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.

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1) In order to start the process, please log on to the proactis portal. Following your registration on to this portal, you wil 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 charaters long.

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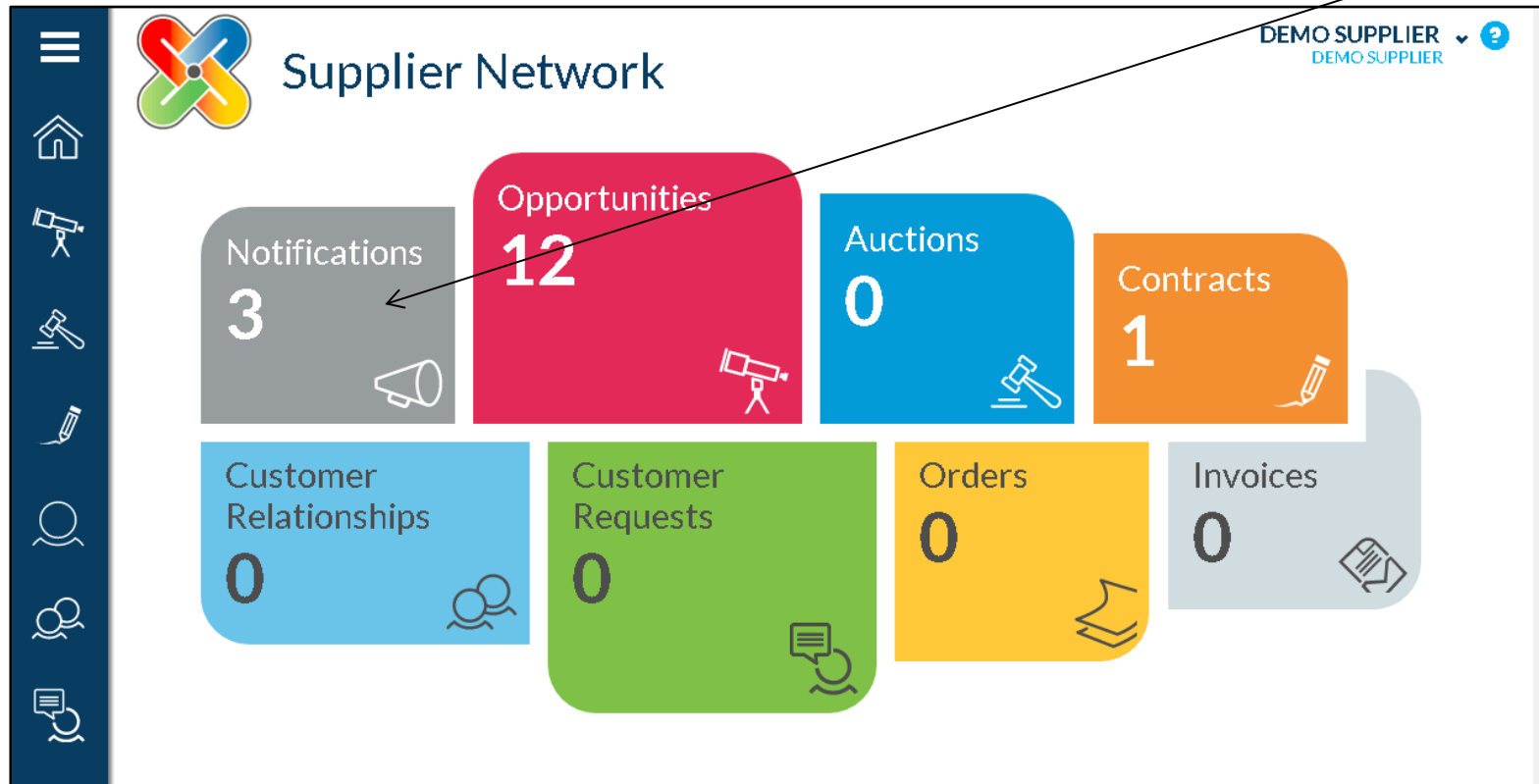
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3) Clicking on 'Notifications' will enable you to see a list of advertised contracts. This will include the Council that has invited you (in this case, Somerset County Council), what the notification is regarding, and the date the notification was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

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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

