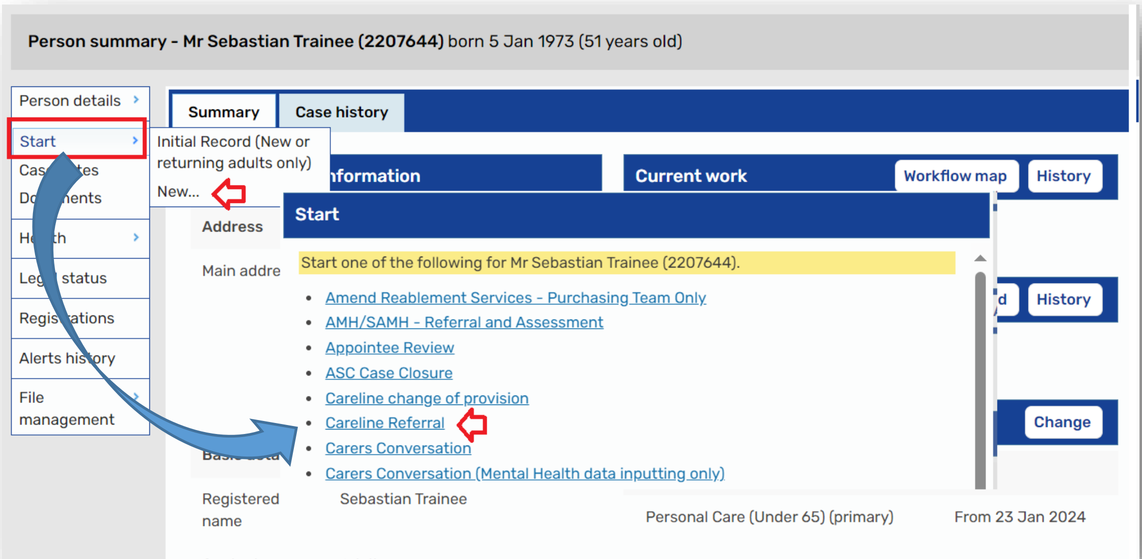
Careline Referral Guidance

The following guidance is for the first workflow step in the Careline process: the referral. This is to be completed by social care practitioners.

Starting the workflow

The Careline referral process is a stand-alone workflow chain, but can also be generated from your Three Conversation workflow as a next action.

- You can start the Careline referral via ‘Start’ and then ‘New’ on the individual’s main page:

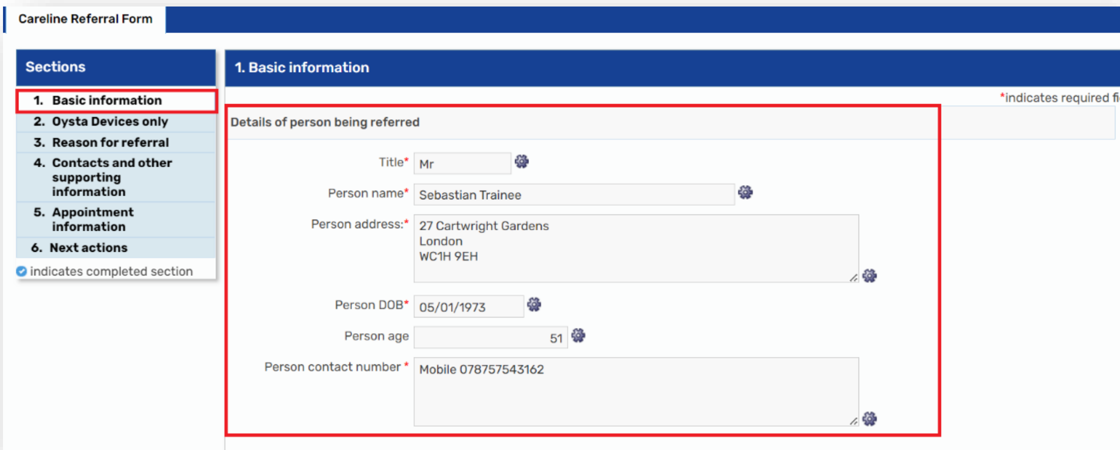


Completing the referral form

When you open your workflow, the referral form is already there for you to start.

