

# Carers Conversation and Carers Review

## Workflow Guidance

### Summary of guide:

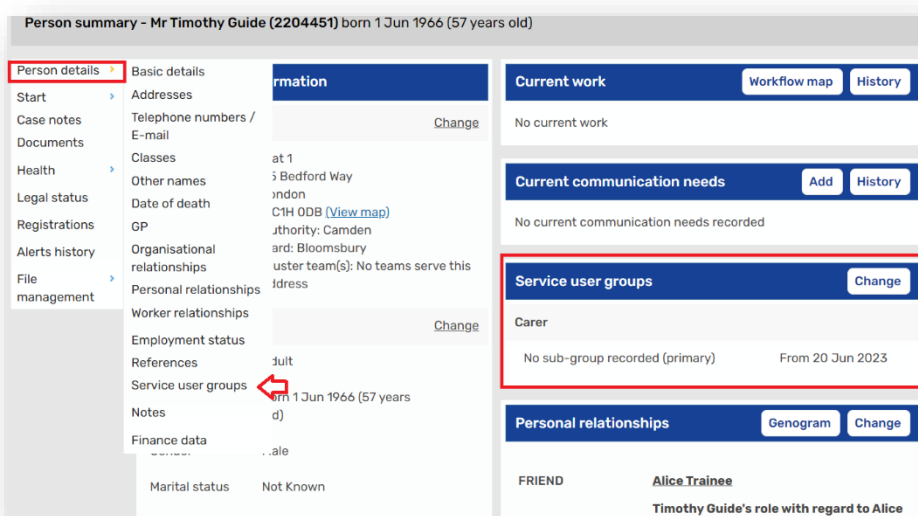
1. Creating a Carers Conversation workflow step
2. Completing the Carers Conversation form
3. Completing the Person Details Form
4. Selecting 'Actions taken' as an outcome and finishing the Carers Conversation workflow
5. Reviewing Carers Review workflow
6. Selecting 'Actions taken' as an outcome and finishing the Carers Review workflow

## 1. Creating a Carers Conversation workflow step

- To start the Carers Conversation process, firstly **ensure you have added the 'Carer' service user group to the Carer's file.**

You can add a service user group via 'Person details' and selecting 'Service User Groups' from the drop down list.

If the individual already has another service user group listed, you can add 'Carer' as well, and ensure 'Carer' is the primary service user group for this process.



Person summary - Mr Timothy Guide (2204451) born 1 Jun 1966 (57 years old)

**Person details** > Basic details > Information > Current work > Current communication needs > Service user groups > Personal relationships

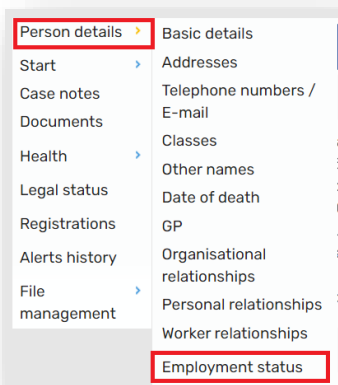
**Service user groups** Change

Carer	No sub-group recorded (primary)	From 20 Jun 2023
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**Personal relationships** Genogram Change

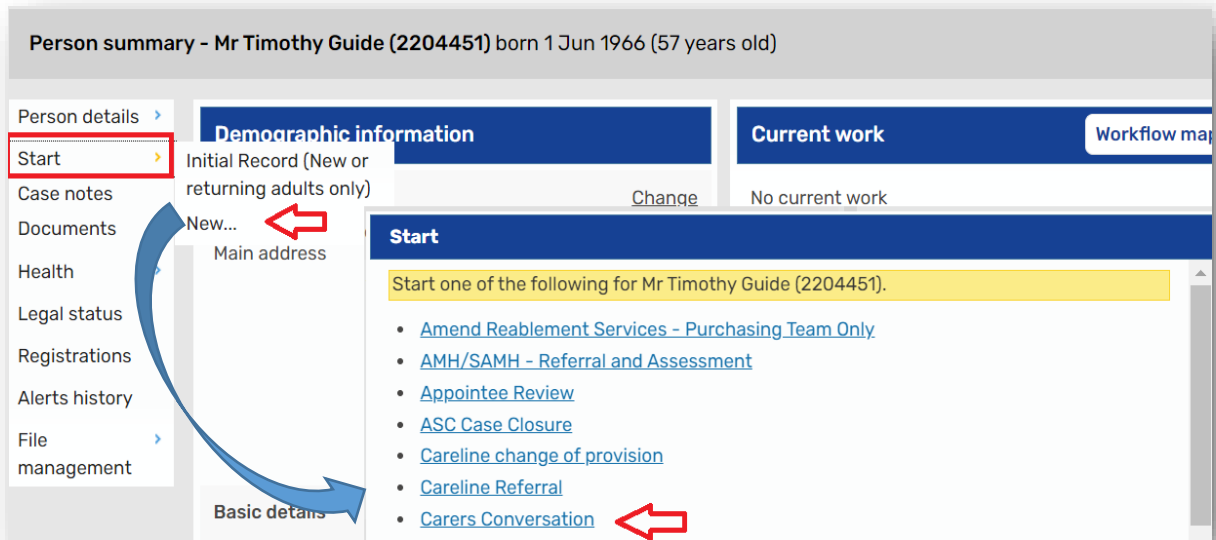
FRIEND **Alice Trainee**  
Timothy Guide's role with regard to Alice

- **The 'Employment status' also needs be completed.** You will need to ensure you have asked the Carer this question during their assessment, and then record it under *Person details*> *Employment status* on the Carer file. It will then pull through to your Carers Conversation workflow.



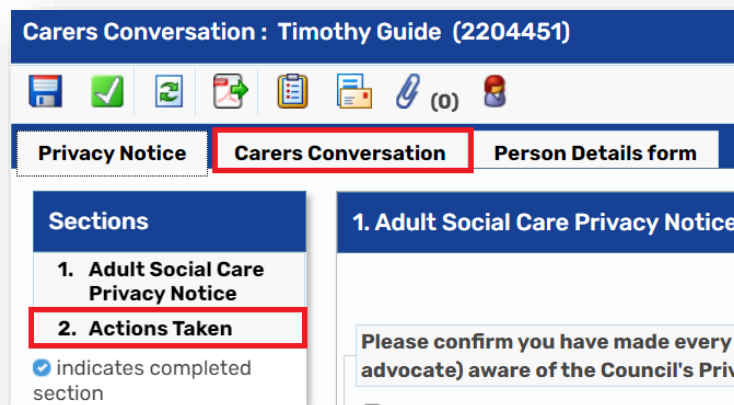
**Person details** > Basic details > Information > Current work > Current communication needs > Service user groups > Personal relationships > Worker relationships > Employment status

- To start the Carers Conversation workflow, go to 'Start', then 'New' and select 'Carers Conversation' from the list:



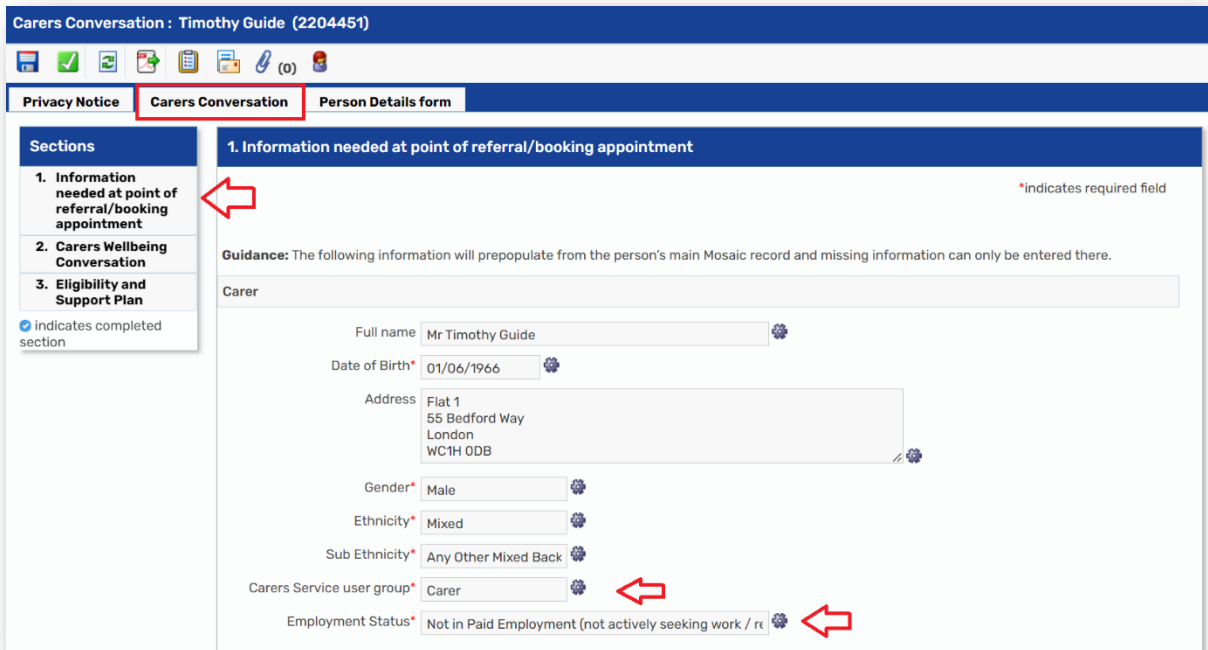
## 2. Completing the Carers Conversation form

- When you open the Carers Conversation workflow step, you will find **three tabs** that require attention:



- The first is the **Privacy Notice**, which you would complete as usual. The **Actions taken** for this step are available under this tab also (circled above).
- The second is the **Carers Conversation** form, which reflects your discussion and planning with the Carer.
- The third is the **Person Details Form**, which is used to capture data on the gender and sexuality of the Carer.

