





# How to Register on the Capacity Tracker

# **ACUTE/COMMUNITY PROVIDERS**



# **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 <a href="https://updatemybrowser.org/">https://updatemybrowser.org/</a>

# **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.

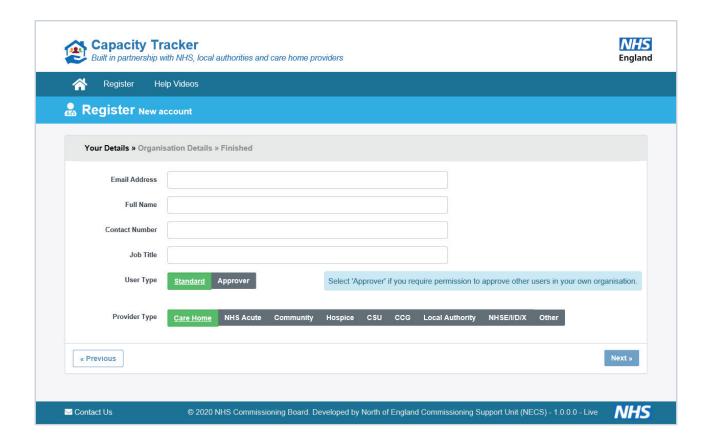
- Is the applicant a current member of your organisation?
- Is their email address correct (i.e., is it aligned to your organisation, no typing mistakes, no personal email addresses)?
- Have they applied for the correct level of access (Approver/Standard)?
- Users who have left the organisation should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

## **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/
- 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 by email <a href="mailto:nect.nect">necs.servicedesk@nhs.net</a>

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

- f. **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.
- g. Examples of Approvers could be as follows:
  - Discharge Managers, Operational Managers, Managers, Assistant Managers, Service Managers, Service Leads

h. 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.

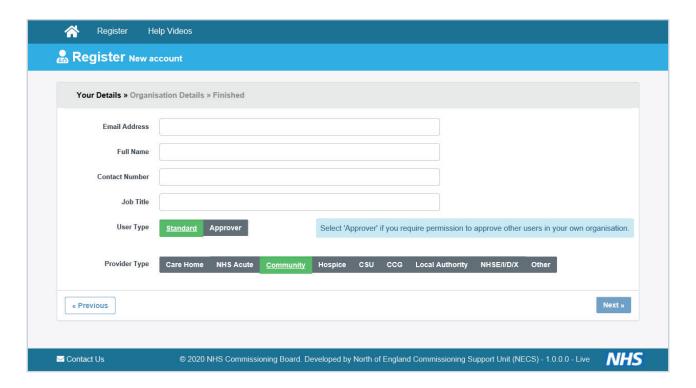
i. **Organisation Type:** This is defaulted to Care Home and is shown in green. If you are registering from

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**

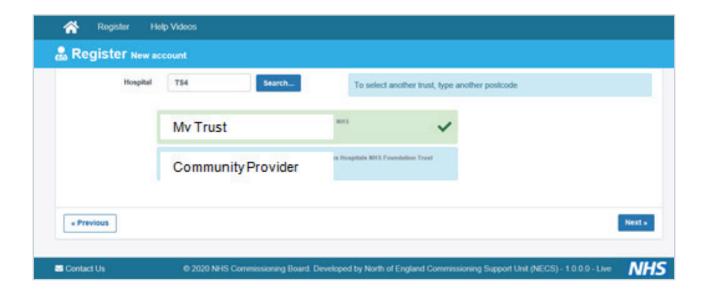
Register He	elp Videos									
Register New a	count									
Your Details » Organia	sation Details »	Finished								
Email Address										
Full Name										
Contact Number										
Job Title										
User Type	<u>Standard</u>	Approver		Select 'A	pprover' if	you require p	ermission to	approve other	users in your o	wn organisation
Provider Type	Care Home	NHS Acute	Community	Hospice	CSU	CCG Loc	al Authority	NHSE/I/D/X	Other	
« Previous										Next »