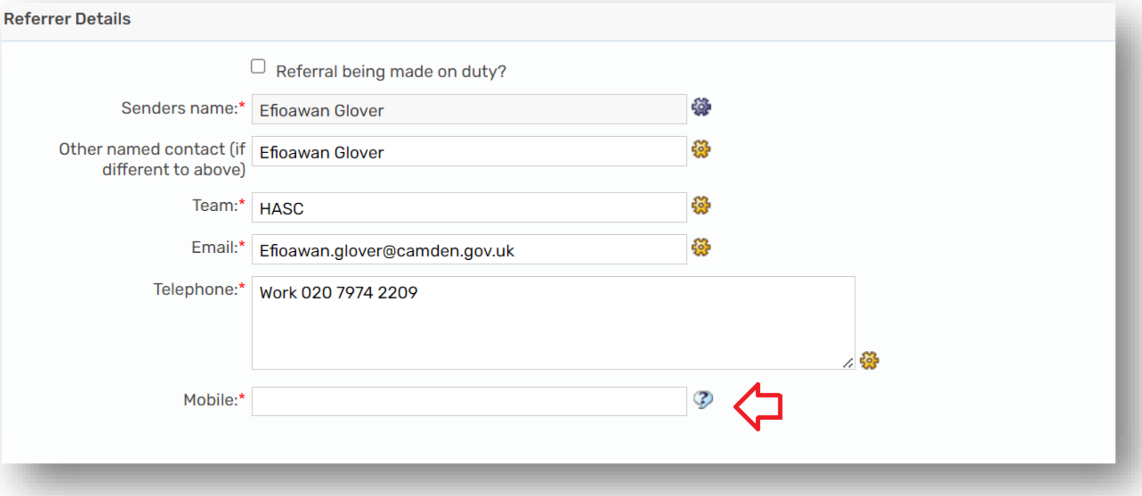
Section 1: Basic information

- Details of individual being referred is read only (it has prepopulated from the main file). Therefore, if any changes are required here, you will need to update this on the individual’s front page through person details.

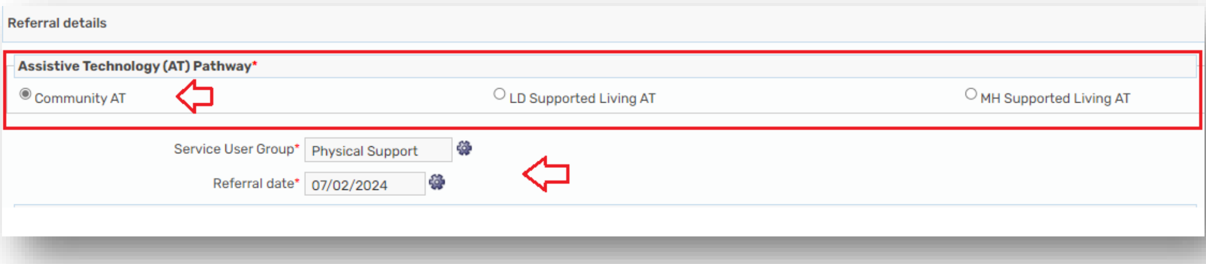


- In **Referrer Details**, if the referral was completed on duty, tick the **Referral being made on duty?** box.

The worker details prepopulate in the sections below, however you can also manually enter information here if needed (where the golden cogwheels appear). Note, in this example, that Mobile is mandatory, and you can manually update it here:

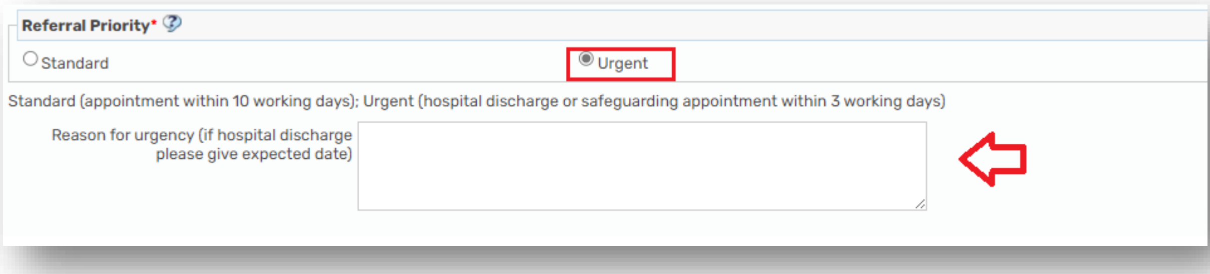


- You will need to select an **AT pathway**. The further questions in this form will be determined by the option you select here.

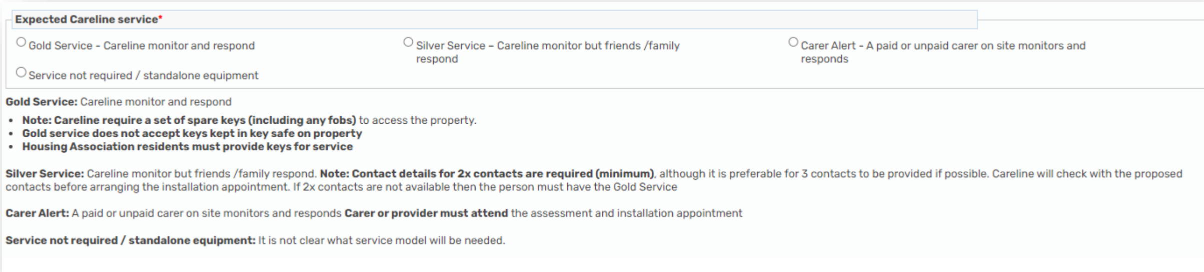


- The service user group will prepopulate from the individual's main page here. If it is incorrect, you will need to update this on the individual's main page and then refresh in this workflow step.
- The date of the referral also populates from when you have opened this workflow step.

- You will need to select whether this referral is urgent or not. If urgent, a further box will open requesting the expected date of discharge, or you can add another reason in the text box.



- Lastly, in this section, indicate which Careline service you are referring for.


