

Careline Change of Provision Workflow Guidance

This guide details the process where a Careline response officer needs to document a change in provision/ equipment for an existing Careline Telecare user.

Summary of guide:

1. Starting the Careline change of provision workflow step
2. Completing the Careline change of provision workflow, including next actions
3. Sending a notification to the referrer or other appropriate worker
4. Finishing the workflow

1. Starting the Careline change of provision workflow

Find the individual on Mosaic, and using the toolbar located on the left of their file, select 'Start' and then 'New':



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

Person details > Summary Case history

Start > Initial Record (New or returning adults only)
New...

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

Information Case status

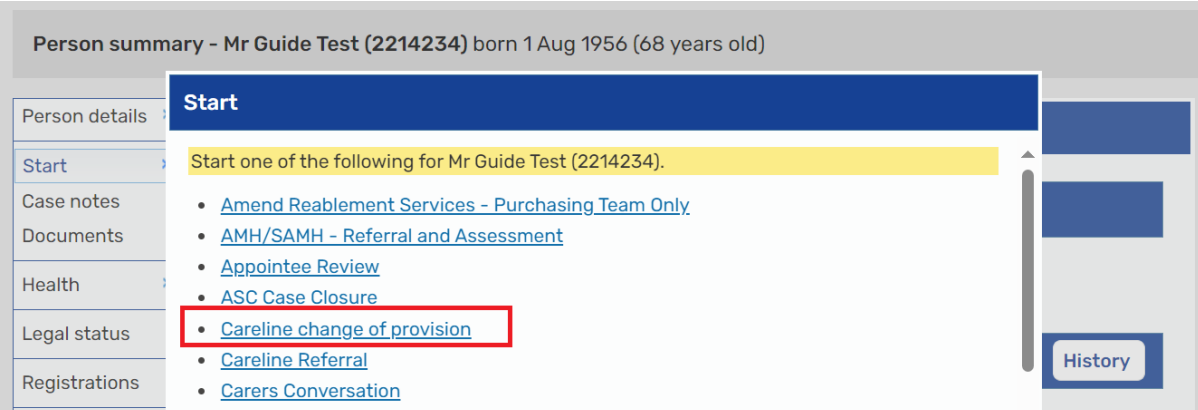
Address Change Open 8 Aug 2024

Main address Flat 10
26A Harrison Street
London
WC1H 8JG ([View map](#))
Authority: Camden
Ward: King's Cross

Current work Workflow map History

No current work

Different workflow step options will appear, and you need to select the **Careline change of provision** workflow step:



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

Person details > Start

Start > Start one of the following for Mr Guide Test (2214234).

- [Amend Reablement Services - Purchasing Team Only](#)
- [AMH/SAMH - Referral and Assessment](#)
- [Appointee Review](#)
- [ASC Case Closure](#)
- **[Careline change of provision](#)**
- [Careline Referral](#)
- [Carers Conversation](#)

Case notes
Documents
Health >
Legal status
Registrations

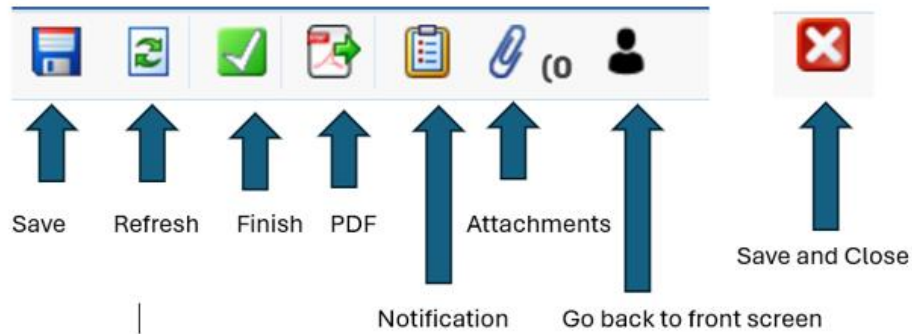
History



2. Completing the Careline change of 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, so that the workflow chain ends. If your workflow remains open, it will reflect that the Careline change of 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 or any other appropriate worker (if initial referrer is no longer involved), to inform them of the outcome of this workflow; if equipment has been uninstalled or if new equipment has been 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.



- **Completing the 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 previous referral information has pulled through (sections 1-5 of the form):

Section 6 of the form, *CARELINE ONLY- Referral Management*, is the section you will need to complete (arrowed above).

You can see the Careline Business Support Officers have completed the first two tables, when arranging the Careline appointment previously.

You can see your Careline installation team colleagues have completed the third table (highlighted green above) called Provision arranged, and listed all the equipment prescribed and on site.


It is this **Provision arranged** table that you are required to update.

Find the relevant piece of equipment from this list in the table, that you are uninstalling. Select the pencil symbol next to it:

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



Then enter the Uninstall/ end date for this item, and 'Save Changes':

Provision arranged

Install / start date 



Provision

Type / brand / timings (if applicable)

Uninstall / end date  

Save changes Cancel

You will notice the Provision arranged table has now been updated with this date:

Provision			
Provision arranged			
Install / start date	Provision	Type / brand / timings (if applicable)	Uninstall / end date
19/08/2024	Epilepsy Sensor	xxxxx	31/08/2024 
			

You can also 'Add' any other equipment that may have been prescribed during your visit.

- **Selecting the next action**

The final task in this form is to select the relevant 'Action Taken' (Section 7 of the form), as an outcome of this Careline change of provision workflow.

