

# Careline Provision Workflow Guidance

This guide details the process where a Careline assessment has taken place and the Careline installation officer needs to record the outcome and/ or equipment provided.

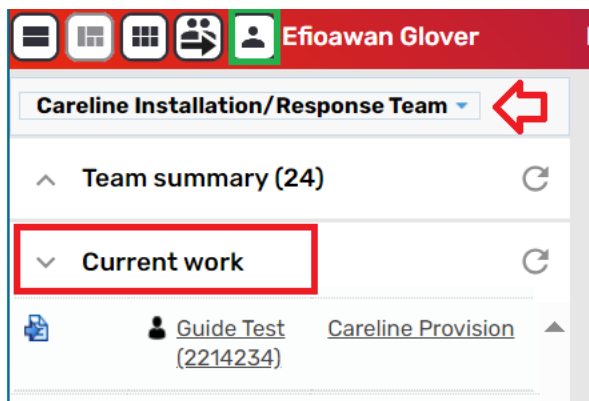
## Summary of guide:

1. Finding the Careline Provision workflow step, in incoming work
2. Completing the Careline Provision workflow, including next actions
3. Sending a notification to the referrer
4. Finishing the workflow

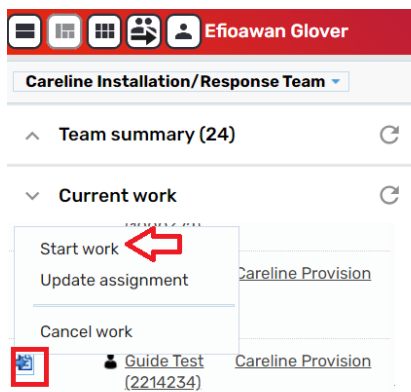
## 1. Finding the Careline Provision workflow

You will find five icons by your name, in the top left corner of Mosaic. The fifth icon opens up your team's folder- called Careline Installation/Response Team (arrowed below).

Underneath this, you will find the Careline Installation/Response Team's 'Current work' folder, where all the **Careline Provision** workflow steps are waiting for you to action:



You can start the **Careline Provision** workflow step in two ways. Either by starting it here, in the Current Work folder, using the icon to the left of the workflow step:





Or by starting it on the individual's front page:

Person summary - Mr Guide Test (2214234) born 1 Aug 1956 (68 years old)

Person details > Summary Case history

Start >  
Case notes  
Documents  
Health >  
Legal status  
Registrations  
Alerts history  
File management >

**Demographic information**

Address [Change](#) Open 8 Aug 2024

Main address Flat 10  
26A Harrison Street  
London  
WC1H 8JG ([View map](#))  
Authority: Camden  
Ward: King's Cross  
Cluster team(s): No teams serve this address  
Not Known

**Case status**

**Current work** [Workflow map](#) [History](#)

Careline Provision  
Start work   
Update assignment

You can also **assign** the workflow steps directly to your own worker folder (or your colleague's folder) from the Careline Installation Team's folder - without 'starting' it by selecting 'Update assignment' and find worker. This enables it to be started at a later date, from your folder:

**Efoawan Glover**

Careline Installation/Response Team

Team summary (24)

Current work

Start work  
Update assignment   
Cancel work

Guide Test (2214234) Careline Provision

When **starting** a workflow step from a team folder, you will be asked to confirm you wish to assign this to yourself. Select 'Yes':

Person summary - Mr Guide Test (2214234) born 1 Aug 1956 (68 years old)

Person details > Summary Case history

Start >  
Case notes  
Documents  
Health >  
Legal status  
Registrations  
Alerts history  
File management >

**Demographic information**

Address [Change](#) Open 8 Aug 2024

Main address Flat 10  
26A Harrison Street  
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WC1H 8JG ([View map](#))  
Authority: Camden  
Ward: King's Cross  
Cluster team(s): No teams serve this address  
Not Known  
Owner occupier

**Basic details**

Registered name Guide Test

**Assign step**

The work you have chosen to start is not assigned to you. If you continue the work will be started and assigned to you. Do you wish to start / assign this work.

