1 – Carer Enquiries [Shared Lives Admin Worker]

| a) Create person record	

Check person record does not already exist
   o   People
   o   Find person
   o   Enter details
   o *Confirm person record does not exist*	

Add new person record, including as much detail as known
   o   Name/s
   o   DOB
   o   Address
   o Any other contact/demographic information provided	

Update 'Class' o 'Shared Lives Applicant' NB. This ensures the records can be distinguished from other case records more easily in reporting	
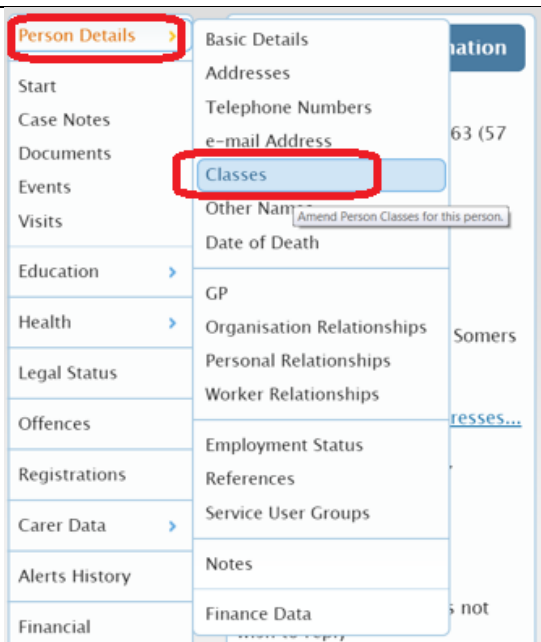
b) Start enquiry

Start workflow step: **Shared Lives Carer Enquiry**	
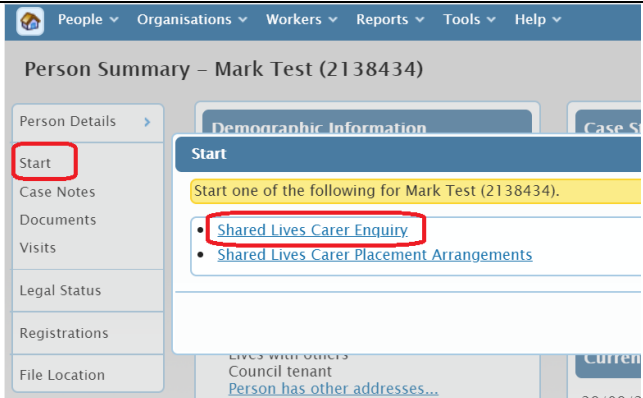
c) Discuss 'Privacy Notice' and record confirmation

Go to 'Privacy Notice' o Complete section at the bottom	
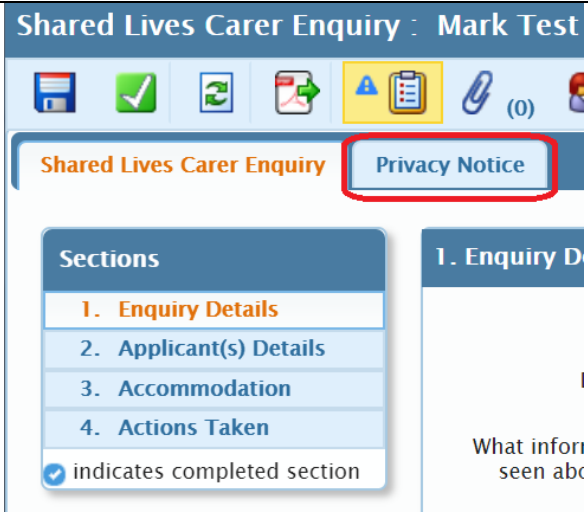
Please confirm you have made every reasonable attempt to issue a copy, explain or make the person aware of the Council's Privacy Notice.

If the person lacks capacity to understand the Privacy Notice, this can be achieved via their advocate or legal representative.

