

**1 – Placement Arrangements [Shared Lives Admin]**

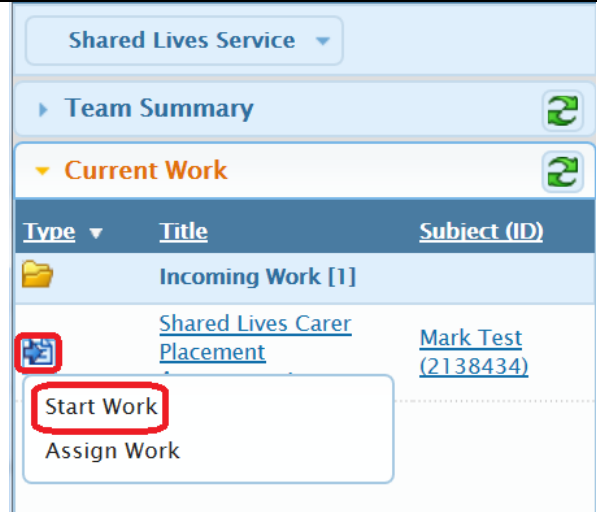
**a) Start ‘Placement Arrangements’ workflow in carer record**

Once the matching process is complete, this workflow should be started in the *carer record*.

From ‘Incoming Work’ folder

- Find ‘**Shared Lives Carer Placement Arrangements**’ step for relevant carer record
- Click clipboard icon
- Click ‘Start Work’

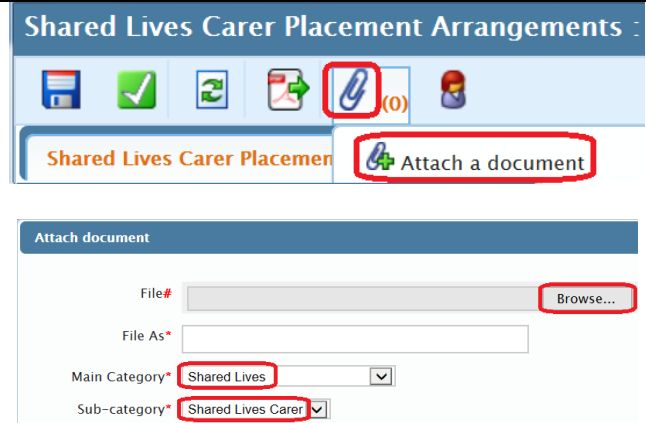
NB. This workflow can be started from scratch for carers that have already been approved [i.e. transferred from BANYA]



**b) Upload/attach documents**

Upload agreement documents

- Click on paperclip icon
- Click ‘Attach a document’
- Browse for file
- Select Main *and* Sub-category
- Click ‘Add’
- Save and close workflow step



**c) Review/update checklist**

Complete section 1: Placement Arrangements



This is a checklist to ensure all arrangements are in place

- NB. the workflow can be saved, closed and resumed accordingly to update completed actions
- All fields are mandatory

**Please confirm the following documents have been completed, signed and uploaded:**

Carer's agreement       Licence agreement       Arrangement agreement

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**Please confirm all financial arrangements are in place:**

Carer's payment details set up in financial systems       Carer's ongoing fees/services set up in Mosaic       Person's rent and board & lodging contribution process arranged

Person's financial assessment/care contribution process arranged

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**Please confirm all relevant checks have been completed regarding the following areas:**

House insurance       Mortgage agreement       Gas Safety

Carbon monoxide       Fire safety       Health & safety

Shared Lives Plus membership       Pets       Medical checklist

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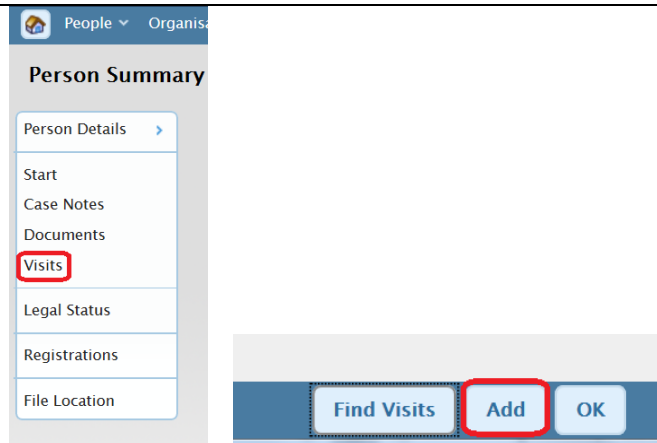
**Business use car insurance (if applicable)\***

