



# **PAMMS Provider Register**

## **Local Authority Guide**

Document Version 1.00 09 October 2019

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# 1. Prefix

## Intended Audience

This guide is for Local Authority staff responsible for managing PAMMS Quality Assurance Assessments and scheduling Provider Returns self-assessments.

## About This Guide

This guide describes the process of:

-  Adding and updating Regulated and Non-Regulated Provider details
-  Launching a Provider Returns Campaign

## Glossary of Abbreviations

Abbreviation	Term
PAMMS	Provider Assessment & Market Management Solution
Provider	Agency, Care Provider, Service Provider
CQC	Care Quality Commission

## Conventions

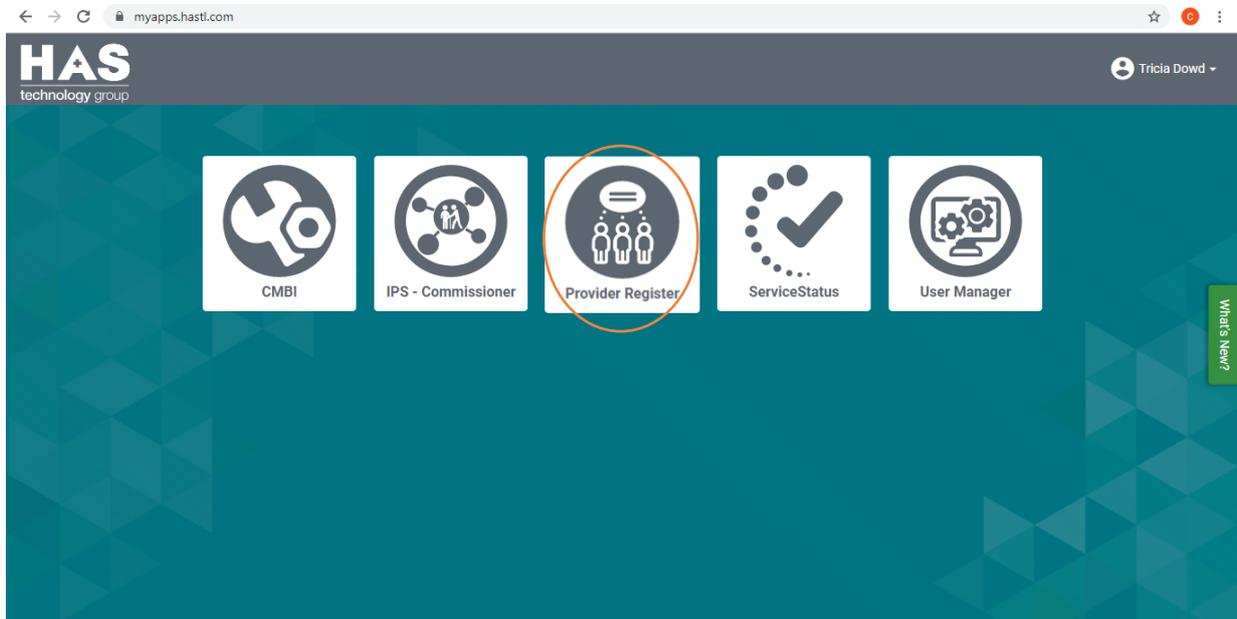
Convention	Explanation
	Highlight activity on the screen
	Highlight linked functionality on the screen
	Important Information
	Procedural Steps highlighted on screen
<b>Commands</b> or <b>Options</b>	Commands, Labels or Options

Provider Register - Prefix

<p><a href="#">Link</a> <a href="#">Visited Link</a></p>	<p>Link to a cross reference within the document, an external website or email address.</p>
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## 2. Accessing the Provider Register

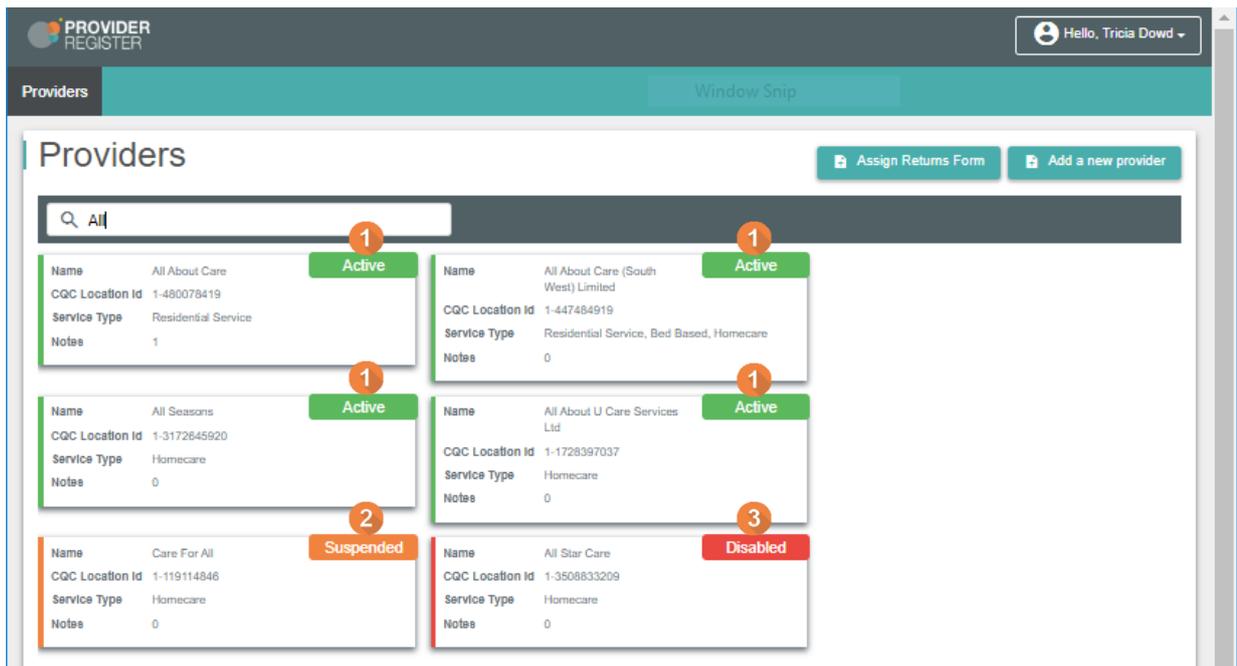
Login to MyApps and select the **Provider Register** icon.



