



USER GUIDE: 'How to Submit a Proposal'

Provider Reference Guide

Somerset County Council (SCC) has implemented a new Regulated Homecare Framework. This portal will enable providers to experience the most user-friendly and efficient way of submitting their proposals for packages of care.

This reference guide is a step-by-step walk-through to aid you in submitting a proposal through this portal. Your details will be kept on the system to avoid you having to input the same information more than once, but will also offer the opportunity to amend the details we keep on file in case any of your details do change.

This portal works with most web-browsers, but may lose some functionality with older versions of Internet Explorer. Please ensure you have an up-to-date web browser, such as Google Chrome, for the best user experience

Should you experience any difficulty in registering, there is a help-line you can call. This can be found at the top right of the home screen. Clicking on the question mark next to your business name will bring up the 'Help' screen.

***** Please note – this system times out after 20 minutes of inactivity. If you are likely to be longer than 20 minutes when completing your proposal, please click 'Save' at regular intervals, ensuring you click save within 20 minutes of the last time you clicked it.*****

- 1) In order to start the process, please log on to the proactis portal. Following your registration on to this portal, you will have received an email that includes your Organisation ID, and Login name. The memorable password you chose when registering is also required. The password you used will have at least one upper-case letter, at least two numbers, and be no less than 11 characters long.

Sign In

Organisation ID
D2527659

Login Name
ADMIN

Password

[View Opportunities](#)

[Sign In](#) [Forgotten password?](#)

Don't have an account? [Sign up](#)

Have you been invited?

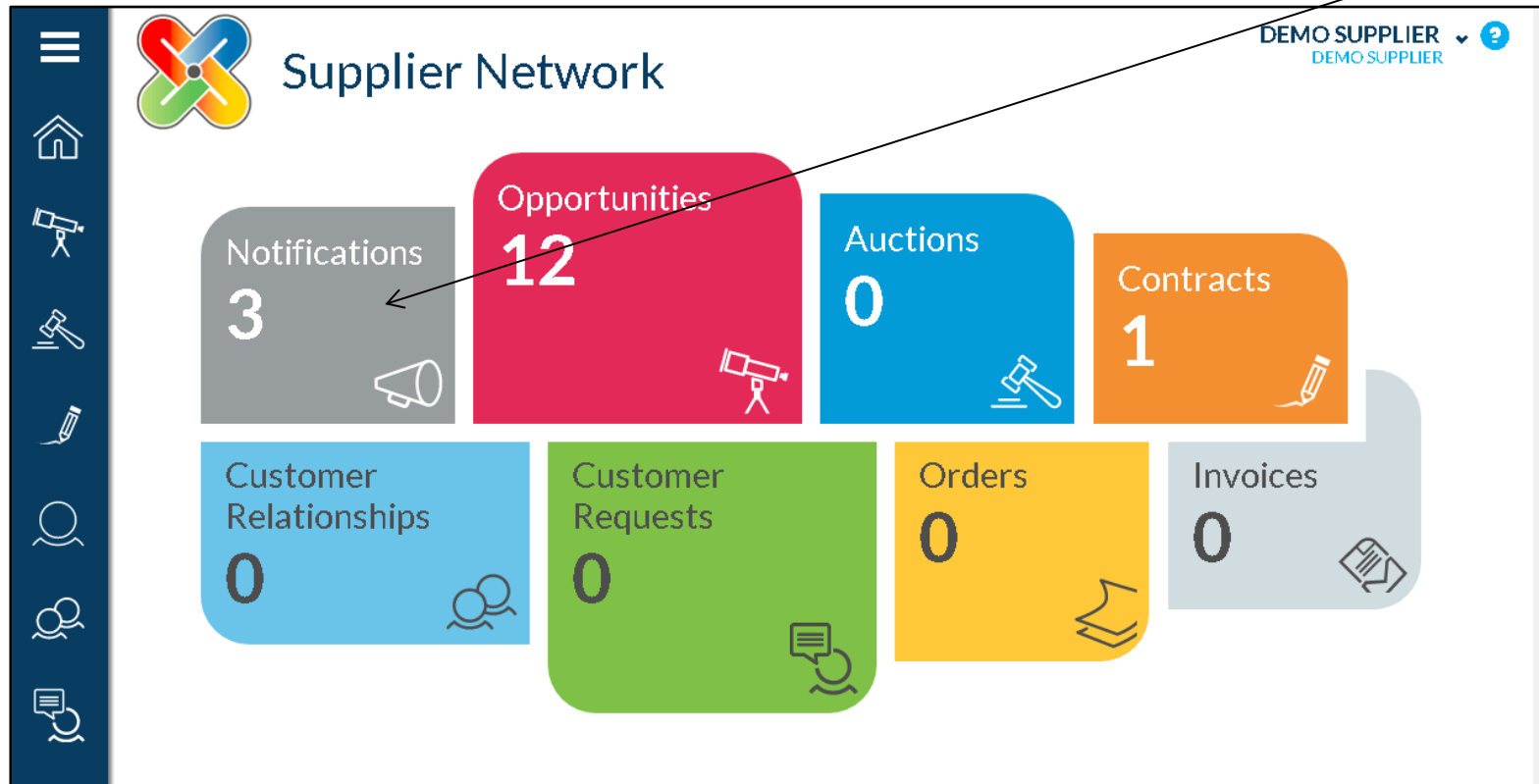
Access Code

[Go](#)

