

Careline Referral Guidance

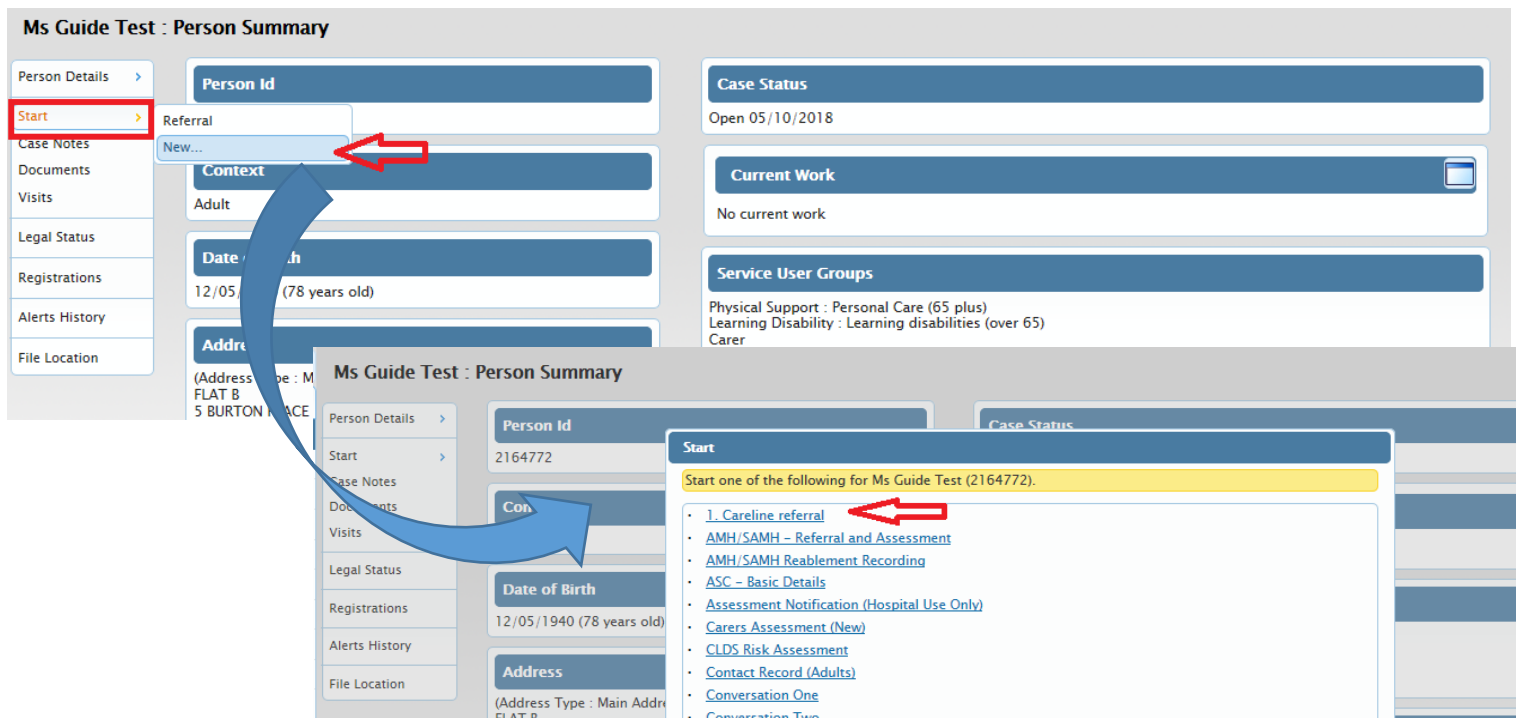
The following guidance is for the first workflow step in the Careline process: the referral. This is to be completed by social care practitioners.

Starting the workflow:

Previously, you have created a Careline referral form in your current workflow step- whether that has been an Assessment or Review etc. The form was embedded in the workflow, and this was either tasked to Careline or emailed over.

Now the Careline referral process is a stand-alone workflow chain.

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



The screenshot shows the 'Ms Guide Test : Person Summary' page. On the left, a navigation menu has 'Start' highlighted with a red box. A red arrow points from 'Start' to the 'New...' option in the 'Referral' dropdown menu. A blue arrow points from 'New...' to the 'Start' button in the 'Person Details' section. Below this, a 'Start' dialog box is open, showing a list of options for starting a workflow for Ms Guide Test (2164772). A red arrow points to the first option, '1. Careline referral'.