### Search

A list of Providers which have already been added to the Provider Register will be displayed. Key information about the Provider is displayed in the summary tile. Providers are ordered according to their status:

1. **Active** Providers are displayed at the top of the list with a green status
2. Temporarily **Suspended** Providers are listed next showing an amber status
3. Finally, **Disabled** Providers are displayed with a red status



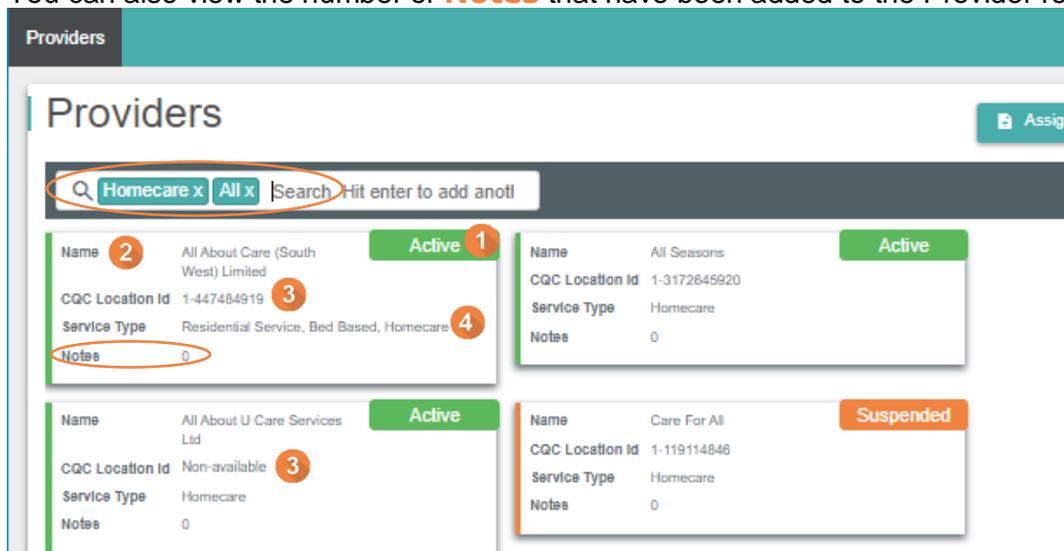
The secondary sort order is based on the more common Custom Name that the Provider is known by. For example, if an Active Provider had the name **The Wonder Care Company**, but were known and referred to as **Wonder Care**, they would be listed before Suspended and Disabled Providers, but alphabetically listed in the **W** section of the Active Providers. If the Provider does not have a Custom Name entered, they will be displayed at the end of the Active Providers on the list. See [Custom Name](#) for further information.

You can filter the list of Providers displayed by entering **Search** terms. You can combine search terms to improve the filtering of the information displayed.

You can search on all or part of:

1. **Status** – Active, Suspended or Disabled
2. **Name** as displayed on the summary tile
3. **CQC Location Id** – this is unique for every registered Provider location, **Non-available** is shown if they are a Non-Regulated Provider
4. **Service Type** as displayed on the summary tile

You can also view the number of **Notes** that have been added to the Provider record.



## Provider Details

Select a Provider to view detailed information. Three tabs of information can be viewed:

1. **Provider Info** – displays information about the Provider
2. **PAMMS** – contains the contact details for the person responsible for completing Provider Returns and responding to PAMMS Quality Assessments
3. **Notes** – additional information entered about the Provider

Select **Providers** to return to the home screen.

The screenshot displays the 'PROVIDER REGISTER' web application. At the top, a teal navigation bar contains the 'Providers' menu item, which is circled in orange. To the right of the navigation bar, a user profile shows 'Hello, Tricia Dowd'. Below the navigation bar, the main content area is titled 'Providers' and includes a search bar with the text 'homecare x all x' and a search button. On the right side of the main content area, there are two buttons: 'Assign Returns Form' and 'Add a new provider'. The main content area is divided into two sections. The left section is a list of providers, each with a card showing their name, CQC Location Id, Service Type, and Notes. The right section is a detailed view of a provider, titled 'Provider Details', which is further divided into 'Provider Info', 'PAMMS', and 'Notes' tabs. The 'Provider Info' tab is active and shows the following information: CQC Location ID: 1-447484919; Provider Location Name: All About Care (South West) Limited; Custom Name: All About Care; Address line 1: Suite G8, Egdon Hall; Address line 2: Lynch Lane Offices, Lynch Lane; City/Town: Weymouth; County: Dorset; Postcode: DT4 9DN. At the bottom of the detailed view, there are buttons for 'Discard Changes' and 'Save Changes'. Three orange circles with numbers 1, 2, and 3 are overlaid on the screenshot, pointing to the search bar, the 'Provider Info' tab, and the 'Provider Details' section respectively.