PROACTIS
The Spend Control Company

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- 2) Completing the Log-On details will bring you through to your 'Home Screen' as shown below. Please click on 'Notifications' in order to see current advertisements that have been sent to you for which you may wish to submit a proposal.



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- 3) Clicking on 'Notifications' will enable you to see a list of advertised contracts. This will include the Council that has invited you (in this case, Somerset County Council), what the notification is regarding, and the date the notification was received.

Notifications - Supplier N: x
https://supplierdemo.proactisp2p.com/Notifications

DEMO SUPPLIER
DEMO SUPPLIER

Your Notifications

From here you can view your notifications and take action if needed.

Customer	Notification	Raised On	Show Me
Somerset County Council	Your Organisation has been invited to take part in a tender process	04/06/2015 15:31:01	
Somerset County Council	Your Organisation has been invited to take part in a tender process	02/06/2015 13:17:35	
Somerset County Council	Your Organisation has been invited to take part in a tender process	27/05/2015 13:58:17	

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- 4) In order to see more information about the notification, please click on the arrow to the far right of the screen, under the 'Show Me' column

Your Notifications

From here you can view your notifications and take action if needed.

Customer	Notification	Raised On	Show Me
Somerset County Council	Your Organisation has been invited to take part in a tender process	04/06/2015 15:31:01	
<p>Your Organisation has been invited to take part in a tender process</p> <p>Your organisation has been invited to take part in the following tender process:</p> <p>Request Number: 1000514 Request Title: *Route overview</p> <p> </p>			
Somerset County Council	Your Organisation has been invited to take part in a tender process	02/06/2015 13:17:35	
Somerset County Council	Your Organisation has been invited to take part in a tender process	27/05/2015 13:58:17	

This will expand the notification, and present you with two options – 'Delete' and 'View'. Please note clicking 'View' will take you through to the opportunity where you may input required information and submit a proposal.

Please note - clicking delete will remove the notification, meaning you will not be able to submit a proposal. Only click this option if you are sure you are not interested in the work.

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- 5) Once you have clicked 'View', you will see the below 'Opportunities' screen. This will show you how long you have to submit a proposal for this contract. Please submit your proposal in ample time, so as to avoid any last minute issues, as time limits cannot be extended. Please click on the blue arrow under the 'Show Me' column to view the details of this contract.