Assignment note

Yes  No

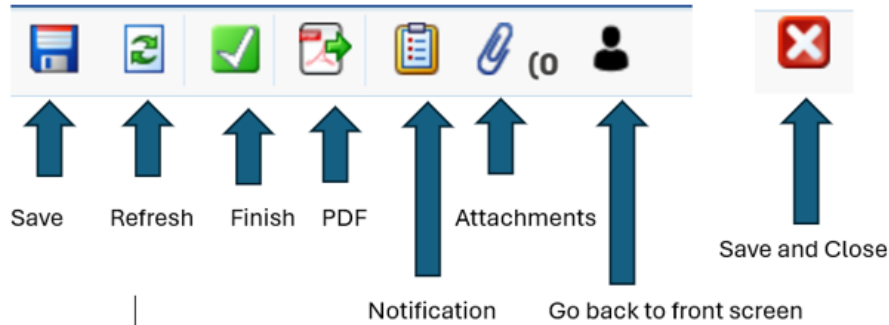
[Add](#) [History](#) [Change](#)



## 2. Completing the Careline Provision workflow

You have now started the workflow step.

- **Navigating the workflow step – the toolbar:**



**Save:** This icon saves this workflow step, but it remains open.

**Refresh:** If any information has pulled through from the individual's main page, and is then amended on the main page- the 'Refresh' icon will pull through this update to the workflow.

**Finish:** This is required at the end of the process. You must 'Finish' the workflow step, once an Action has been selected. Once finished, either the workflow chain will end or any future actions/ workflow steps can be started (i.e. sending another Careline Referral Management workflow step). If your workflow remains open, it will reflect that the Careline provision stage with the individual is still current.

**PDF:** This icon converts the form here, into a PDF version. It is unlikely that you will need to use this.

**Notification:** You will need to select this icon to send a notification to the referrer, as to the outcome of this workflow; whether any equipment was provided etc.

**Attachments:** This enables you to attach word documents etc. that you have on file, to the workflow if required. It is unlikely that you will need to use this.

**Switch back:** This icon brings you back to the individual's main page, but please note this does not close down your workflow step. It is still running and will need to be saved and closed.

**Save and close:** This icon saves the workflow step, and closes it down- to be resumed at a later stage. Please note, this has not 'Finished' the workflow.



- **The Careline Provision form**

The Careline Referral Management Outcome form is already there in the workflow step, waiting for you to read and complete. You can see the referral information has pulled through (sections 1-5 of the form):

Careline Provision : Guide Test 2214234

Careline Referral Management Outcome

**Sections**

- 1. Basic information
- 2. Oysta Devices only
- 3. Reason for referral
- 4. Contacts and other supporting information
- 5. Appointment information
- 6. CARELINE ONLY - Referral Management**
- 7. Next actions

• indicates completed section

**6. CARELINE ONLY - Referral Management**

Appointment management \*Indicates required field

Attempts to arrange an appointment\*

Date of contact	Comments
08/08/2024	Telephone call to Mr Test. No answer. Message left to contact...etc.
09/08/2024	Telephone call to daughter Janice, who confirmed that she would be present for the Careline assessment. Appointment scheduled for 15/08/2024 at 2.30pm.

Have you contacted/attempted to contact the person within 10 working days of the referral? \*

Yes  No

Scheduled appointment

Date of appointment	Comments
15/08/2024	Appointment scheduled with Mr Test and his daughter Janice 15/08/2024 at 2.30pm