☑ Yes   ☐ No

Please give details* | Test

Date* | 05/10/2020

d) Record details of enquiry

Go to 'Shared Lives Carer Enquiry'	

Complete section 1: Enquiry Details

Complete section 2: Applicant Details

NB. Any fields with a ⚙ prepopulate with data from the person record;
If it is missing:
- o   save/close the form
- o   update the person record;
- o   resume the workflow step and the data will appear

Sections	2. Applicant(s) Details			
1. Enquiry Details				*indicates required field
2. Applicant(s) Details			Applicant(s) Details	
3. Accommodation	**Surname**	**First name**	**DOB**	**Age**
4. Actions Taken	Test	Mark	20/08/1963	57
● indicates completed section				🔑 Find

Contact details

Mark Test

Telephone number(s) Home 02081234567   ⚙

Email address test@test.com   ⚙

To add records to a table as below, click 'Find':

Children under 18 living in your household

Surname	First name/s	Sex	DOB	Age	Relationship
					🔑 Find

Adults (including grown-up children) living in your household

Surname	First name/s	Sex	DOB	Age	Relationship
					🔑 Find

If the other person exists as a record of its own in Mosaic (e.g. someone who will be a support carer), you can use 'Find Person' to search for the record.

Otherwise, choose 'Manual Input' to enter the details into the form.

NB. You cannot create/update a person record from within a form.

Find Party

Find Person	**Manual Input**

Last Name**#** [   ]

First Name(s) [   ]

Complete section 3: Accommodation

Sections	3. Accommodation
1. Enquiry Details	**Accommodation**
2. Applicant(s) Details	
3. Accommodation	**Type of accommodation**
4. Actions Taken	○ Rented ○ Owned
● indicates completed section	**Property Type**
	○ Flat ○ House ○ Other

Further information [   ]

Number of bedrooms [   ]

How long have you lived at this address? [   ]

e) Choose next actions

Complete 'Actions Taken':
- o   Click 'Add'

Sections
1. Enquiry Details
2. Applicant(s) Details
3. Accommodation
4. Actions Taken
✓ indicates completed section

4. Actions Taken					
Next Actions					
Next actions					
Next action	**Assigned to**	**Reason**	**Note**	**Priority**	**Status**
					≣Add

If person does not wish to proceed at this point [e.g only wanting more info] – select '**NFA – Shared Lives**'

Next actions

Select action   -- Please Select --   ▼
                   -- Please Select --
                   Shared Lives Carer Initial Visit
Note   NFA - Shared Lives

Priority
○ 🅰 Urgent   ● 📄 Normal   ○ 🔖 Low

If person wishes to/is suitable to proceed: choose '**Shared Lives Carer Initial Visit'**
- o   Pass to worker OR team:
- o   NB. this can be assigned to a named worker [Find] or the team folder [Pass to Team]
- o   Click 'Add and Close'

Next actions

Select action   [Shared Lives Carer Initial Visit ▼]

Pass to worker   [Find] [Clear] [Assign To Me]

Pass to team   [Shared Lives Service ▼]

Note   [   ]

Priority
○ 🅰 Urgent   ● 📄 Normal   ○ 🔖 Low

[Add] [Add and Close] [Close]

Finish the workflow step

Shared Lives Carer Enquiry : Mark Test (2138434)

💾 ✅ 🔁 📤 📋 📎 (0) 🧑

| **Shared Lives Carer Enquiry** | **Privacy Notice** |

2 – Carer Initial Visit [Shared Lives Link Worker]

a) Start 'Visit' workflow step	

From 'Incoming Work' folder
- o Find 'Shared Lives Care Initial Visit' step for relevant carer record
- o Click clipboard icon
- o Click 'Start Work'

NB. If you start this from the Team folder the below message will appear to confirm that it will be assigned to you.
1. Click 'Yes'

b) Record details of Initial Visit

Check section 1: Applicant Details
2. NB. All fields are prepopulated from the main record; updates can only be applied to the main person record

Shared Lives Carer Initial Visit

Sections

1. Applicant Detail(s)
2. Visit Details
3. Summary and Recommendation
4. Actions Taken

Complete section 2: Visit Details
3. NB. Any fields that appeared in the Enquiry step will prepopulate but can also be amended accordingly

| Shared Lives Carer Initial Visit | Letter: Shared Lives Carer Reference Request |

Sections

1. Applicant Detail(s)
2. **Visit Details**
3. Summary and Recommendation
4. Actions Taken

✔ indicates completed section

Date of visit*   06/10/2020

Name of worker*   Barnaby Rogers Acting for Richard Adlem

Accommodation

Type of accommodation*
○ Rented   ● Owned

Property type*
○ Flat   ● House   ○ Other

Do you have a spare room?*
○ Yes   ○ No

Complete section 3: Summary and Recommendation

| Shared Lives Carer Initial Visit | Letter: Shared Lives Carer Reference Request |