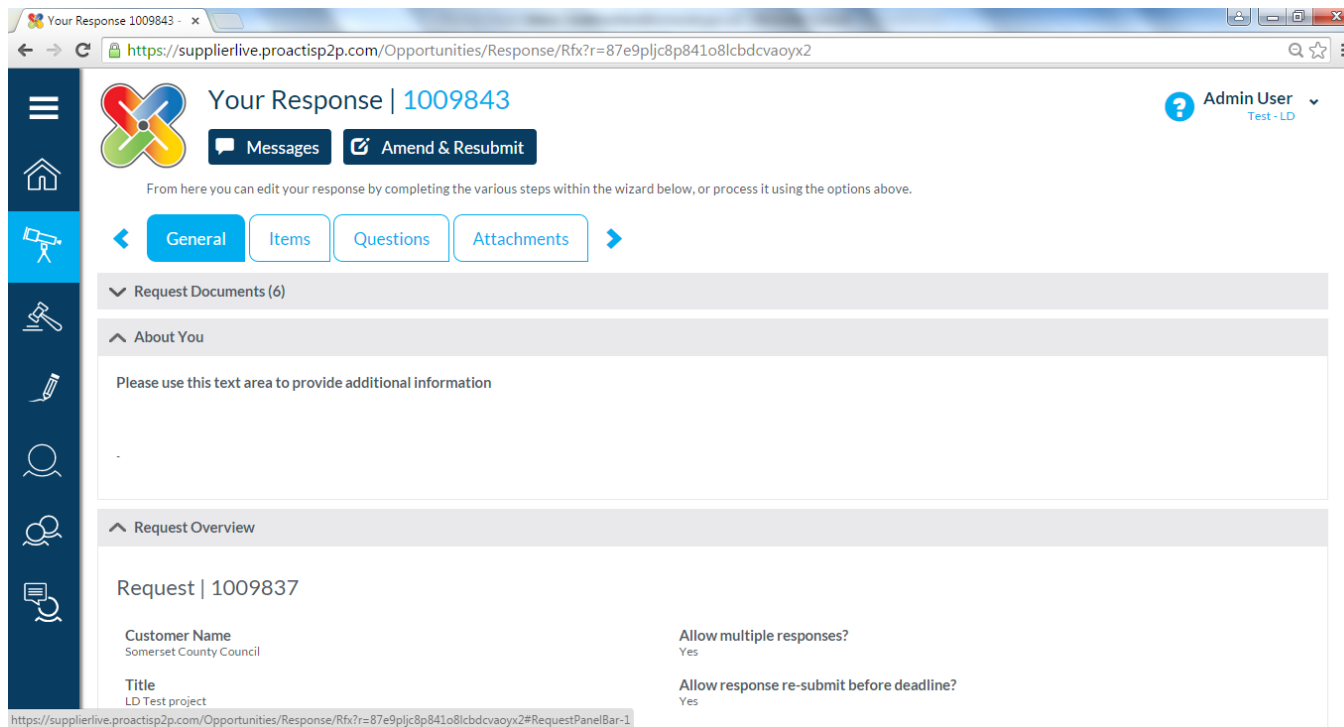
DEMO SUPPLIER ▼ ?
DEMO SUPPLIER

Your Opportunities

From here you can review the requests that have been sent to you by customers and create responses.

Search Filters

6) You will then be taken through to the 'Your Response' screen. This will show details of the contract. As you can see below, the 'General' tab is highlighted. This means that this tab is currently showing on your screen. If you have any information about your company that you think SCC should know, please put this in the box under the 'About You' heading. If this box is not showing, and you need to put information in it, please click the arrow to the left of the word 'About' on the header.



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7) Any documents uploaded by SCC will be found in the 'Request Documents' Section. Please ensure you click here to see the list of documents. **IT IS ESSENTIAL THAT YOU DOWNLOAD ALL THESE DOCUMENTS AS THIS IS THE INFORMATION YOU WILL NEED TO SUBMIT A PROPOSAL.**

From here you can edit your response by completing the various steps within the wizard below, or process it using the options above.

General Items Questions Attachments

Request Documents (6)

Please ensure you read all documents before responding to opportunity request.

Name	Type	Download
Glossary of Terms	Spec - Glossary of terms	
LD Supported Living Specification	Spec - Supported living	
LD Residential Care Specification	Spec Residential Care inc. Short Breaks	
Schedule to Supported Living Spec	Spec - Supported living	
Schedule to Residential Care Spec	Spec Residential Care inc. Short Breaks	
Cost Model	Price Model	

About You

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8) Within the 'Request Documents' tab you will find the following important Documentation:

- **Service Specification** – This is the overarching call-off specification for Homecare Services.



- **Homecare Request** – This document will set out the outcomes for the users of the service and any specific requirements for delivering the service.

The image is a screenshot of a web-based form titled 'Somerset County Council Care and Support Homecare request'. The form is divided into several sections:

- Section 1: Person basic details**: Includes fields for AIG / NAG number, Date of birth, Delivery area, Postcode, Hazards, and Communication requirements.
- Section 2: Skill level / competency requirements of care worker**: A table with columns for 'Categories required' and 'Competency level'. Categories include:
 - Reaching: select
 - Demeritis care: select
 - Single handed care: select
 - Complex moving and handling: select
 - Challenging behaviour: select
 - Clinical / medical tasks: select (with a 'Meets policy level' dropdown)
 - CHC fast track end of life: select
 - CHC long term conditions: select
- Section 3: Outcomes - What is to be achieved**: A table with columns for 'No.', 'MIS new / goal', 'Outcome', and 'Timeframe'. It contains four rows for outcomes 1 through 4, each with dropdown menus for selection.
- Additional fields**: Start date, Start time of visit / urgent response, Cease date, Care type, Funded by, Is any task time critical?, If yes please provide details, Provider response time, Other response period, Primary Support Reason, Area, and Service.

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- Pricing Tool** – You will need to download this pricing tool as it is a requirement to attach it in Question 1.01. Please fill in the quantity of hours and price per hour. There are several boxes for you to break the cost down further if you wish. If you need any more then please insert more rows.

	A	B	C	D	E	F	G	H	I	J
2	Please provide a breakdown of the weekly cost (see example below)									
3										
4		Number of Hours	Price per hour	Total Cost						
5	Individual hours			£0.00						
6	Shares Hours (eg 1:2 please provide a breakdown)			£0.00						
7				£0.00						
8				£0.00						
9				£0.00						
10	Extras (please list)			£0.00						
11	Fixed Costs (if applicable)			£0.00						
12	Total			£0.00						

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9) Please now click on the arrow to the right side of the tabs (shown below). This will move you along to the 'Items' tab, which is highlighted in blue in the screenshot. This will allow you to input your price for the contract to support your proposal. You will need to click on this arrow every time you wish to move along to the next tab.

