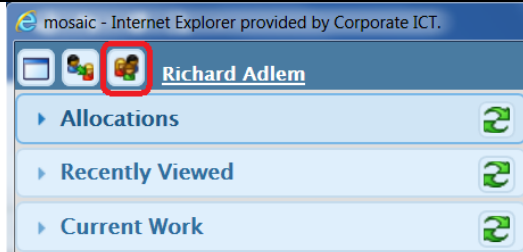


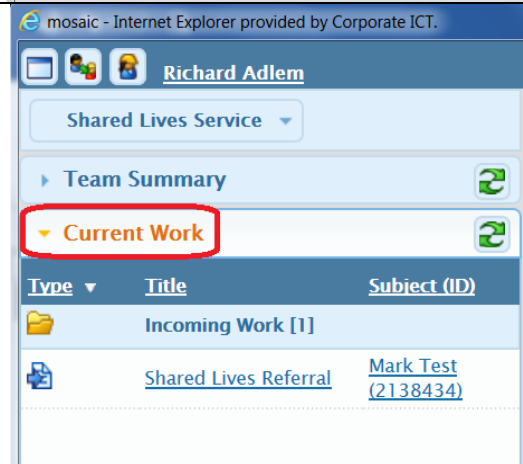
1 – Referral Management [Shared Lives Admin]

a) Find new referrals

Select 'Team workview'



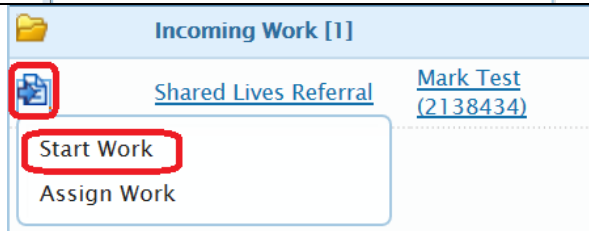
Check 'Current Work' folder



Start workflow step

NB. If you start this from the Team folder a message will appear to confirm that it will be assigned to you.

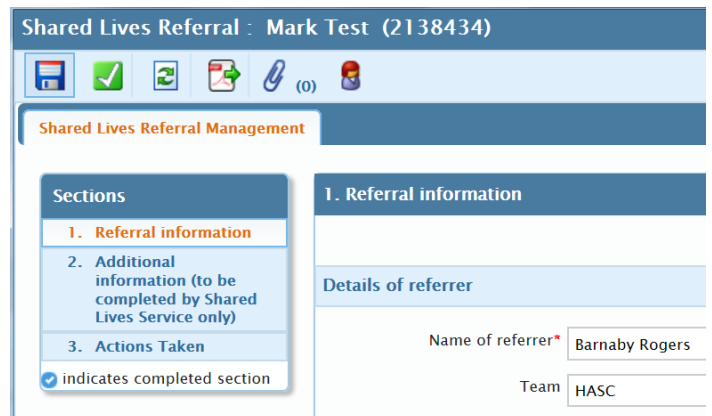
- Click 'Yes'



b) Review referral information

Check section 1: Referral information

- Review information from practitioner



Complete section 2: Additional information

- If any information in the referral form needs clarification, section 2 can be used to add any further notes

The screenshot shows the 'Shared Lives Referral Management' interface. On the left, a 'Sections' sidebar lists: 1. Referral information, 2. Additional information (to be completed by Shared Lives Service only), and 3. Actions Taken. A blue checkmark icon indicates completed sections. The main area is titled '2. Additional information (to be completed by Shared Lives Service only)' and contains a large text input field labeled 'Additional information'. Below the field is a checkbox labeled 'Section completed'.

c) Choose next actions

Complete 'Actions Taken':

- Click 'Add'

The screenshot shows the '3. Actions Taken' section of the 'Shared Lives Referral Management' interface. The 'Sections' sidebar on the left has '3. Actions Taken' highlighted with a red box. The main area is titled '3. Actions Taken' and contains a table with the heading 'Next Actions'. The table has columns: Next action, Assigned to, Reason, Note, Priority, and Status. An 'Add' button with a green plus icon is located at the bottom right of the table area.