#### Community

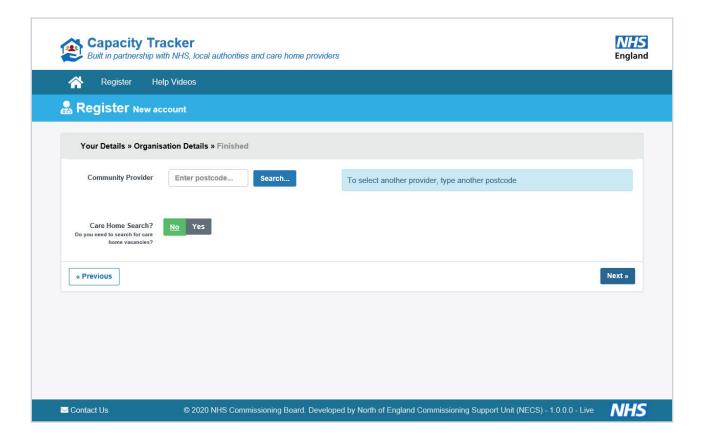


j. NHS Trust Provider: In the box where the cursor is flashing, enter the postcode of the Acute Trust and select search. All Providers with that postcode will then be listed. From this list click on your Trust organisation and this will have a tick adjacent; if you wish to add multiple locations, please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

#### **NHS Trust**

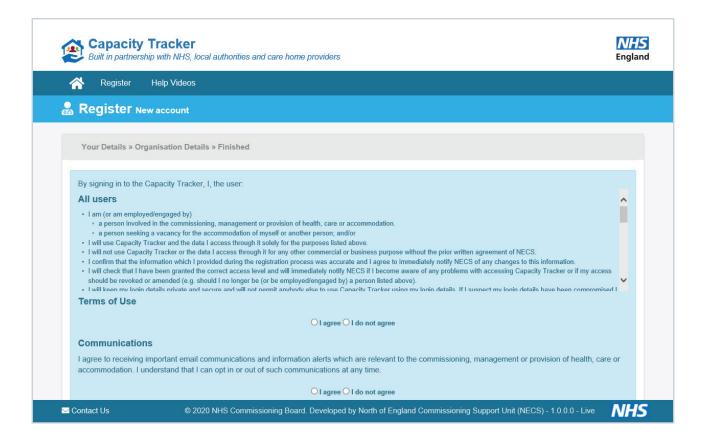


## Community



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.

k. **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.



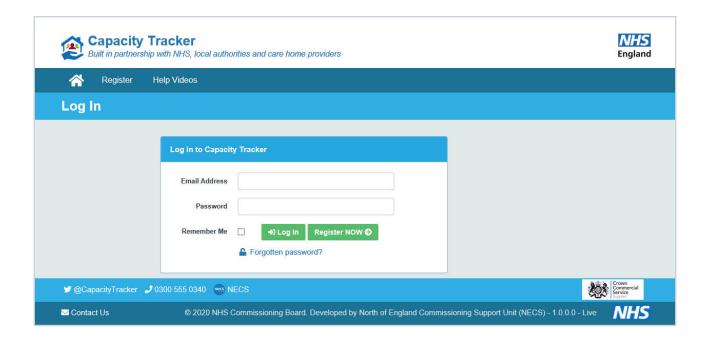
- I. Once approved, the system will email you your login details including a password which must be changed on first use to something more memorable. In the unlikely event that you don't receive an email directly please check your spam folders in case it has been diverted there. Your password must comply with NHS policy on password strength which will be advised on the change password screen.
- m. 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

n. 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



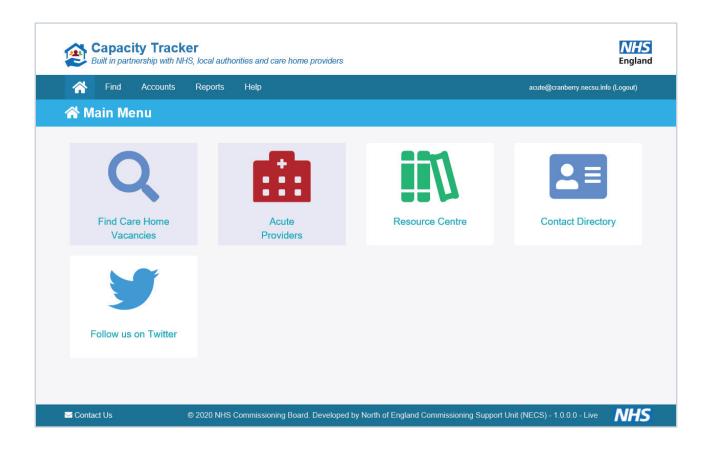
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# **User Login**