Ms Guide Test : Person Summary

Person Details > **Start** > Referral > New...

Person Id: 2164772

Case Status: Open 05/10/2018

Context: Adult

Date of Birth: 12/05/1940 (78 years old)

Address: (Address Type: Main Address) FLAT B, 5 BURTON PLACE

Current Work: No current work

Service User Groups: Physical Support : Personal Care (65 plus), Learning Disability : Learning disabilities (over 65), Carer

Start

Start one of the following for Ms Guide Test (2164772).

- 1. [Careline referral](#)
- [AMH/SAMH - Referral and Assessment](#)
- [AMH/SAMH Reablement Recording](#)
- [ASC - Basic Details](#)
- [Assessment Notification \(Hospital Use Only\)](#)
- [Carers Assessment \(New\)](#)
- [CLDS Risk Assessment](#)
- [Contact Record \(Adults\)](#)
- [Conversation One](#)
- [Conversation Two](#)



Completing the referral form:

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

Section 1: Referral information

- 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.
- You can find a referrer by selecting the 'Find' option.
- For further clarity on these sections, the ? symbol will provide more information (in yellow below).

1. Careline referral : Guide Test (2164772)

Careline Referral Form

Sections

- 1. Referral information
- 2. Risks and outcomes
- 3. Benefits
- 4. Additional Client / Service information
- 5. Appointment information
- 6. Actions Taken

indicates completed section

1. Referral information

*indicates required field

AT Pathway*

Community AT LD Supported Living AT MH Supported Living AT

Client cohort* Learning Disability ? ←

Referral date* 05/03/2019 ? ←

Referral Priority* ?

Standard (appointment within 10 working days). Urgent (hospital discharge or safeguarding appointment within 3 working days)

Standard Urgent

Find Referrer ?

Referrer name: Referrer team: Email:

? If referring on behalf of another care professional / provider, please enter the details manually



Section 2: Risks and Outcomes

- The individual's basic details will prepopulate to this section. If you have added a Next of Kin onto the individual's main page, then it will also pull through here. If not, you can add it.

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indicates completed section

2. Risks and outcomes *indicates required field

Person name*

Person address*

Person DOB*

Person contact number*

First language:
 Interpreter needed?

Next of kin

Name:

Relationship:

Contact number:

Next of Kin

| | | |
|-------|---------------|-----------------|
| Name: | Relationship: | Contact number: |
|-------|---------------|-----------------|

- Underneath you will find Risks and Outcomes. You can tick the risks that apply, and then the outcomes, which the Assistive Technology will hopefully achieve.

Note: the risk options are ordered in a way which correspond with the order of the likely outcome associated with that risk- to be helpful (e.g. the first risk listed is 'Lack of confidence living alone', the first outcome listed is 'increased support and reassurance to the person' etc.)

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indicates completed section

Relationship:

Contact number:

Next of Kin

| | | |
|-------|---------------|-----------------|
| Name: | Relationship: | Contact number: |
|-------|---------------|-----------------|

Risks

| | | |
|--|---|---|
| <input checked="" type="checkbox"/> Lack of confidence living alone <input type="checkbox"/> Risk of incident or issue that means there has not been movement in the property for some time <input type="checkbox"/> Risks linked to sight and /or hearing impairments <input type="checkbox"/> Risk of changes in behaviour that are not spotted quickly <input type="checkbox"/> Risk of getting lost travelling independently <input type="checkbox"/> Risk of social isolation <input type="checkbox"/> Risk of person absconding from care arrangements | <input type="checkbox"/> Risk of carer being unsupported <input checked="" type="checkbox"/> Risk of falls <input type="checkbox"/> Risks linked to self care and/or neglect due to difficulty remembering important parts of daily routine such as taking medication or having something to eat/drink <input type="checkbox"/> Safeguarding risks <input type="checkbox"/> Difficulty communicating that help is required <input type="checkbox"/> Lack of support for hospital discharge <input type="checkbox"/> Other | <input checked="" type="checkbox"/> Environmental risks in the home (smoke / fire / gas / flood / temperature) <input type="checkbox"/> Risk of seizures (epileptic/other) <input type="checkbox"/> Risk of failing to take medication <input type="checkbox"/> Lack of confidence to go out in the community independently (linked to unsteadiness, safeguarding or disorientation) <input type="checkbox"/> Health issues that may require rapid responses to avoid deterioration <input type="checkbox"/> Inadequate /inappropriate night support |
|--|---|---|