If person is not suitable for referral:

- Select 'NFA – Shared Lives'
- Choose one of the reasons

The screenshot shows the 'Next actions' dropdown menu. The 'Select action' dropdown is set to 'Shared Lives referral declined'. The 'Reason*' dropdown is open, showing options: '-- Please Select --', 'Does not meet criteria: Challenging behaviour', 'Does not meet criteria: Risk to others', 'Does not meet criteria: Sleeping patterns', and 'Other (Please specify below)'. The 'Note' field is empty.

If the person is suitable:

- Select 'Referral accepted: progress to Shared Lives Conversation'
- Assign to team
- Click 'Add and Close'

The screenshot shows the 'Next actions' dropdown menu. The 'Select action' dropdown is set to 'Referral accepted: progress to Shared Lives Conversation'. The 'Pass to team' dropdown is set to 'Shared Lives Service'. At the bottom, there are three buttons: 'Add', 'Add and Close' (highlighted with a red box), and 'Close'.

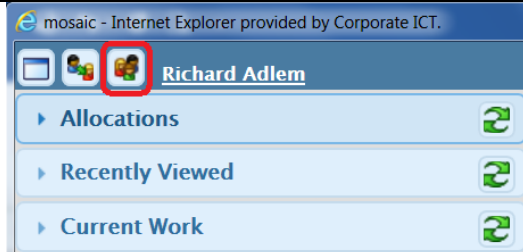
Finish the workflow step

The screenshot shows the 'Shared Lives Referral : Mark Test' toolbar. It contains several icons: a folder, a green checkmark in a red box (highlighted), a refresh icon, a document with a green arrow, a paperclip, '(0)', and a person icon.

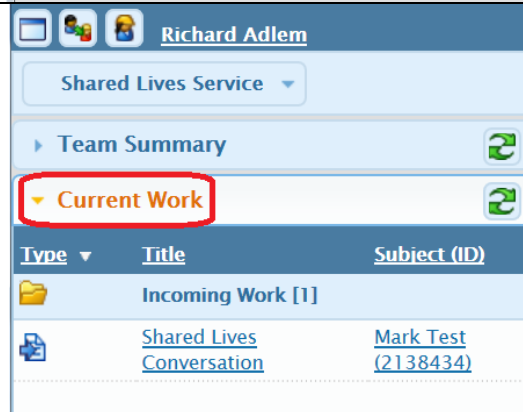
2 – Conversation [Shared Lives Link Worker]

a) Find/start ‘Conversations’

Select ‘Team workview’



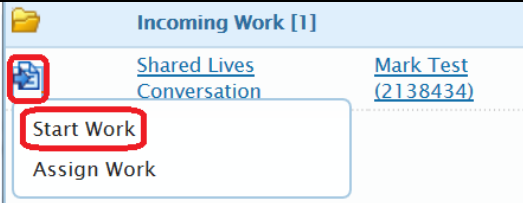
Check ‘Current Work’ folder



Start workflow step

NB. If you start this from the Team folder a message will appear to confirm that it will be assigned to you.

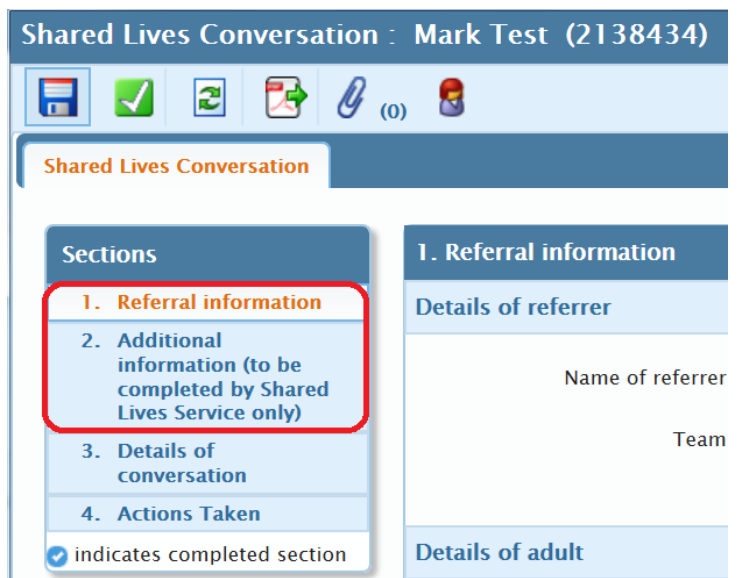
- Click ‘Yes’