**Providers**

Search:  Search. Hit enter to add another

**Providers List:**

- Name: All About Care (South West) Limited | Status: Active
- Name: All Seasons | Status: Active
- Name: All About U Care Services Ltd | Status: Active
- Name: Care For All | Status: Suspended
- Name: All Star Care | Status: Disabled

**Provider Details (All About Care (South West) Limited)**

**Provider Info** | PAMMS | Notes

CQC Location ID: 1-447484919

Provider Location Name: All About Care (South West) Limited

Custom Name: All About Care

Address line 1: Suite G8, Egdon Hall

Address line 2: Lynch Lane Offices, Lynch Lane

City/Town: Weymouth

County: Dorset

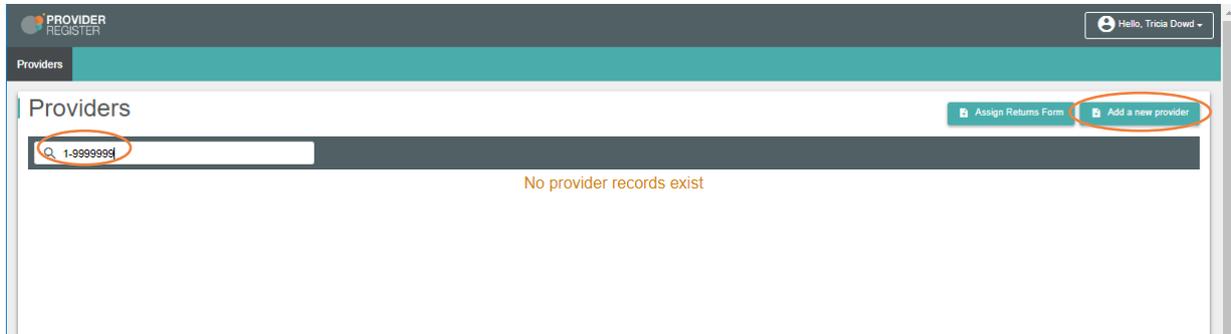
Postcode: DT4 9DN

Parent Provider Details

Buttons: Discard Changes, Save Changes

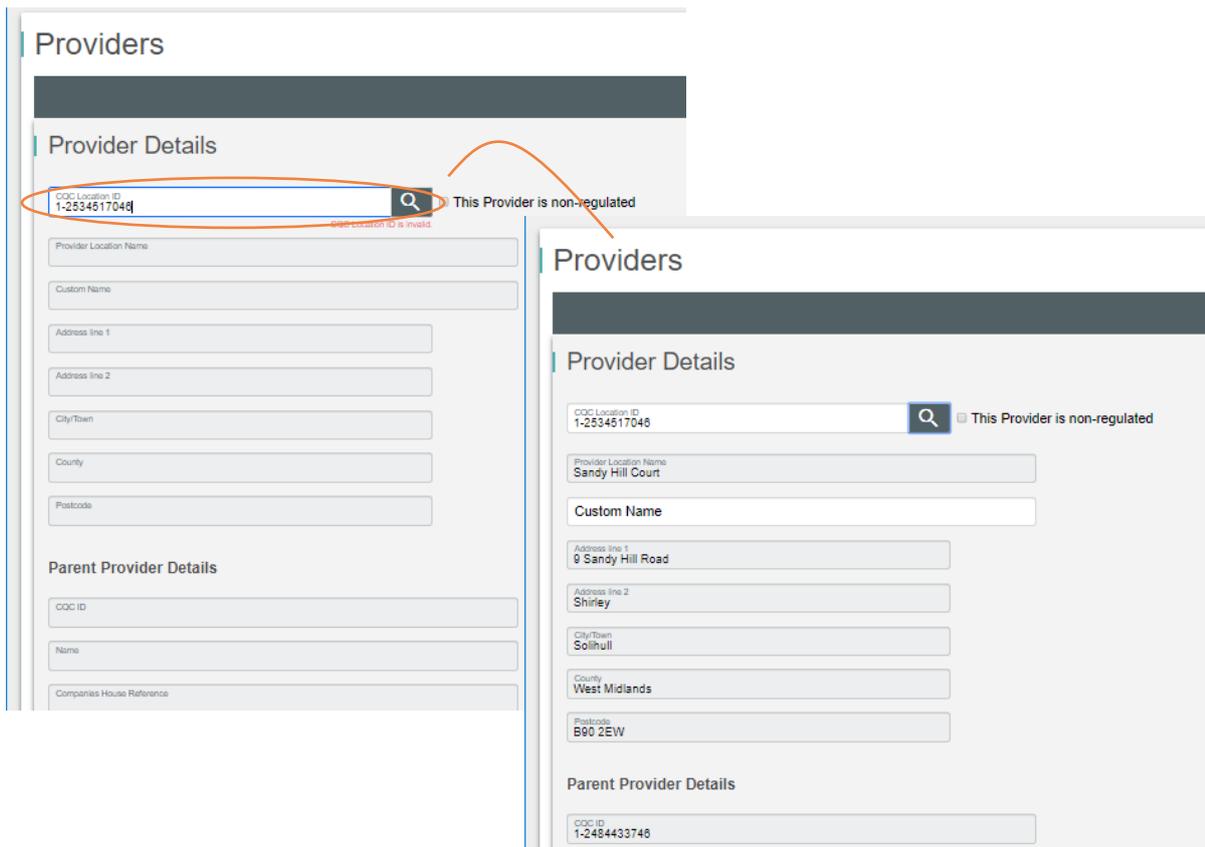
### 3. Add a New Provider

Before adding a new Provider ensure that they have not already been added to the Provider Register. Enter their Name or paste their CQC Location Id in the **Search** box. If no results are displayed select **Add a new Provider**.



### Adding a Regulated Provider

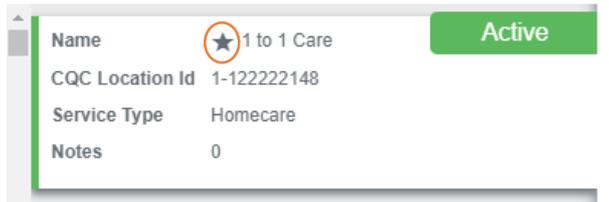
Enter the **CQC Location ID** in the box and select the **Search** icon. The Provider location details will automatically be populated from the CQC Provider Database. These fields are greyed out and can't be modified.



Some additional fields are included for you to complete. You can see which fields are editable as they are displayed with a white background rather than being greyed out.