Provision

Provision arranged

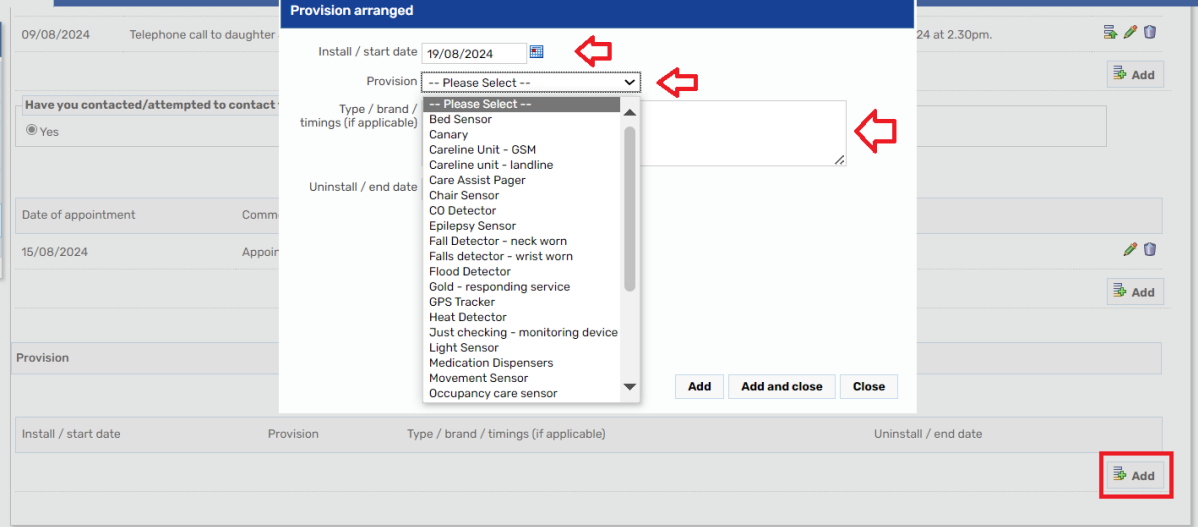
Install / start date	Provision	Type / brand / timings (if applicable)	Uninstall / end date
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**Section 6** of the form, *CARELINE ONLY- Referral Management*, is the section you will need to complete (arrowed above).

You can see your Careline colleagues have completed the first two tables, when arranging the Careline appointment, in the previous workflow step.

If you have prescribed any equipment as an outcome of your assessment, you are required to add each piece of equipment in the third and last table on this page, called **'Provision arranged'** (in green above).

Select 'Add' and a *Provision arranged* box appears. You need to select a date for when this piece of equipment was installed, then select the equipment from the 'provision' drop down option list, and finally you can add further information such as type or brand in the free text box underneath:



You can select 'Add' here if you want to add multiple items, or 'Add and Close' when finished.

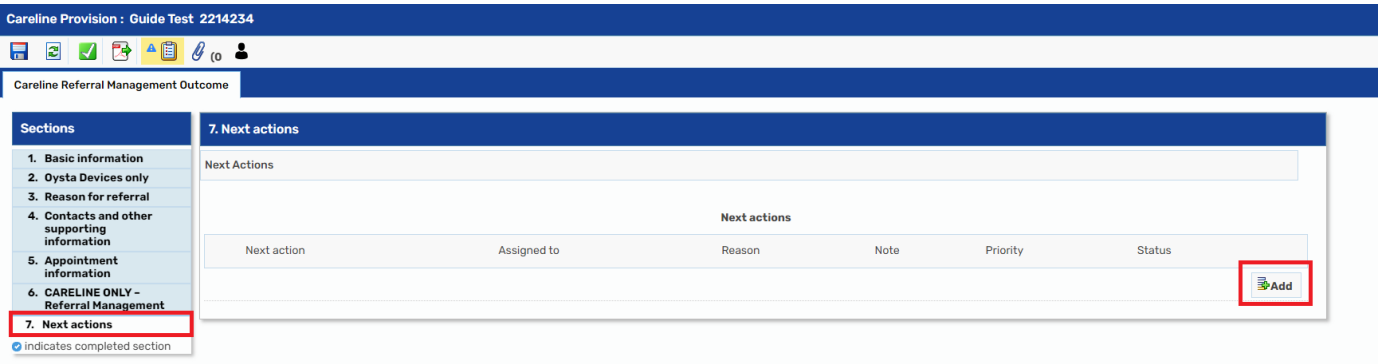
Once added, it will appear in the **Provision arranged** table:

Provision arranged			
Install / start date	Provision	Type / brand / timings (if applicable)	Uninstall / end date
19/08/2024	Epilepsy Sensor	xxxxx	

- **Selecting the next action**

The final task in this form is to select the relevant 'Next actions' (section 7 of the form), as an outcome of this Careline Referral Management workflow.