- Within the **Carers Conversation** form, you will find three sections to complete:



Carers Conversation : Timothy Guide (2204451)

Privacy Notice **Carers Conversation** Person Details form

Sections

1. Information needed at point of referral/booking appointment
2. Carers Wellbeing Conversation
3. Eligibility and Support Plan

Indicates completed section

1. Information needed at point of referral/booking appointment

\*Indicates required field

Guidance: The following information will prepopulate from the person's main Mosaic record and missing information can only be entered there.

Carer

Full name Mr Timothy Guide

Date of Birth\* 01/06/1966

Address Flat 1  
55 Bedford Way  
London  
WC1H 0DB


Gender\* Male

Ethnicity\* Mixed

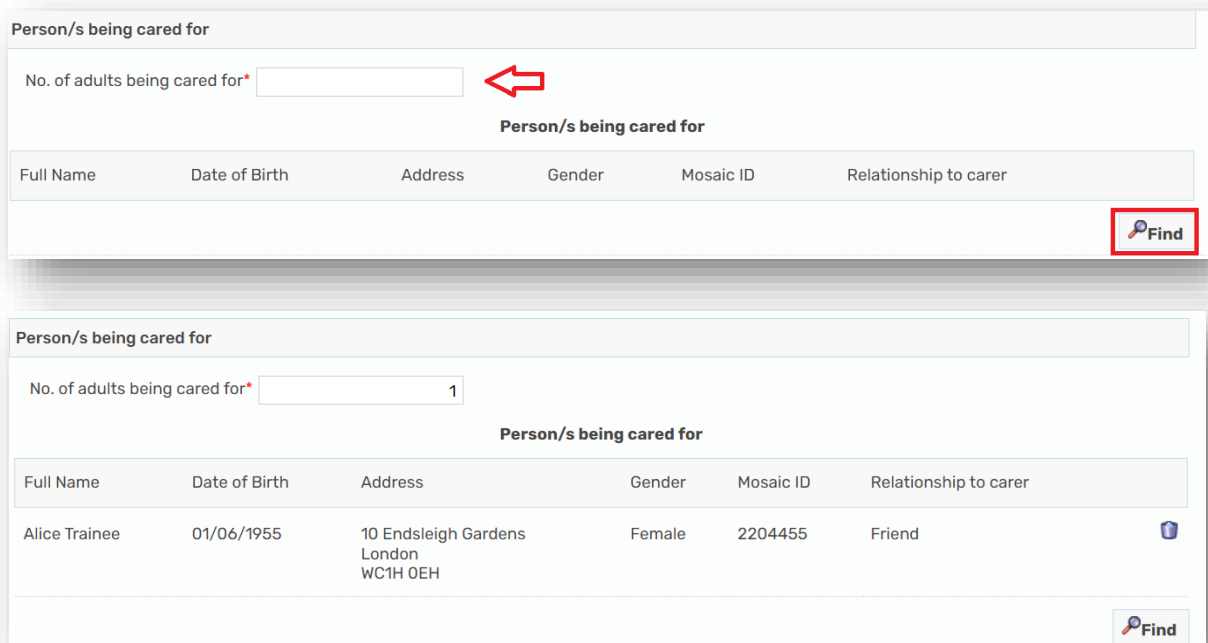
Sub Ethnicity\* Any Other Mixed Back

Carers Service user group\* Carer

Employment Status\* Not in Paid Employment (not actively seeking work / re

- **Section 1** covers basic details and information needed about the Carer. You will note the basic carer information has pulled from the Carer's main file/ front screen (indicated by the grey cog ). If anything is missing here or incorrect, you will need to update it on the Carer's main file, and then refresh here in the workflow step, as these details are mandatory. You can see that the 'Carer' service user group and 'Employment Status' have pulled through here (and are also mandatory).

You are then required to manually add the number of adults being cared for by the Carer, and add the cared for person/ people into the table provided below, using the 'Find' option.



Person/s being cared for


No. of adults being cared for\*

Person/s being cared for

Full Name	Date of Birth	Address	Gender	Mosaic ID	Relationship to carer
Alice Trainee	01/06/1955	10 Endsleigh Gardens London WC1H 0EH	Female	2204455	Friend

Find

- The **Total hours caring per week** will need to be completed by asking the Carer (or estimating) the number of hours of informal support they are providing a week to the cared for person. Use the drop down available:

You can refer to the guidance icon  for assistance.


Person/s being cared for						
Full Name	Date of Birth	Address	Gender	Mosaic ID	Relationship to carer	
Alice Trainee	01/06/15	gh Gardens	Female	2204455	Friend	
Total hours caring per week *		<div style="border: 1px solid black; padding: 2px;">           -- Please Select --            1 - 7 hours            8 - 14 hours            15 - 21 hours            22 - 28 hours            29 - 35 hours            36 - 42 hours            43 - 49 hours            50+ hours         </div>				



Answer the remaining questions about the Carer, to finish this section. Please note, if you select 'No' to 'Does your GP know you are a carer?', an additional question is asked shown below:


**Does your GP know you are a carer?\***

Yes  No

**Would you like us to contact them?\*** 

Yes  No

Details Test

**Do you need any support with communication?\*** 

Yes  No

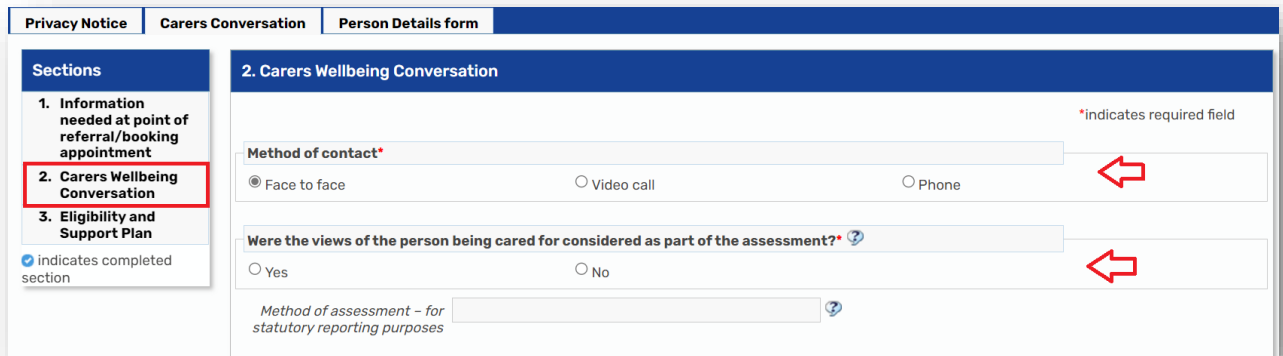
Details Test

**Is the carer receiving payment for any of the care and support they provide? (eg via a direct payment)\***

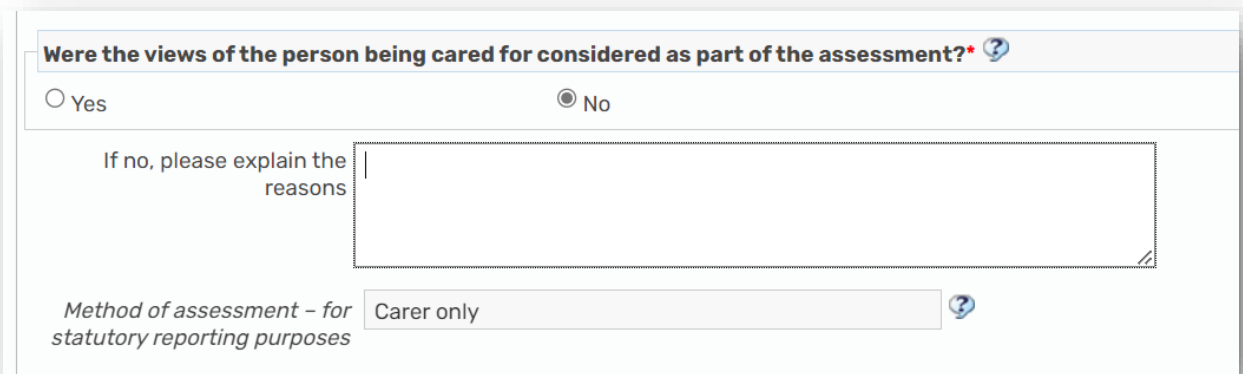
Yes  No


Details Test

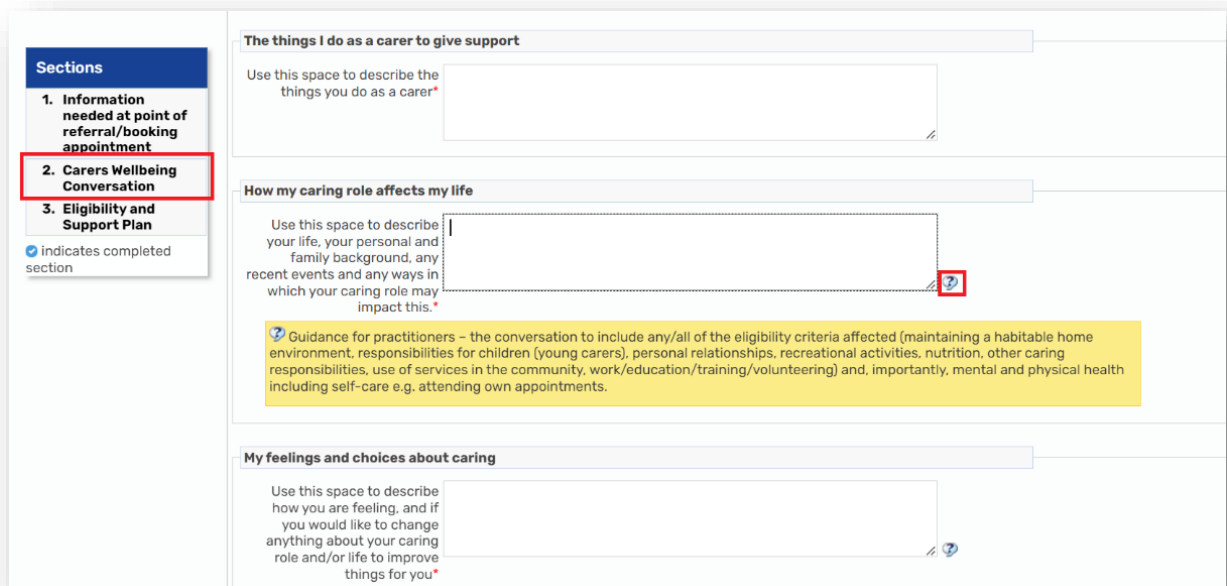
- **Section 2** of the form is your conversation with the Carer and there are seven areas/ text boxes to complete.
- Select the **Method of contact** you had with the Carer, and answer whether **the views of the cared for person were considered as part of the assessment**:



If you select 'No', then you will need to provide a reason:

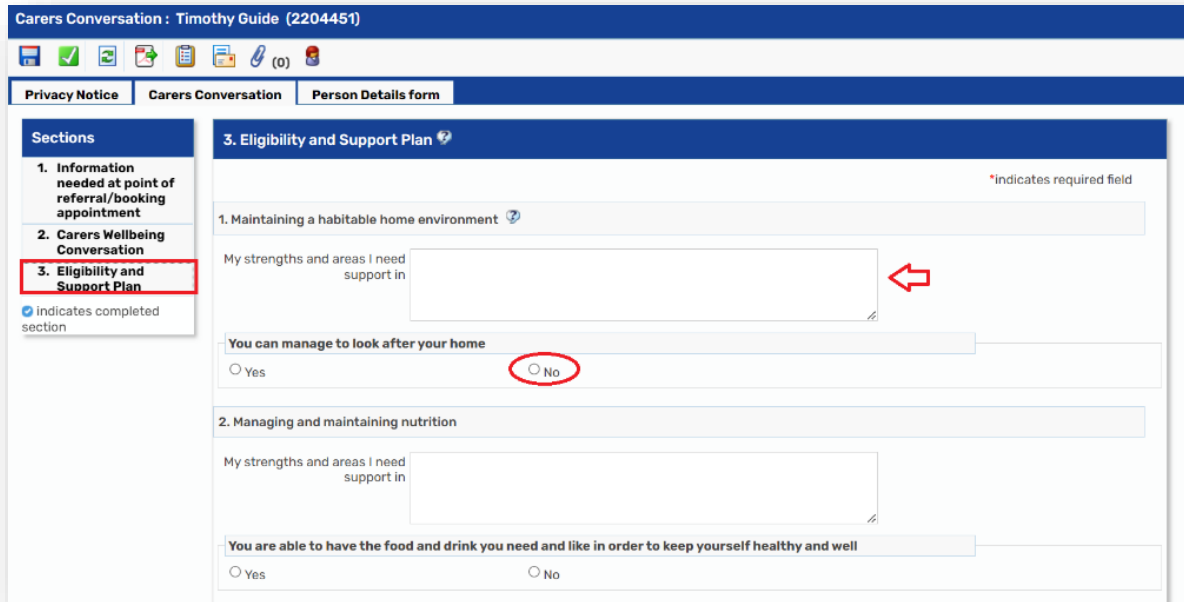


- Add details of your conversation in the following relevant text boxes, to complete the rest of Section 2. Select the  icon, to find guidance/prompts on what to consider:

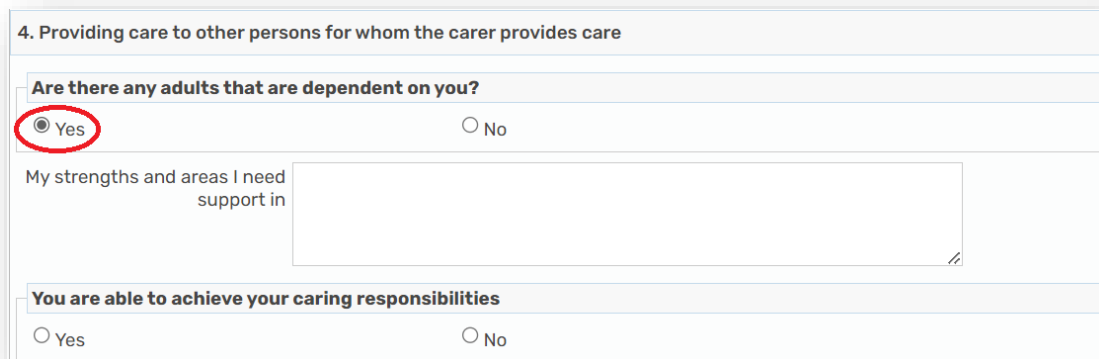


- **Section 3** of the form explores eligibility, a possible budget, and support planning.
  - Firstly, you can explore the strengths and areas the Carer may need support in, for each of the carer eligibility criteria outcomes, in the text box provided.

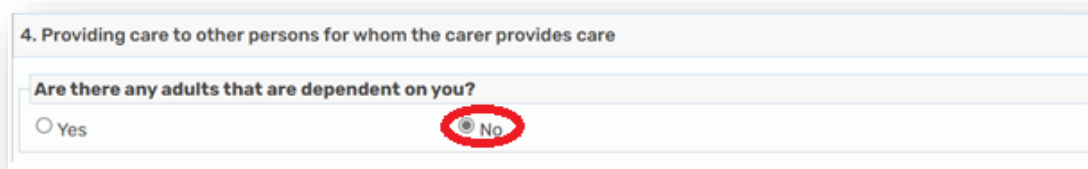
For each area, you are asked if the Carer is able to achieve that particular outcome, and you will need to select 'Yes' or 'No'.



Some text boxes will only open if it is relevant, depending on how you have answered the question. For instance, if you select 'Yes' to 'Are there any adults that are dependent on you?' - then the text boxes appears with an additional question below.




If you select 'No' to 'Are there any adults that are dependent on you?' - there is no additional text box.



- After you have addressed all these outcomes, and if you have stated that the Carer is unable to achieve one or more, then it will display this below, under 'Eligibility':

**Eligibility**

As a result of your caring role, you are unable to achieve one or more of the outcomes  

- You will then need to select 'Yes' or 'No' for '**Is (or is there a risk of) your mental or physical health deteriorating due to your caring role.**'

If you select 'Yes', then the wellbeing areas open up, and you can select the one or more that apply/ demonstrate the impact on the Carer's wellbeing.


If one or more outcomes are unable to be achieved (as shown above), if the Carer's mental or physical health is deteriorating due to their caring role (or there is a risk of this), and there is a significant impact on the Carer's wellbeing, then it will display their eligibility on this page under '**Decision**'- Eligibility indicated:



**Is (or is there a risk of) your mental or physical health deteriorating due to your caring role?**

Yes  No

**As a consequence there is, or is likely to be, a significant impact on your wellbeing (tick relevant areas):**

<input checked="" type="checkbox"/> Personal dignity and being treated with respect	<input type="checkbox"/> Physical and mental health and emotional wellbeing	<input type="checkbox"/> Protection from abuse and neglect
<input type="checkbox"/> Suitability of living accommodation	<input type="checkbox"/> Participation in work, education, training or recreation	<input type="checkbox"/> Social and economic wellbeing 
<input type="checkbox"/> Domestic, family and personal relationships	<input type="checkbox"/> Your contribution to society	<input checked="" type="checkbox"/> Control over day-to-day life (including over care and support provided and the way it is provided)
<input type="checkbox"/> Other (please specify below)	<input type="checkbox"/> None of these options apply	

Decision

Alternatively, if the Carer was not eligible, it would display this under 'Decision' in this way:

**Eligibility**

As a result of your caring role, you are unable to achieve one or more of the outcomes

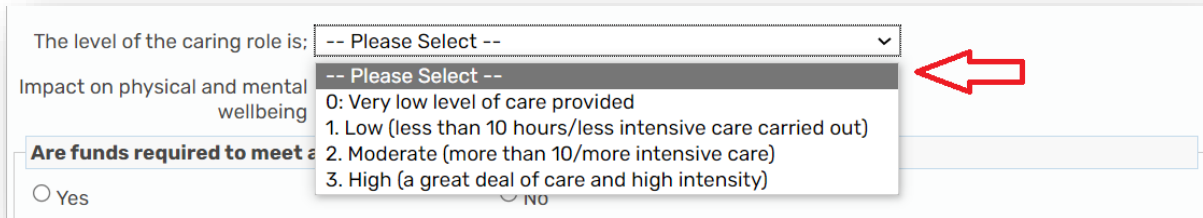
**Is (or is there a risk of) your mental or physical health deteriorating due to your caring role?**

Yes  No

Decision

- Next, you need to demonstrate the level of the caring role, and the impact on the Carer’s physical and mental wellbeing.