Outcomes

| | | |
|---|---|--|
| <input checked="" type="checkbox"/> Increased support and reassurance to the person <input type="checkbox"/> Improved responsiveness of support <input type="checkbox"/> Increased independence in the home (better control over home environment) <input type="checkbox"/> Improved responsiveness to changes in behaviour <input type="checkbox"/> Increased confidence and safety when travelling independently <input type="checkbox"/> Improved connection to others <input type="checkbox"/> Reduced risk of person absconding from care arrangements | <input type="checkbox"/> Increased support and reassurance to the carer <input checked="" type="checkbox"/> Reduced impact of falls <input type="checkbox"/> Reduced risk of forgetting important elements of routine <input type="checkbox"/> Improved safety and security <input type="checkbox"/> Help and support to be alerted quickly if the person may be in difficulty <input type="checkbox"/> Increased support for successful and safe hospital discharge <input type="checkbox"/> Other | <input checked="" type="checkbox"/> Safer living environment <input type="checkbox"/> Improved support in the event of a seizure <input type="checkbox"/> Improved medication management <input type="checkbox"/> Increased confidence and safety when out in the community independently <input type="checkbox"/> Reduced impact of health incidents <input type="checkbox"/> Improved night support |
|---|---|--|

Section 3: Benefits

- This section has four options initially, around measuring the possible benefits of the proposed implementation Assistive Technology.

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3. Benefits *indicates required field

Type of care package impact from AT ?

REDUCE: Use AT to enable a reduction in existing care package costs (immediately or delayed)
 AVOID: Use AT to avoid an expected increase in other care package costs (immediately or delayed)
 PREVENT: Use AT to prevent or delay future potential care package costs

NONE: Use AT to stabilise existing care arrangements with no financial benefit

REDUCE: When undertaking a review, you identify a care package component that could be reduced and replaced with AT. This might be possible immediately after Careline have installed, or could be delayed by a number of weeks pending rehabilitation and/or the confidence of the individual increasing.

AVOID: When undertaking an assessment or review, you identify that you could immediately avoid introducing or increasing a care package component by using AT as an alternative solution. This might be a short-term “stop gap” solution for a few months, or a longer-term solution.

PREVENT: You identify that AT might delay the need for additional care and support in the future, and may be able to identify the likely type of care (but cannot accurately quantify it).

NO FINANCIAL BENEFIT: You identify that AT will help to reduce risk, support end of life care, potential placement /carer breakdown, or safeguarding concerns.

If you select **REDUCE** or **AVOID**:

- When you select either of these options, further categories appear pertaining to what you have selected. For example, if AT is going to enable a reduction in services- what type of services are these:

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3. Benefits *indicates required field

Type of care package impact from AT ?

REDUCE: Use AT to enable a reduction in existing care package costs (immediately or delayed)
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NONE: Use AT to stabilise existing care arrangements with no financial benefit

Category of other care costs likely to be impacted by AT ?

Reduce Homecare
 Reduce Floating Support (reduction / delay / avoid)
 Reduce Travel Assistance (reduction / delay / avoid)

Facilitate a change from Sleeping Night Support to no Night Support
 Facilitate a change from Waking Night Support to Sleeping Night Support
 Facilitate a move from Residential Care to the community

Quantify the potential value of the financial benefit

Hours per week ?

Standard hourly rate

Weekly value of saving



- Based on what you have selected, boxes appear requesting you to quantify this benefit. If you select 'Reduce Homecare' for example, you can enter the hours per week this will be reducing, and it will calculate the saving (based on average rate of £17 per hour in this case).
- NOTE: 'Reduce Travel Assistance' and 'Facilitate a move from Residential to community' options do not have an embedded average rate. You can manually add a cost.