Expected Careline service*

○ Gold Service - Careline monitor and respond ○ Silver Service – Careline monitor but friends /family respond ○ Carer Alert - A paid or unpaid carer on site monitors and responds

○ Service not required / standalone equipment

Gold Service: Careline monitor and respond

- **Note: Careline require a set of spare keys (including any fobs)** to access the property.
- **Gold service does not accept keys kept in key safe on property**
- **Housing Association residents must provide keys for service**

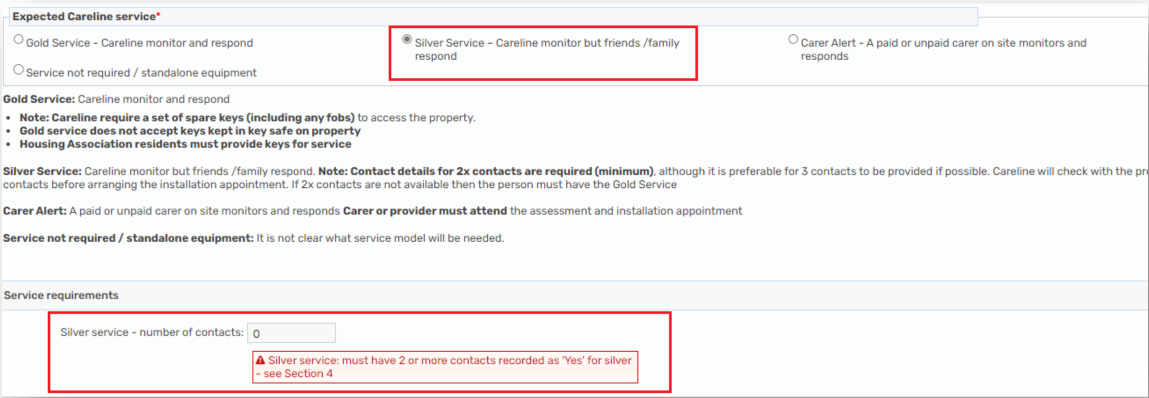
Silver Service: Careline monitor but friends /family respond. **Note: Contact details for 2x contacts are required (minimum)**, although it is preferable for 3 contacts to be provided if possible. Careline will check with the proposed contacts before arranging the installation appointment. If 2x contacts are not available then the person must have the Gold Service

Carer Alert: A paid or unpaid carer on site monitors and responds **Carer or provider must attend** the assessment and installation appointment

Service not required / standalone equipment: It is not clear what service model will be needed.

Please note the guidance service list under the expected Careline service.

If you select ‘Silver service’ then at least **two contacts are required** and the contacts will need to be recorded in Section 4.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Carer Alert: A paid or unpaid carer on site monitors and responds **Carer or provider must attend** the assessment and installation appointment

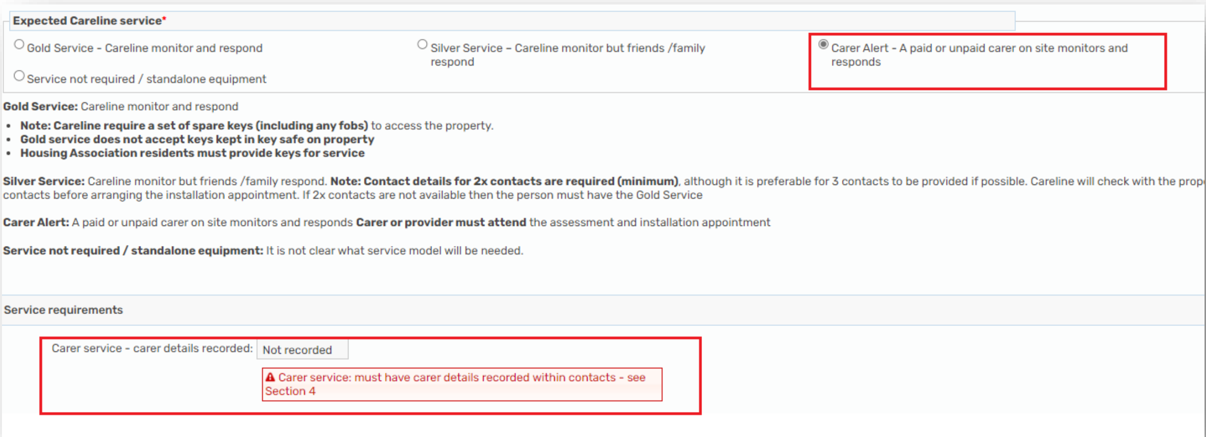
Service not required / standalone equipment: It is not clear what service model will be needed.

Service requirements

Silver service - number of contacts: 0

Silver service: must have 2 or more contacts recorded as 'Yes' for silver - see Section 4

If you select ‘Carer Alert’ carers details will need to be recorded in Section 4.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Carer Alert: A paid or unpaid carer on site monitors and responds **Carer or provider must attend** the assessment and installation appointment

Service not required / standalone equipment: It is not clear what service model will be needed.