For ‘*The level of the caring role*’, choose from the drop down list of 0-3, using the guidance next to it to determine which one most applies in regards to the support they are providing:



The level of the caring role is: -- Please Select --

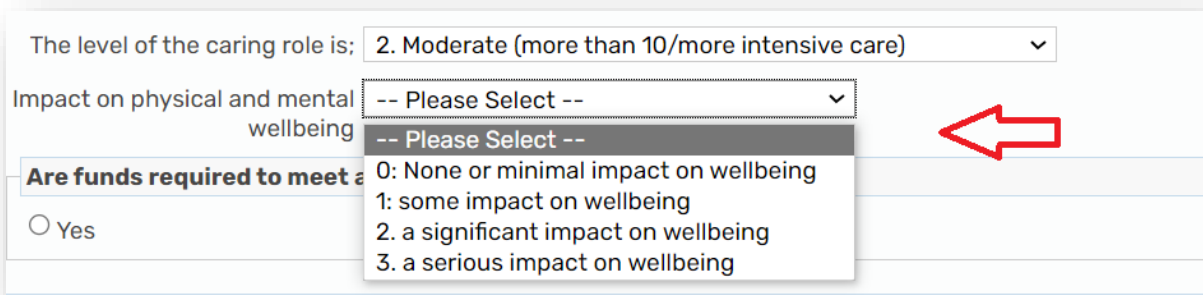
Impact on physical and mental wellbeing

Are funds required to meet any of the carer’s outcomes?

Yes  No

0: Very low level of care provided  
 1. Low (less than 10 hours/less intensive care carried out)  
 2. Moderate (more than 10/more intensive care)  
 3. High (a great deal of care and high intensity)

For ‘*Impact on physical and mental wellbeing*’, choose from the drop down list of 0-3, using the guidance next to it to detail the level of impact on the Carer’s wellbeing:



The level of the caring role is: 2. Moderate (more than 10/more intensive care)

Impact on physical and mental wellbeing

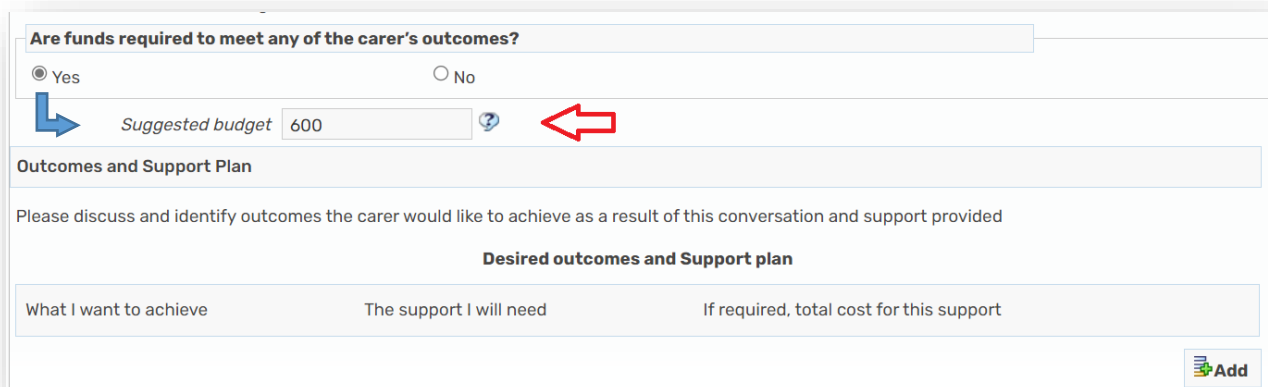
Are funds required to meet any of the carer’s outcomes?

Yes  No

0: None or minimal impact on wellbeing  
 1: some impact on wellbeing  
 2. a significant impact on wellbeing  
 3. a serious impact on wellbeing

**If you require funds to support the Carer to achieve any of their outcomes, please select ‘Yes’ under ‘Are funds required to meet any of the carer’s outcome?’.** If you leave this blank or select ‘No’, then the indicative budget will not appear.

In some instances, where the Carer is eligible for support, their outcomes can be achieved without funds, so therefore this indicative budget box is not required.



Are funds required to meet any of the carer’s outcomes?


Yes  No

Suggested budget 600

Outcomes and Support Plan

Please discuss and identify outcomes the carer would like to achieve as a result of this conversation and support provided

**Desired outcomes and Support plan**

What I want to achieve	The support I will need	If required, total cost for this support
		

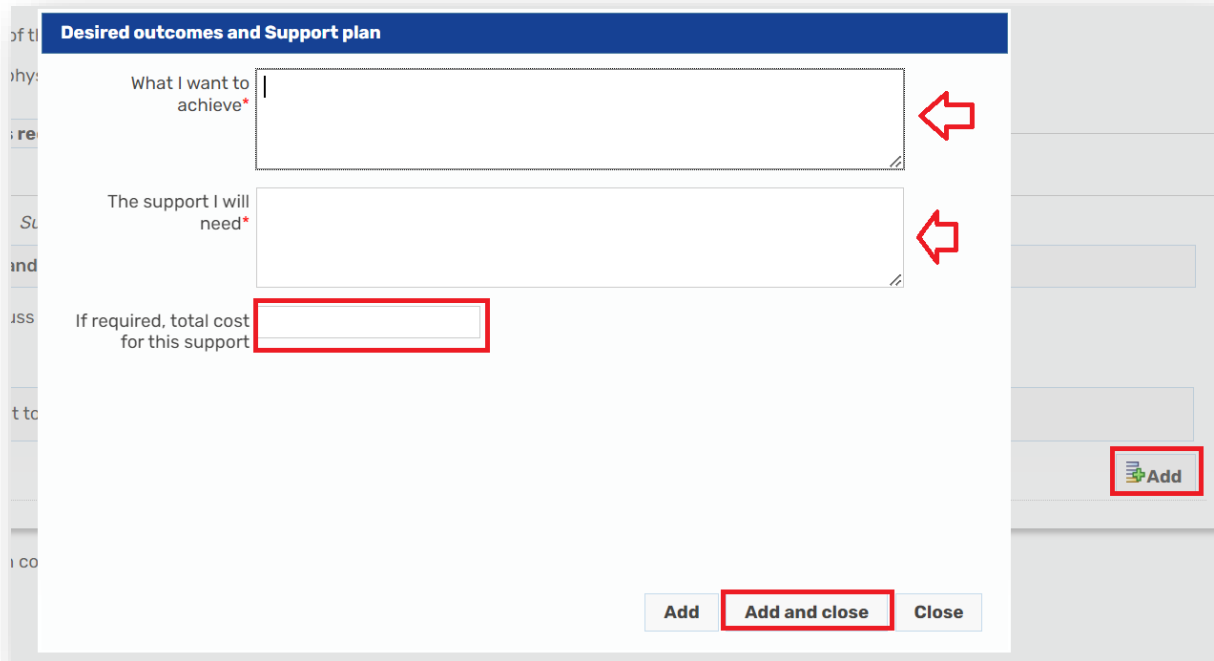
If you are providing any level of support or providing information and advice, to enable the Carer to achieve their outcomes (with or without using a carer budget), then the **support plan** needs to be used to detail this.



- To add to the **Desired outcomes and Support plan** table, select 'Add', and detail in the text boxes what the Carer would like to achieve, and how they will be supported to do so.

If a carer budget is being used in regards to a particular outcome, then you can detail how much in the 'total cost' box.

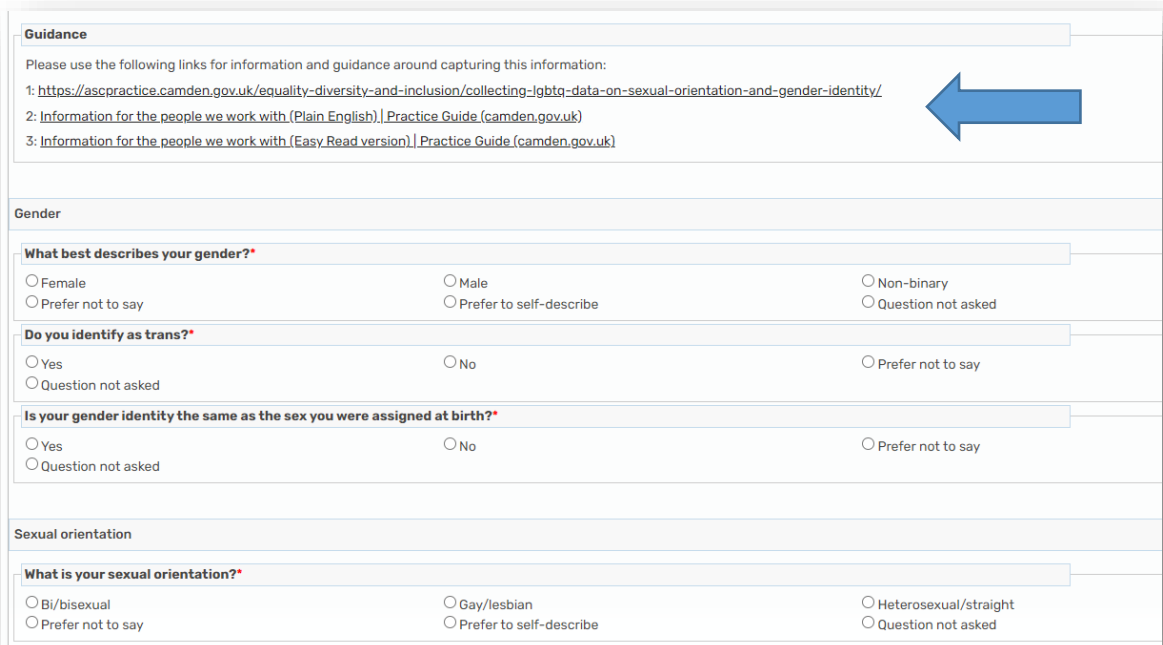
Multiple outcomes can be added in this table, and be a mixture of purchased and non-purchased:



### 3. Person Details form

After you have completed the Carers conversation form and supported the Carer to achieve their outcomes, you will then complete gender and sexual orientation details for the Carer in the **Person Details Form**. This section is mandatory.

