What Matters- Conversation Update Guidance

For those with an ongoing service or initial conversations (1, 2 or 3) in progress, a **What Matters- Conversation update** workflow step can be used for the following reasons:

- **A <u>one-off</u> care call/ payment needs to be made**, that does not require picking up the existing review on the system (as the ongoing support plan isn't being amended and a review isn't being completed). For example, this might be a one-off payment as a carer stayed longer, or for an extra care call due to a day centre being closed.
  This Conversation update step <u>cannot</u> be used for any ongoing changes to a support plan, but for one offs ONLY.

- **To record further updates if Conversation 1, 2 or 3 are already in progress.** It might be to record a significant event or issue, to record the discussion or to reflect the tasks completed by the Duty worker.

- **To refer to Occupational Therapy, Outreach, Family Group Conference, Welfare Rights or Sensory Needs**, without picking up the existing review on the system to do so. If the care does not need to be reviewed currently, but for instance, a request comes in on Duty for an OT to become involved; this Conversation update step can be used to refer.

- **To record work completed on Duty, that requires more than a case note.** It might be to record a significant event or issue, to record the discussion that requires the review to be brought forward or to reflect the tasks completed by the Duty worker.

The Conversation Update step is to enable workers to record effectively, without picking up the Conversation/ Review workflow if it's not necessary. This step <u>cannot be used</u> for any ongoing changes to an ongoing support plan, such as an urgent ongoing increase. The review workflow needs to be picked up for this, and 'other update' selected.

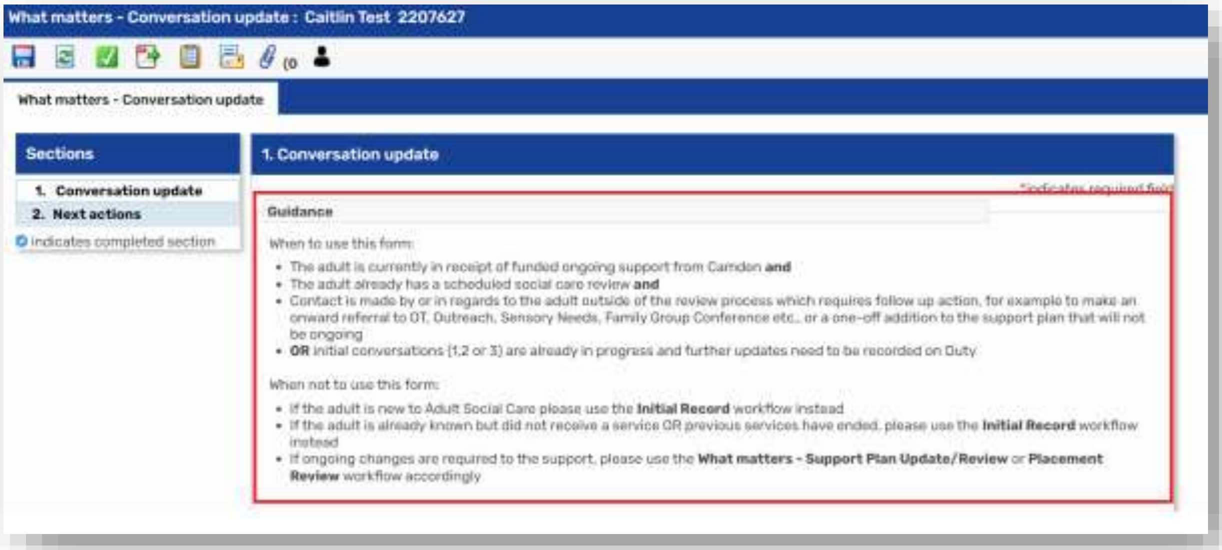
The Conversation update is a stand-alone step, replacing the *Update Support Plan* workflow, the *OT- Request OT intervention* step, and the CLDS *Enquiry* workflow, as this new step covers all these functions.