The screenshot displays a web application interface for submitting a response. At the top, it says "Your Response | 1000516" and "DEMO SUPPLIER". Below this are buttons for "Decline", "Messages", "Validate", "Save", and "Submit". A message states: "From here you can edit your response by completing the various steps within the wizard below, or process it using the options above." Below the message are four tabs: "General", "Items", "Questions", and "Attachments". The "Items" tab is highlighted in blue. A blue arrow points to the right of the "Items" tab. Below the tabs is a table for "Lot 1 | Default".

Ref	Part Number	Name	UOM	Unit Price (GBP)	Quantity Requested	Quantity Supplying	Value (GBP)	Free Issue?
#1		Price	Total	50.00	0	1	50	<input type="checkbox"/>

At the bottom of the table, there are navigation arrows and the text "1 - 1 of 1 Items".

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10) When the above has been completed, please now move on to the 'Questions' tab, using the same arrow as before. This will show you the questions you need to answer in order to support your proposals. Answers may require you to type, or choose an option from a drop-down box (as shown below).

Your Response | 1000516 DEMO SUPPLIER

Decline Messages Validate Save Submit

From here you can edit your response by completing the various steps within the wizard below, or process it using the options above.

General Items **Questions** Attachments

Please complete the following questionnaire from Somerset County Council. Your answers will be automatically saved every five minutes. You can also hit the Save button at any time if you want to stop and finish off later.

1: Quality (1 question)

1.01 I confirm that I am able to meet all of the specific requirements outlined in the route description (10)

Yes
Yes
No

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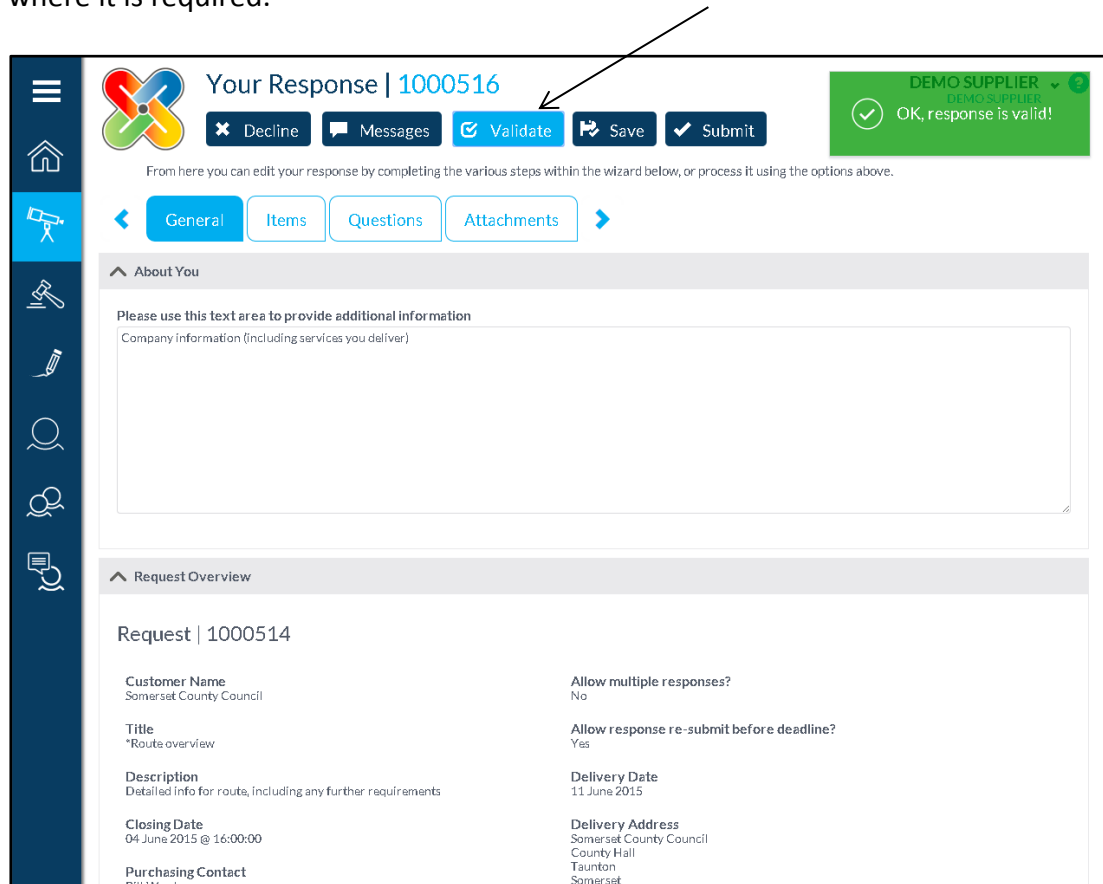
11) When the questions have been answered, please move on to the 'Attachments' tab, highlighted in blue, below. This will allow you to upload any relevant documents that SCC request. You can either drag and drop an attachment here, or upload it from your files.