Please use the links under the **Guidance** section for more information on why and how to complete this.



**Guidance**

Please use the following links for information and guidance around capturing this information:

- 1: <https://ascpractice.camden.gov.uk/equality-diversity-and-inclusion/collecting-lgbtq-data-on-sexual-orientation-and-gender-identity/>
- 2: [Information for the people we work with \(Plain English\) | Practice Guide \(camden.gov.uk\)](#)
- 3: [Information for the people we work with \(Easy Read version\) | Practice Guide \(camden.gov.uk\)](#)

**Gender**

**What best describes your gender?\***

Female  
 Prefer not to say  
 Male  
 Prefer to self-describe  
 Non-binary  
 Question not asked

**Do you identify as trans?\***

Yes  
 Question not asked  
 No  
 Prefer not to say

**Is your gender identity the same as the sex you were assigned at birth?\***

Yes  
 Question not asked  
 No  
 Prefer not to say

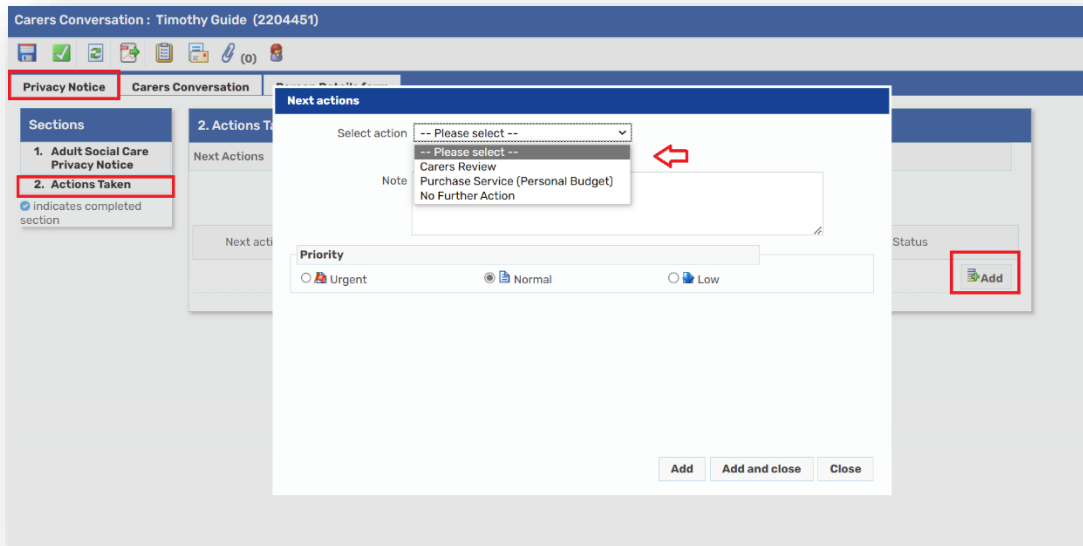
**Sexual orientation**

**What is your sexual orientation?\***

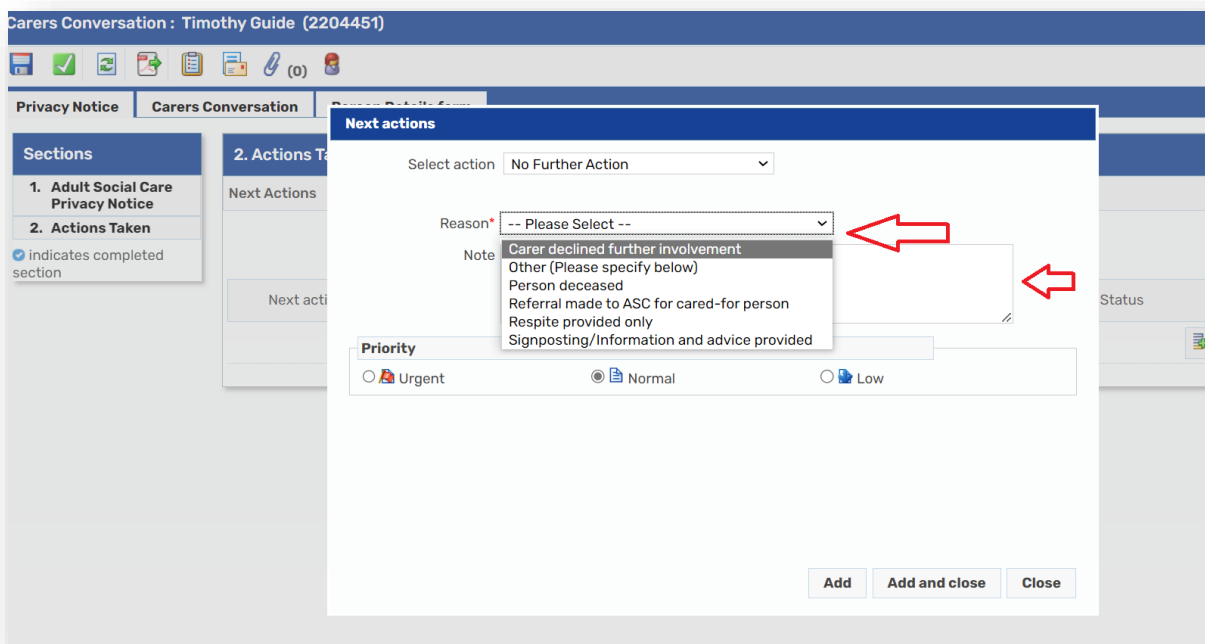
Bi/bisexual  
 Prefer not to say  
 Gay/lesbian  
 Prefer to self-describe  
 Heterosexual/straight  
 Question not asked

## 4. Selecting a next Action

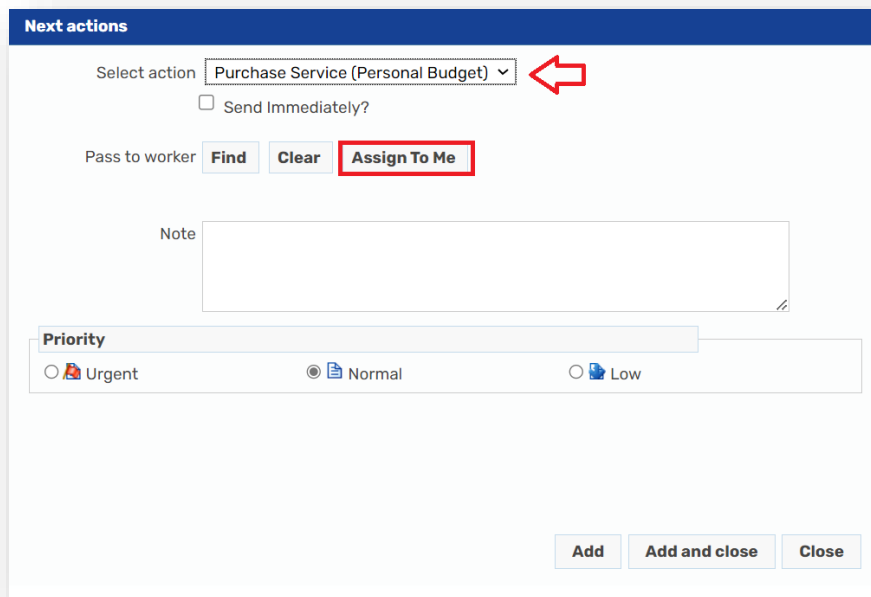
- Finally, you will need to select an **Action** as an outcome of this Carers Conversation. You will find this under the 'Privacy Notice' tab.
- Select 'Add' and you will find three actions available from the drop down:



- **If there are no further actions required as an outcome of your conversation**, then select the action of **No further action** from the drop down, and choose a 'Reason'. For 'Other' reason, please use the Note box to elaborate:



- If you are providing a carer budget then you will be selecting the action of **Purchase service (Personal Budget)** and assigning it to yourself, so you are able to purchase the direct payment:



**Next actions**

Select action: Purchase Service (Personal Budget) ▼ ←

Send Immediately?

Pass to worker: Find Clear Assign To Me

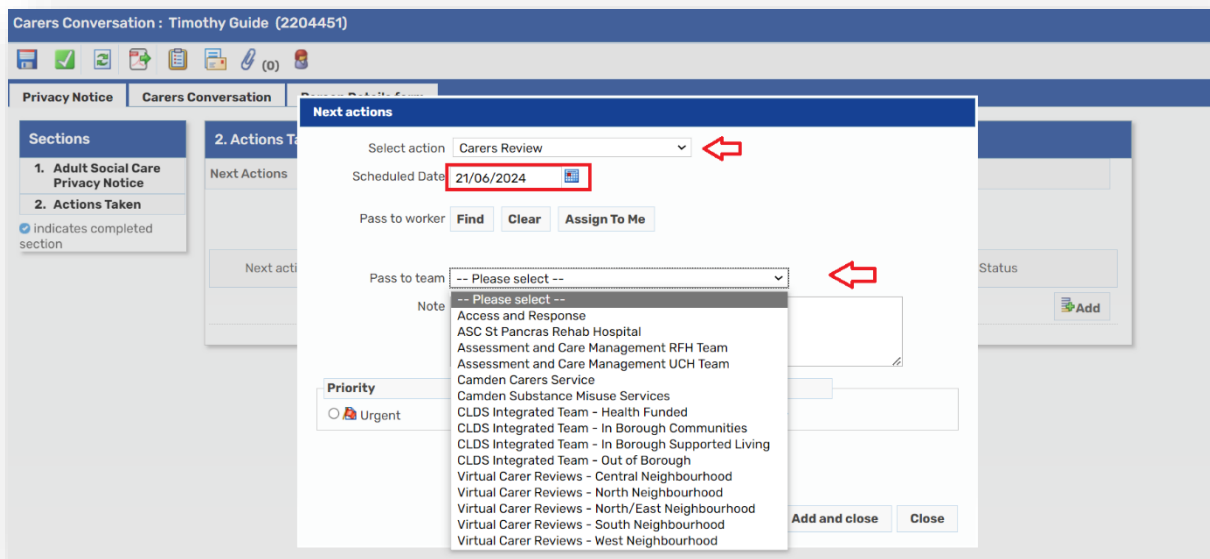
Note:

**Priority**

Urgent  Normal  Low

Add Add and close Close

- If a carer budget is being provided then you will also be selecting the action of **Carers Review**, so the Carer can be reviewed in a year's time. Pass this to your team from the drop down list:



**Carers Conversation : Timothy Guide (2204451)**

**Next actions**

Select action: Carers Review ▼ ←

Scheduled Date: 21/06/2024 📅

Pass to worker: Find Clear Assign To Me

Pass to team: -- Please select -- ▼ ←

Note:

**Priority**

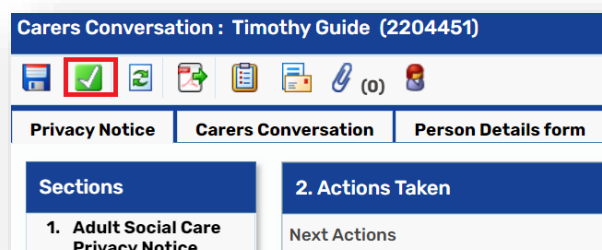
Urgent

Add and close Close

- Please select --
- Access and Response
- ASC St Pancras Rehab Hospital
- Assessment and Care Management RFH Team
- Assessment and Care Management UCH Team
- Camden Carers Service
- Camden Substance Misuse Services
- CLDS Integrated Team - Health Funded
- CLDS Integrated Team - In Borough Communities
- CLDS Integrated Team - In Borough Supported Living
- CLDS Integrated Team - Out of Borough
- Virtual Carer Reviews - Central Neighbourhood
- Virtual Carer Reviews - North Neighbourhood
- Virtual Carer Reviews - North/East Neighbourhood
- Virtual Carer Reviews - South Neighbourhood
- Virtual Carer Reviews - West Neighbourhood

Once you have added an Action/s, then select 'Add and Close'.

- You can then finish this Carers Conversation workflow step, by using the 'Finish' icon in the toolbar:



**Carers Conversation : Timothy Guide (2204451)**

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**Privacy Notice** **Carers Conversation** **Person Details form**

**Sections**

**1. Adult Social Care Privacy Notice**

**2. Actions Taken**

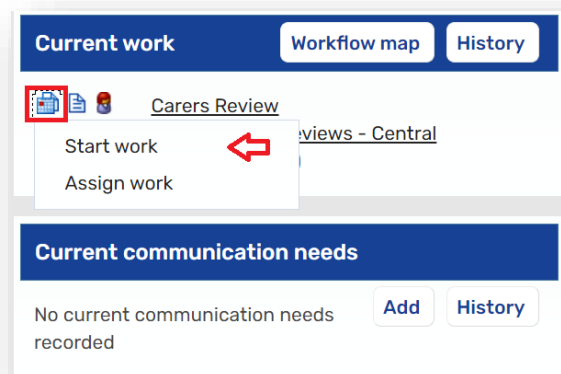
Next Actions

## 5. Reviewing Carers Review workflow step

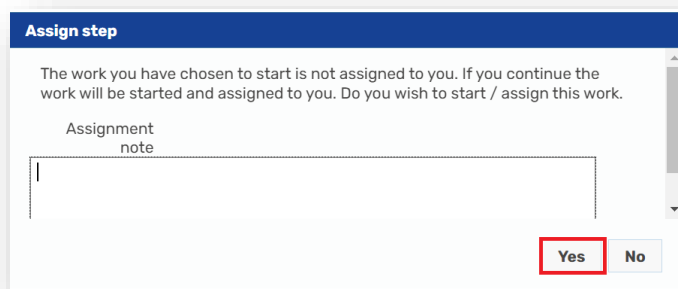
If a Carer has received a Carer’s Conversation or Carers Review before, then it is likely they will have a **Carer’s Review** workflow step waiting to be picked up on their front page and in your team’s work folder. If the Carers Review is assigned to another worker or different team, contact the Mosaic Super User to assign the Carers Review to you.

**Please do not start a new Carer Conversation workflow step from ‘Start’, as this would create duplication.**

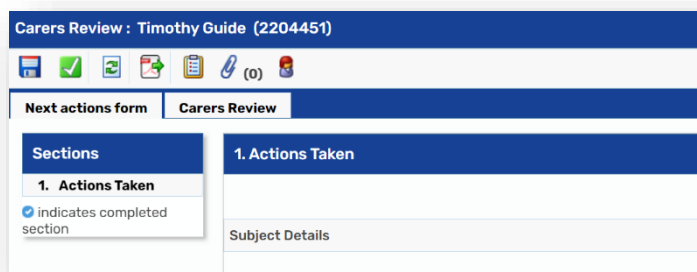
- You can start Carers Review step as normal:



- Select ‘Yes’ for the **Assign Step** box.



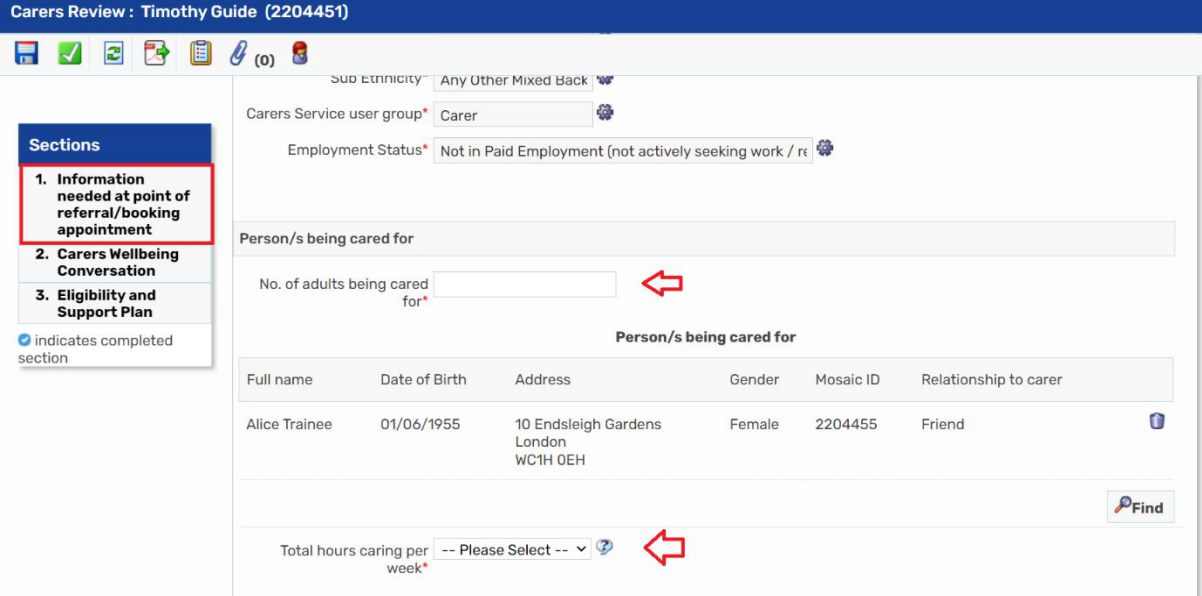
- When you open the Carers Review workflow step, you will find two tabs that require attention:



The first is the **Next actions form**, where you would add your actions.

The second is the **Carers Review form**, which reflects your discussion and planning with the Carer at the review.

- Within the **Carers Review**, you will find three sections to complete, as you would in the Carers Conversation workflow step.



**Carers Review : Timothy Guide (2204451)**

Sub Ethnicity: Any Other Mixed Back

Carers Service user group: Carer

Employment Status: Not in Paid Employment (not actively seeking work / re)

**Sections**

1. Information needed at point of referral/booking appointment
2. Carers Wellbeing Conversation
3. Eligibility and Support Plan

indicates completed section

Person/s being cared for

No. of adults being cared for:



**Person/s being cared for**

Full name	Date of Birth	Address	Gender	Mosaic ID	Relationship to carer
Alice Trainee	01/06/1955	10 Endsleigh Gardens London WC1H 0EH	Female	2204455	Friend

Total hours caring per week: -- Please Select --

**Find**

- Again, you will need to add the number of adults being cared for and search for the cared for by clicking 'Find'. You will notice that the previous cared for person has prepopulated from the previous Carers Conversation.

If the Carer is no longer caring for the previous cared for, click on the bin icon  to delete and select the  icon to add the new cared for person.

- Again, you will need to add the **Total hours caring per week** of informal support the Carer is providing per week.

**Section 2** of the form is your conversation/ review with the Carer, and there are eleven areas/ text boxes to complete.

The additional element in this Carers Review, which differs from the Carers Conversation, is exploring whether the previous carer budget made a positive difference to the Carer's life/ wellbeing (whether their outcomes were met) and ensuring the funds were allocated to what was agreed in the previous support plan.

Updates since the last conversation

**Guidance**

- Please review each of the outcomes that were expressed during the previous conversation and identify/record what has been achieved accordingly
- Please also record an overall assessment of whether these outcomes have been met

**Previous outcomes and support plan**

What I want to achieve	The support I will need
Test	Test

How well has my support been working since our last conversation.\*

Did I achieve the outcomes we previously identified? \*

What has changed since the last conversation? \*

The previous support plan pulls through here (circled above) for information purposes, which is why it's not amendable.

- You need to complete the three mandatory boxes, which is essentially Review type questions.
- Then choose an option to indicate if the previous outcomes identified have been achieved.