Yes       N/A

**d) Schedule visits in Mosaic**

Click on 'Visits'

- Click 'Add'



Add details for planned visit:

- Date of visit
- Time of visit
- Pass to worker
- Select 'Visit Type'
- Click 'Save'

NB. Visit types:

- Shared Lives Scheduled Visit
- Shared Lives Unannounced Visit
- Shared Lives Scheduled Review
- Shared Lives Unscheduled Review

**Add Scheduled Visit – Mark Test (2138434)**

Fields marked with \*

Date \*

Time \* Enter as 24 hour clock e.g. 15:30

Pass to Team #

Pass to Worker #

Visit Type

Planned visits will appear in a list and will also appear in the 'Current Work' folder for the assigned worker

**Visits – Mark Test (2138434)**

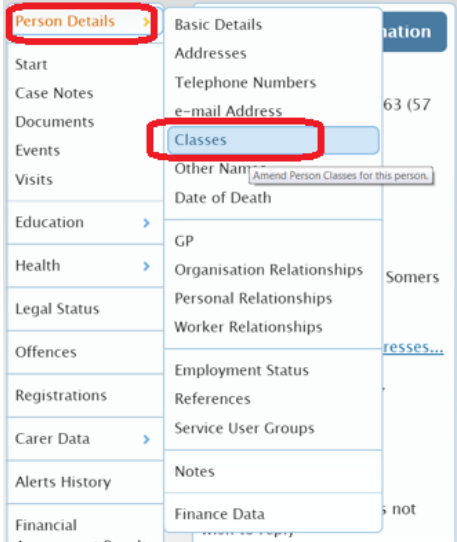
Visits shown for this person only				
<a href="#">Planned Date/Time</a>	<a href="#">Took Place?</a>	<a href="#">Actual Date/Time</a>	<a href="#">Worker/Organisation</a>	<a href="#">Team</a>
<a href="#">26/10/2020 at 10:00</a>	Scheduled		Deni Nygate	Shared Lives Service

### e) Update 'Class'

#### Update 'Class'

- Add 'Shared Lives Approved Carer'
- Remove 'Shared Lives Applicant'

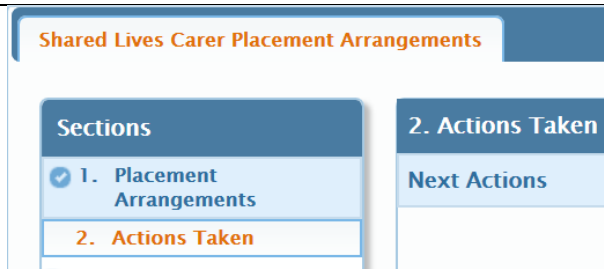
NB. This ensures the records can be distinguished from other case records more easily in reporting



- Reported Missing by another Local Authority
- Shared Lives Applicant
- Shared Lives Approved Carer
- Special Guardian

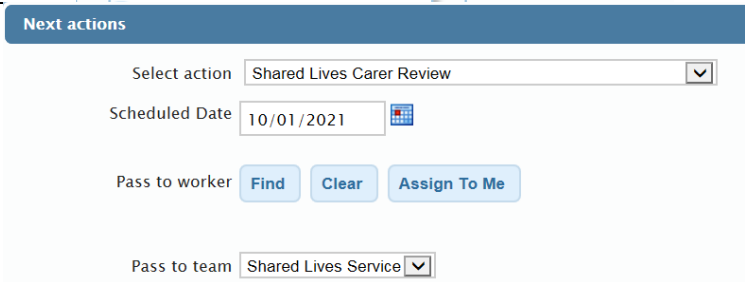
### f) Choose next actions

#### Complete section 2: 'Actions taken'



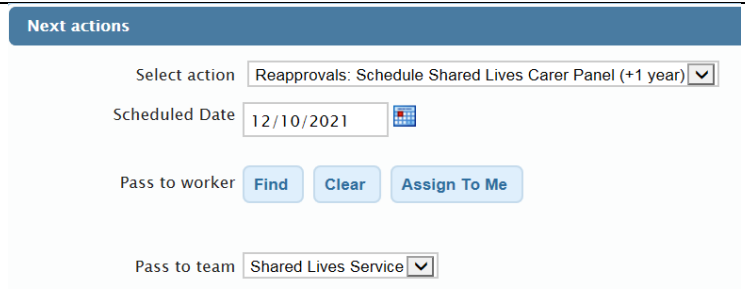
#### Schedule first review

- Select 'Shared Lives Carer Review'
- Pass to worker **OR** team
- This will automatically be scheduled for 3 months but can be adjusted accordingly
- Click 'Add'