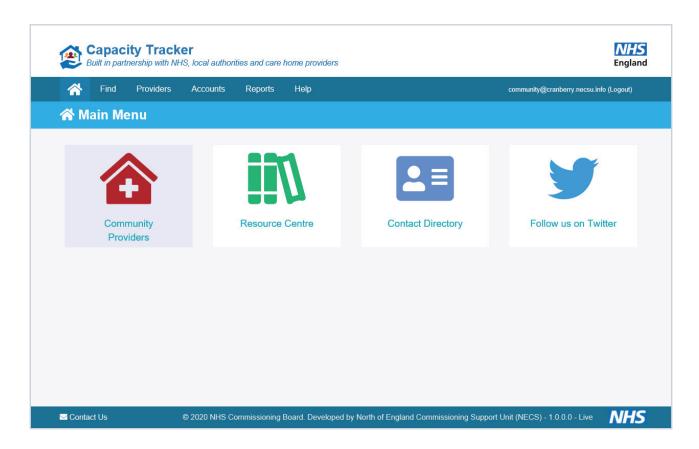
- a. It is advisable to tick the 'Remember Me' checkbox so that the system remembers your password, unless of course you are using a public computer/ device to access the Portal.
- b. Following a successful login you will be presented with the following 'Home Page/Main Menu' screen or a variation of 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.

## **NHS Acute**



## Community



#### **Account Lockout**

If the wrong password is entered **5** times, the account will be locked. To resolve this issue you should contact the Capacity Tracker helpdesk by email **necs.servicedesk@nhs.net** for password reset support.

**Note:** Passwords expire after 90 days and must be changed – a reminder email will be sent prior to this expiry date.

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# **Initial Organisation Setup**

Please note that you can select 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**

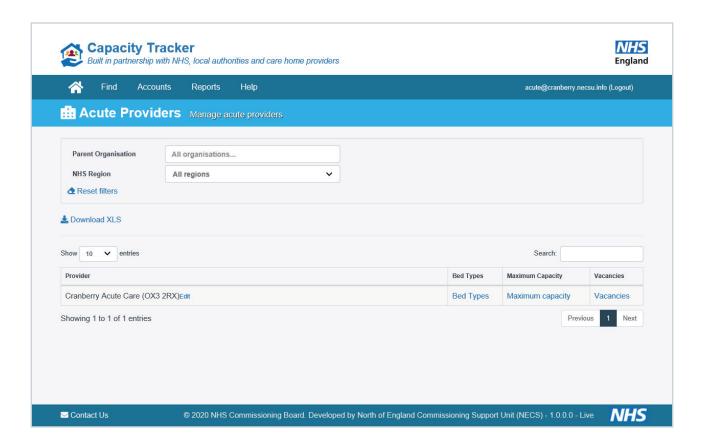


#### Community

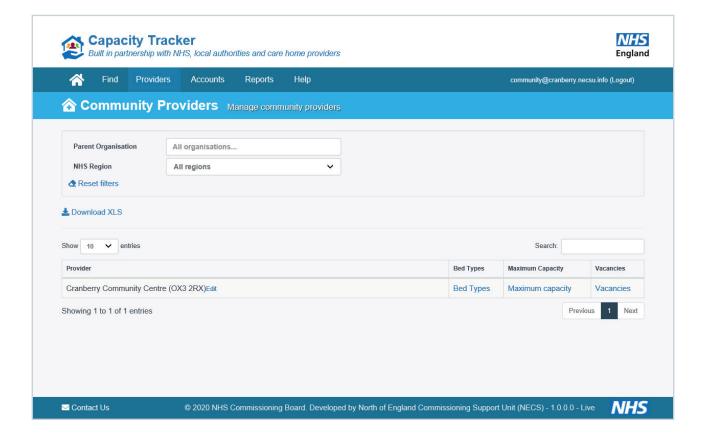


b. You will be presented with the following screen.

#### **NHS Acute**



## **Community**



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:
- i. Name
- ii. Address and Postcode (very important that this is entered this correctly)
- iii. Classification and Funding data
- iv. Misc. Details including CQC report URL, Public URL for your Organisation
- v. Manager details. Contact details -these are important as they appear in the search results.
- vi. NHS.net email needs to be populated as soon as possible in addition to the Manager's generic email address.

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.

- d. 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.
- e. Whilst you are on this page, you have the option to add as many notes as you want 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.

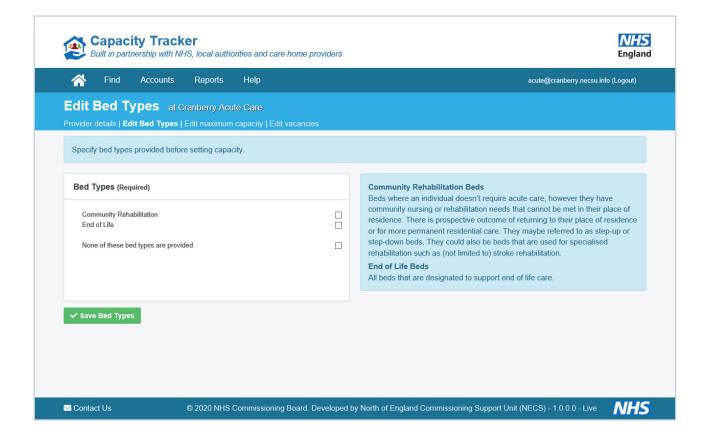
If added, notes appear in the search results when users search for capacity. Key words within notes can also be searched on when looking for vacancies i.e Bariatric Equipment, Hoists, Pets allowed etc.