**Previous outcomes achieved? \***

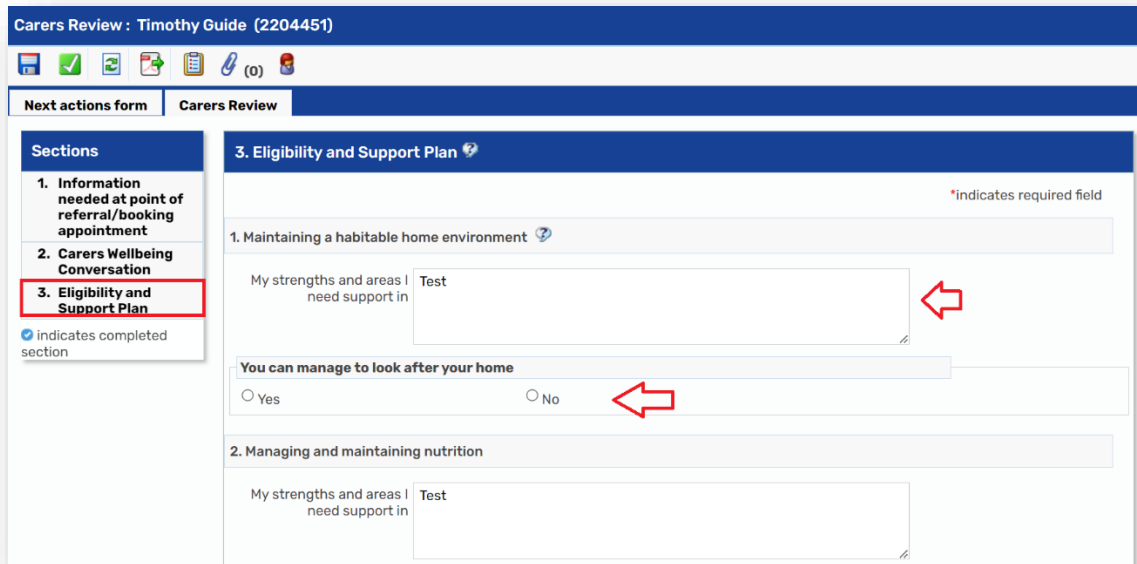
Fully met
  Partially met
  Not met

If you select the icon, you will find guidance/prompts on what to consider here.

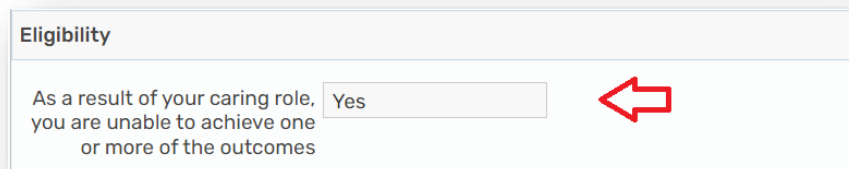
- You will notice for the following sections that these have prepopulated from the previous Carers Conversation or Review. Please update these sections with the current circumstances.

**Section 3** of the form explores eligibility, a possible budget, and support planning.

You will notice that the responses from the previous Carers Conversation/ Review have prepopulated. For each area, you need to review if the Carer is able to achieve that particular outcome:



- Once completed, you will notice that if one or more outcomes are not able to be met, this section will display 'Yes':



- Next, select 'Yes' or 'No' for ***'Is (or is there a risk of) your mental or physical health deteriorating due to your caring role.'***

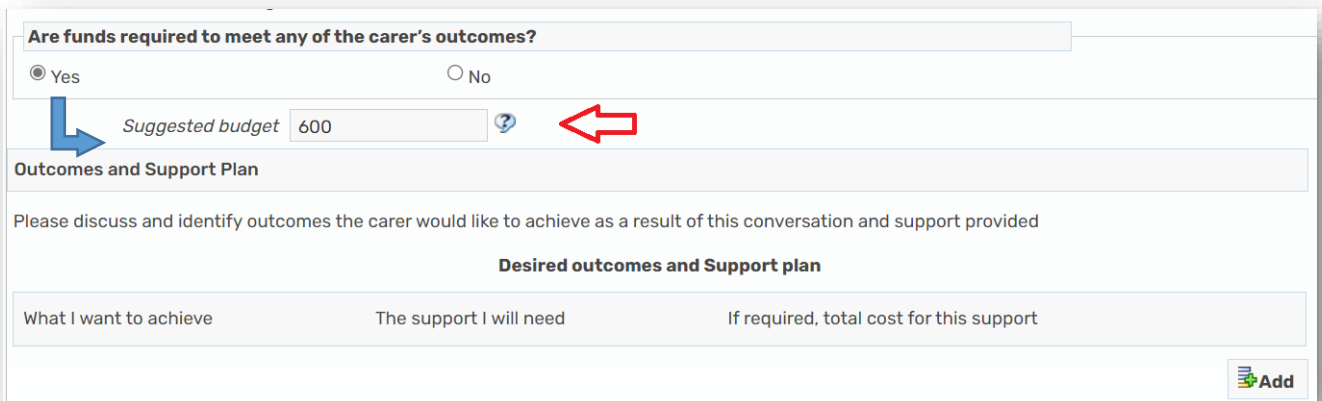
If 'Yes', then select the relevant wellbeing areas that apply.

If one or more outcomes are unable to be achieved (as shown above), if the Carer's mental or physical health is deteriorating due to their caring role (or there is a risk of this), and there is a significant impact on the Carer's wellbeing, then it will display their eligibility under **'Decision'- Eligibility indicated.**

Alternatively, if the Carer was not eligible, it would display this under **'Decision' with Eligibility not indicated.**

- You then need to demonstrate the level of the caring role, and the impact on the Carer’s physical and mental wellbeing, by choosing the drop down list of 0-3, using the guidance next to it to determine which one most applies in regards to the support they are providing.
- For ‘*Impact on physical and mental wellbeing*’, choose from the drop down list of 0-3, using the guidance next to it to detail the level of impact on the Carer’s wellbeing:
- If you require funds to support the Carer to achieve any of their outcomes, please select ‘Yes’ under ‘*Are funds required to meet any of the carer’s outcome?*’. If you leave this blank or select ‘No’, then the indicative budget will not appear.

In some instances, where the Carer is eligible for support, their outcomes can be achieved without funds, so therefore this indicative budget box is not required.



**Are funds required to meet any of the carer's outcomes?**


Yes  No

**Suggested budget** 600

**Outcomes and Support Plan**

Please discuss and identify outcomes the carer would like to achieve as a result of this conversation and support provided

**Desired outcomes and Support plan**

What I want to achieve	The support I will need	If required, total cost for this support
		

- If you are providing any level of support or providing information and advice, to enable the Carer to achieve their outcomes (with or without using a carer budget), then the **support plan** needs to be used to detail this.

To add to the **Desired outcomes and Support plan** table, select ‘Add’, and detail in the text boxes what the Carer would like to achieve, and how they will be supported to do so.

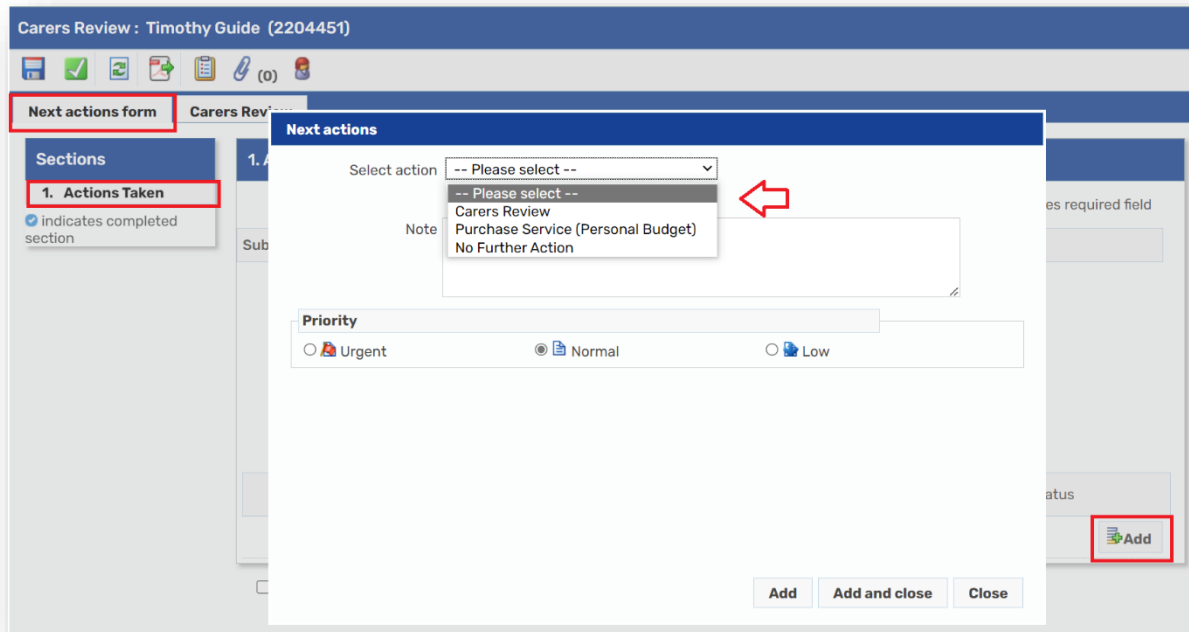
If a carer budget is being used in regards to a particular outcome, then you can detail how much in the ‘total cost’ box.

Multiple outcomes can be added in this table and be a mixture of purchased and non-purchased.