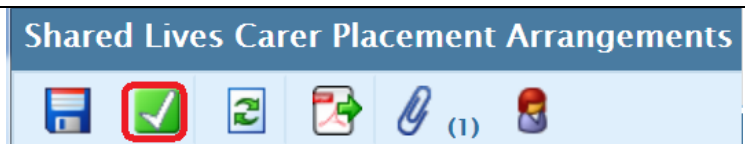


#### Schedule panel for 12 month reapproval

- Select 'Reapprovals: Schedule Shared Lives Carer Panel (+1 year)'
- Pass to worker **OR** team
- This will automatically be scheduled for 12 months but can be adjusted accordingly
- Click 'Add and Close'



#### Finish workflow step



**2 – Visits [Shared Lives Link Worker]**

**a) Record outcome of visit**

Click on 'Visits' in 'Current Work'

- Click house icon
- Click 'Complete Visit'

Current Work

Type	Title	Subject (ID)
Incomplete Work [1]		
Visits [1]	Visit on 26/10/2020 at 10:00	Mark Test (2138434)

Amend Visit

**Complete Visit**

Update the details of the visit only if there were any changes to the original schedule.

**Visit plan**  
 Planned Date: 26/10/2020      Planned Time: 10:00

**Visit status**  
 Took Place       Did Not Take Place

**Visit details**  
 Actual Date \* 26/10/2020      Actual Time \* Enter as 24 hour clock e.g. 15:30 10:00  
 Visit Type Shared Lives Scheduled Visit  
 Reason not at planned time  
 Subject was seen alone

**Visit did not take place**  
 Reason

**b) Add case note to visit**

Add a note regarding the visit:

- Click 'Create Case Note'

**Create Case Note** Save Cancel

- Add Title
- Select 'Type of Note': 'Shared Lives Carer Visit'
- Date and Time are automatically linked to the visit
- Add the detail in the 'Note' field
- Click 'Finish'

Title (max. 100 letters) \* Shared Lives First Visit

Type of Note \* Shared Lives Carer Visit

Date 26/10/2020

Time (Enter as 24 hour clock e.g. 15:30) 10:00

Save and Continue **Finish** Cancel



### c) Schedule next visit

Add details of 'Next Visit'

- Click 'Save'
- Click 'OK'

#### Next Visit

**Next visit Details**

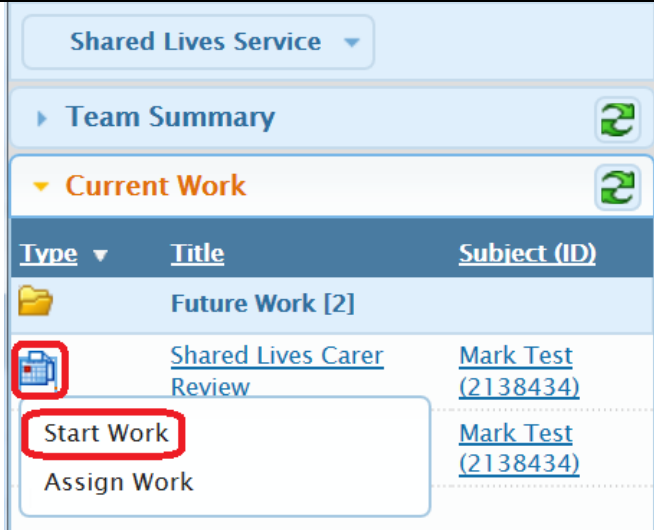
Date	<input type="text" value="02/11/2020"/> 	Time	<input type="text" value="11:00"/>
		<small>Enter as 24 hour clock e.g. 15:30</small>	
Pass to Team	<input type="text"/>	<input type="button" value="Find"/>	<input type="button" value="Clear"/>
Pass to Worker	<input type="text" value="Deni Nygate"/>	<input type="button" value="Find"/>	<input type="button" value="Clear"/>
Visit Type	<input type="text" value="Shared Lives Scheduled Visit"/> 		

**3 – Reviews [Shared Lives Link Worker]**

**a) Start 'Review' workflow in carer record**

- NB. The first review is scheduled for 3 months and subsequently every 12 months.
- The Review workflow steps will initially appear in the 'Future Work' but will move to 'Incoming Work' 7 days before they are due.
- However, they can be started in Mosaic at any point accordingly.