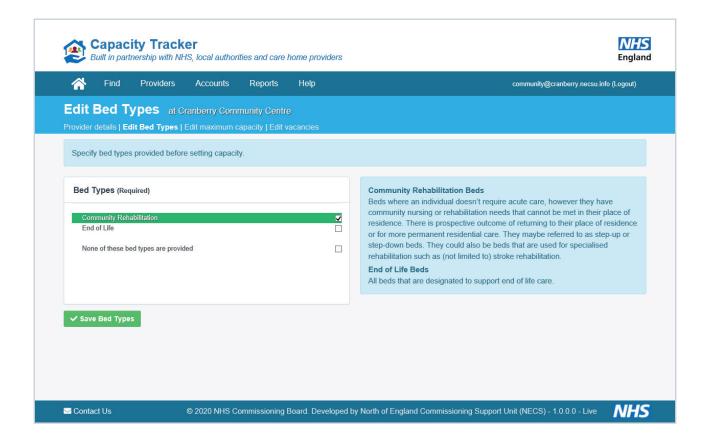


## Step 2: Define the Bed Types that you offer

- 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.



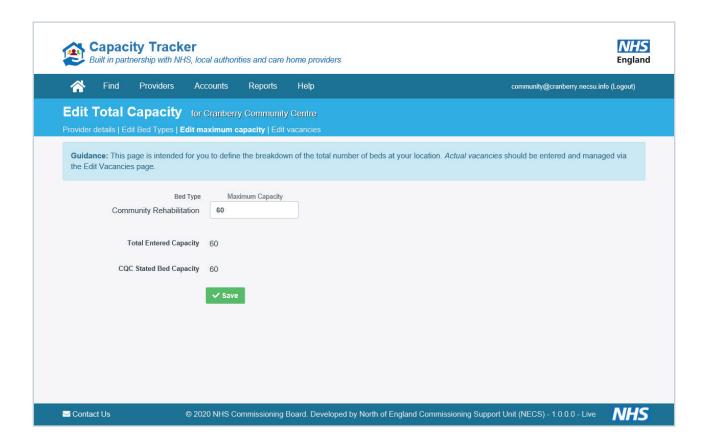


## Step 3: Enter Maximum capacity for each Bed Type

- 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. Please note the number of Beds the Organisation has registered with the CQC is automatically populated. The TOTAL capacity entered should NOT exceed the capacity registered with the CQC.
  - If you try to do this you will be presented with a warning on the screen asking if you're sure.
- f. 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.

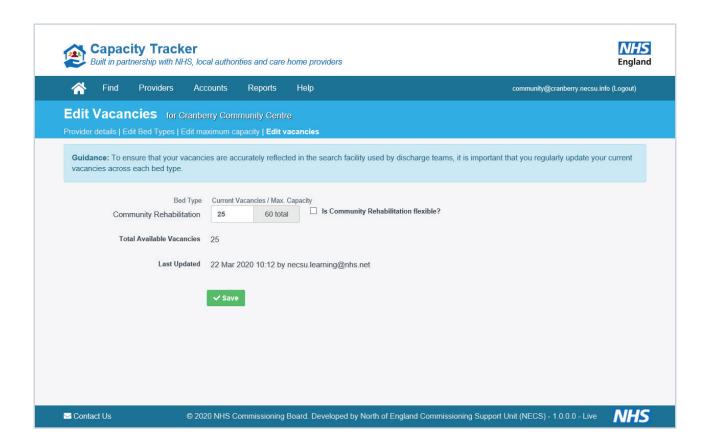
g.



#### **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'



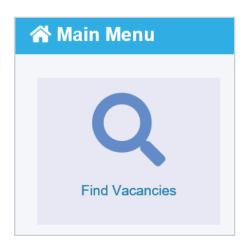
For your Organisation(s) to appear in the search results, they must have completed ALL the above key data fields.