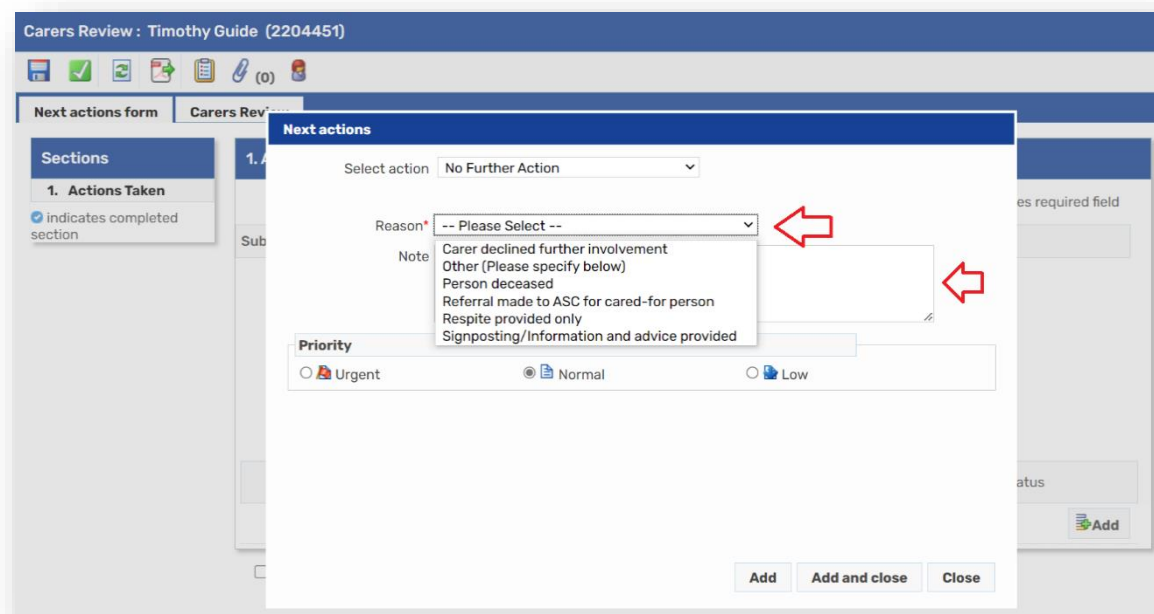
## 6. Selecting a next Action for the Carers Review

Finally, you will need to select an **Action**. You will find in the 'Next actions form' tab. Select 'Add' and you will find three actions available from the drop down:



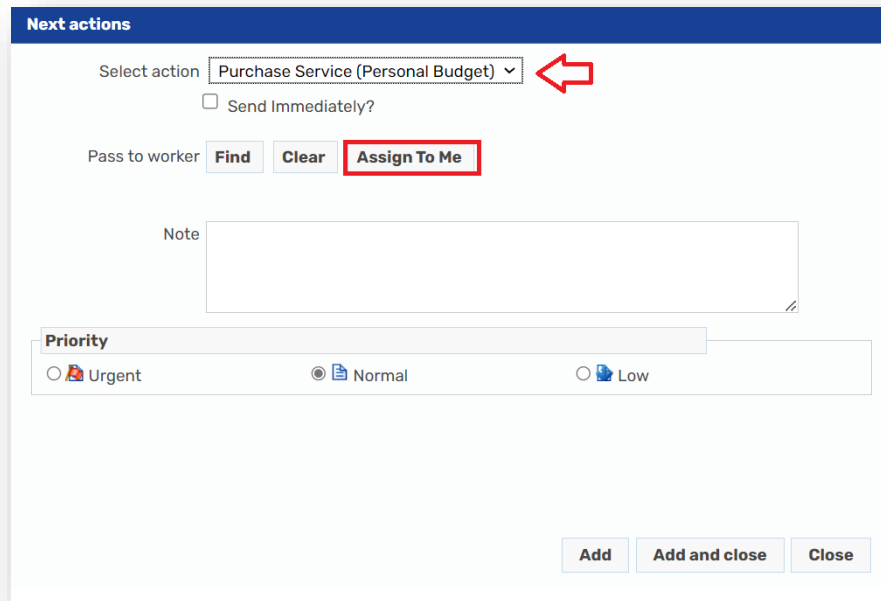
The screenshot shows the 'Next actions form' for Timothy Guide (2204451). The 'Next actions' dropdown menu is open, displaying the following options: '-- Please select --', 'Carers Review', 'Purchase Service (Personal Budget)', and 'No Further Action'. A red arrow points to the dropdown menu. The 'Add' button is highlighted with a red box. The 'Priority' section shows 'Normal' selected.

- If there are no further actions required as an outcome of your conversation, then select the action of **No further action** from the drop down, and select a 'Reason'. For 'Other' reason, please use the Note box to elaborate:




The screenshot shows the 'Next actions form' for Timothy Guide (2204451). The 'Select action' dropdown is set to 'No Further Action'. The 'Reason' dropdown is open, displaying the following options: '-- Please Select --', 'Carer declined further involvement', 'Other (Please specify below)', 'Person deceased', 'Referral made to ASC for cared-for person', 'Respite provided only', and 'Signposting/Information and advice provided'. Red arrows point to the 'Reason' dropdown and the 'Note' text area. The 'Add' button is highlighted with a red box. The 'Priority' section shows 'Normal' selected.

- If you are providing a carer budget then you will be selecting the action of **Purchase service (Personal Budget)**, and assigning it to yourself, so you are able to purchase the direct payment:



**Next actions**

Select action: Purchase Service (Personal Budget) 

Send Immediately?

Pass to worker: **Find** **Clear** **Assign To Me**

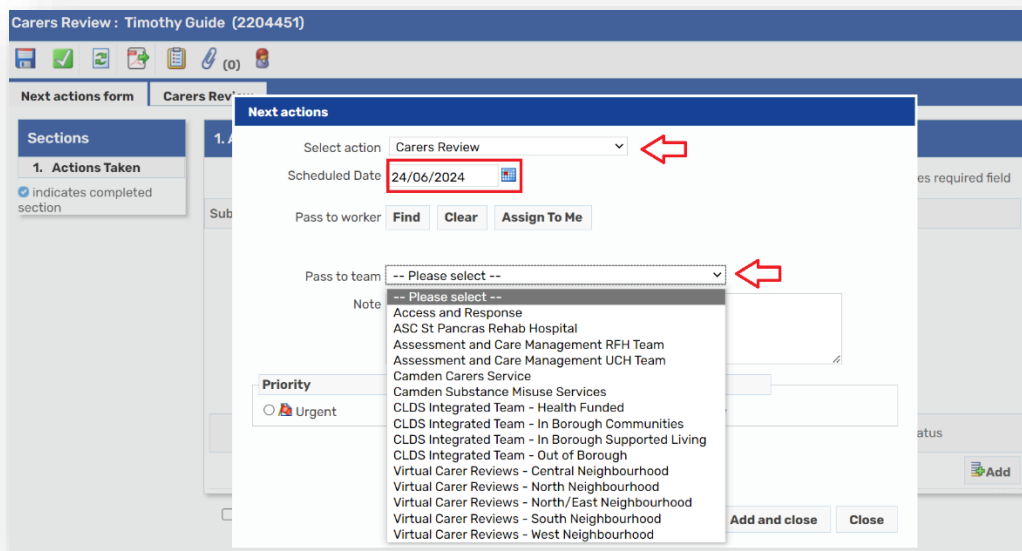
Note:

**Priority**

Urgent  Normal  Low


**Add** **Add and close** **Close**


- If you have provided a carer budget to the Carer (detailing this in the support plan), then you are also required to select an action of **Carers Review**, so the Carer can be reviewed in a year's time. Pass this to your team from the drop down list:




**Carers Review : Timothy Guide (2204451)**

**Next actions**

Select action: Carers Review 

Scheduled Date: 24/06/2024 

Pass to worker: **Find** **Clear** **Assign To Me**

Pass to team: -- Please select -- 

Note: -- Please select --

**Priority**

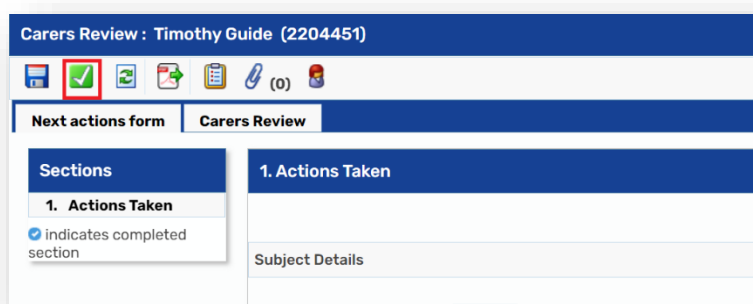
Urgent

Access and Response  
 ASC St Pancras Rehab Hospital  
 Assessment and Care Management RFH Team  
 Assessment and Care Management UCH Team  
 Camden Carers Service  
 Camden Substance Misuse Services  
 CLDS Integrated Team - Health Funded  
 CLDS Integrated Team - In Borough Communities  
 CLDS Integrated Team - In Borough Supported Living  
 CLDS Integrated Team - Out of Borough  
 Virtual Carer Reviews - Central Neighbourhood  
 Virtual Carer Reviews - North Neighbourhood  
 Virtual Carer Reviews - North/East Neighbourhood  
 Virtual Carer Reviews - South Neighbourhood  
 Virtual Carer Reviews - West Neighbourhood

**Add and close** **Close**

Once you have added an Action/s, then select 'Add and Close'.

- You can then finish this **Carers Review** workflow step, by using the 'Finish' icon in the toolbar:



**Carers Review : Timothy Guide (2204451)**

**Next actions form** **Carers Review**

**Sections**

**1. Actions Taken**

indicates completed section

**Subject Details**