## Provider Info

1. **Custom Name** – enter any name that the Provider is more commonly known as. This acts as a secondary sort order, after Status, for listing the Providers on the home page. Although this is an optional field, we would recommend that you paste the Provider Location Name into this field if they do not have a Custom Name
2. **Status** – this option defaults to **Active**. This may be changed to **Suspended** or **Disabled** if the Provider is not currently Active
3. **This is a Priority Provider** – tick this checkbox if they are a trusted or favoured Provider. A star \* will be shown before their Name on the summary tile



4. **Service Type** – select *each* of the services delivered by the Provider:

- Bed Based
- Homecare
- Nursing Service
- Residential Service
- Supported Living
- Children's Services

Although entering a Service Type is optional, we recommend that these are entered as you can assign Provider Returns templates by filtering on Service Type. Including Service Types also offers additional reporting options if you use Risk Profiler. The Service Types selected are displayed

5. **Primary Support Reason** – select the main support service offered by the Provider:

- Learning Disability Support
- Mental Health Support
- Physical Support
- Sensory Support
- Support with Memory and Cognition
- Social Support
- Other

6. **References** – enter any internal references that you may want to report on. These are optional:

- Internal ID – an internal reference used within your organisation to identify the Provider location
- Financial ID – a budgetary or invoicing reference used in relation to the Provider location

- Case Management ID – any reference used in your Case Management system to identify the Provider

Select **Save Changes**.

The screenshot displays a web form for adding a new provider. It is divided into several sections:

- Provider Details:** Contains fields for COC Location ID (1-2534517046), Provider Location Name (Sandy Hill Court), Custom Name (Haven Solihull), Address line 1 (9 Sandy Hill Road), Address line 2 (Shirley), City/Town (Solihull), County (West Midlands), and Postcode (B90 2EW).
- Parent Provider Details:** Contains fields for COC ID (1-2484433746), Name (Haven Care Services Ltd), and Companies House Reference (09914147).
- Status:** Includes a dropdown menu for Status (Active) and a checkbox for "This is a Priority Provider".
- Service Details:** Includes a dropdown menu for Service Type (Homecare x) and a dropdown menu for Primary Support Reason (Sensory Support).
- References:** Includes text input fields for Internal ID, Finance ID, and Case management ID (3127654).

At the bottom right of the form, there are two buttons: "Discard Changes" and "Save Changes". The "Save Changes" button is highlighted with a red circle.

## Provider Returns

Select the **PAMMS** tab and enter details of the **Primary Contact** responsible for completing Provider Returns and responding to PAMMS QA Assessments at the location:

- First Name**
- Last Name**
- Email Address**

Select **Save Changes**.

## Provider Register - Add a New Provider

The screenshot shows the 'Provider Info' tab selected. The 'Contacts' section is expanded, showing the 'Primary Contact' form. The 'First Name' field contains 'Sara', the 'Last Name' field contains 'Shields', and the 'Email address' field contains 'Sara@AllAbout.co.uk'. A 'Clear' button is located below the email field. At the bottom of the form, there are two buttons: 'Discard Changes' and 'Save Changes'.

You can add *up to three* **Other Contacts**. PAMMS QA Assessments will be shared with these Other Contacts. Select **Add new Contact**.

The screenshot shows the 'PAMMS' tab selected. The 'Contacts' section is expanded, showing the 'Primary Contact' section. A summary card for the primary contact is displayed, showing 'Name: Sara Shields' and 'Email: sara@AllAbout.co.uk'. Below the card are 'Edit' and 'Delete' buttons. The 'Other Contacts' section is visible below, with an 'Add new Contact' button. At the bottom of the form, there are two buttons: 'Discard Changes' and 'Save Changes'.

Enter the Contact details. You will need to select **Save Changes** after adding each contact.

## Provider Register - Add a New Provider

**Contacts** Collapse

**Primary Contact**

Primary Contact

Name Sara Shields

Email sara@AllAbout.co.uk

Delete

**Other Contacts**

First Name Henry

Last Name Wallace

Email address henry@AllAbout.co.uk

Clear

Discard Changes Save Changes

You can return to the Provider's **PAMMS** tab to **Edit** or **Delete** Contact details. You should *always* ensure that there is a Primary Contact assigned to the Provider.

**Providers** Assign Returns Form Add a new provider

Search: home x Search. Hit enter to add another criteria

Name	CQC Location Id	Service Type	Notes	Status
All About Care (South West) Limited	1-447484919	Residential Service, Bed Based, Homecare	0	Active
All Seasons	1-3172645920	Homecare	0	Active
Amathes	1-312173875	Homecare	0	Active
Briardene Care Home	1-125861962	Homecare, Supported Living	0	Active
All About U Care Services Ltd	1-1728397037	Homecare	0	Active