Sections

1. Applicant Detail(s)
2. Visit Details
3. **Summary and Recommendation**
4. Actions Taken

✔ indicates completed section

3. Summary and Recommendation

Link worker views
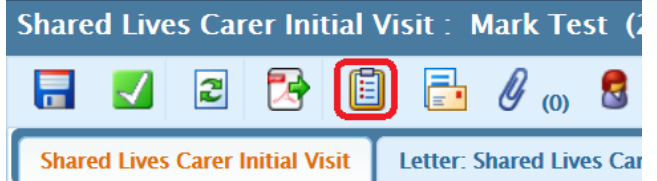
Strengths *

Issues to overcome*

Recommendations*

☐ Link worker signature

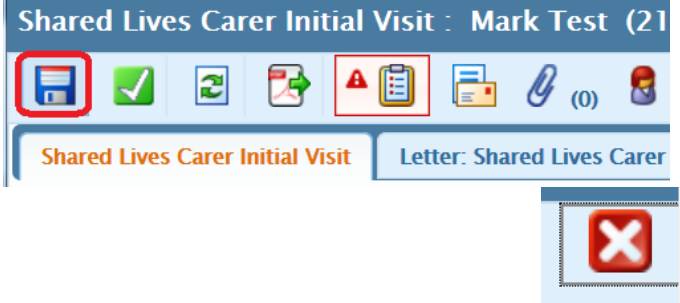|	
c) Management sign-off	
Click 'Requests'	

Select 'Please review information and confirm next action'
   o Pass to worker: Find 'Richard Adlem'
   o Click 'OK'	

Save the workflow step to send the request and then close	

Manager	

Check 'Current Work' folder
   o Incoming Requests
   o Click the clipboard icon
   o Resume Work
   o Review the contents of the form and next actions	
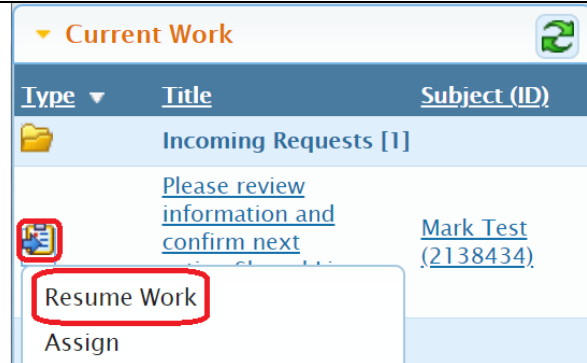
Complete 'Manager' part within section 3 of the form	

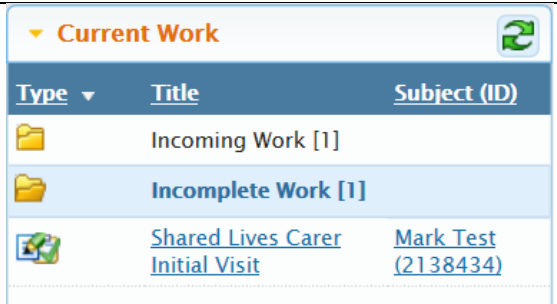|	
Click on the 'Requests' icon o Select the request	Shared Lives Carer Initial Visit : Mark Test (2138434) Shared Lives Carer Initial Vis ▲ ▣ Please review information and confirm next action (**Required**) – 09/10/2020 (Richard Adlem)
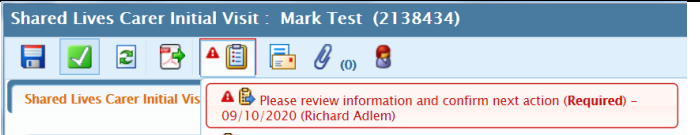
o   If the content is complete/agreed – select 'Completed'
   o   If anything requires updating, select 'Returned'
   o   Enter any detail in the 'Note' field as appropriate
   o   Click 'OK'
 	
Sent Request
 	
Request Id: 830999
Request Type: Please review information and confirm next action (**Required**)
 	
ⓘ You may Complete, Withdraw or Return the request, change the Note or Reassign to another party.
 	