Service requirements

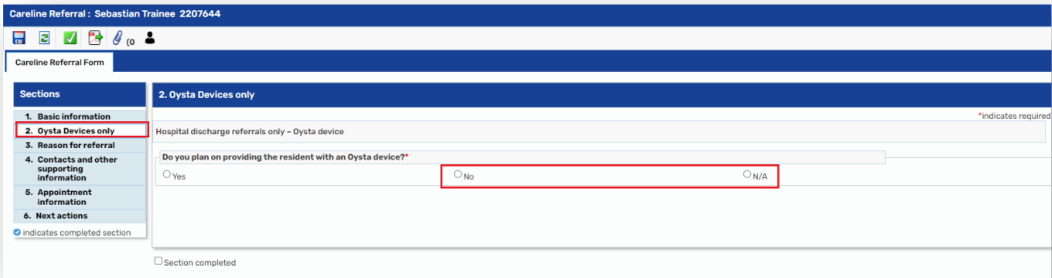
Carer service - carer details recorded: Not recorded

Carer service: must have carer details recorded within contacts - see Section 4

Section 2: Oysta Devices only

This section is for Hospital discharge referrals only. Please find practice guidance on Oysta devices here: Hospital Discharge: Oysta devices

- If the individual you are making a careline referral for is not in hospital, then select 'N/A', and if you are organising the hospital discharge but Oysta is not required then select 'No'.


Careline Referral : Sebastian Trainee 2207644

Careline Referral Form

Sections
1. Basic information
2. Oysta Devices only
3. Reason for referral
4. Contacts and other supporting information
5. Appointment information
6. Next actions

indicates completed section

2. Oysta Devices only

*indicates required

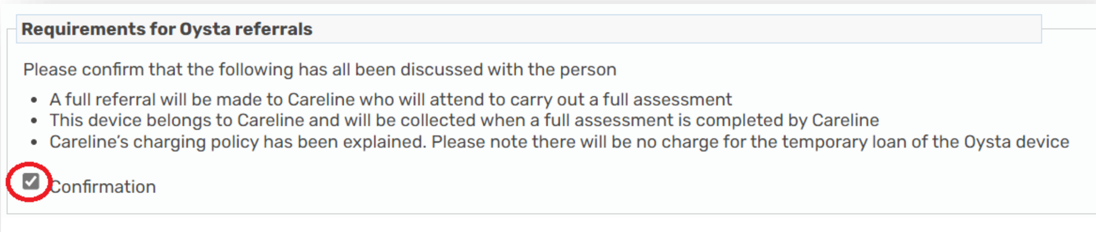
Hospital discharge referrals only – Oysta device

Do you plan on providing the resident with an Oysta device?*

Yes No N/A

Section completed

- If you select 'Yes', further questions are displayed.
- You will need to read the **Requirements for Oysta referrals** and tick the **Confirmation** box.

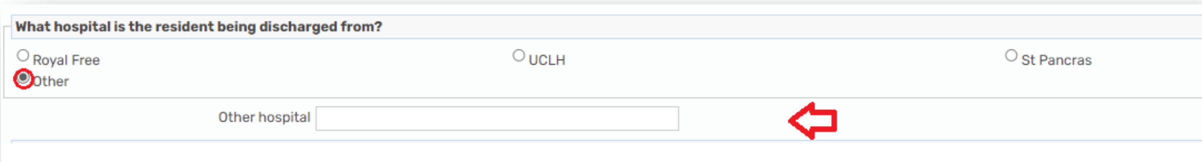

Requirements for Oysta referrals

Please confirm that the following has all been discussed with the person

- A full referral will be made to Careline who will attend to carry out a full assessment
- This device belongs to Careline and will be collected when a full assessment is completed by Careline
- Careline's charging policy has been explained. Please note there will be no charge for the temporary loan of the Oysta device

Confirmation

- You will then need to complete **What hospital is the resident being discharged from?** If you select Other, a box is displayed to add the name of the alternative hospital.

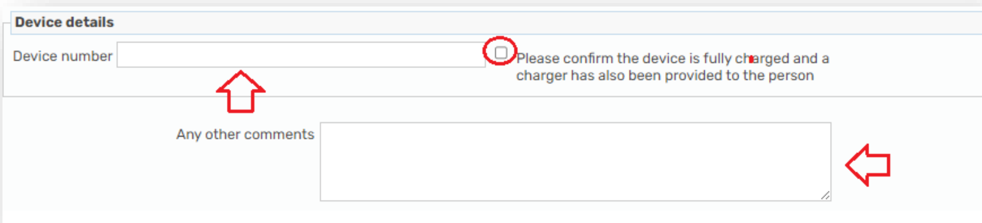

What hospital is the resident being discharged from?

Royal Free UCLH St Pancras
Other

Other hospital

- Under **Device details,** put in device number and tick the box to confirm if the device has been charged.

If you have further details, add it in the **any other comments** box.