## **Find Vacancies**

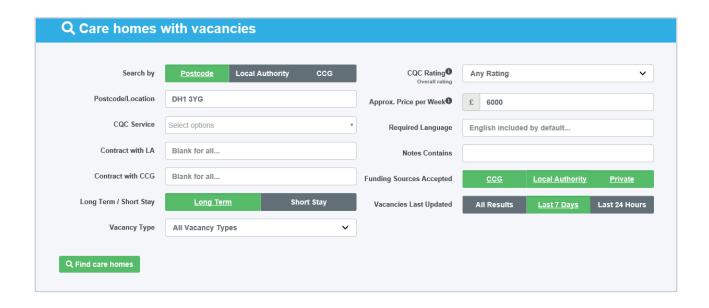
#### **Searching for Care Home Vacancies or Short Stay Services**

- a. If your Organisation has enabled the search for Care Homes function, you will be able to search the system for Care Home Long Term Vacancies or Short Stay Services.
- b. Click the 'Find' link in the Top menu bar then 'Find Vacancies' from the dropdown menu. Alternatively, you can go to the Home page and select the 'Find Vacancies' Tile.





You will be presented with the screen below:

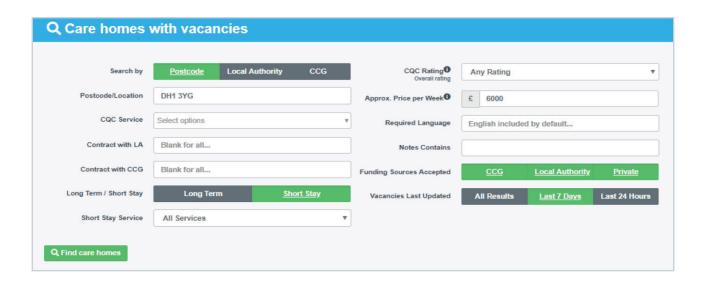


The System search automatically defaults to search for Long Term Vacancies.

- c. Follow the steps below to search for Long Term Vacancy types:
- i. Select one search type, this can be based on
- 1. Postcode (This could be the hospital postcode, the patient's home postcode or perhaps their relative's postcode).
- 2. Local Authority (it will limit the search to care homes aligned to this organisation)
- 3. CCG (it will limit the search to care homes aligned to this organisation)
- 4. Once a search type has been chosen you can then either select the green find care homes button at the bottom of the screen or filter further by selecting one or more from the following:
- ii. Select the required Service and/or Vacancy Type.
- iii. Choose the funding sources you can provide (CCG, Local Authority or Private).
- iv. Choose the overall CQC Rating if you want to restrict the search further.
- v. Enter a Maximum Price per Week you want to limit the results to.
- vi. Select any specific language requests. Only languages that are offered by Care Homes will be listed in the drop-down. English is automatically the default.
- vii. Filter your search further by selecting the Vacancies Last Updated button viii. Select 'Find Care Homes'
- ix. You will be presented with the list of organisations with vacancies that meets your search criteria. The results will be sorted by distance (as the crow flies) from the postcode you entered in your search or the CCG or LA HQ address if one of these were chosen. A similar screen below will be displayed. The current CQC Overall rating for the Care Home will also be displayed.



- d. If Short Term Vacancies are required please follow the steps below:
- Input the required CCG, LA Area or Postcode along with your filtering requirements
- ii. Select Short Stay (turns green upon selection).
- iii. Short Stay Services field has a drop down menu select the specific service required
- iv. Click Find Care Homes button for results



- e. For each care home that appears in your search results you can quickly access several key pieces of information using the relevant links. This is designed to avoid having to cold call care homes that don't have vacancies but also gives you relevant information to determine whether patient transfers are likely to be feasible. This includes:
- i. The date the Care Home last updated their Vacancy Numbers
- ii. Care Home Contact & Travel Details
- iii. Notes posted by the Care Home
- iv. Services delivered by the Care Home
- v. Contracts in place with Local Authorities and CCGs
- vi. Whether the Care Home accepts Out Of Hours Admissions
- i. Specialist equipment available such as bariatric / Hoist

- f. You can also display your search results in three ways for your own convenience.
- i. List View (Default)
- ii. Map View (the Red Star is the postcode you enter in the Search)
- iii. Print (this allows you to print or save the file for later use)
- iv. Export To Microsoft Excel
- v. Data exported out of the system for this report is for Health and Social Care Professionals use only and not for distribution as it will contain commercially sensitive information from care homes. To provide patients and family members/carers with a snap-shot of vacancy information via print out/email, see Vacancy Reports for Public in the Reports tab.

#### For further information or to request a demonstration please contact us



0191 301 1300



necsu.capacitytracker@nhs.net



carehomes.necsu.nhs.uk



@CapacityTracker



@NHSCapacityTracker