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 <u>cannot</u> be extended. Please click on the blue arrow under the 'Show Me' column to view the details of this contract.
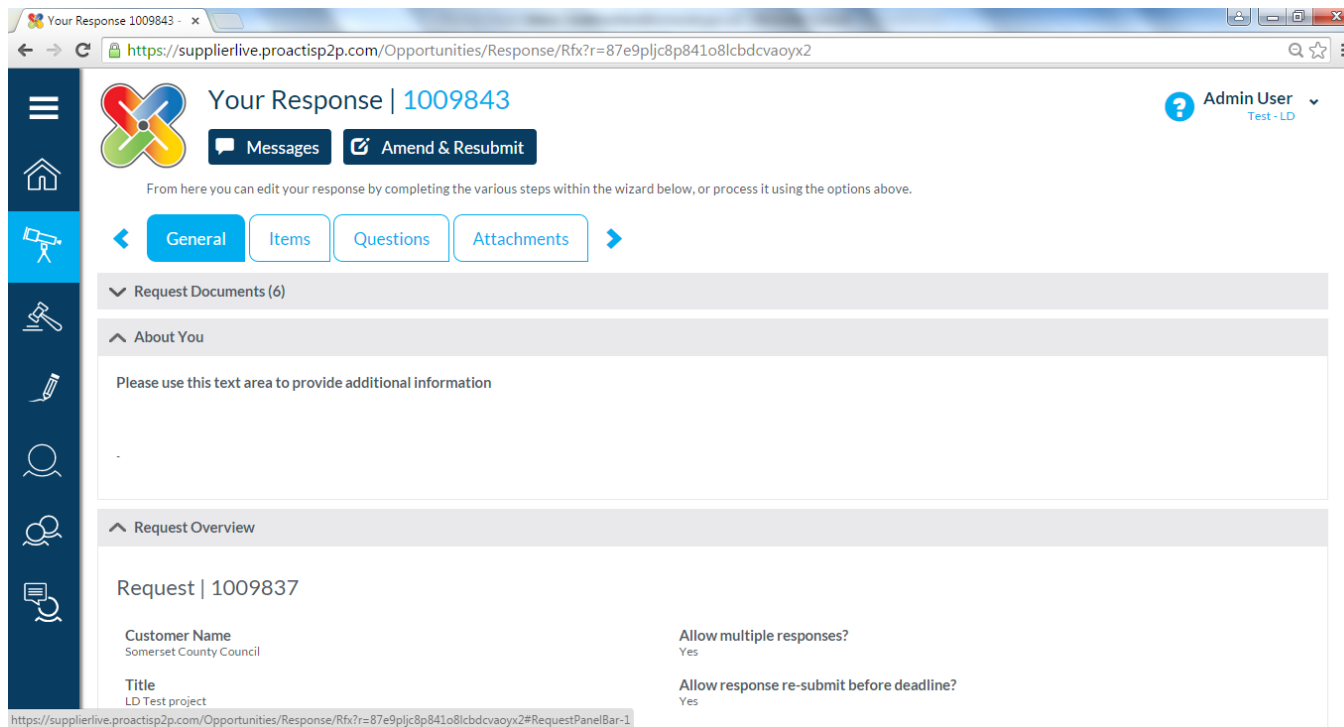

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6) You will then be taken through to the 'Your Response' screen. This will show details of the contract. As you can see below, the 'General' tab is highlighted. This means that this tab is currently showing on your screen. If you have any information 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.**

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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.

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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.

	Number of Hours	Price per hour	Total Cost
Please provide a breakdown of the weekly cost (see example below)			
Individual hours			£0.00
Shares Hours (eg 1:2 please provide a breakdown)			£0.00
			£0.00
			£0.00
			£0.00
Extras (please list)			£0.00
Fixed Costs (if applicable)			£0.00
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.

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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).

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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.