b) Review referral information

Check sections 1 and 2

- Review information from practitioner and additional notes from Shared Lives admin



c) Record details of conversation

Arrange meeting/conversation with person, advocate and practitioner

Complete section 3: Details of conversation

The screenshot shows the 'Shared Lives Conversation' form. On the left, a 'Sections' sidebar lists: 1. Referral information, 2. Additional information (to be completed by Shared Lives Service only), 3. Details of conversation (highlighted with a red box), and 4. Actions Taken. A blue checkmark icon indicates a completed section. On the right, the '3. Details of conversation' section is active, showing fields for 'Name of link worker*' (filled with 'Barnaby Rogers Acting'), 'Date of conversation*' (with a calendar icon), and 'Accommodation and personal support needs'.

d) Choose next actions

Complete section 4: 'Actions Taken':

- Click 'Add'

The screenshot shows the 'Sections' sidebar from the previous step. The '4. Actions Taken' section is now highlighted in orange, indicating it is the current step in the workflow.

If person is not suitable for Shared Lives:

- Select 'NFA – Shared Lives'
- Choose one of the reasons

The screenshot shows the 'Next actions' form. The 'Select action' dropdown is set to 'Shared Lives referral declined'. The 'Reason*' dropdown is open, showing options: '- Please Select -', 'Does not meet criteria: Challenging behaviour', 'Does not meet criteria: Risk to others', 'Does not meet criteria: Sleeping patterns', and 'Other (Please specify below)'. The 'Note' field is empty.

If the person is suitable:

- Select 'Shared Lives Matching'
- Assign to team
- Click 'Add and Close'

The screenshot shows the 'Next actions' form. The 'Select action' dropdown is set to 'Shared Lives Matching'. The 'Pass to team' dropdown is set to 'Shared Lives Service'. At the bottom, three buttons are visible: 'Add', 'Add and Close' (highlighted with a red box), and 'Close'.

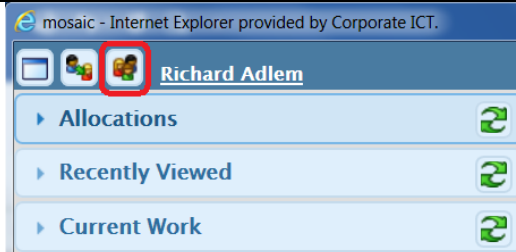
Finish the workflow step

The screenshot shows the 'Shared Lives Conversation : Mark Test' toolbar. It contains several icons: a folder, a green checkmark in a square (highlighted with a red box), a refresh icon, a document with a green arrow, a paperclip, '(0)', and a person icon.

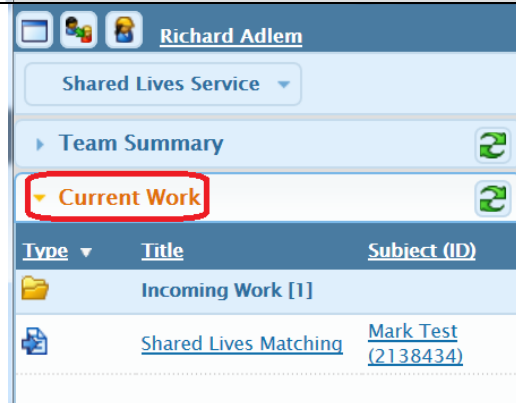
3 – Matching [Shared Lives Link Worker]

a) Find/start 'Matching' workflow

Select 'Team workview'