Status
◉ Sent   ○ Withdrawn   ○ Completed
○ Returned
 	
Note	
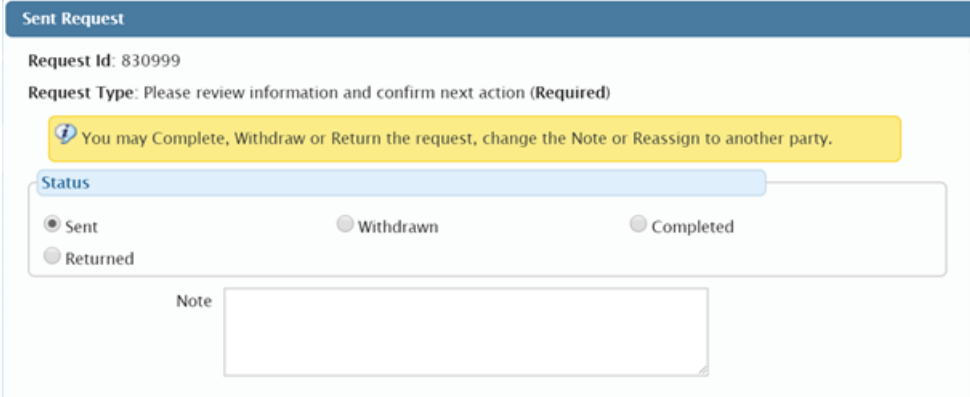
Save the workflow step to send the request and then close	Shared Lives Carer Initial Visit : Mark Test (21... Shared Lives Carer Initial Visit Letter: Shared Lives Carer

Shared Lives Admin Worker	
Check 'Incomplete Work' folder o The green tick indicates that the manager has completed their part	▼ **Current Work** **Type** ▼ **Title** **Subject (ID)** 📁 Incoming Work [1] 📂 **Incomplete Work [1]** 📝 Shared Lives Carer Initial Visit Mark Test (2138434)
Resume the workflow	📂 **Incomplete Work [1]** 📝 Shared Lives Carer Initial Visit Mark Test (2138434) Resume Work Assign Work
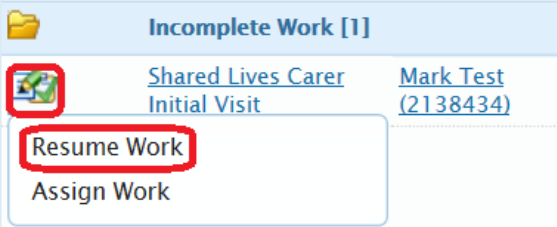
d) Choose next actions

Complete 'Actions Taken':
- o   Click 'Add'

Shared Lives Carer Initial Visit	Letter: Shared Lives Carer Reference Request

Sections

	4. Actions Taken
1. Applicant Detail(s)	**Next Actions**
2. Visit Details	
3. Summary and Recommendation	
4. Actions Taken	Next actions
☑ indicates completed section	

Next action	Assigned to	Reason	Note	Priority	Status

🗐 Add

If person is not suitable/does not wish to proceed at this point – select '**NFA – Shared Lives**'	

If person wishes to/is suitable to proceed:
1. Shared Lives Carer Application
4. Pass to worker OR team:
5. NB. this can be assigned to a named worker [Find] or the team folder [Pass to Team], depending on who will be completing the step
- Click 'Add and Close' for the last action

Next actions

Select action [Shared Lives Carer Application ▼]

Pass to worker [**Find**] [**Clear**] [**Assign To Me**]

Pass to team [Shared Lives Service ▼]

Note [   ]

Priority

○ 🅰 Urgent   ◉ 📄 Normal   ○ 📄 Low

[**Add**] [**Add and Close**] [**Close**]

Finish the workflow step	**Shared Lives Carer Initial Visit** 💾 ✅ 🔁 📄 ⚠️🗒️

3.i – Carer Application [Shared Lives Link Worker]

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a) Start/record 'Application' workflow

From 'Incoming Work' folder 　○　Find 'Shared Lives Carer Application' step for relevant carer record 　○　Click clipboard icon 　○　Click 'Start Work'	
Record all details from the application form into sections 1-7 NB. Data recorded within the Initial Visit form will prepopulate into sections of the application workflow; where relevant this can be updated	