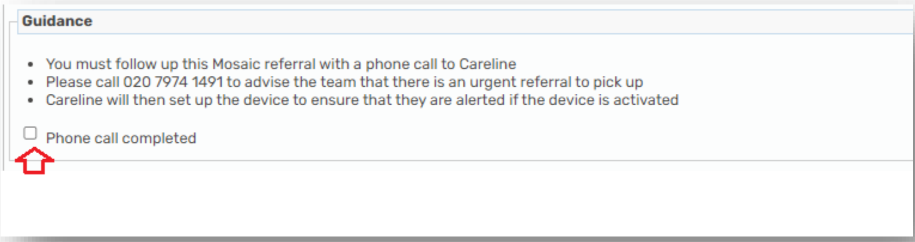

Device details

Device number

Please confirm the device is fully charged and a charger has also been provided to the person

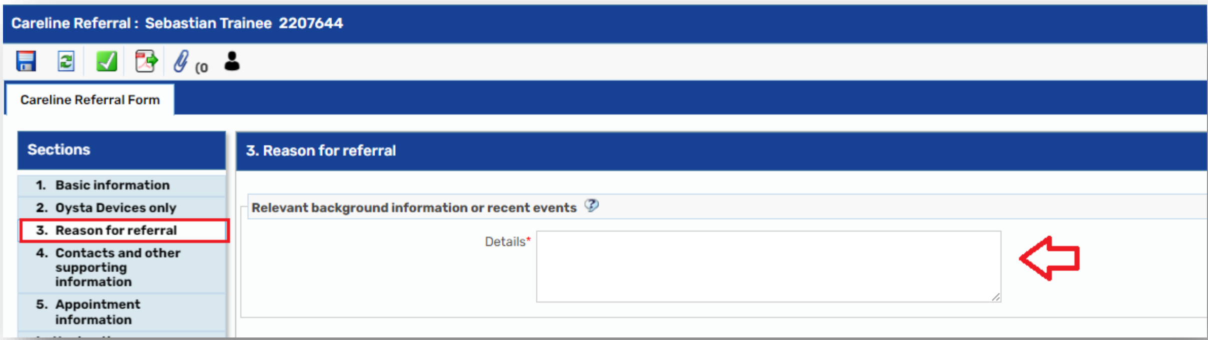
Any other comments

- Read through the **Guidance** and tick the box **Phone call completed** confirming you have contacted Careline.

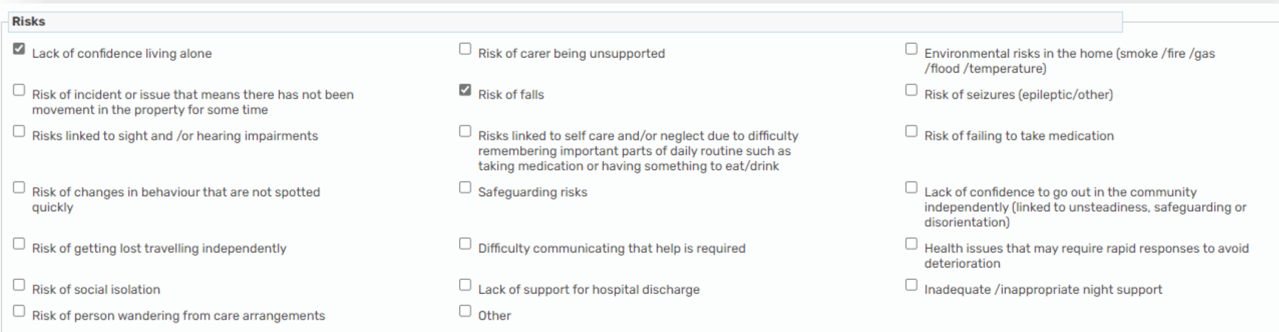


Section 3: Reason for referral

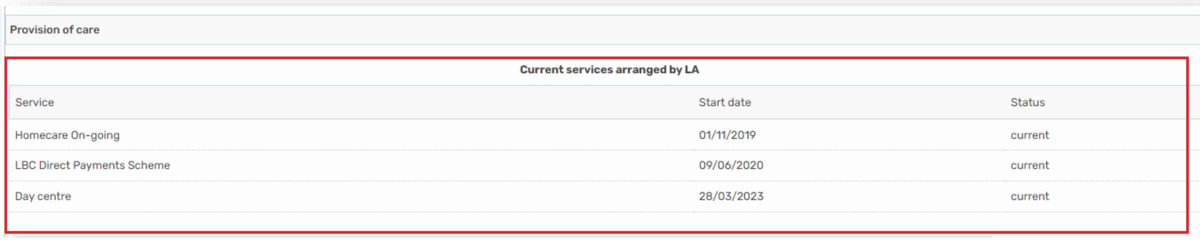
- In the Details box, state the reason for the referral. This section is mandatory.



- Underneath you will find Risks. Tick the risks that apply.



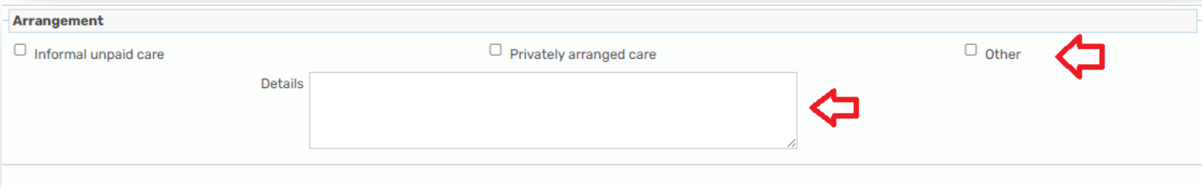
- If the individual is receiving services, it will be displayed in **Provision of care** under **Current services arranged by LA.**