1. Starting the What matters- Conversation update step

- Go to 'Start' and then 'New' on the person's main page, and select **What matters- Conversation update**:

2. Completing the What matters- Conversation update

When you open this workflow step, please ensure you **read the guidance**, to confirm you are using this step correctly:



What matters - Conversation update : Caitlin Test 2207627

What matters - Conversation update

Sections

1. **Conversation update**
2. **Next actions**

indicates completed section

1. Conversation update

*indicates required field

Guidance

When to use this form:

- The adult is currently in receipt of funded ongoing support from Camden **and**
- The adult already has a scheduled social care review **and**
- Contact is made by or in regards to the adult outside of the review process which requires follow up action, for example to make an onward referral to OT, Outreach, Sensory Needs, Family Group Conference etc., or a one-off addition to the support plan that will not be ongoing
- **OR** initial conversations (1,2 or 3) are already in progress and further updates need to be recorded on Duty

When not to use this form:

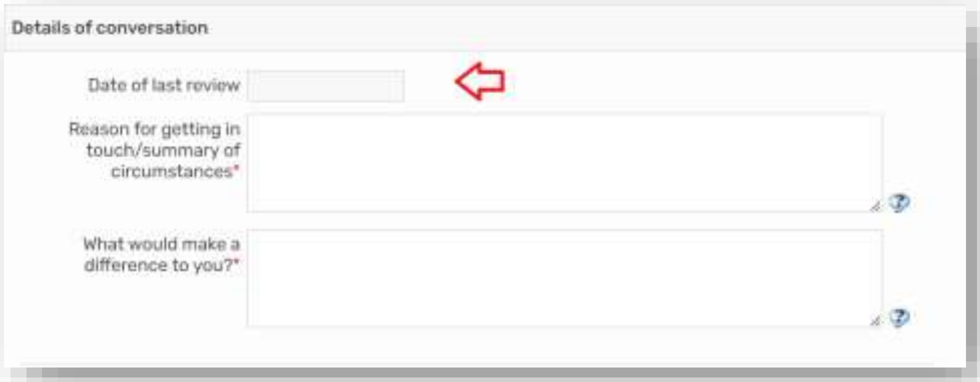
- If the adult is new to Adult Social Care please use the **Initial Record** workflow instead
- If the adult is already known but did not receive a service OR previous services have ended, please use the **Initial Record** workflow instead
- If ongoing changes are required to the support, please use the **What matters - Support Plan Update/Review** or **Placement Review** workflow accordingly

There are only two sections of this form, the details of the conversation update, and the actions taken.

Section 1. Conversation update:

- The 'Date of the last review' will pull from the last date a review workflow was completed, for information purposes.

- Detail the conversation discussion in the next two text boxes; summarising the circumstances and what would make a difference to the person:



Details of conversation

Date of last review

Reason for getting in touch/summary of circumstances*

What would make a difference to you?*

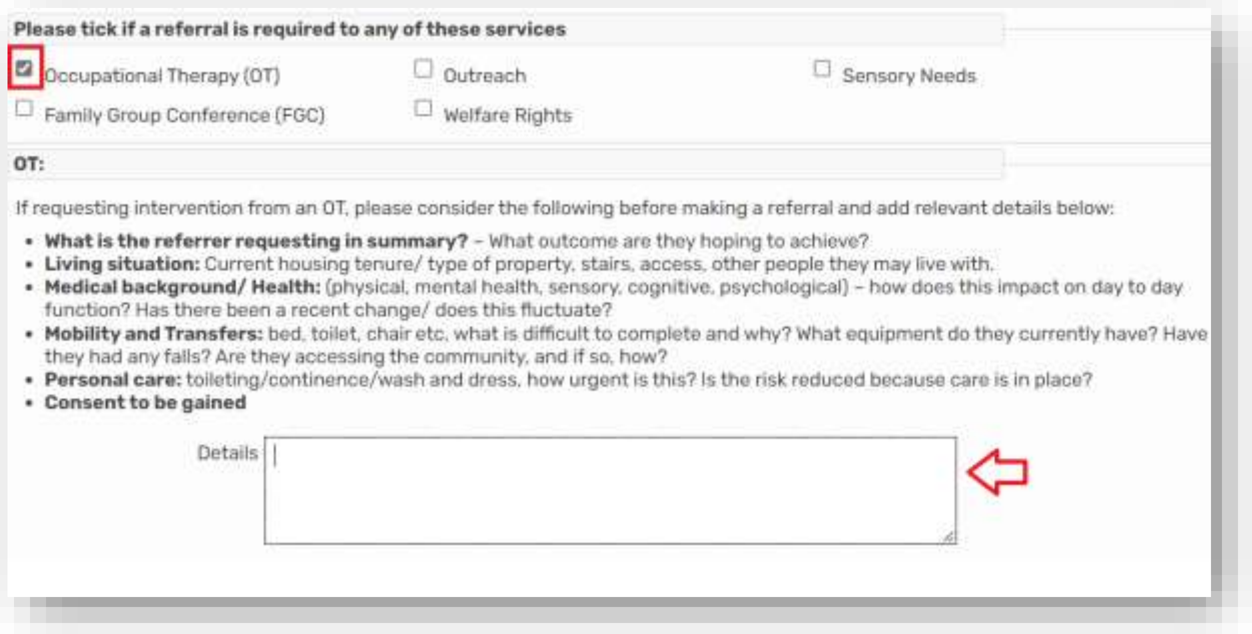
- If you are completing this Conversation update to **refer to a specific ASC team**, you can tick the boxes that apply (if not, and you are completing this for a one off care call/ payment, then leave these blank):

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

☐ Occupational Therapy (OT) ☐ Outreach ☐ Sensory Needs

☐ Family Group Conference (FGC) ☐ Welfare Rights

- When you tick the boxes for the required referral, a further text box with guidance opens for each referral, to enable you to detail the referral information required:



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

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

OT:

If requesting intervention from an OT, please consider the following before making a referral and add relevant details below:

- **What is the referrer requesting in summary?** – What outcome are they hoping to achieve?
- **Living situation:** Current housing tenure/ type of property, stairs, access, other people they may live with.
- **Medical background/ Health:** (physical, mental health, sensory, cognitive, psychological) – how does this impact on day to day function? Has there been a recent change/ does this fluctuate?
- **Mobility and Transfers:** bed, toilet, chair etc, what is difficult to complete and why? What equipment do they currently have? Have they had any falls? Are they accessing the community, and if so, how?
- **Personal care:** toileting/continence/wash and dress, how urgent is this? Is the risk reduced because care is in place?
- **Consent to be gained**

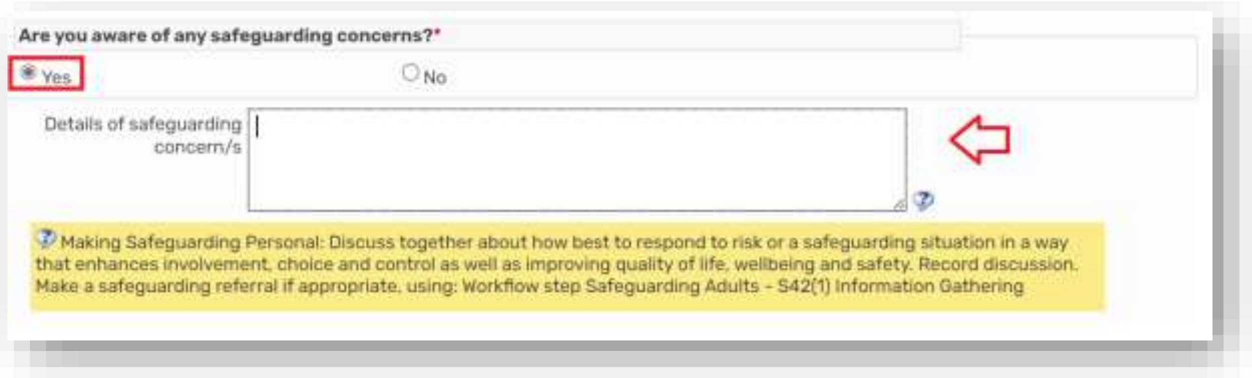
Details

The OT, Outreach worker, FGC manager or Sensory Needs worker will refer to this step and the information you have provided, when they become involved.

