

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

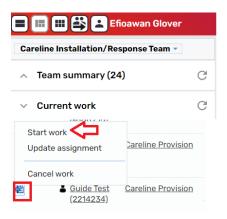
1. Finding the Careline Provision workflow

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:

	🖿 🖽 😫 🖪 Efi	oawan Glover
Ca	reline Installation/Res	sponse Team 👻 🧲
^	Team summary (24) C
~	Current work	G
	Guide Test (2214234)	Careline Provision

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	Person summary - Mr Guide Test (2214234) born 1 Aug 1956 (68 years old)			
Person details >	Summary Case his	itory		
Case notes Documents	Demographic info	rmation	Case status	
Health >	Address	Change	Open 8 Aug 2024	
Legal status		at 10 A Harrison Street	Current work	Workflow map History
Registrations		ondon	Current work	worknow map
Alerts history		C1H 8JG (<u>View map)</u> ıthority: Camden	Careline Provision	-)
File > management	Cli	ard: King's Cross uster team(s): No teams serve this address ot Known	Start work Update assignment	<u>se leam</u>)

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:

		fioawan Glover			
Careline	Careline Installation/Response Team 👻				
∧ Tear	n summary (2	4)			
✓ Curr	ent work				
Start wo	ork assignment 🧲	Careline Provision			
Cancel	Work <u>Guide Test</u> <u>(2214234)</u>	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':

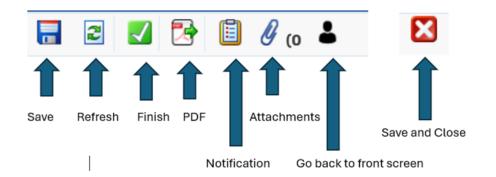
Person summary	y - Mr Guide Test (22	214234) born 1 Aug 1956 (68 years old)				
Person details 🔸	Summary Cas	se history				
Start >	· _ ·					
Case notes	Demographic	information		Case status		
Documents Health	Address		Change	Open 8 Aug 2024		
Legal status Registrations Alerts history File management	Main address	Flat 10 26A Harrison Street London WCH 8JG (<u>View map</u>) Authority: Camden Ward: King's Cross Cluster team(s): No teams serve this addres Not Known Owner occupier	Assign step The work you have chosen to start is no work will be started and assigned to you Assignment note	Current work t assigned to you. If you continue the . Do you wish to start / assign this work.	1 <u>Team</u>)	Workflow map History Add History
	Basic details				*	
	Registered name	Guide Test		Yes	No	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):

1. Basic information 2. Oysta Devices only 2. Descriptions	es required field
Sections 6. CARELINE ONLY - Referral Management 1. Basic information 2. Oysta Devices only	s required field
Sections 1. Basic information *indicate 2. Opsta Devices only Appointment management	s required field
1. Basic information 2. Oysta Devices only 2. Provide for the state of the state	
7. Descent for setting	
Keason for Fereral Attempts to arrange an appointment* Acontacts and other	
supporting Date of contact Comments	
5. Appointment information 08/08/2024 Telephone call to Mr Test. No answer. Message left to contactetc.	/ 🛈
CARELINE ONLY Referral Management O9/08/2024 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.	š / O
7. Next actions © indicates a mple to section	Add
Have you contacted/attempted to contact the person within 10 working days of the referral?*	
® Yes ONo	
Scheduled appointment	
Date of appointment Comments	
15/08/2024 Appointment scheduled with Mr Test and his daughter Janice 15/08/2024 at 2.30pm	/ 🛈
	Add 🗟
Provision	
Provision arranged	
Install / start date Provision Type / brand / timings (if applicable) Uninstall / end date	
	🗟 Add

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:

		Provision arranged							– 🤌 🔿
19/08/2024 Telephone	call to daughter	Install / start date]				24 at 2.30pm.	Add
		Provision	Please Select	~ <					∃r Add
Have you contacted/attemp	ted to contact	Type / brand /	Please Select Bed Sensor						
9 Yes		timings (if applicable)	Canary						
			Careline Unit - GSM Careline unit - landline				1.		
		Uninstall / end date	Care Assist Pager						
Date of appointment	Comm		Chair Sensor CO Detector						
			Epilepsy Sensor Fall Detector - neck worn						
5/08/2024	Appoir		Falls detector - wrist worn						1
			Flood Detector Gold - responding service						BbA 🕏
			GPS Tracker Heat Detector						3 Aud
			Just checking - monitoring devi	ce					
ovision			Light Sensor Medication Dispensers						
			Movement Sensor Occupancy care sensor	-	Add	Add and close	Close		
			occupancy care sensor	_					
nstall / start date	Prov	rision Typ	e / brand / timings (if applicable)				Unins	tall / end date	
									🗟 Add

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

• 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':