Provision of care

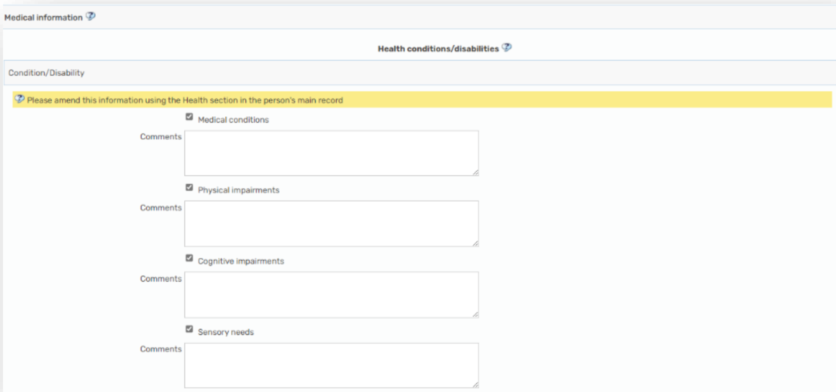
Current services arranged by LA

Service	Start date	Status
Homecare On-going	01/11/2019	current
LBC Direct Payments Scheme	09/06/2020	current
Day centre	28/03/2023	current

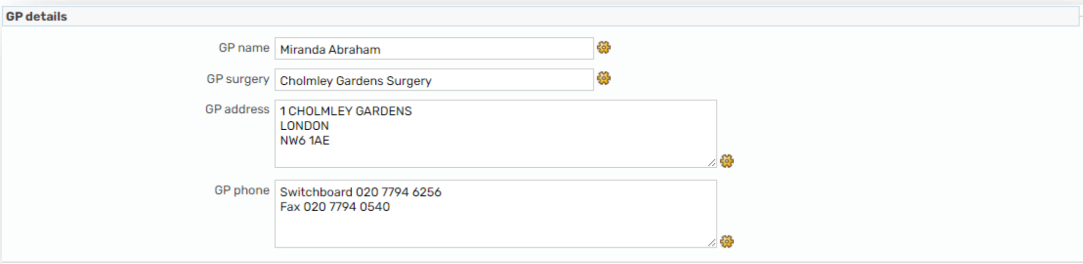
- If 'Yes' is selected to **Does the person have any other care arrangements in place?** Another box is displayed to detail the type of care.



- You can also add any relevant health information under **Medical Information**. Note, when you select medical, physical or cognitive- further boxes appear enabling you to elaborate:

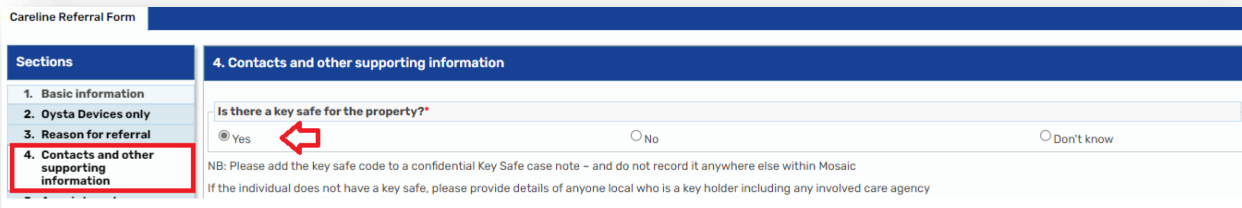


- Lastly, in this section, the GP details have prepopulated from the individual's front screen. You can also update this section directly.