Please note:

- For Welfare Rights, it guides you to the web page to complete a referral directly to their team.
- For Family Group Conference, you also need to select the forms and letter icon and create the **Adult Family Group Conference Referral Form.** This is an additional referral form specific to FGC that's required.

- If you select 'Yes' to the Safeguarding concerns question, a further text box opens where you can provide basic details around this concern. If required, you will need to start the Safeguarding workflow separately outside of this step, to formally record this Safeguarding.



Are you aware of any safeguarding concerns?*

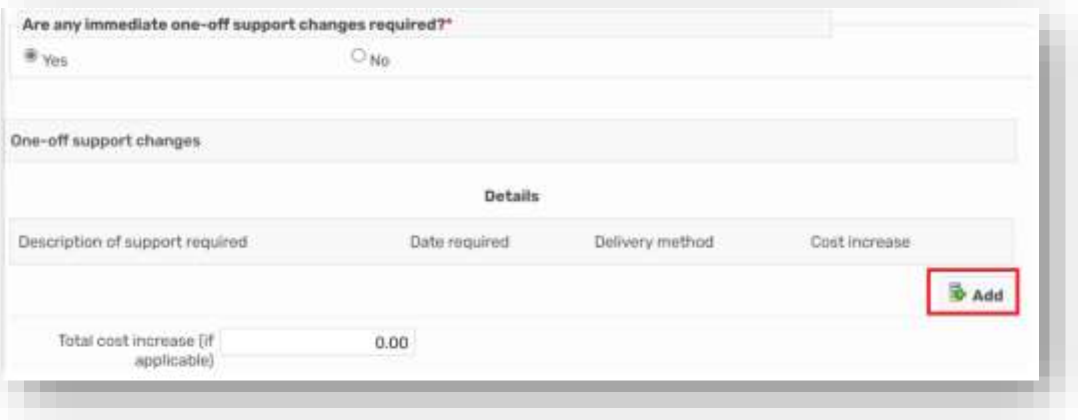
◉ Yes ○ No

Details of safeguarding concern/s

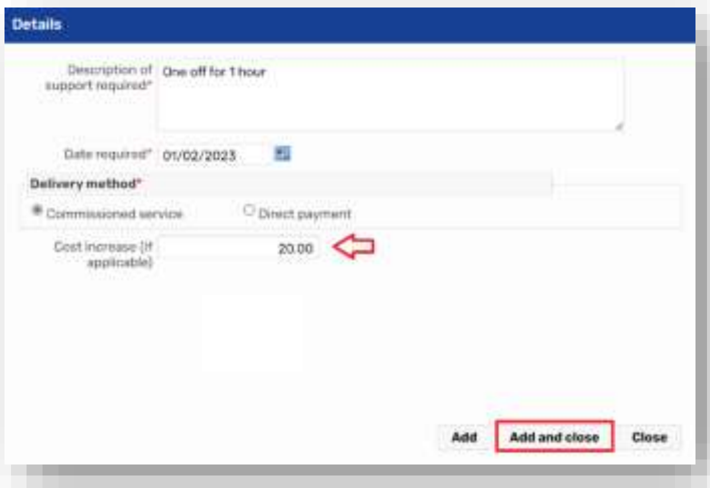
Making Safeguarding Personal: Discuss together about how best to respond to risk or a safeguarding situation in a way that enhances involvement, choice and control as well as improving quality of life, wellbeing and safety. Record discussion. Make a safeguarding referral if appropriate, using: Workflow step Safeguarding Adults - S42(1) Information Gathering

- If you are completing this Conversation update step to **purchase a one-off payment**, then you will select 'Yes' to the below, and a one-off table will appear:

(If you're not using this step for a one off cost, select 'No' and jump to page 7 of this guide)