Select 'Add':





From the drop down options, you have the following:

If selecting:

**Installation unsuccessful- book another** (where no equipment was installed and another appointment needs to be scheduled)

OR

**Installation partially successful- book another** (assessment took place, and some equipment was provided but another appointment is needed for further equipment etc.).

You are therefore requesting for another appointment to be scheduled. By selecting either of these options, you are sending another workflow step back to the Careline business support officers (another Careline referral management workflow step), to request for them to schedule a second appointment:

**Select action:** Selecting the outcome of your assessment

**Pass to team:** Sending your request for another appointment to be scheduled, back to your team

**Reason:** Choosing a reason as to why the installation was unsuccessful or partially unsuccessful



Adding any additional notes, in relation to this outcome or your assessment



If selecting **Installation successful**, then you can add additional notes in the free text below and 'Add and close'.

Please note: it is insufficient to add the equipment installed ONLY in this text box. Any provided equipment must also be listed in the Provision arranged table, in Section 6 of the form.

**Next actions**

Select action: Installation successful

Note

Priority:  Urgent  Normal  Low

Add Add and close Close

If selecting **Installation unsuccessful- close referral**, you need to select a reason from the drop down list, and can add any additional information/ elaborate further in the note box below, and then 'Add and Close':

**Next actions**

Select action: Installation unsuccessful - close referral

Reason\* -- Please Select --

Note



Priority:  Urgent  Normal  Low

Add Add and close Close

You can see this action has been added, below. If required, this can be amended via the pencil icon, or deleted via the dustbin icon:

Sections	7. Next actions						
1. Basic information	Next Actions						
2. Oysta Devices only							
3. Reason for referral							
4. Contacts and other supporting information							
5. Appointment information							
6. CARELINE ONLY - Referral Management							
7. Next actions							
<small>indicates completed section</small>							

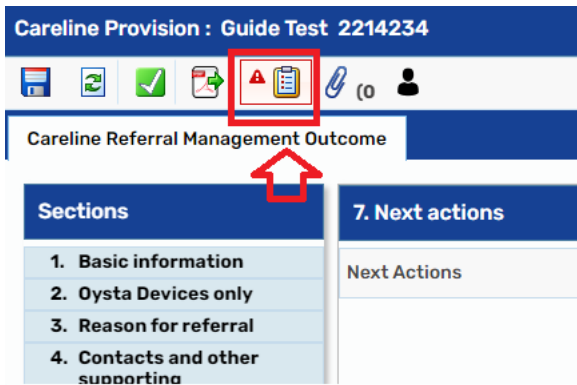
  

Next actions						
Next action	Assigned to	Reason	Note	Priority	Status	
Installation successful			xxxxxxxxxxxxxxxxxxxxxxxxxxxx	High	Proposed	 

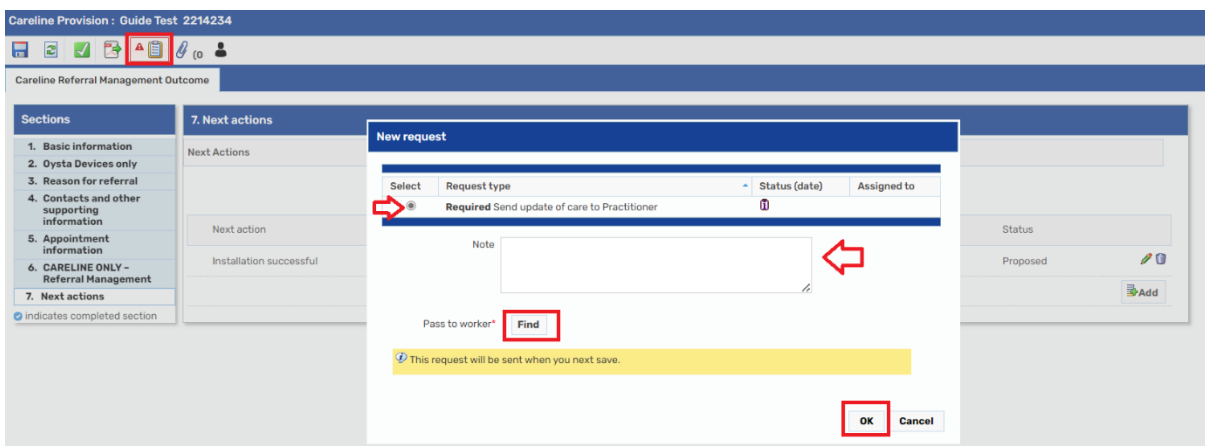
### 3. Sending a notification to the referrer