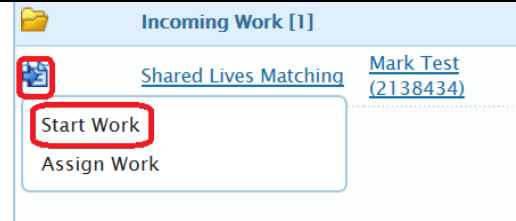
Check 'Current Work' folder



Start workflow step

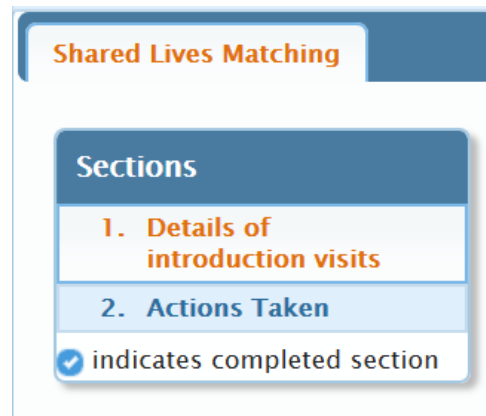
NB. If you start this from the Team folder a message will appear to confirm that it will be assigned to you.

- Click 'Yes'

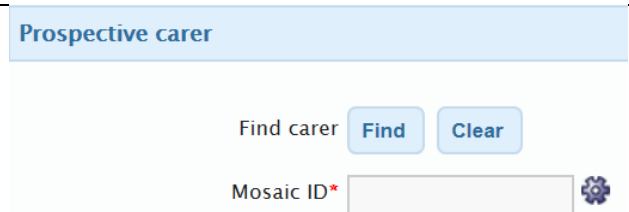











b) Record details of first visit

Complete section 1: Details of introduction visits












Find carer record and pull Mosaic ID into form



<p>Select type of placement</p>	<p>Type of placement*</p> <p><input type="radio"/> Long term <input type="radio"/> Respite</p>
<p>Record details of first visit</p>	<p>Introduction visit details – 1*</p> <p>Location of visit <input type="text"/></p> <p>Date of visit <input type="text"/> </p> <p>Duration of visit <input type="text"/></p> <p>Is there already another person placed at the property?</p> <p><input type="radio"/> Yes <input type="radio"/> No</p>
<p>Save and close workflow until next visit</p>	<p>Shared Lives Matching : Mark Test (2138434)</p> <p>      (0) </p> <p>Shared Lives Matching</p> <p></p>

c) Record details of subsequent visit/s

<p>Check 'Incomplete Work' folder</p> <ul style="list-style-type: none"> • Click pencil icon • Click Resume Work 	<p>Richard Adlem</p> <p>▸ Allocations </p> <p>▸ Recently Viewed </p> <p>▼ Current Work </p> <table border="1"> <thead> <tr> <th>Type ▾</th> <th>Title</th> <th>Subject (ID)</th> </tr> </thead> <tbody> <tr> <td></td> <td>Incomplete Work [1]</td> <td></td> </tr> <tr> <td></td> <td>Shared Lives Matching</td> <td>Mark Test (2138434)</td> </tr> </tbody> </table> <p>Resume Work</p> <p>Assign Work</p>	Type ▾	Title	Subject (ID)		Incomplete Work [1]			Shared Lives Matching	Mark Test (2138434)
Type ▾	Title	Subject (ID)								
	Incomplete Work [1]									
	Shared Lives Matching	Mark Test (2138434)								

<p>Scroll down to the bottom of section 1</p> <ul style="list-style-type: none"> Insert Section 	<p>Next steps xxx</p> <p>Date of next visit (if appropriate) 09/10/2020</p> <p>Insert Section</p>
<p>Record details of second/subsequent visit/s</p>	<p>Insert Section Delete Section</p> <p>Introduction visit details – 2*</p> <p>Location of visit</p> <p>Date of visit</p> <p>Duration of visit</p> <p>Is there already another person placed at the property?</p> <p><input type="radio"/> Yes <input type="radio"/> No</p>
<p>Save and close workflow until next visit</p> <p><u>NB. Repeat this process as many times as required</u></p>	<p>Shared Lives Matching : Mark Test (2138434)</p> <p>Shared Lives Matching</p> <p></p>
<p>If matching is unsuccessful, jump to ‘e’</p>	

d) Complete Arrangement Agreement form [If matching is successful]