Careline Provision : Guide Test	2214234						
🔚 🖻 🔽 🔁 🖺	🖉 (o 🖁						
Careline Referral Management Ou	utcome						
Sections	7. Next actions						
1. Basic information	Next Actions						
2. Oysta Devices only							
3. Reason for referral							
 Contacts and other supporting information 			Next actions				
5. Appointment information	Next action	Assigned to	Reason	Note	Priority	Status	
6. CARELINE ONLY – Referral Management							add
7. Next actions							
indicates completed section							



From the drop down options, you have the following:

ext actions		
Select action	Please select	
Note	Please select Installation successful Installation unsuccessful - close referral Installation partially successful - book another Installation unsuccessful - book another	
Priority		
🔿 🕭 Urgent	Normal	🔿 Ъ Low
		Add Add and close Close

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:

Careline Provision : Guide Test	: 2214234		
🔒 2 🗾 🄁 📲	Ø (o 👗		
Careline Referral Management	Outcome	Next actions	
Sections	7. Next actions	Select action Installation partially successful - book another 🗸 🦾	
1. Basic information 2. Oysta Devices only	Next Actions		
 Reason for referral Contacts and other supporting information 	A next action and recipient must be selected	Rasson*	
5. Appointment information 6. CARELINE ONLY – Referral Management	Next action	k. Status	
Next actions indicates completed section		Priority August Badd Data Low	
		Add Add and close Close	

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 <u>Installation unsuccessful- close referral</u>, 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 V
Note	Careline assessed telecare not appropriate Client already has telecare; no additional telecare required Client deceased Client declined due to cost Client declined equipment and services
Priority	Client moving to residential care Client staying in hospital
🔿 🕭 Urgent	Declined due to COVID-19 Demonstration - client will call back if they want to proceed Family/Carer declined equipment and services Issues with contacts (silver service only)
	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			1	lext actions			
information	Next action	Assigned to	Reason	Note	Priority	Status	
5. Appointment information							\sim
6. CARELINE ONLY – Referral Management	Installation successful			*****		Proposed	
7. Next actions							BAdd
indicates completed section							

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:

Ca	Careline Provision : Guide Test 2214234										
		2	\checkmark	7	A	Ø	(0	-			
С	Careline Referral Management Outcome										
			<u>4 } </u>								
	Sections 7. Next actions										
	Sec	ctions	5			I	7. N	lext a	ctic	ons	
				matio	n					ons	
	1.	Basio	c infor	matio ces or				lext a		ons	
	1. 2.	Basic Oysta	c infor a Devi		nly					ons	

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:

Careline Provision : Guide Test	t 2214234		
- 2 🗸 🄁 📲	🖉 (o 👗		
Careline Referral Management Ou	utcome		
Sections	7. Next actions	r	
 Basic information Oysta Devices only 	Next Actions	New request	
3. Reason for referral		Select Request type	
4. Contacts and other supporting information		Required Send update of care to Practitioner	
5. Appointment information	Next action	Note	Status Proposed / 0
6. CARELINE ONLY – Referral Management	installation successful		
7. Next actions			bbA
indicates completed section		Pass to worker* Find	
		${\mathscr D}$ This request will be sent when you next save.	
		OK Cancel	



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

Careline Provision : Guide Test 2214234							
🗟 🛛 🛃							
Careline Referral Manag	Send update of care to Practitioner (Required)						
Sections	B Send request						

4. Finishing the workflow step

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

Careline Provision : Guide Test 2214234						
🖬 Z 🔽 🔁 🗐 🖉 👝 🛓						
Careline Referra Management Outcome						
Sections 7. Next actions						
1. Basic information	Next Actions					
2. Oysta Devices only						
3. Reason for referral						

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 <u>Installation unsuccessful- book another</u> or <u>Installation partially successful- book</u> <u>another</u>, 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.

Person summa	iry - M	Mr Guide Test (22	214234) born 1 Aug 1956 (68 years old)			
Person details >		Summary Cas	se history			
Start >	1					
Case notes		Demographic	information		Case status	
Documents				01	0	
Health >		Address		Change	Open 8 Aug 2024	
Legal status		Main address	Flat 10 26A Harrison Street			
Registrations			London		Current work	Workflow map History
			WC1H 8JG (View map)		🗟 🖹 🕹 🛛 <u>Careline Referral Management</u>	
Alerts history			Authority: Camden Ward: King's Cross		(<u>Careline Telecare</u>)	
File >			Cluster team(s): No teams serve this address			

If you selected <u>Installation successful</u> or <u>Installation unsuccessful- close referral</u>, as a next action, then you would expect to see no further Careline related workflow on the individual's front screen.

Person summary - Mr Guide Test (2214234) born 1 Aug 1956 (68 years old)								
Person details >	Summary Cas	se history						
Start > Case notes Documents	Demographic	information		Case status				
Health >	Address		Change	Open 8 Aug 2024				
Legal status	Main address	Flat 10 26A Harrison Street		Current work	Workflow map History			
Registrations Alerts history		WC1H 8JG <u>(View map)</u> Authority: Camden		No current work				
Legal status Registrations	Address	Flat 10 26A Harrison Street London WC1H 8JG (<u>View map</u>)	Change	Open 8 Aug 2024	Workflow map History			