**Provider Info** **PAMMS** **Notes**

**Contacts** Collapse

**Primary Contact**

Primary Contact

Name Sara Shields

Email sara@AllAbout.co.uk

Edit Delete

**Other Contacts**

Contact 1

Name Henry Wallace

Email henry@AllAbout.co.uk

Edit Delete

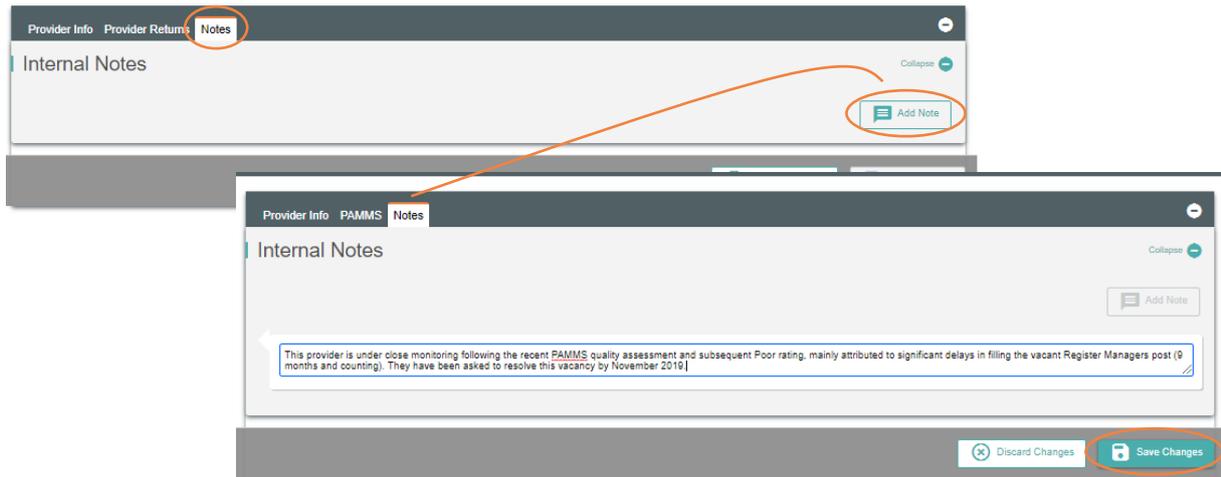
Add new Contact

Discard Changes Save Changes

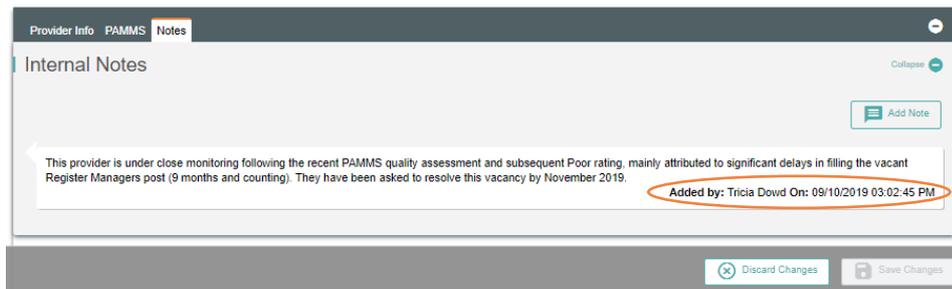
### Notes

Add any additional information about the Provider via the **Notes** tab. Select **Add Note** and enter the information. Select **Save Changes**.

## Provider Register - Add a New Provider



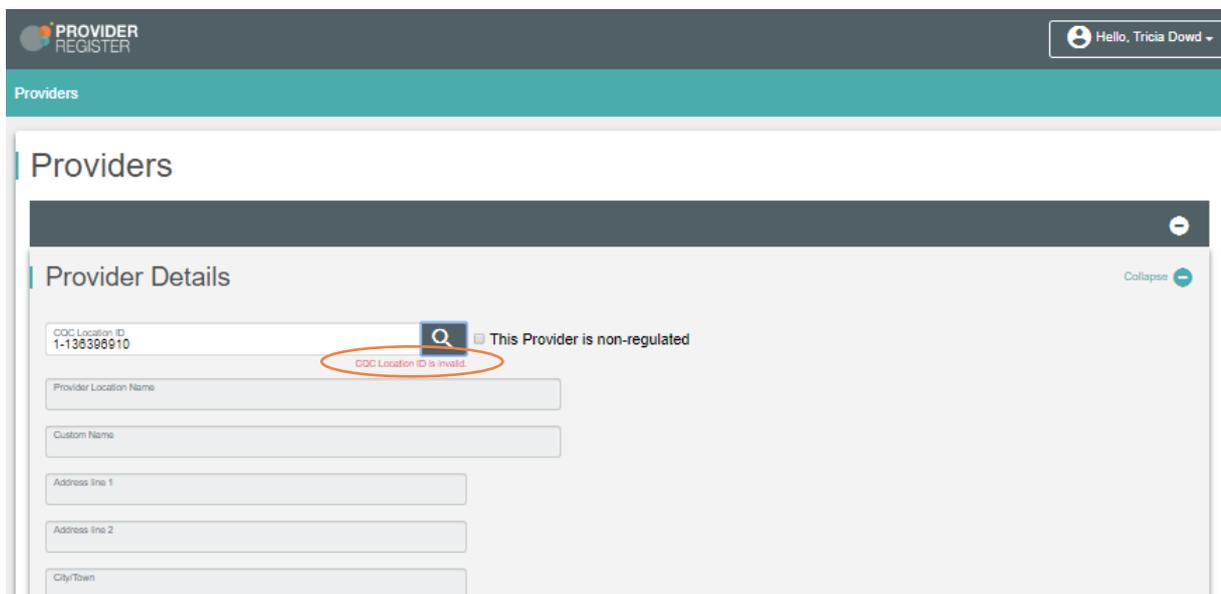
When Notes are saved, they are annotated with **Added by** information displaying the **Name** of the person creating the note and the **Time** and **Date** the note was added. Once saved, notes cannot be modified.



Notes are Internal and can only be viewed within your Local Authority.