<p>Click on ‘Forms and letters’</p> <ul style="list-style-type: none"> Select ‘Shared Lives Arrangement Agreement’ 	<p>Shared Lives Matching : Mark Test (2138434)</p> <p>Shared Lives Matching</p> <p>Optional Forms and Letters</p> <p>Forms</p> <p>Shared Lives Arrangement Agreement</p> <p>Sections</p> <p>1. Details of introduction visits</p> <p>2. Actions Taken</p> <p>1. Shared Lives Arrangement Agreement</p> <p>(Name of Person) Mark Test</p> <p>(Home Address of Person) 5 Pancras Square London N1C 4AG</p>
---	---

Complete form

- Find carer details
- Find Shared Lives Link Worker details
- Find Social Worker/Practitioner details

(Name(s) of Shared Lives carer (s))

(Name(s) of Shared Lives carer (s))

(Address of Shared Lives carer (s))

(Name of Shared Lives worker)

(Name of Shared Lives worker)

(Name of Care Manager/Social worker or equivalent)

(Name of Care Manager/Social worker or equivalent)

Complete remaining subsections:

- Shared Lives Arrangement Agreement
- Shared Lives arrangement fees
- Sharing or visiting the Shared Lives carers' home
- Ending the Shared Lives arrangement

Arrange electronic signatures

Signature of Parties to the Arrangement Agreement

Person

Signature



NB. If electronic signatures are not possible, the form can be converted to PDF and emailed/printed and then scanned/uploaded to Mosaic using the paperclip icon.

Shared Lives Matching : Mark Test (2138434)

(0)

Output Options

Set font size using slider

100

Include...

Guidance and prompts

Output for written completion (empty textareas are expanded)

Headers and footers

e) Choose next actions

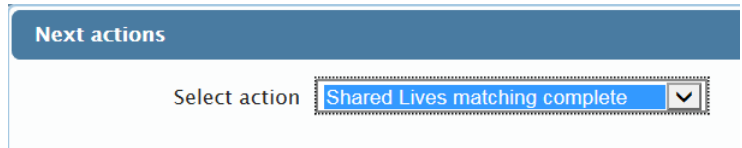
Complete section 2: 'Actions Taken':

- Click 'Add'



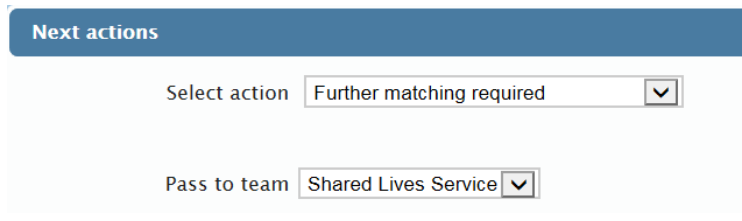
1) If matching is successful:

- Select 'Shared Lives matching complete'
- Click 'Add and Close'



2) If matching is unsuccessful **BUT** the person agrees to matching with another prospective carer:

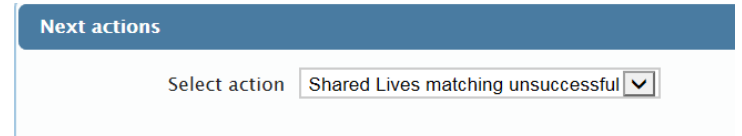
- Select 'Further matching required'
- Assign to team
- Click 'Add and Close'



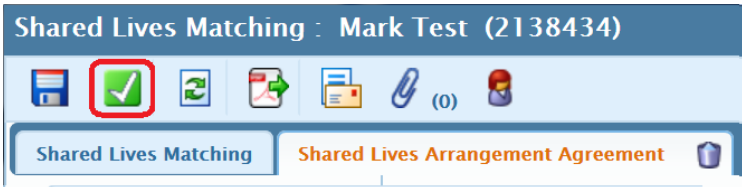
NB. Repeat process from beginning

3) If matching is unsuccessful and no further matching is required:

- Select 'Shared Lives matching unsuccessful'
- Click 'Add and Close'



Finish the workflow step



Contact practitioner to confirm decision and ensure they:

- update the support plan/review and**
- where appropriate, send a purchasing request to the ASC Purchasing Team to set up the Shared Lives service**