The screenshot shows a web application interface for managing a response. At the top, there is a navigation bar with a logo on the left, the title "Your Response | 1000516" in the center, and the user name "DEMO SUPPLIER" on the right. Below the navigation bar are five buttons: "Decline", "Messages", "Validate", "Save", and "Submit". A message below the buttons states: "From here you can edit your response by completing the various steps within the wizard below, or process it using the options above." Below this message is a horizontal navigation bar with four tabs: "General", "Items", "Questions", and "Attachments". The "Attachments" tab is highlighted in blue. Below the navigation bar is a message: "If required please use the options below to add Attachments to your response. Select an attachment type, add or drag and drop a file and then click 'Upload files'." Below this message is a section titled "Your Files". Under "Your Files", there is a section titled "Attachment Type" with a dropdown menu. The dropdown menu is open, showing three options: "Select a type...", "General Document", "Health & Safety Policy", and "Insurance Certificate". Below the dropdown menu is a large area with a download icon and the text "Or drag and drop files here". Below this area is a section titled "Uploaded Files" which contains a table with columns for "Name", "Type", "Download", and "Remove". The table is currently empty, and the text "No items to display" is shown at the bottom right of the table.

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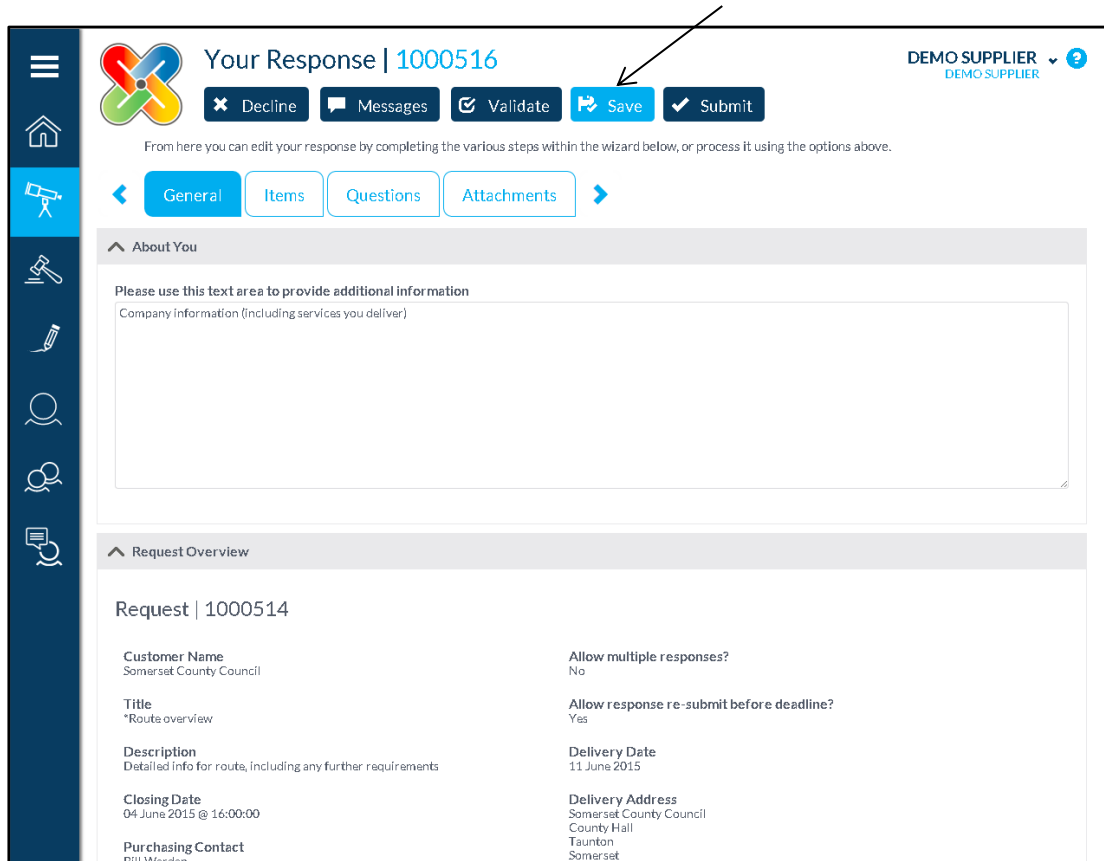
12) When you are happy with your response, please click the 'Validate' button (shown below). This means the system will check that all required areas are completed to avoid any vital information being missed.