## Incorrect CQC Location Identity

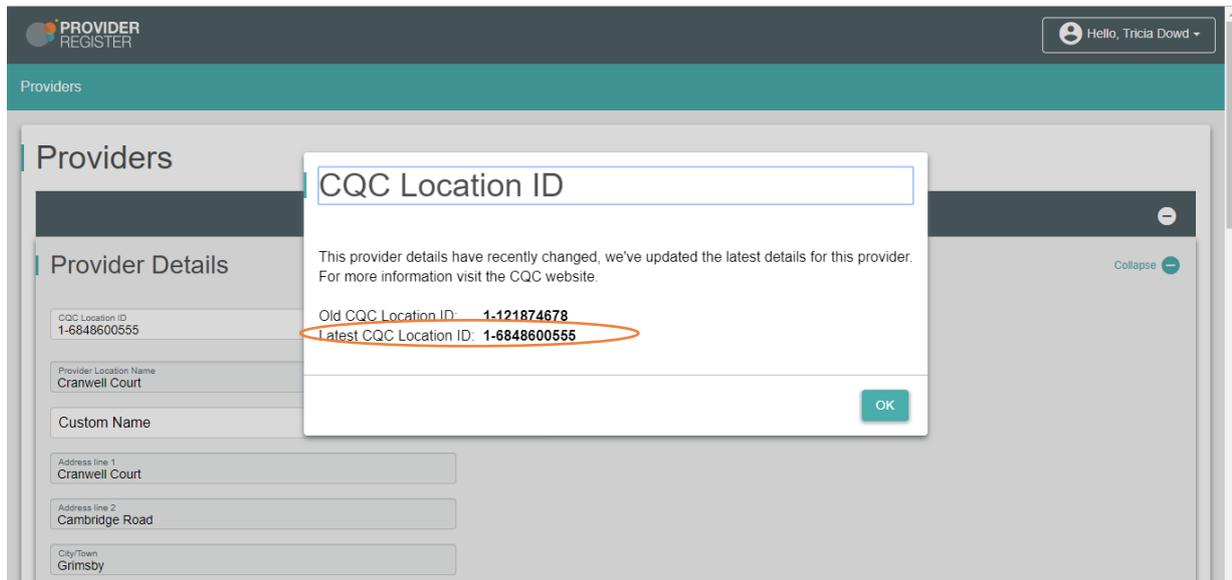
If you select to **Add a new Provider** and enter an incorrect CQC Id, an error message will be displayed informing you that the **CQC Location ID is invalid**.



## Changes to CQC Location Identities

If a Provider changes location, they will receive a new Location Id from the CQC. Provider Register will automatically update the Provider record with the new Location ID and Address details at midnight on the day the CQC update the location.

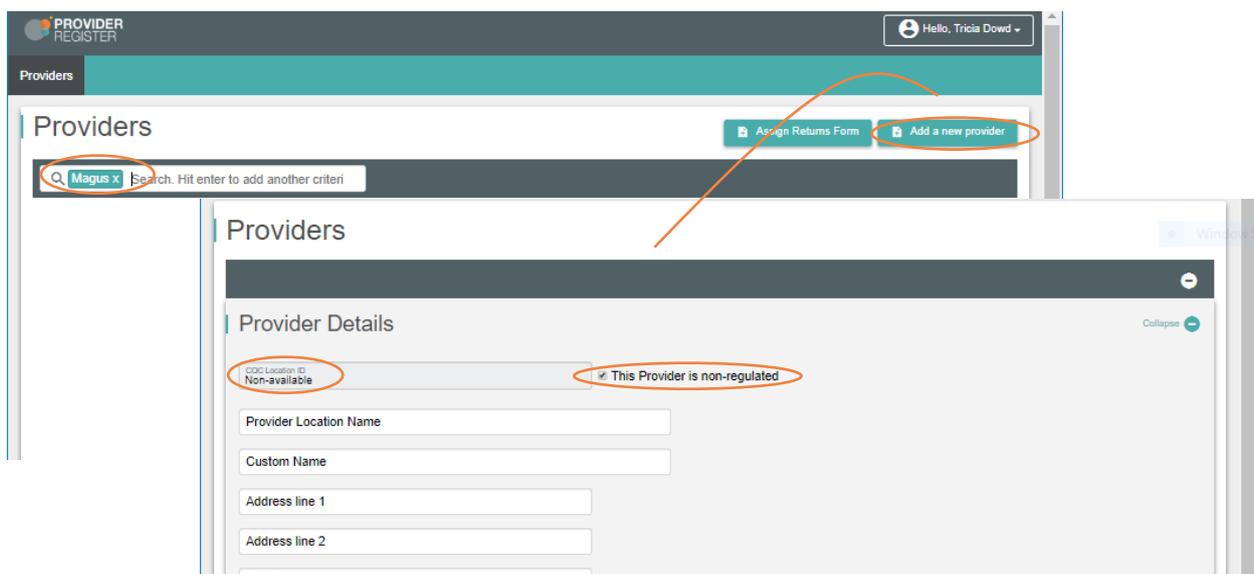
If you try to add a new Provider using a CQC Location ID which has been updated, a message will be displayed showing the **Latest CQC Location ID** for the new Provider Location.



## Adding a Non-Regulated Provider

You can add a non-regulated Provider to the Provider Register. Before adding the new Provider ensure that they have not already been added to the Provider Register. Enter their Name in the **Search** box. If no results are displayed select **Add a new Provider**.

Tick the **This Provider is non-regulated** check box. Only the **CQC Location ID** and Parent Provider's **CQC Location** fields will be greyed out, displaying the text **Non-available**. Text can be entered in all other fields.



You will need to enter:

1. **Provider Location Name**
2. **Custom Name** – enter any name that the Provider is more commonly known as. This acts as a secondary sort order, after status, for listing the Providers on the home page. Although this is an optional field, we would recommend that you paste the Provider Location Name into this field if they do not have a Custom Name
3. **Address**
4. **Postcode**
5. Parent Provider's **Name** – if the Provider does not have a Parent Organisation, paste the Provider Location Name
6. **Companies House Reference** for the Parent Provider or the Provider

The screenshot shows a 'Provider Details' form with the following fields and callouts:

- 1**: Provider Location Name (Magus Care)
- 2**: Custom Name (Magus)
- 3**: Address line 1 (123 Helpful Road)
- 3**: Address line 2
- 3**: City/Town (Birmingham)
- 3**: County
- 4**: Postcode (B1 2JP)
- 5**: Parent Provider Name (Magus Care)
- 6**: Companies House Reference (123456)

Other visible fields include 'COC Location ID' (Non-available) and a checked checkbox 'This Provider is non-regulated'.

Complete the remaining **Provider Info** and complete the **PAMMS** and **Notes** tabs, see [Adding a Regulated Provider](#).