---
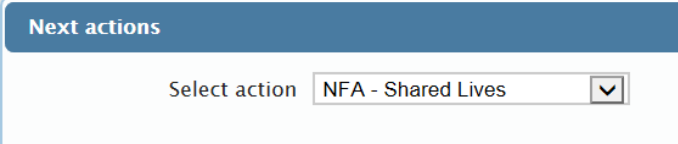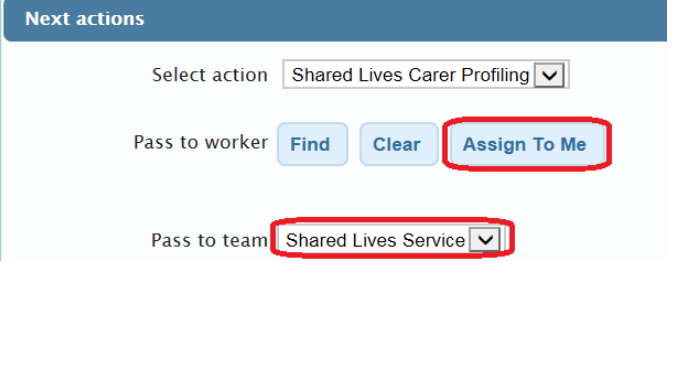
b) Choose next actions

Complete 'Actions Taken': 　○　Click 'Add'	

If person is not suitable/does not wish to proceed at this point – select '**NFA – Shared Lives**'	**Next actions** Select action NFA - Shared Lives
If person is suitable to proceed: 1. Select 'Shared Lives Carer Profiling' • Pass to worker **OR** team: • NB. this can be assigned to yourself [Assign to me] or the team folder [Pass to Team], depending on who will be completing the next step • Click 'Add' and repeat for 2 and 3 [click 'Add and Close' for the last action] 2. Shared Lives Carer Checks 3. Shared Lives Carer References	**Next actions** Select action Shared Lives Carer Profiling Pass to worker Find Clear **Assign To Me** Pass to team Shared Lives Service
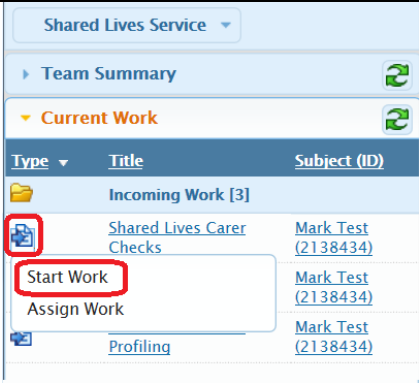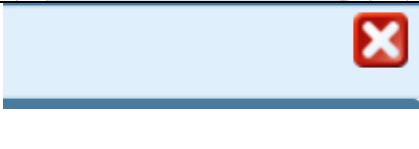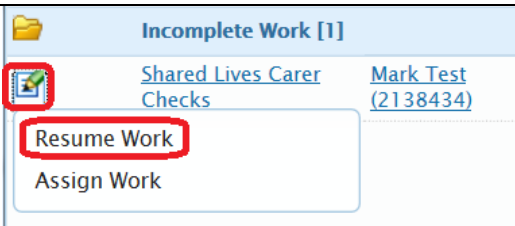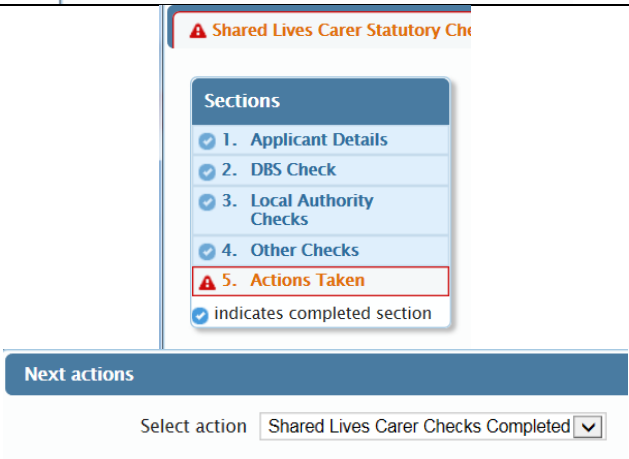
c) Management sign-off

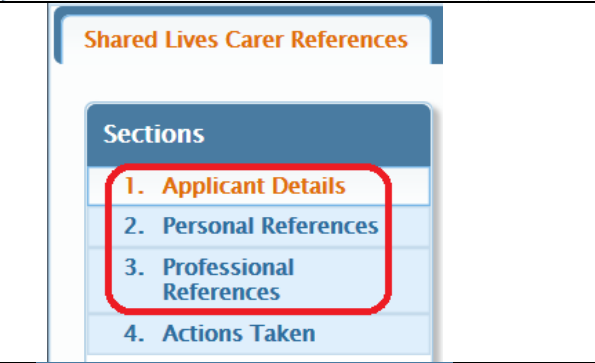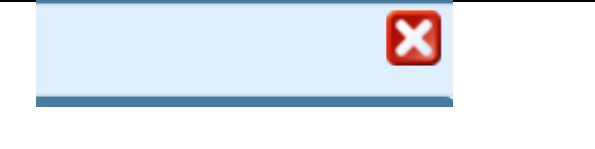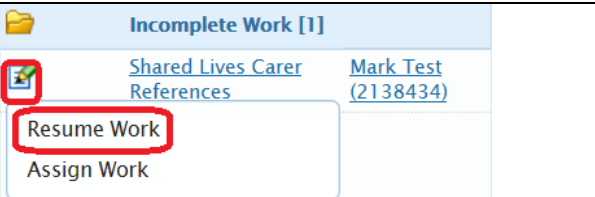| |
|---|
| Repeat sign-off process from Initial Visit |