- From 'Incoming/Future Work' folder
- Find '**Shared Lives Carer Review**' step for relevant carer record
  - Click clipboard/calendar icon
  - Click 'Start Work'



Review/update sections 1-10 of the Carer Review Form

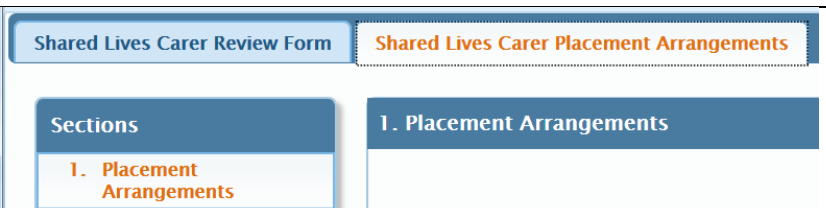
NB. Where relevant, data will prepopulate from the latest completed form from either the 'Shared Lives Carer Profile' or 'Shared Lives Carer Review'.



Complete section 11: Details of Review

11. Details of Review

Complete the Placement Arrangements form (see separate guide)



b) Choose next actions	
Complete section 12: 'Actions taken'	<div style="border: 1px solid #ccc; padding: 5px;"> <div style="background-color: #e6f2ff; padding: 2px; margin-bottom: 2px;">✓ 11. Details of Review</div> <div style="background-color: #fff9c4; padding: 2px; margin-bottom: 2px;">12. Actions Taken</div> </div>
Schedule first review <ul style="list-style-type: none"> <li>• Select 'Shared Lives Carer Review'</li> <li>• Pass to worker <b>OR</b> team</li> <li>• This will automatically be scheduled for 12 months but can be adjusted accordingly</li> <li>• Click 'Add and Close'</li> </ul>	<div style="border: 1px solid #ccc; padding: 5px;"> <div style="background-color: #005596; color: white; padding: 2px;"><b>Next actions</b></div> <div style="padding: 5px;"> <p>Select action <input style="width: 100%;" type="text" value="Shared Lives Carer Review"/></p> <p>Scheduled Date <input style="width: 100%;" type="text" value="12/10/2021"/> </p> <p>Pass to worker <span style="margin-left: 10px;"><input type="button" value="Find"/></span> <span style="margin-left: 10px;"><input type="button" value="Clear"/></span> <span style="margin-left: 10px;"><input type="button" value="Assign To Me"/></span></p> <p>Pass to team <input style="width: 100%;" type="text" value="Shared Lives Service"/></p> </div> </div>
If a placement has ended: <ul style="list-style-type: none"> <li>• Select 'NFA - Shared Lives'</li> <li>• Click 'Add and Close'</li> </ul>	<div style="border: 1px solid #ccc; padding: 5px;"> <div style="background-color: #005596; color: white; padding: 2px;"><b>Next actions</b></div> <div style="padding: 5px;"> <p>Select action <input style="width: 100%;" type="text" value="NFA - Shared Lives"/></p> </div> </div>
If a carer has been deapproved <ul style="list-style-type: none"> <li>• Select 'Shared Lives Carer removed from Register' [as well as NFA above]</li> </ul>	<div style="border: 1px solid #ccc; padding: 5px;"> <div style="background-color: #005596; color: white; padding: 2px;"><b>Next actions</b></div> <div style="padding: 5px;"> <p>Select action <input style="width: 100%;" type="text" value="Shared Lives Carer removed from Register"/></p> </div> </div>