Service information

5. Appointment information

6. Actions Taken

indicates completed section

financial benefit

Hours per week 10.00

Standard hourly rate 17

Weekly value of saving 170

Expected timing of the financial benefit

Is the start of the benefit expected to be immediate or delayed?

Immediate care package impact following installation

Delayed care package impact by X weeks

Expected duration

Short term (3 months or less)

Indefinite (until circumstances change)

- Underneath there are two additional questions, around expected timing of the financial benefit and the expected duration.

If you select PREVENT or NONE:

As you are unable to quantify possible savings for these options, only one further question appears where you select one category:

3. Benefits

*indicates required field

Type of care package impact from AT

REDUCE: Use AT to enable a reduction in existing care package costs (immediately or delayed)

AVOID: Use AT to avoid an expected increase in other care package costs (immediately or delayed)

PREVENT: Use AT to prevent or delay future potential care package costs

NONE: Use AT to stabilise existing care arrangements with no financial benefit

Category of other care costs likely to be impacted by AT

Avoid or delay an increase in Homecare

Avoid or delay an increase in Floating Support

Avoid or delay an increase in Travel Assistance

Avoid or delay the introduction of Sleeping Night Support

Avoid or delay a change from Sleeping Night to Waking Night Support

Avoid or delay admission to Residential Care

3. Benefits

*indicates required field

Type of care package impact from AT

REDUCE: Use AT to enable a reduction in existing care package costs (immediately or delayed)

AVOID: Use AT to avoid an expected increase in other care package costs (immediately or delayed)

PREVENT: Use AT to prevent or delay future potential care package costs

NONE: Use AT to stabilise existing care arrangements with no financial benefit

Reason

Manage safeguarding concerns

Avoid unpaid carer breakdown

Avoid placement breakdown

Other



Section 4: Additional Client/ Service information

- The first question here 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.
- The second expanding box enables you to provide background information for the individual.

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4. Additional Client / Service information

*indicates required field

If the person being referred is in receipt of means tested benefits then they will receive a subsidised service. Otherwise they will need to contribute up to £5.72 /week to their Careline service

I have discussed the charging policy with the person that I am referring*

Yes No

Comment

Relevant background information or recent events

- Under 'Provision of care', you are able to tick the services that apply if there is a care arrangement in place:

Sections

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Provision of care

Does the person have any other care arrangements in place*

Yes No

Informal unpaid care

Privately arranged care

Commissioned care

Commissioned services

Supported living (24/7)

Supported living (not 24/7)

Reablement

Other

Medical information ?

Medical conditions

Physical impairments

Cognitive impairments

- 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:

6. Actions Taken

indicates completed section

Medical information ?

Medical conditions

Comments

Physical impairments

Comments

Cognitive impairments

Comments



- Lastly, in this section, indicate which Careline service you are referring for, and whether there is a key safe on site. Please note, you should not 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).

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 /not known

Is there a key safe for the property?

Yes No Don't know

Section completed

5. Appointment information

- This section enables you to provide important information for Careline to arrange their assessment.
- 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:

Sections

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5. Appointment information *indicates required field

Are there any concerns about the person's ability to understand, engage and advocate for themselves?*

Yes – a joint visit will be required No – but the person would like a joint visit for support No – the person can fully understand, engage and advocate for themselves

Please comment

Who should be at the Careline assessment and installation appointment ?

The referrer Paid carer/provider Close family/friend

Advocate Other

Appointment risks ?

Two to visit ? Another person living at the property or known to visit could present a risk Environmental risks within the property ?

Substance misuse ? There is a pet that could pose a risk Other risks or potential concerns

Additional comments

Appointment preferences

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



Selecting a next Action:

- To send this referral to Careline, you select an Action, under Section 6:

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6. Actions Taken

Next Actions

Next action

Next actions

Select action: Send to Careline

Pass to worker: Find Clear

Pass to team: Please Select Careline Telecare

Note

Priority

Urgent Normal Low

Add Add and Close Close

- Select 'Add' and choose 'Send to Careline' 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'.

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6. Actions Taken

Next Actions

| Next action | Assigned to | Reason | Note | Priority | Status |
|------------------|-------------------|--------|------|----------|----------|
| Send to Careline | Careline Telecare | | | Normal | Proposed |

Add

- 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.