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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.
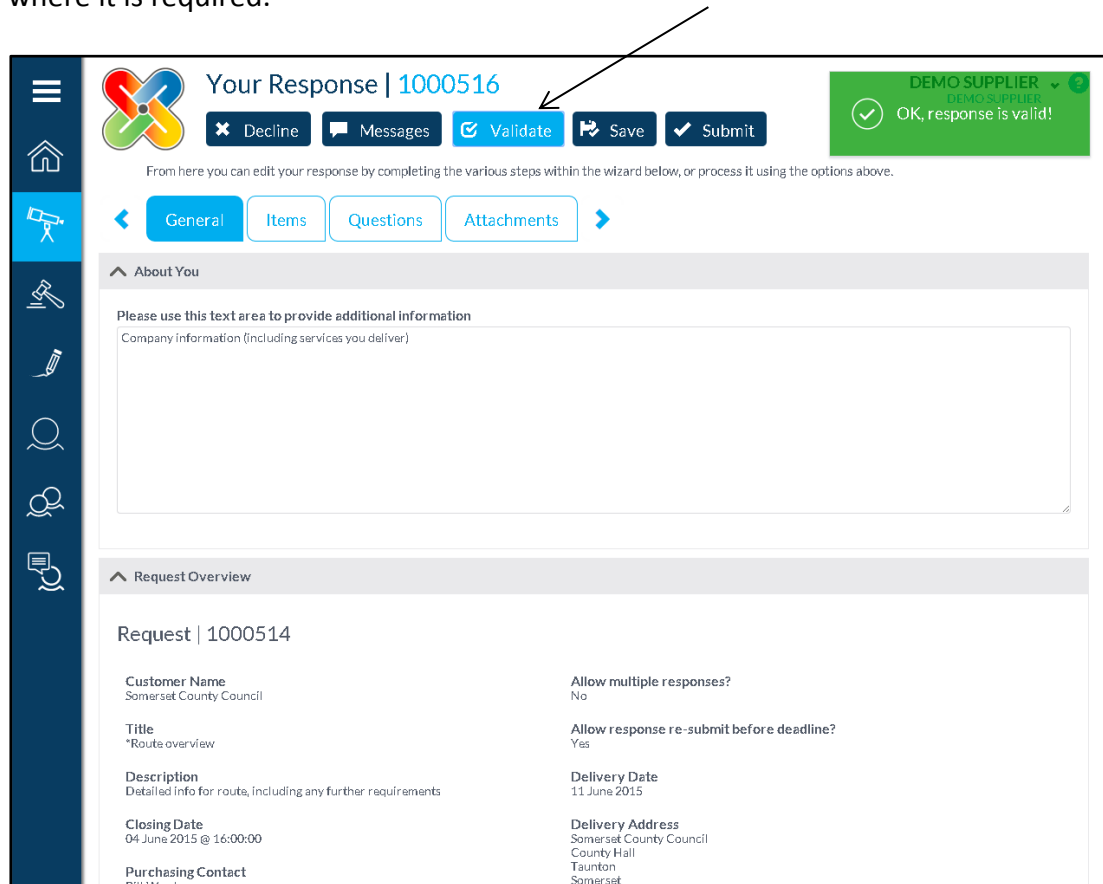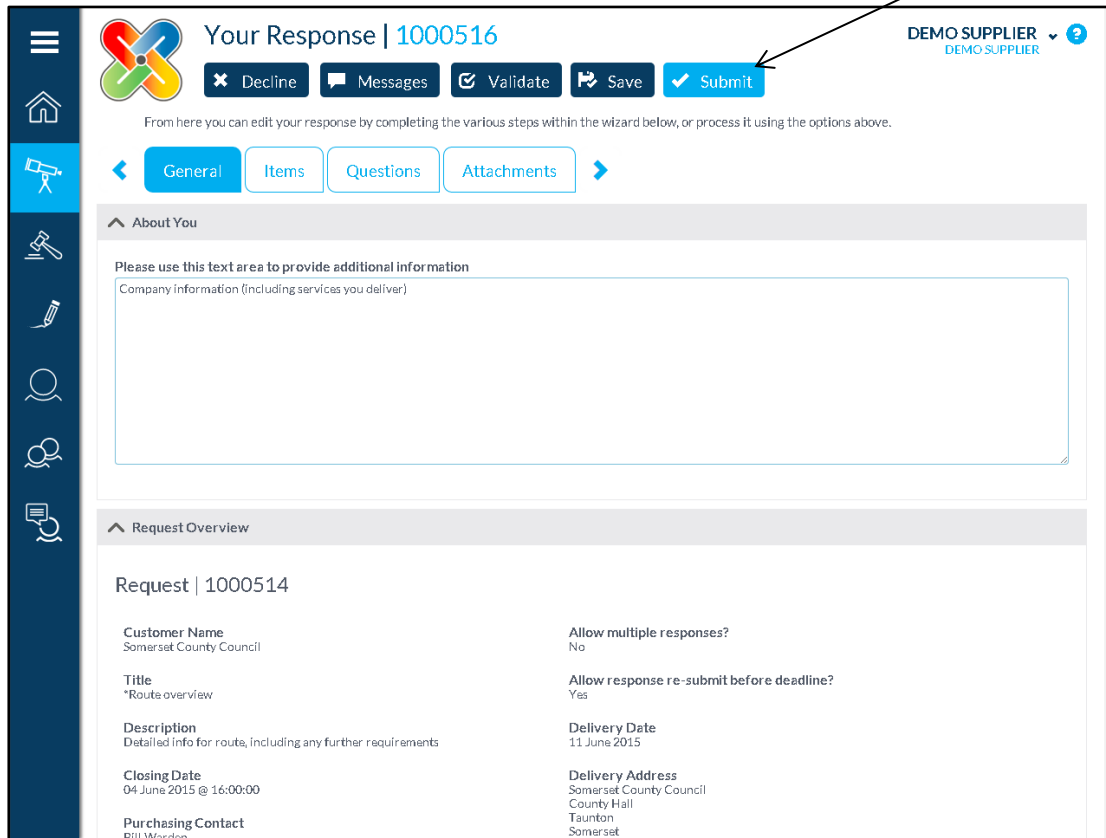