Select 'Add':

Careline change of 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

7. Next actions

Next Actions

Next action	Assigned to	Reason	Note	Priority	Status
					

Select 'Uninstalled' from the drop down, select a reason from the list, and then provide further information in the 'Note' text box, before selecting 'Add and Close':

Next actions

Select action: Uninstalled

Reason*: -- Please Select --

Note

- Client deceased
- Client moving to residential care
- Client moving with family within the borough
- Client no longer wants equipment due to cost
- Client no longer wants/requires equipment and services
- Client requested return of keys and silver service not desired/appropriate
- Family member moving to other borough with client
- Hospital discharge - practitioner unsure whether client will be returning home
- Issues with contacts and gold service not desired

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:


Careline Referral Management Outcome																											
Sections	7. Next actions																										
<ul style="list-style-type: none"> 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 <p><small>indicates completed section</small></p>	<div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 10px;">Next Actions</div> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr style="background-color: #f2f2f2;"> <th colspan="7">Next actions</th> </tr> <tr> <th>Next action</th> <th>Assigned to</th> <th>Reason</th> <th>Note</th> <th>Priority</th> <th>Status</th> <th></th> </tr> </thead> <tbody> <tr> <td>Uninstalled</td> <td></td> <td>Client no longer wants/requires equipment and services</td> <td></td> <td>Normal</td> <td>Proposed</td> <td style="text-align: right;"> </td> </tr> </tbody> </table> <div style="text-align: right; margin-top: 5px;">Add</div>						Next actions							Next action	Assigned to	Reason	Note	Priority	Status		Uninstalled		Client no longer wants/requires equipment and services		Normal	Proposed	
Next actions																											
Next action	Assigned to	Reason	Note	Priority	Status																						
Uninstalled		Client no longer wants/requires equipment and services		Normal	Proposed																						

3. Sending a notification to the referrer

Before finishing this workflow step, you will need to notify the original referrer or current relevant worker, of this outcome- especially if further follow up from them is required.

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

Careline change of provision : Guide Test 2214234



Careline Referral Management Outcome

Sections

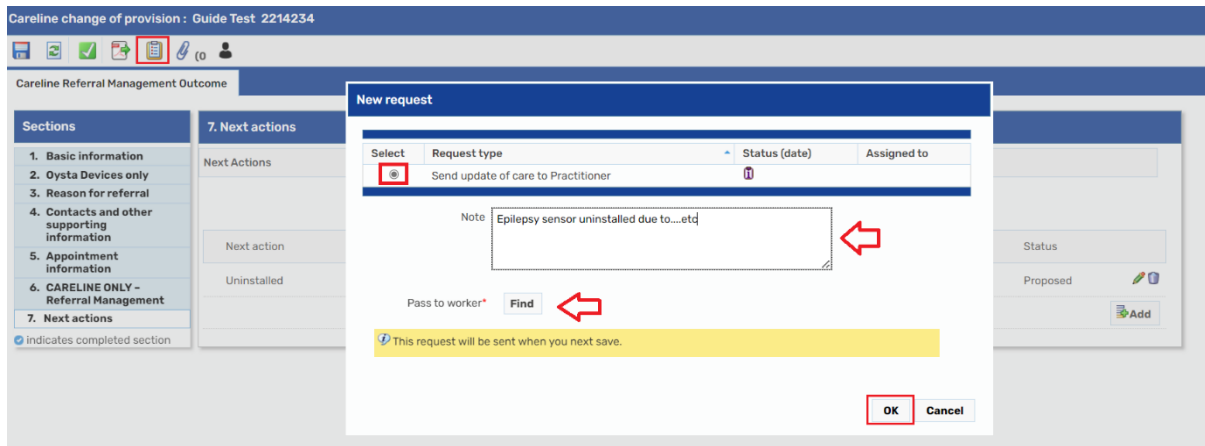
- 1. Basic information

7. Next actions

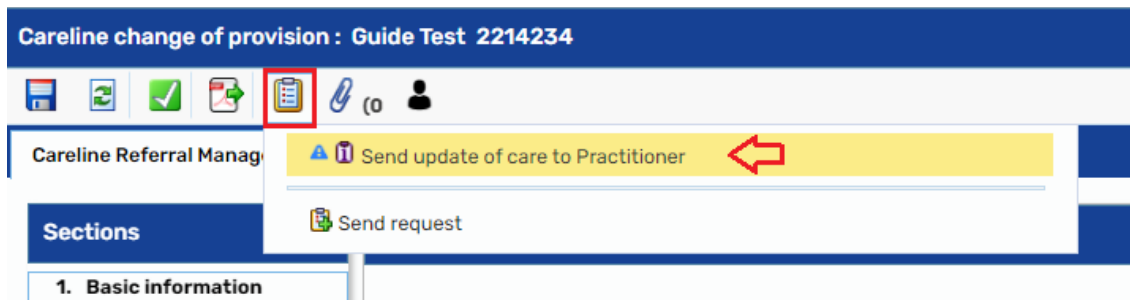
Next Actions



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:

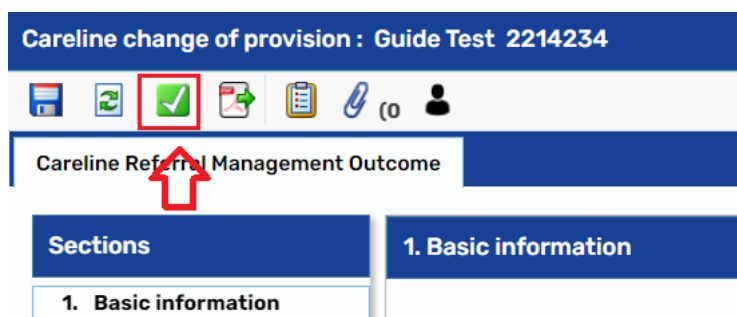


If you select the Request icon again, you can see your notification has been sent to the referrer:



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 ready to shut this step down.