Please note that the system is not able to check the actual content of your response, it will only check that a response has been given where it is required.



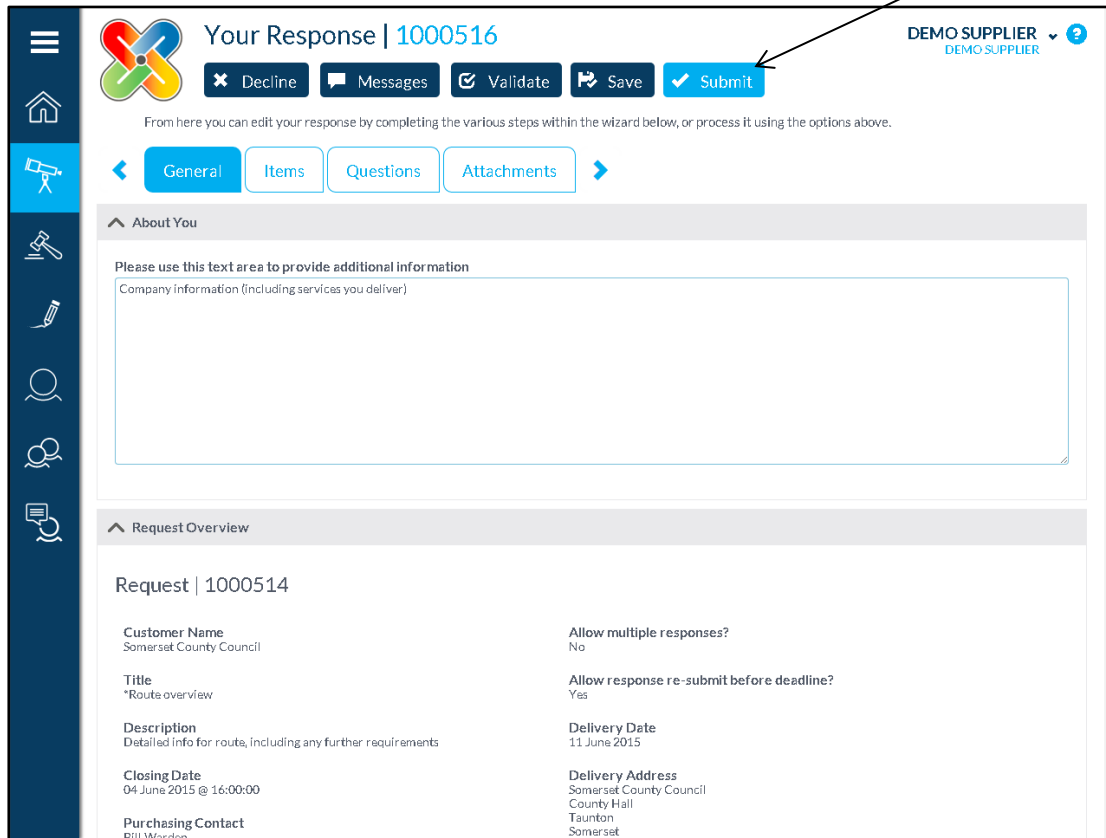
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13) You are able to save the response at any point, by clicking 'Save'. This will save all information you have uploaded. Please only click 'Save' if you are missing information required for your proposal, as a delay may mean a contract is forgotten about.



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14) When you are happy with your proposal, and that you have input the correct information, price, and answers to questions, please click 'Submit'. This will ensure that SCC receives your proposal. Please submit your response in ample time, to avoid any last-minute issues.



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15) When you have submitted the response, a green message will appear on the top right-hand side of your screen, to confirm your response has been submitted. In order to view this, please click on the relevant blue arrow under the 'Show Me' column.

DEMO SUPPLIER
DEMO SUPPLIER
OK, response
'1000516' submitted!

From here you can review the requests that have been sent to you by customers and create responses.

Search by customer reference, title or customer name...