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13) You are able to save the response at any point, by clicking 'Save'. This will save all information you have uploaded. Please only click 'Save' if you are missing information required for your proposal, as a delay may mean a contract is forgotten about.
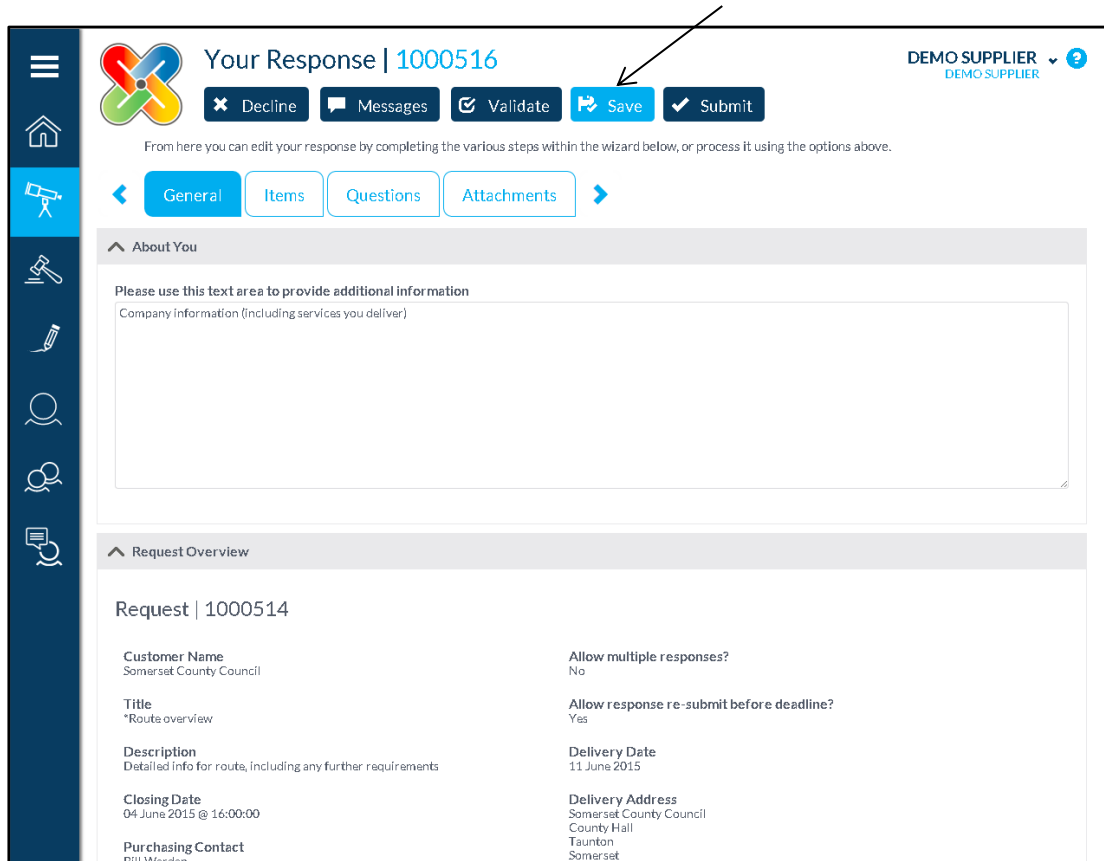