d) Finish workflow step

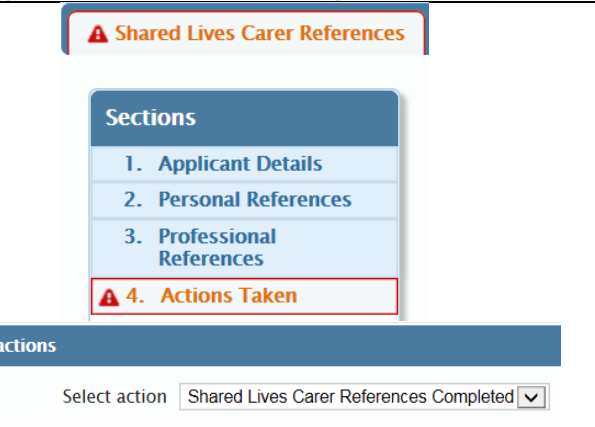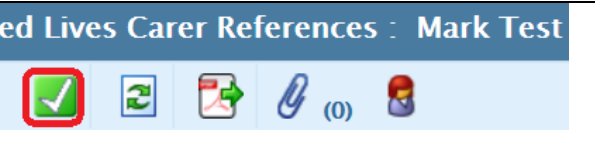|	
Finish the workflow step	**Shared Lives Carer Application : Mark Test**
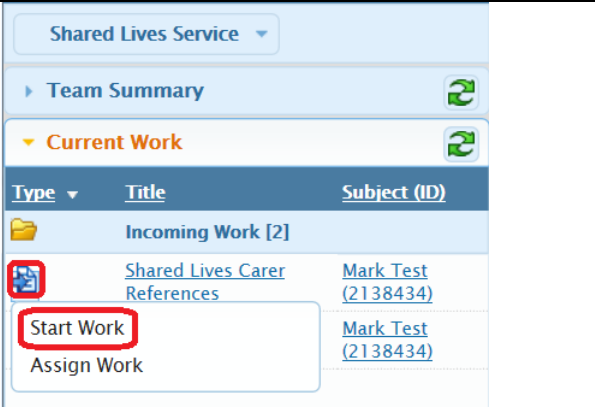
3.ii – Carer Checks [Shared Lives Admin]

| a) Record 'Checks'	

From 'Incoming Work' folder
   o Find 'Shared Lives Carer Checks' step for relevant carer record
   o Click clipboard icon
   o Click 'Start Work'	

Complete sections 1-4 with as much information as possible	
Save and close workflow	

When further information is available:
   • Find workflow step in 'Incomplete Work' folder
   • Click clipboard icon
   • Select 'Resume Work'
   • Update sections 1-4 accordingly	

Add 'Actions taken'
   • Select 'Shared Lives Carer Checks Completed'
   • Click 'Add and Close'	

Finish step	

3.iii – Carer References [Shared Lives Admin]

a) Record 'References'	

From 'Incoming Work' folder
    o   Find 'Shared Lives Carer References' step for relevant carer record
    o   Click clipboard icon
    o Click 'Start Work'	

Complete sections 1-3 with as much information as possible NB. Details from the Application form will prepopulate into sections 2 and 3	
Save and close workflow	

When further information is available:
   • Find workflow step in 'Incomplete Work' folder
   • Click clipboard icon
   • Select 'Resume Work'
   • Update sections 1-3 accordingly	

Add 'Actions taken'
   • Select 'Shared Lives Carer References Completed'
   • Click 'Add and Close'	

Finish step	

4 – Carer Profile [Shared Lives Link Worker]