Before finishing this workflow step, you will need to notify the referrer of the outcome of their referral, especially if further follow up from them is required.

You can do this via the **Request** icon in the toolbar:

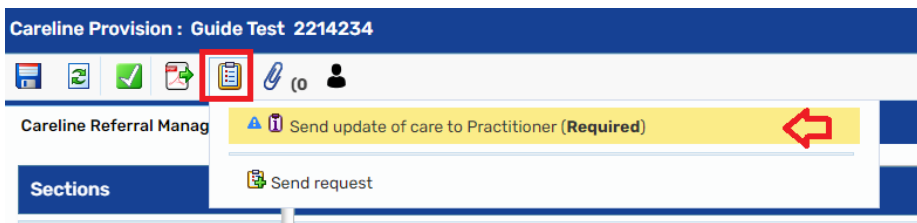


Select 'Send update of care to Practitioner', add a 'Note' to inform them of the outcome or any further follow up required, and find their name on Mosaic via the 'Find' button. Then select OK:



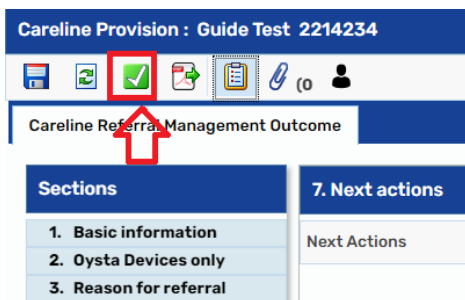


If you select the Request icon again, you can see your notification has been sent to the referrer:



## 4. Finishing the workflow step

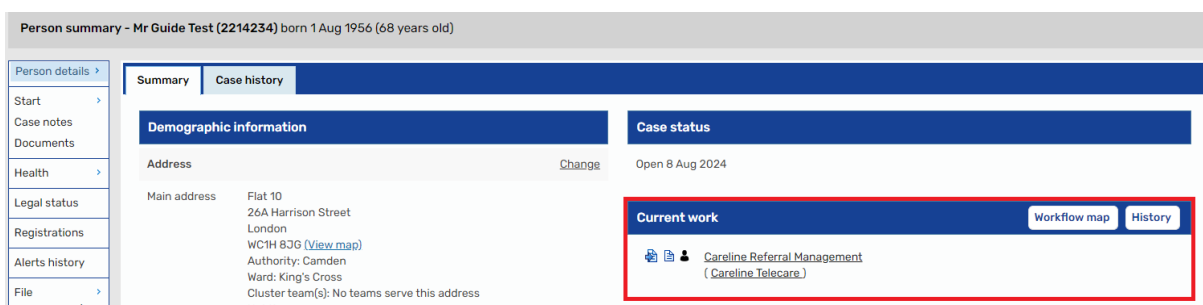
To finish this workflow step, you need to select the 'Finish' icon in the toolbar- the green tick:



This is not to be confused with the 'Save and close' icon, which allows you to resume the workflow step another time, until all sections and outcomes have been completed.

By 'Finishing' the workflow, you have completed all fields, and are either ready to shut this step down, or send the next workflow step to the Careline team.

If you selected [Installation unsuccessful- book another](#) or [Installation partially successful- book another](#), as a next action, then once you've finished your workflow step, you would expect to see the Careline referral management workflow step on the individual's front screen, waiting to be picked up by the team.



If you selected [Installation successful](#) or [Installation unsuccessful- close referral](#), as a next action, then you would expect to see no further Careline related workflow on the individual's front screen.

