. If you do not offer either service check the box for None of these Bed Types are provided. For clarity a definition for each bed type is shown.

c. Once finished, you should press **Save Bed Types button**.

**Note:** The services offered must be in accordance as per your CQC Statement of Purpose.
Step 3: Enter Maximum capacity for each Bed Type

a. For each of the bed types defined on the previous screen you will be presented with a box to enter the Maximum Capacity. It’s therefore important that this is done before moving to the next step and declaring your current Vacancies.

b. This is the TOTAL number if full capacity were available. Current vacancies will be entered on the next screen so please do not get the two mixed up.

c. The system will automatically calculate the difference between your Total Capacity and the Vacancies which is entered on the next screen (this will be the number of USED beds and will be used for reporting purposes).

d. After entering total capacities, click ‘Save’.
e. If vacancy numbers are not populated, your Organisation will not have fully completed its registration and will not appear in any search results listing vacancies.

Step 4: Edit Vacancies

a. For each of the bed type you will be presented with a box to enter the Current Vacancies.

b. This is the number of VACANCIES which you are currently able to provide i.e., if you were contacted today.

c. Simply enter the VACANCY number against each vacancy type.

d. The system will not allow you to save more vacant capacity than you have told the system you have as MAXIMUM capacity for obvious reasons. Helpfully, the system will display the TOTAL capacity that you’ve entered from the previous screen.

e. **Please note that this is the screen you are routinely asked to update** and this information will be used to determine whether your organisation appears in search results when organisations are trying to locate beds which is why it is important to keep your information as up-to-date as possible. Once Saved the update is date stamped and is displayed next to the Last Updated text. It is therefore in your interest to update ideally as soon as your vacancies change or as a very minimum on a daily basis. This simply takes just 30 seconds and can be updated on the go via mobile phone or tablet with Wi-Fi access.

a. **Flexible beds** – there is a checkbox available and should ticked if your organisation provides multiple bed types and has the ability to flex across those bed types.

b. When completed, press ‘Save’
For your Organisation(s) to appear in the search results, they must have completed ALL the above key data fields.

4. **Find Vacancies**

A separate user guide exists titled Searching for Care Home Vacancies – this is available via the link below:

https://careprodukstore.blob.core.windows.net/carehomeuserdocs/searching-vacancies-carehome.pdf

Further Help and Tips:

REMEMBER: You can search for Care Homes via any internet connected device including i-Pads/tablets and smartphones – so you can find Care Homes quickly ‘on the go’. Search for https://carehomes.necsu.nhs.uk/ and log-in using your user name and password. Save as a favourite to access the site more quickly.
For further information or to request a demonstration please contact us
Telephone: 0191 6913729
Email: Necsu.capacitytracker@nhs.net
Internet: Carehomes.necsu.nhs.uk
Twitter: @CapacityTracker
Facebook: @NHSCapacityTracker
I.T. issues you can contact the Helpdesk on necs.servicedesk@nhs.net