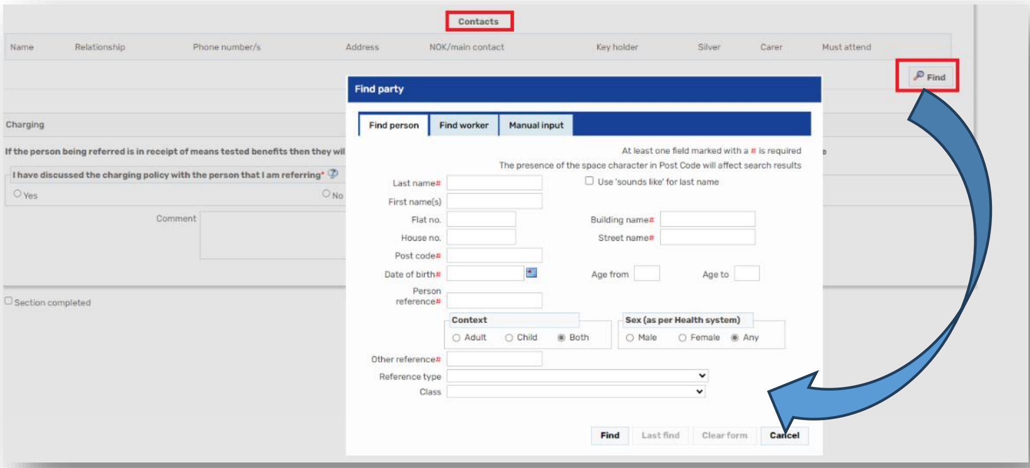


Section 4: Contacts and other supporting information

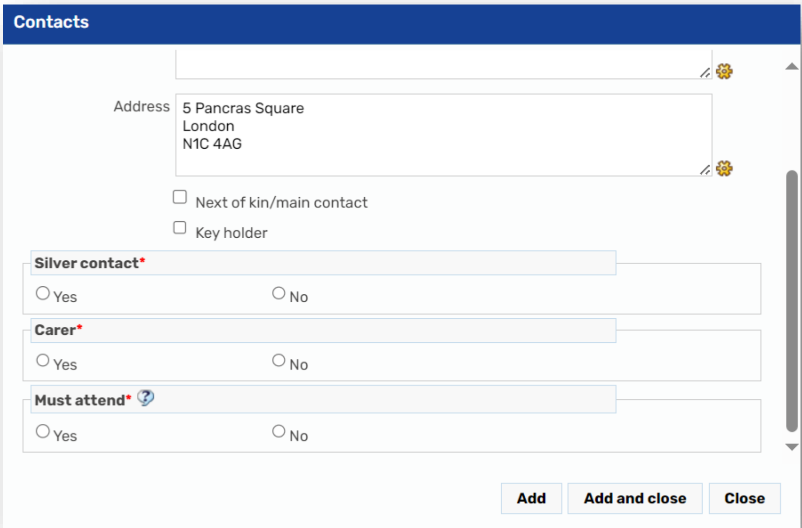
- The first question is mandatory, and you need to state whether there is a key safe on site. **Please note, you <u>should not</u> be writing the individual's key safe code in this form** (this needs to be entered under a confidential case note, using the category Key safe code, only. You can find guidance here: [key safe code guide]).



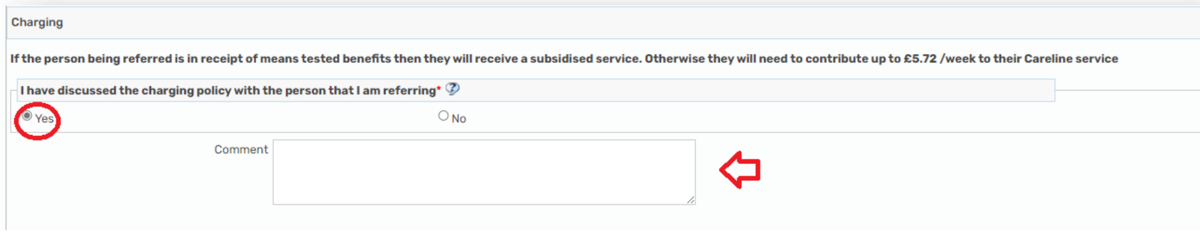
- For this table, please refer back to the guidance service list under the expected Careline service- in section 1. If you selected **Silver service** for example, then at least **two contacts are required** here. Select **Find** to search for the contact and add to the table.



- You can list the contact you've selected as NOK/ main contact, a key holder, the silver contact, a carer, or a person who must be present at the Careline appointment:

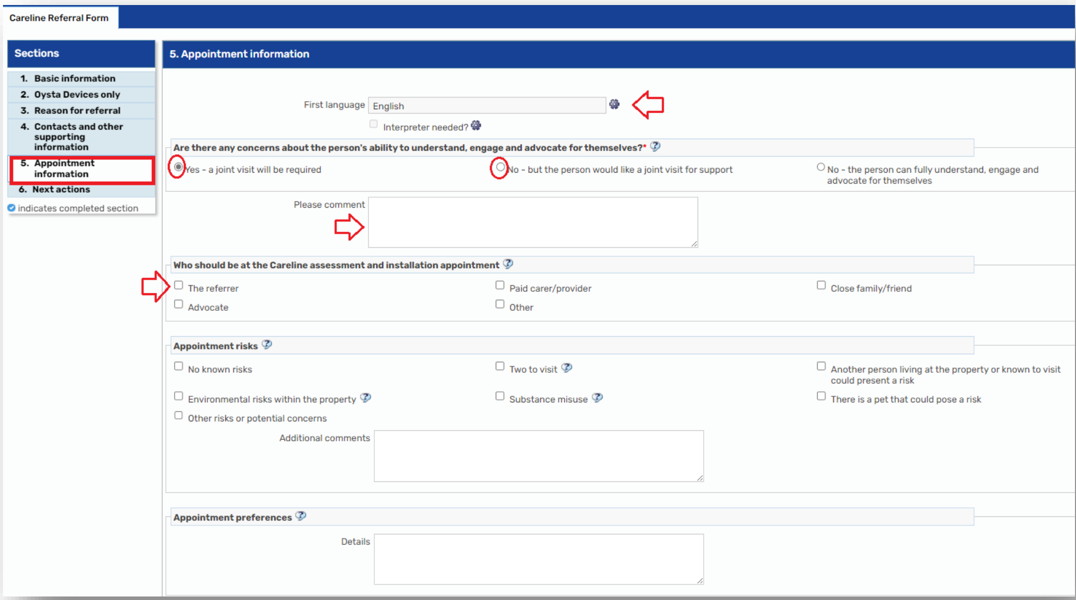


- Under **Charging**, this question is mandatory, as it is important to have this conversation with the individual if possible. Either way, it is useful for Careline to be aware if this has been discussed or not prior to their visit.