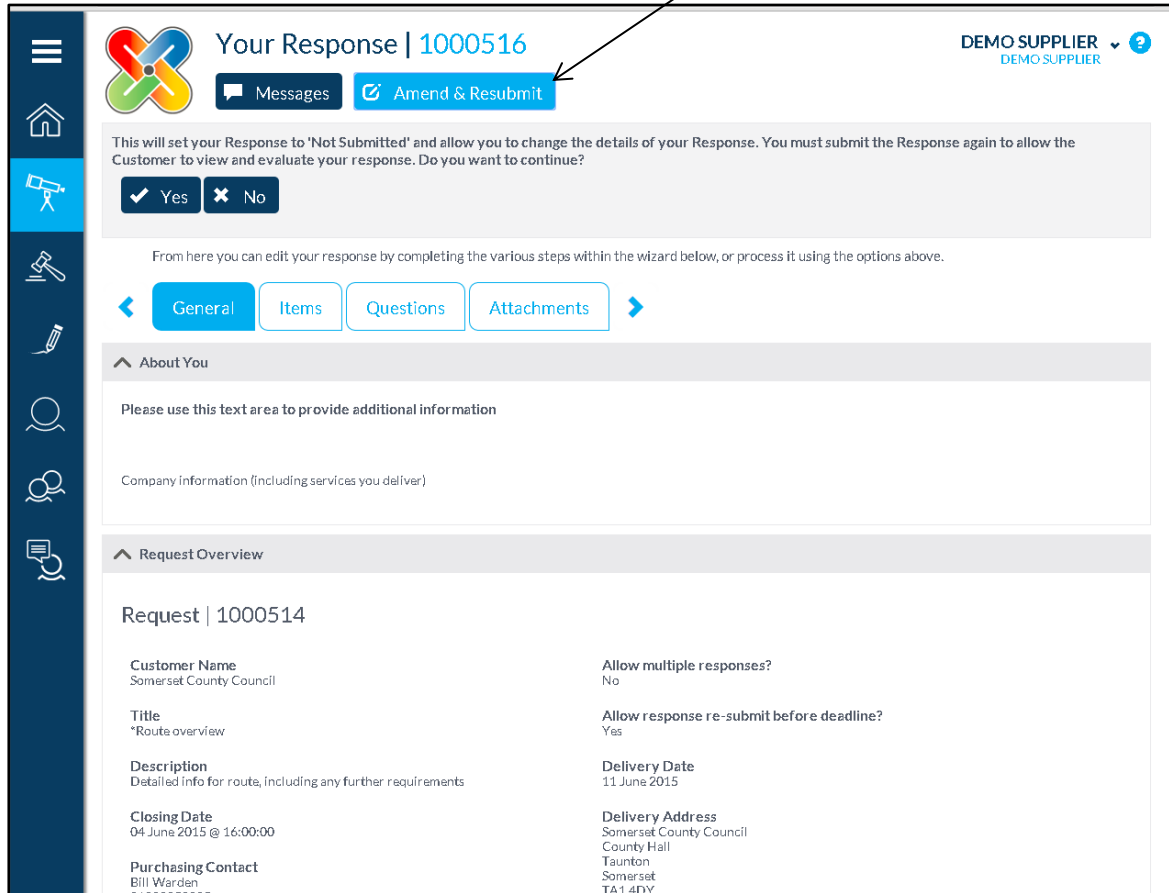
Search Filters

Reference	Customer Name	Title	Type	Closing Date	Time Remaining	Show Me
1000514	Somerset County Council	*Route overview	Private	04/06/2015 16:00	14 minutes 52 seconds	➔
ERFX1000007	The University of Birmingham	Tender for the provision of Software Services	Advertised	04/06/2015 23:59	8 hours 14 minutes	➔
SRMT1000035	Department for Education	Middle Leadership Secondments – Pilot	Advertised	17/06/2015 23:59	13 days 8 hours	➔
ERFX1000006	The University of Birmingham	Tender for computer equipment	Advertised	01/07/2015 23:59	27 days 8 hours	➔
EREQ1000255	Bristol City Council	Supply of School Meals	Advertised	09/07/2015 23:59	1 month 5 days	➔
ERFX1000002	The University of Birmingham	Tender for Beards	Advertised	13/07/2015 23:59	1 month 9 days	➔
ERFX1000001	The University of Birmingham	Tender for IT hardware	Advertised	10/10/2015 23:59	4 months 6 days	➔
ERFX1000270	Cardiff Council	DPS - Domiciliary Care Provision	Advertised	31/12/2016 23:59	More than a year	➔
1000020	Somerset County Council	DPS - Term for Taunton Taxi routes	Advertised	01/03/2018 23:59	More than a year	➔
1000311	Somerset County Council	Advert for DPSTerm TEST 0005	Advertised	14/05/2019 23:59	More than a year	➔