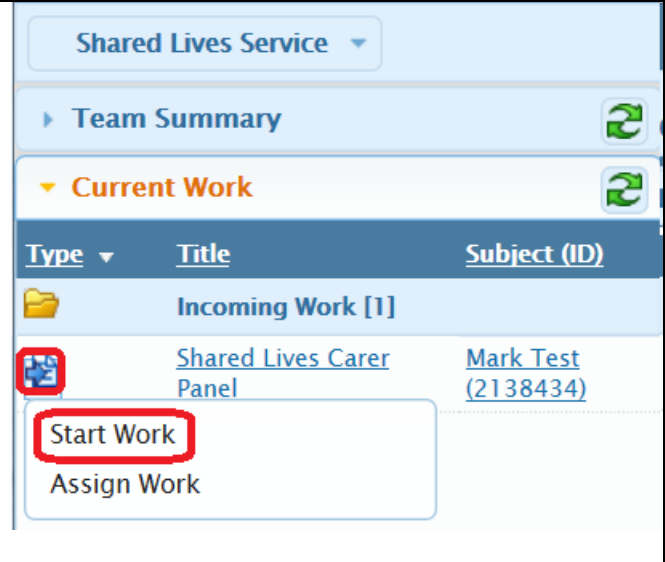
c) Management sign-off	
Repeat sign-off process from Initial Visit	
NB. If the Review coincides with a Panel decision, save and close the workflow until the panel outcome is determined.  If the panel require further information, resume the workflow and update the form accordingly.	
Once the panel has reapproved the carer, finish the workflow step	<div style="border: 1px solid #ccc; padding: 5px;"> <div style="background-color: #005596; color: white; padding: 2px;"><b>Shared Lives Carer Review : Mark Test (2138434)</b></div> <div style="padding: 5px;">       (0)                      </div> </div>

**4 – Carer Panel [Shared Lives Admin]**

**a) Start/record ‘Panel’ workflow**

From ‘Incoming Work’ folder

- Find ‘Shared Lives Carer Panel’ step for relevant carer record
- Click clipboard icon
- Click ‘Start Work’



Complete section 1: Panel Details

- NB. This can be completed in advance of the panel



NB – for ‘Reason for presenting to panel’, select ‘Re-approval’ if no changes are being made to the placement

Reason for presenting to panel\*

New approval
  Re-approval
  Variation to arrangement
  De-approval
  Other (please specify below)

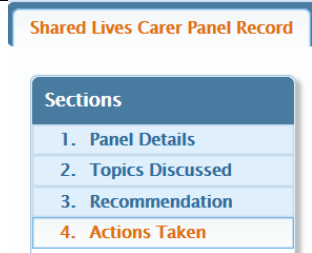
Complete section 2 and 3 (see previous guide)

**b) Signature from chair** (see previous guide)

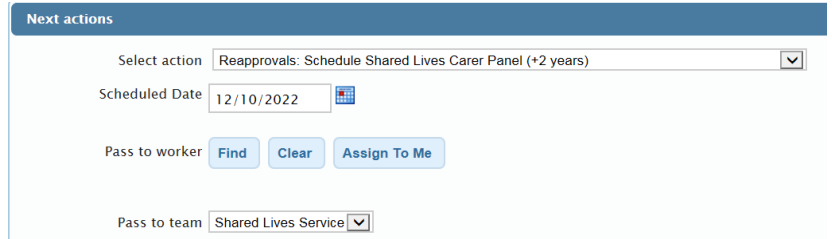


**c) Choose next actions**

Complete section 4: 'Actions taken'

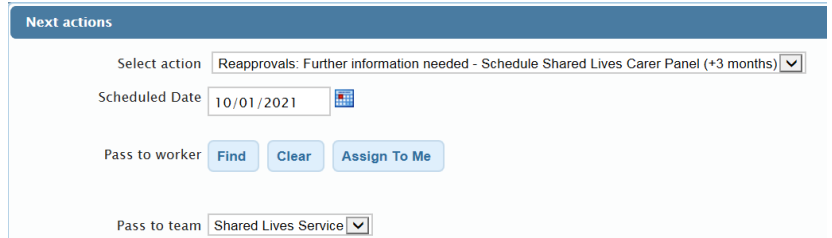


- If panel has **reapproved** as a carer:
- Select 'Reapprovals: Schedule Shared Lives Carer Panel' [either +2 or +3 years, accordingly]
  - Pass to worker **OR** team:



- If panel has requested **further information**:
- Select 'Reapprovals: Further information needed – Schedule Shared Lives Carer Panel (+3 months)'
  - Pass to worker/team etc

NB. The Review workflow should be updated with any additional information before returning to panel



- If panel has deapproved the carer/ended the placement:
- select '**NFA – Shared Lives**'



**d) Management sign-off**

Repeat sign-off process from Initial Visit

Finish the workflow step

**Shared Lives Carer Panel : Mark Test (2138434)**