Section 5: Appointment information

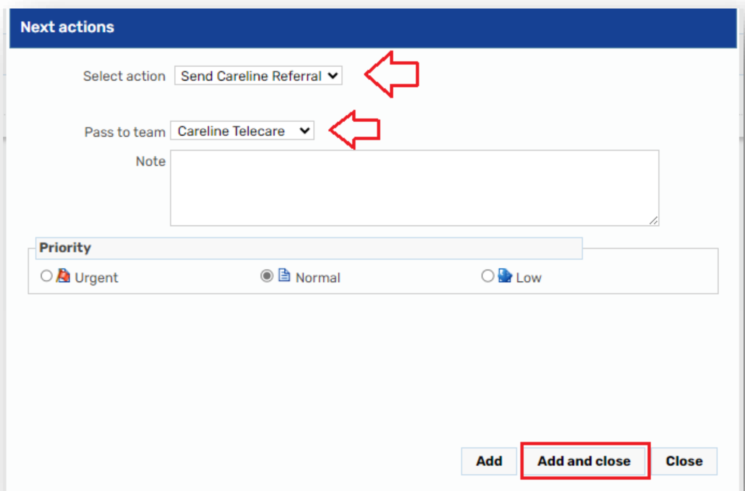
- This section enables you to provide important information for Careline to arrange their assessment/ visit.
- If the individual's first language is not English, this can be updated from the front page and then referral from refreshed .
- If the individual requires a joint visit to support them to understand and advocate for themselves, or if they would like someone else to be present for general support, then a further comment box appears to provide more information around this.
- You can then also tick the relevant person who will be supporting with this.



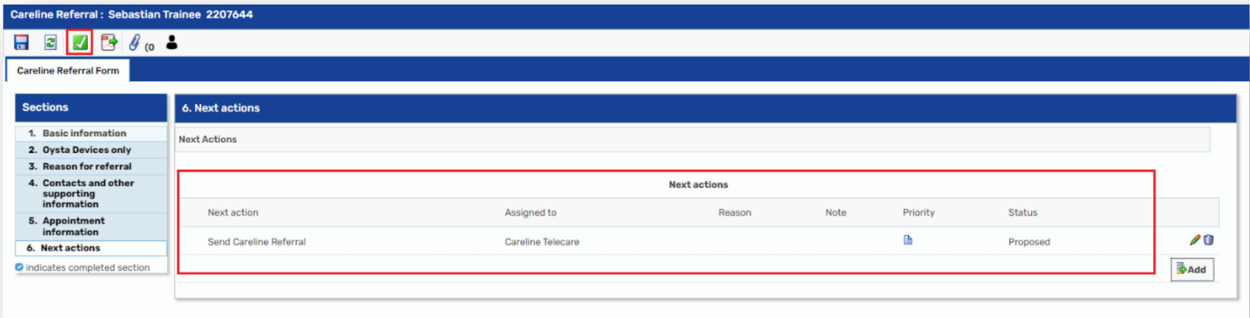
- Underneath is a section around **appointment risks** with an additional comments box to inform Careline staff, and an appointment preferences box.

Selecting a next Action (sending the Careline referral)

- To send this Careline referral or Oysta referral to Careline, you need to select an Action under Section 6 **Next actions**:

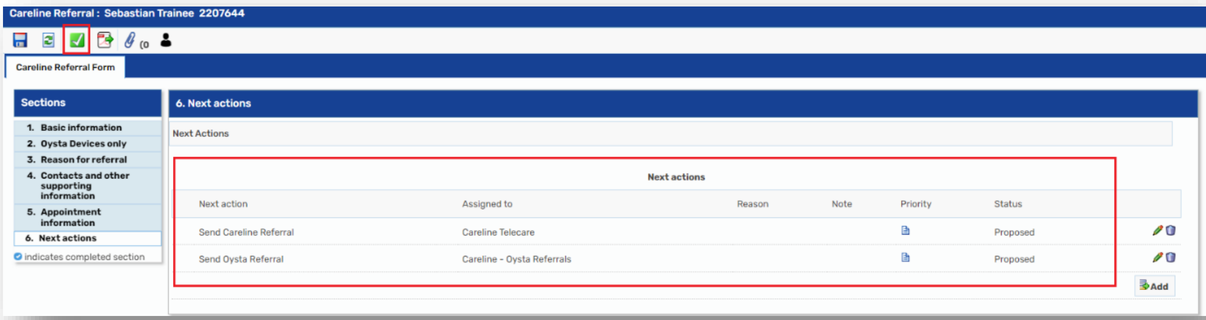


- Select **Add** and choose **Send Careline Referral** from the drop-down menu. Then select Careline Telecare under **Pass to team**.
- If, for whatever reason this referral workflow is no longer required, you can select **Cancelled**.
- Once you have selected your action, click **Add and Close**.



Selecting a next Action (sending the Oysta Referral)

- If you are also sending an Oysta Referral, select **Add** and choose **Send Oysta Referral** from the drop-down menu. Then select **Careline – Oysta Referrals** under **Pass to team**. (Both outcome options need to be selected for Oysta referrals- you will not be able to finish this step without doing so).
- If, for whatever reason this referral workflow is no longer required, you can select **Cancelled**.
- Once you have selected your Action, click **Add and Close**.



You can see this Action has now been added. Finally, **you need to 'Finish' the workflow** (via the green tick icon in toolbar), to complete this referral and send to Careline.