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14) When you are happy with your proposal, and that you have input the correct information, price, and answers to questions, please click 'Submit'. This will ensure that SCC receives your proposal. Please submit your response in ample time, to avoid 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.
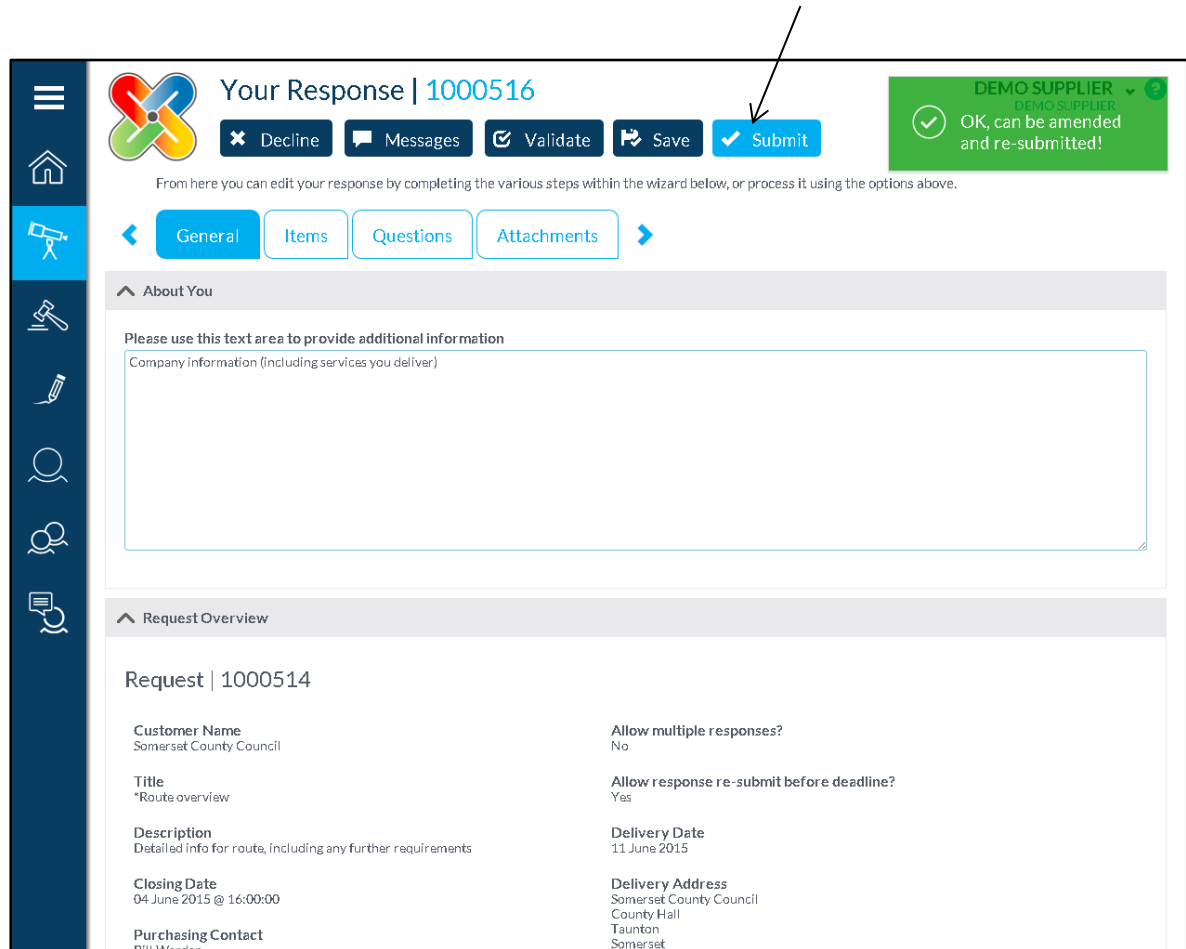