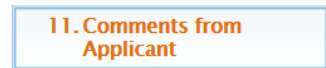| a) Start/record 'Profile' workflow	

From 'Incoming Work' folder
    o   Find 'Shared Lives Carer Profile' step for relevant carer record
    o   Click clipboard icon
    o Click 'Start Work'	
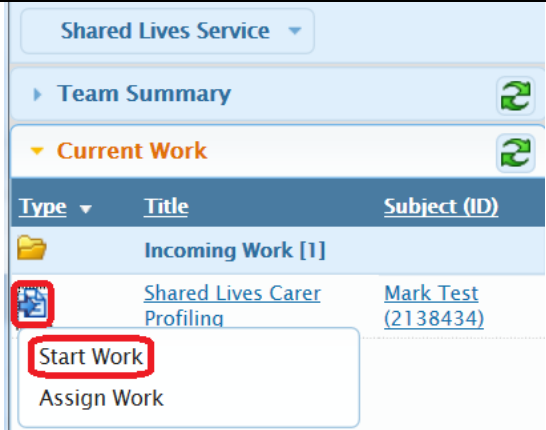
Following visits/conversations with the applicant, complete sections 1-10 of the profile form accordingly. NB. Some information recorded within the Application form will prepopulate into the Profile workflow and can be updated accordingly.	
Ensure the applicant has had sight of the information recorded in sections 1-10. • If they provide any comments, they can be recorded in section 11.	
• Tick to confirm they have seen the information and update the 'date' field. 	

Complete section 12:	12. Evidencing knowledge and skills of the applicant/s

Record assessor's view and evidence for all key areas
- Where and how Shared Lives carers live
- Personal skills
- Values
- Working with Shared Lives

Where and how Shared Lives carers live

Balance the needs and lifestyles of all people in the household

Assessor's view of applicant(s) knowledge and skills in this area*	x	Evidence the assessor has to support this view*	x

Complete section 13:	13. Shared Lives Support Officer's Summary and Recommendations
• Record summary and recommendation	

b) Choose next actions

Complete section 14 'Actions taken'	and Recommendations 14. Actions Taken

If person is not suitable/does not wish to proceed at this point – select '**NFA – Shared Lives**'	**Next actions** Select action NFA - Shared Lives

If person is proceeding to panel: 4. Select 'Shared Lives Carer Panel' 5. Pass to worker **OR** team: 6. NB. this can be assigned to yourself [Assign to me] or the team folder [Pass to Team], depending on who will be completing the next step	**Next actions** Select action Shared Lives Carer Panel Pass to worker Find Clear Assign To Me Pass to team Shared Lives Service

c) Management sign-off

Repeat sign-off process from Initial Visit

d) Finish workflow step

Finish the workflow step	Shared Lives Carer Profiling : Mark Test

5 – Carer Panel [Shared Lives Admin]

a) Start/record 'Panel' workflow	
From 'Incoming Work' folder o Find 'Shared Lives Carer Panel' step for relevant carer record o Click clipboard icon o Click 'Start Work'	Shared Lives Service ▾ ▸ Team Summary ▾ Current Work Type ▾ Title Subject (ID) 📁 Incoming Work [1] Shared Lives Carer Panel Mark Test (2138434) Start Work Assign Work
Complete section 1: Panel Details • NB. This can be completed in advance of the panel	Shared Lives Carer Panel Record Sections 1. Panel Details
Complete 'Reason for presenting to panel' Reason for presenting to panel* ◯ New approval ◯ Re-approval ◯ Variation to arrangement ◯ De-approval ◯ Other (please specify below)	
Record details of Shared Lives lead and Panel chair Shared Lives Officer presenting to panel ☐ Date of panel meeting 09/10/2020 Panel chairperson ☐	
Add all panel members to the table: • Click 'Find' Panel members present and in what capacity they are attending **Name** **Capacity** 🔍Find • Choose 'Find person' for applicant/support carer, if they have a record in Mosaic • Choose 'Find worker' for any member of Shared Lives Service with a Mosaic account • Choose 'Manual input' to record all other members Find Person Find Worker Manual Input	

Complete section 2: Topics discussed • This should be completed during the panel meeting This covers the following areas: 1. DBS 2. Personal references 3. Employer reference 4. Health management 5. HMRC registered 6. Household details / health & safety check 7. Car details 8. Family support 9. Community network 10. Commitment to training 11. Level of need/banding 12. Availability and support offered	**Shared Lives Carer Panel Record** **Sections** 1. Panel Details 2. Topics Discussed
Complete section 3: Recommendation	**Shared Lives Carer Panel Record** **Sections** 1. Panel Details 2. Topics Discussed 3. Recommendation