## Deleting a Provider

To delete a Provider (as opposed to Suspending or Disabling), select it and scroll down to the bottom of the record. Select **Delete Provider**. A dialogue will be displayed informing you that the deletion will be permanent (you will not get the option to discard this action). Select **Yes, Delete** to delete the record permanently.

**Providers** Assign Returns Form Add a new provider

Search. Hit enter to add another criteria.

Name	★ 1 to 1 Care	Active
CQC Location Id	1-122222148	
Service Type	Homecare	
Notes	0	

Name	1st Homecare (Oxford) Ltd	Active
CQC Location Id	1-309362562	
Service Type	Bed Based, Nursing Service, Residential Service	
Notes	1	

Name	Redhill	Active
CQC Location Id	1-6985511439	
Service Type	-	
Notes	0	

Name	Abingdon Court Care Home	Active
CQC Location Id	1-2907731567	

**References** Collapse

Internal ID

Finance ID

Case management ID

**Delete Record** Collapse

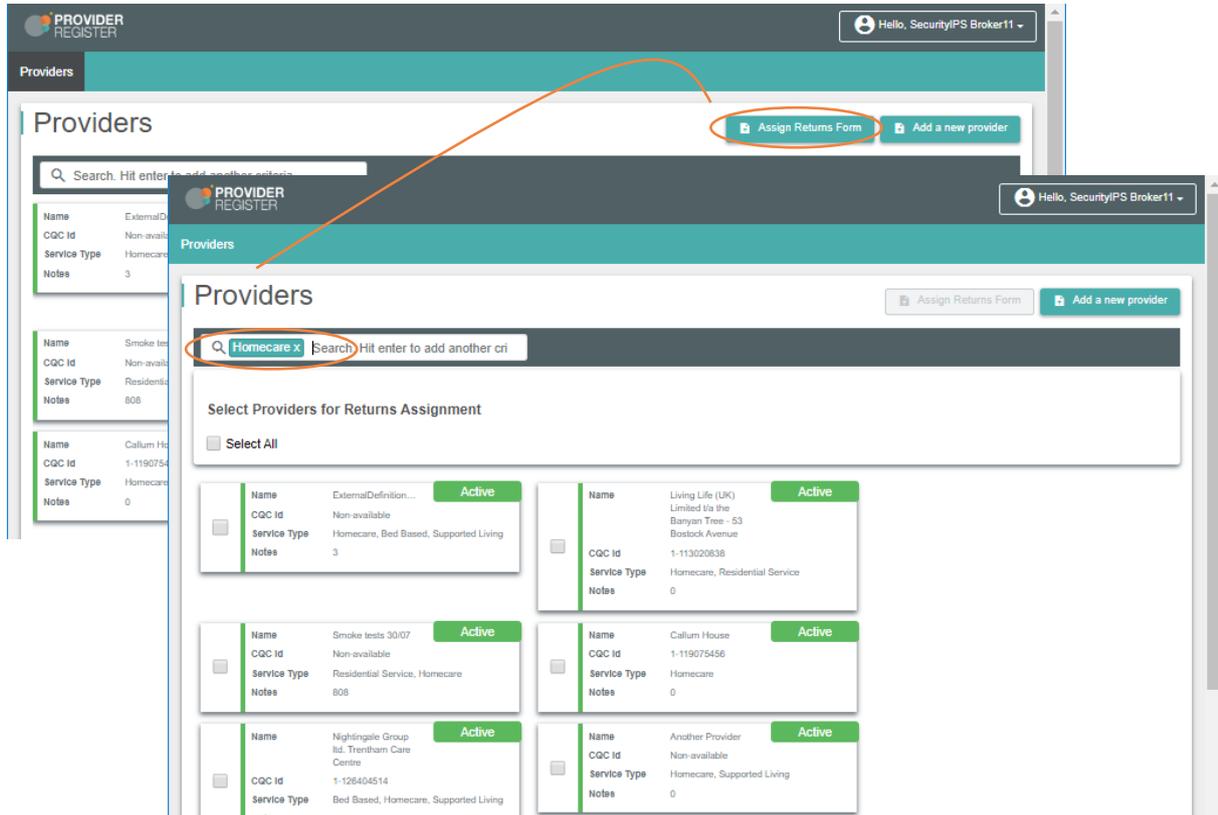
**Delete Record**

You are about to delete this Provider Record. These changes cannot be undone. Are you sure you want to proceed?

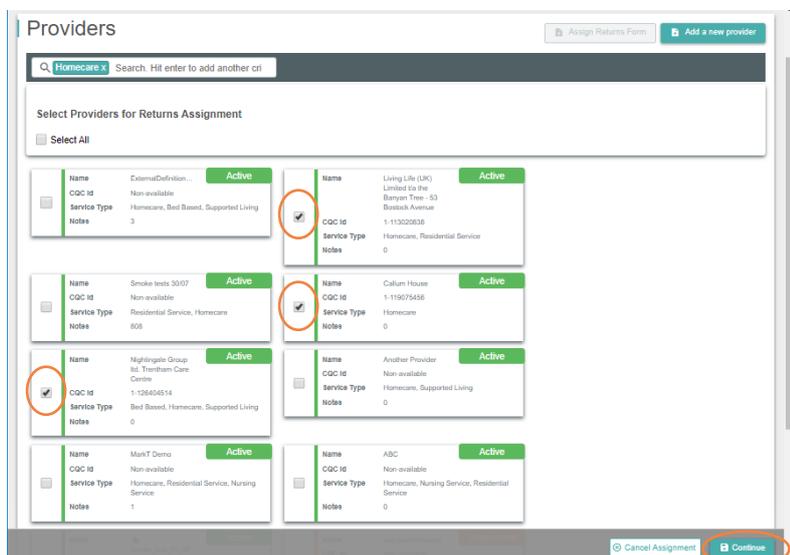
## 4. Provider Returns Campaign

### Adding a Campaign

Select **Assign Returns Form** to start a Provider Returns campaign. Use the Search box to filter the list of Providers. Enter the **Service Type** into the **Search** box to filter Providers offering services in the area of your campaign.