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16) If you notice a mistake, or wish to revise your price/information/answers, you can do so by clicking 'Amend &Resubmit'. Please note, you are only able to amend a response up to the submission deadline date, shown in picture 5.
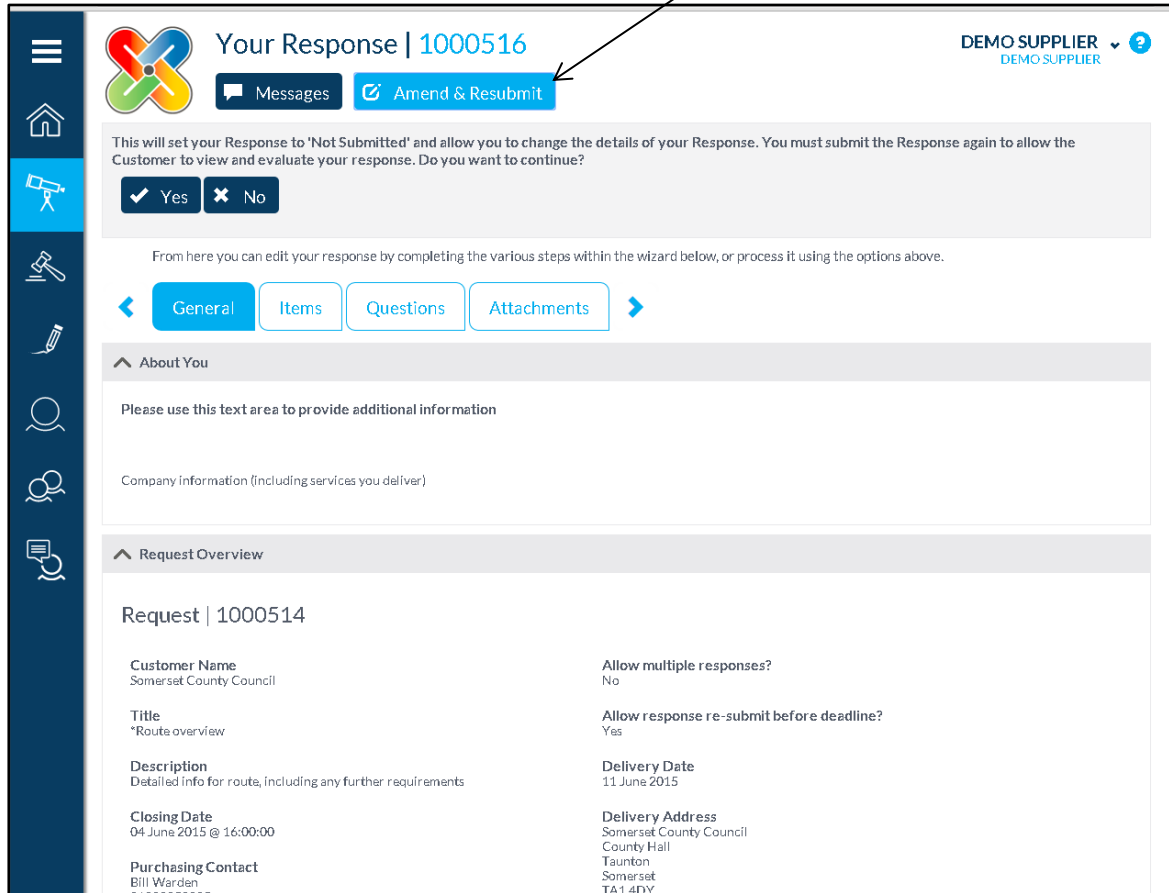
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17) A green box will appear on the top of your screen if you are able to amend your response. To amend your response, please do as advised in pictures 6 – 10. When you are happy with your response, please click 'Submit'.

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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.

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