Select the appropriate outcome:
- NB. If the outcome is 'Approval with conditions', an extra box will appear to note the conditions
- A further text box is available for any general recommendations/actions

Panel recommends

○ Approval   ⦿ Approval with conditions   ○ Further information required

○ No approval

If approved with conditions, please state the conditions laid down by the panel

Are there any other recommendations/actions to follow up

b) Signature from chair

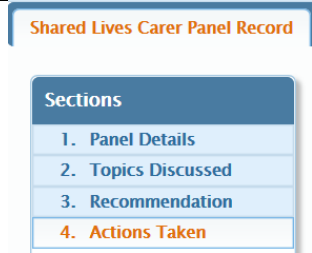|	
Output to PDF • Print/email/sign • Scan/upload using paperclip icon	**Shared Lives Carer Panel : Mark Test (2138434)**

Panel chairperson

Name	Date	Person ID
Mrs Chair	09/10/2020	2138434

Signature

c) Choose next actions

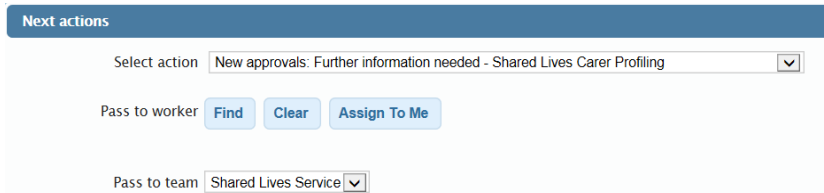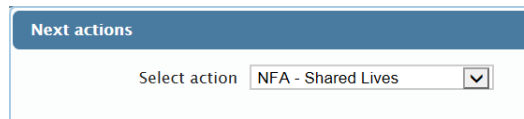|	
Complete section 4: 'Actions taken'	**Shared Lives Carer Panel Record** **Sections** 1. Panel Details 2. Topics Discussed 3. Recommendation 4. Actions Taken
If panel has **approved** as a carer: 7. Select 'New approvals: Approved - Shared Lives Carer added to register' 8. AND 9. Select 'New approvals: Approved - Shared Lives Carer Placement Arrangements' 10. Pass to worker **OR** team: 11. NB. this can be assigned to yourself [Assign to me] or the team folder [Pass to Team], depending on who will be completing the next step	**Next actions** Select action New approvals: Approved - Shared Lives Carer added to register **Next actions** Select action New approvals: Approved - Shared Lives Carer Placement Arrangements Pass to worker Find Clear Assign To Me Pass to team Shared Lives Service
If panel has requested **further information**: • Select 'New approvals: Further information needed – Shared Lives Carer Profiling' • Pass to worker/team etc NB. This will create a new version of the Shared Lives Carer Profile workflow, which will prepopulate and can be updated accordingly, before progressing to a subsequent panel workflow.	**Next actions** Select action New approvals: Further information needed - Shared Lives Carer Profiling Pass to worker Find Clear Assign To Me Pass to team Shared Lives Service
If panel has rejected the application: • select '**NFA – Shared Lives**'	**Next actions** Select action NFA - Shared Lives
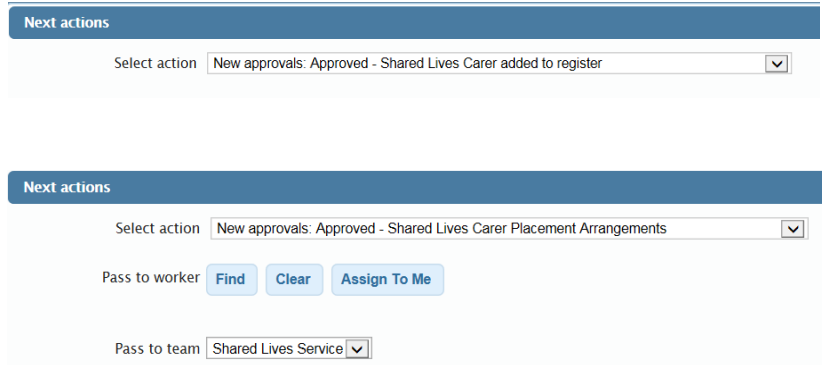
d) Management sign-off

Repeat sign-off process from Initial Visit	
Finish the workflow step	**Shared Lives Carer Panel : Mark Test (2138434)**