**Tick** the Providers that you want to add to the Provider Return campaign or choose **Select All** if you wish to add all displayed Providers. Select **Continue**.



## Provider Register - Provider Returns Campaign

Select the **Form Name** for your campaign from the menu. When the form is selected you will see:

1. **Frequency** – the frequency that the Form will be issued during the campaign, One Off, Weekly, Monthly, Quarterly, etc
2. **Start Date** – the date the Form is valid from – this is the earliest date that it can be sent to a Provider
3. **End Date** – the date the Form is valid to – this is the latest date that it can be sent to a Provider
4. **Deadline** – the length of time in which the Provider must complete the Self-Assessment

Select **Assign Form**.

The screenshot shows the 'Providers' interface. At the top, there are buttons for 'Assign Returns Form' and 'Add a new provider'. Below this is a 'Collapse' button and the title 'Add Provider Returns Form'. A table with the following columns is visible: Form Name, Frequency, Start Date, End Date, and Deadline. The 'Form Name' dropdown is circled in orange. Below the table, there are four numbered callouts (1, 2, 3, 4) pointing to the Frequency, Start Date, End Date, and Deadline columns respectively. The 'Form Name' dropdown is set to 'Quarterly: MP Test Customer Return'. Below the table, there is a section titled 'Selected Providers for Returns Assignment' with a 'Collapse' button. This section contains a list of providers with their details and 'Active' status. The 'Assign Form' button is circled in orange.

Form Name	Frequency	Start Date	End Date	Deadline
Form Name	Quarterly	01/07/2019	30/06/2020	21 days

Name	Active
Banya Family Placement Agency Ltd	Active
Beech Court Nursing Home	Active
Beech Haven	Active
Bicester Innovation Centre	Active

You will receive notification that the Return **Form has been successfully assigned**.

The screenshot shows the 'Providers' interface with a notification message: 'Form has been successfully assigned'. The notification is circled in orange. Below the notification, there is a search bar and a list of providers with their details and 'Active' status.

An email notification will be sent to each Provider's primary contact email address (usually just after midnight on the start date) informing them that they have a Self-Assessment to complete. This process will be repeated at the defined Frequency until the End Date of the campaign is reached.

If you add the form to a Provider *after* the Start Date, the Provider will be added to the distribution list for that Return form. The form will then be sent at the next scheduled Frequency Date.

You can only assign a form to a Provider *once*. If you attempt to assign the same form to a Provider for a second time, Provider Register will confirm the assignment but will not send out an additional email notification as the Form has already been assigned to that Provider.

## Removing a Provider From a Campaign

To remove a Provider from a campaign, open the Provider and select the **PAMMS** tab. Select the **Delete** icon next to the campaign **Form Name**.

The screenshot shows the 'Providers' page in the system. On the left, there is a list of providers with details like Name, CQC Location Id, Service Type, and Notes. The main area shows the 'PAMMS' tab for a selected provider. Under 'Contacts', there are input fields for First Name, Last Name, and Email address. Below that is the 'Provider Returns Forms' table. The table has columns for Form Name, Frequency, Start Date, End Date, and Deadline. The 'PenTest Form ABC' row has a red circle around the trash icon in the 'Deadline' column, indicating the delete action.

Form Name	Frequency	Start Date	End Date	Deadline
PenTest Form ABC	Quarterly	01/07/2019	30/06/2020	21 days
PenTest Form XYZ	One Off	01/01/2019	31/12/2020	21 days

Select **Save Changes**. Any previous Provider Returns submissions made before the Provider was removed from the campaign can still be viewed on the Provider Portal.

# Provider Register - Provider Returns Campaign

Providers

Providers

Assign Returns Form Add a new provider

Search. Hit enter to add another criteria.

Name: 1 Oak Home Care **Active**  
CQC Location Id: 1-3857492840  
Service Type: Bed Based  
Notes: 0

Name: ExternalDefinition3233 **Active**  
CQC Location Id: Non-available  
Service Type: Homecare, Bed Based, Supported Living  
Notes: 3

Name: Living Life (UK) **Active**  
Limited Via the Banyan  
Tree - 53 Bostock  
Avenue  
CQC Location Id: 1-113020838  
Service Type: Homecare, Residential Service  
Notes: 0

Name: Smoke tests 30/07 **Active**  
CQC Location Id: Non-available  
Service Type: Residential Service, Homecare  
Notes: 808

Name: Klair House **Active**  
CQC Location Id: 1-118977359  
Service Type: -  
Notes: 0

### Contacts

Primary Contact

First Name  
Last Name  
Email address  
Clear

### Provider Returns Forms

Form Name	Frequency	Start Date	End Date	Deadline
PenTest Form ABC	Quarterly	01/07/2019	30/06/2020	24 days
PenTest Form XYZ	One Off	01/01/2019	31/12/2020	21 days

Discard Changes Save Changes

## 5. Summary

- Filter the Provider listing by searching on all or part of their **Name**, **CQC Location Id**, **Service Type** or **Status**
- Select **Add a new Provider** and enter their **CQC Location Id** to add a new Regulated Provider. The Provider location details will automatically be populated from the CQC Provider Database
- Select **Add a new Provider** and click the **This provider is non-regulated** tick box to add a Non-Regulated Provider. Add their location details
- Select whether the **Provider is a Priority Provider** and add details regarding their **Custom Name**, **Service Type**, **Primary Support Reason** and any internal **References**
- Enter the **Primary Contact** information on the **PAMMS** tab
- Select **Assign Returns Form** to start a Provider Returns campaign. **Tick** the Providers you want to add to the campaign. Select and **Assign Form**. The form will be emailed to the Primary Contact at the next scheduled Frequency Date



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