1 - 10 of 12 Items

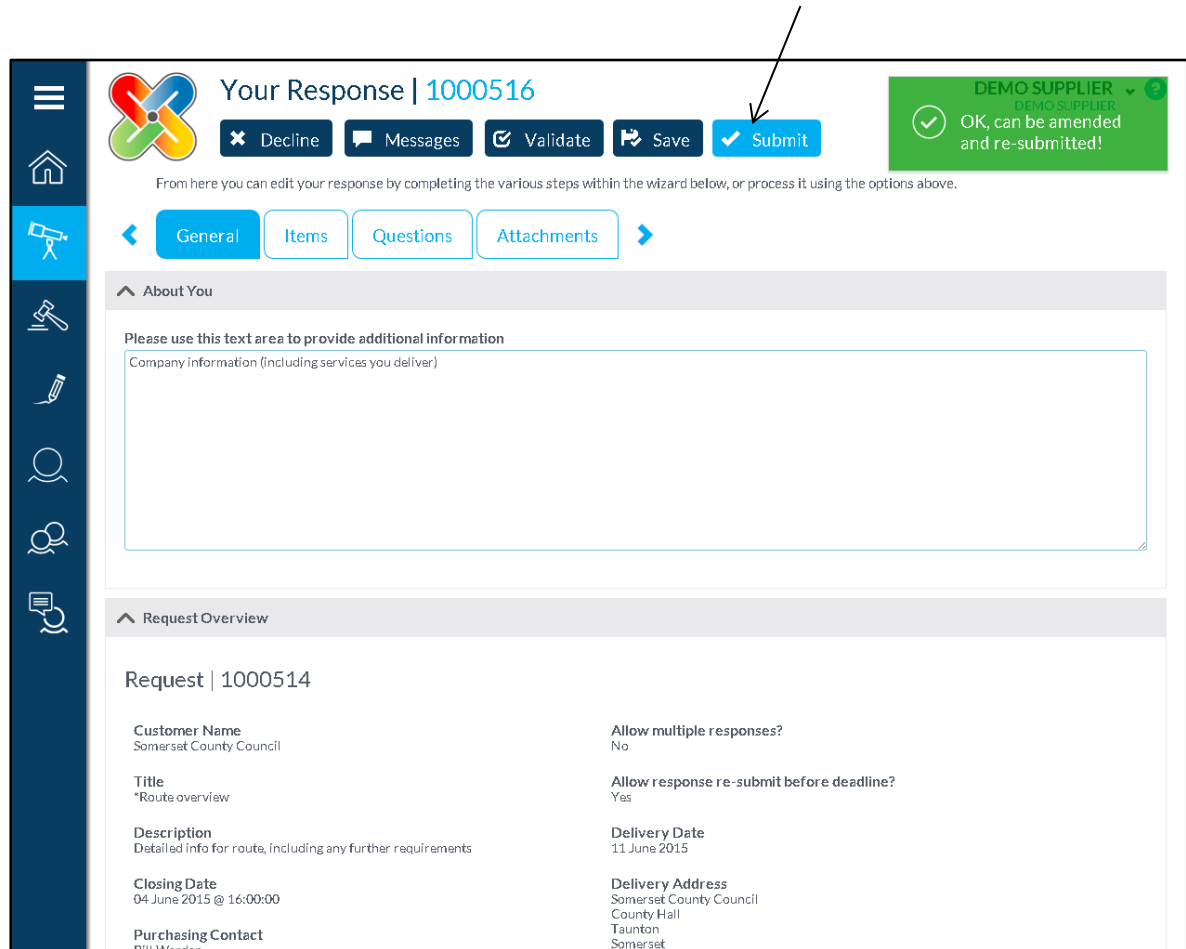
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16) If you notice a mistake, or wish to revise your price/information/answers, you can do so by clicking 'Amend & Resubmit'. Please note, you are only able to amend a response up to the submission deadline date, shown in picture 5.



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17) A green box will appear on the top of your screen if you are able to amend your response. To amend your response, please do as advised in pictures 6 – 10. When you are happy with your response, please click 'Submit'.



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18) A green box will appear in the top right-hand side of your screen, to confirm that submission has been successful. SCC will receive your proposal, and evaluate once the submission deadline has passed. You will be notified in due course if you have been successful.

Your Opportunities

From here you can review the requests that have been sent to you by customers and create responses.

DEMO SUPPLIER
OK, response '1000516' submitted!

Search by customer reference, title or customer name... Search Filters

Reference	Customer Name	Title	Type	Closing Date	Time Remaining	Show Me
1000514	Somerset County Council	*Route overview	Private	04/06/2015 16:00	14 minutes 3 seconds	➔
ERFX1000007	The University of Birmingham	Tender for the provision of Software Services	Advertised	04/06/2015 23:59	8 hours 14 minutes	➔
SRMT1000035	Department for Education	Middle Leadership Secondments – Pilot	Advertised	17/06/2015 23:59	13 days 8 hours	➔
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ERFX1000002	The University of Birmingham	Tender for Beards	Advertised	13/07/2015 23:59	1 month 9 days	➔
ERFX1000001	The University of Birmingham	Tender for IT hardware	Advertised	10/10/2015 23:59	4 months 6 days	➔
ERFX1000270	Cardiff Council	DPS - Domiciliary Care Provision	Advertised	31/12/2016 23:59	More than a year	➔
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1 - 10 of 12 Items

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