

1 – What Matters – Conversation Update [Shared Lives Admin Worker]

This process is to be used by the Shared Lives Admin worker, when dates have been agreed for Shared Lives Carer Breaks or Respite, and request needs to be sent to the Purchasing Team.

a) Start Conversation Update [in cared-for person record]

Start workflow step:
What matters – Conversation update

Person summary - Paul Test (2138437) born 18 Sep 1981 (40 years old)

Person details >

- Start**
- Case notes
- Documents
- Visits
- Legal status
- Registrations
- File location

Demographic information

Address [Change](#)

Case status

Open 7 May 20

Start

Start one of the following for Paul Test (2138437).

- [Shared Lives Carer Enquiry](#)
- [Shared Lives Carer Placement Arrangements](#)
- [What matters - Conversation update](#)**

b) Record details of carer break/respite arrangements

Go to 'What matters- Conversation update' form

What matters - Conversation update: Paul Test (2138437)

What matters - Conversation update

Sections

- 1. Conversation update**
- 2. Actions Taken

indicates completed section

1. Conversation update

Guidance

When to use this form:

Complete section 1: Conversation update

Record brief details of why this service is needed (e.g. Main carer will be unavailable) and the exact details of when this care is required

Details of conversation

Date of last review

Reason for getting in touch/summary of circumstances*

What would make a difference to you?*

Please ignore any questions that are not relevant for this request; and tick 'No' regarding whether there are any safeguarding concerns

Please tick if a referral is required to any of these services

Occupational Therapy (OT)
 Outreach
 Sensory Needs
 Family Group Conference (FGC)
 Welfare Rights

Are you aware of any safeguarding concerns?*

Yes
 No

Tick 'Yes' for 'Are any immediate one-off support changes required'
 Select 'Add' to record the details

Are any immediate one-off support changes required?*

Yes
 No


One-off support changes

Description of support required	Date required	Delivery method	Cost increase
			
Total cost increase (if applicable) <input type="text" value="0.00"/>			

Record all the details of the required payment/payee include dates/rate bands/specific costs
 Click 'Add and close' to add this to the table

One-off support changes

Description of support required*
 Person 1234567 - Mrs Xxx Xxxxxxxx will be providing Shared Lives Respite support on the following dates:
 15th April to 18th April (4 nights)
 This is to be paid at the same rate as the main carer, at Band 3.
 £90 per night plus £5 cleaning fee. = £365.00
 Please arrange payment as soon as possible.

Date required* 

Delivery method*

Commissioned service
 Direct payment

Cost increase (if applicable)

One-off support changes

Description of support required	Date required	Delivery method	Cost increase
Person 1234567 - Mrs Xxx Xxxxxxxx will be providing Shared Lives Respite support on the following dates: 15th April to 18th April (4 nights) This is to be paid at the same rate as the main carer, at Band 3. £90 per night plus £5 cleaning fee. = £365.00 Please arrange payment as soon as possible.	11/04/2022	Commissioned service	365.00
			
Total cost increase (if applicable) <input type="text" value="365.00"/>			

c) Choose next actions

Complete 'Actions Taken': Click 'Add'

The screenshot shows the 'What matters - Conversation update' interface. On the left, a 'Sections' menu has '2. Actions Taken' highlighted with a red box. Below it, a note says 'indicates completed section'. The main area is titled '2. Actions Taken' and contains a table for 'Next actions'. The table has columns for 'Next action', 'Assigned to', 'Reason', 'Note', 'Priority', and 'Status'. An 'Add' button is highlighted with a red box in the bottom right corner.

Select 'Purchase Service (Personal Budget)'

The screenshot shows the 'Next actions' dropdown menu. The 'Select action' dropdown is open, showing a list of options. 'Purchase Service (Personal Budget)' is highlighted with a red box. Other options include 'What Matters - OT Assessment', 'What matters - Outreach', 'Sensory Needs Assessment', 'Adult Family Group Conference Referral', 'Safeguarding Adults - S42(1) Information Gathering', 'Review to be brought forward', 'No Further Action', and 'Cancelled'. The 'Priority' section shows 'Urgent' selected.

In 'Pass to team' select 'ASC Purchasing Team'

Add a note, to refer them to the details of payment request captured within the Conversation Update section

Click 'Add and Close'

The screenshot shows the 'Next actions' form. The 'Select action' dropdown is set to 'Purchase Service (Personal Budget)'. The 'Pass to worker' section has 'Find' and 'Clear' buttons. The 'Pass to team' dropdown is set to 'ASC Purchasing Team'. The 'Note' field is empty. The 'Priority' section has 'Urgent', 'Normal', and 'Low' options. The 'Add and close' button is highlighted with a red box.

Finish the workflow step

The screenshot shows the 'What matters - Conversation update' interface for 'Paul Test (2138437)'. The '2. Actions Taken' section is active. The table for 'Next actions' now contains one entry: 'Purchase Service (Personal Budget)' assigned to 'ASC Purchasing Team' with a status of 'Proposed'. The 'Add and close' button is highlighted with a red box.