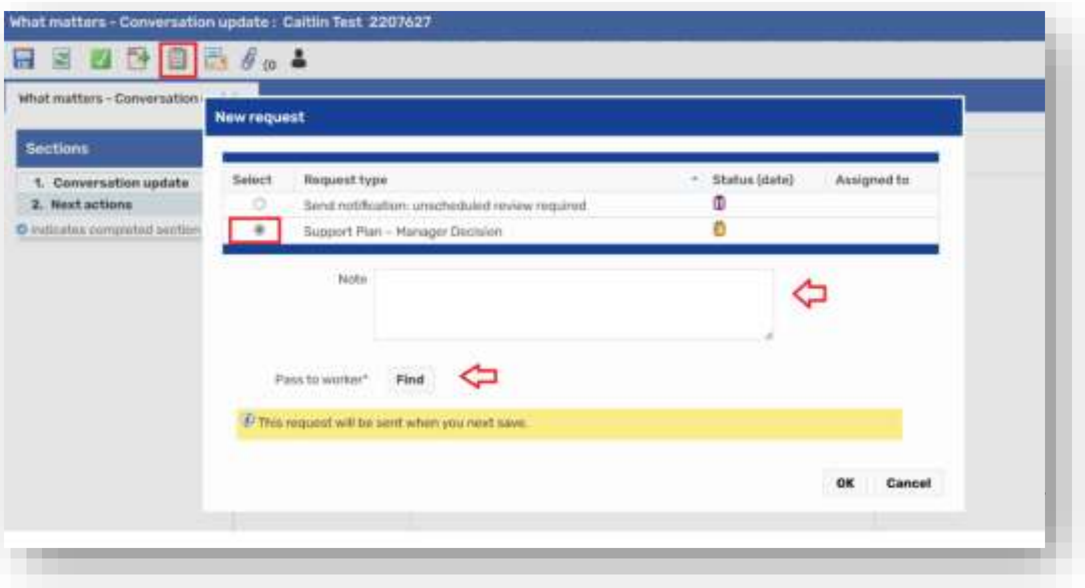
- Select 'Add' and provide details around this one-off payment, including the cost, then 'Add and close':



- If this additional **cost requires authorisation**, you will need to send an authorisation request to the manager.

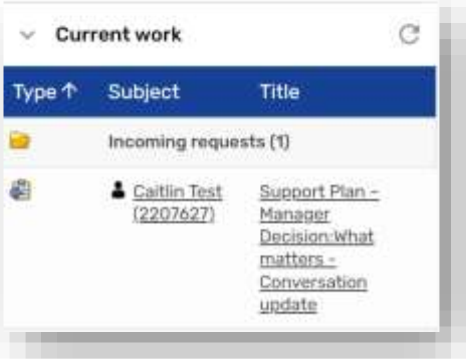
  Click on the Requests icon  and select *'Support Plan – Manager Decision'*. Complete the notes section and pass it to worker (manager) using the Find button.

  You now need to save  and then close  the workflow, for your manager to authorise.



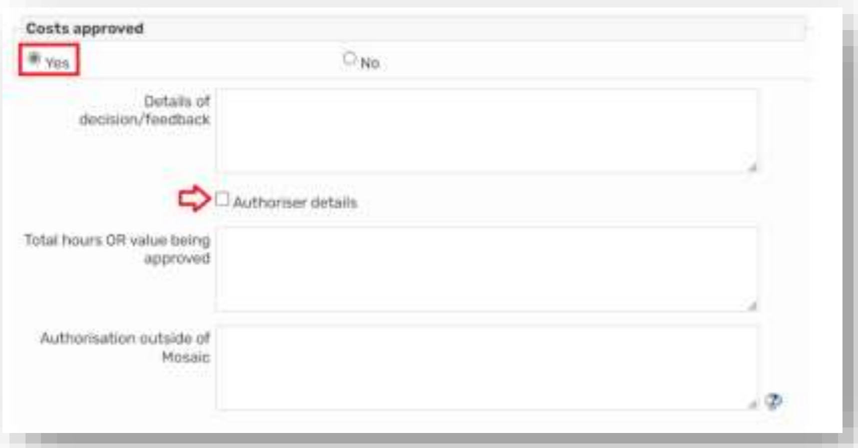
Manager Authorisation

- As the authorising manager, this authorisation request will appear in your incoming request folder under Current work.



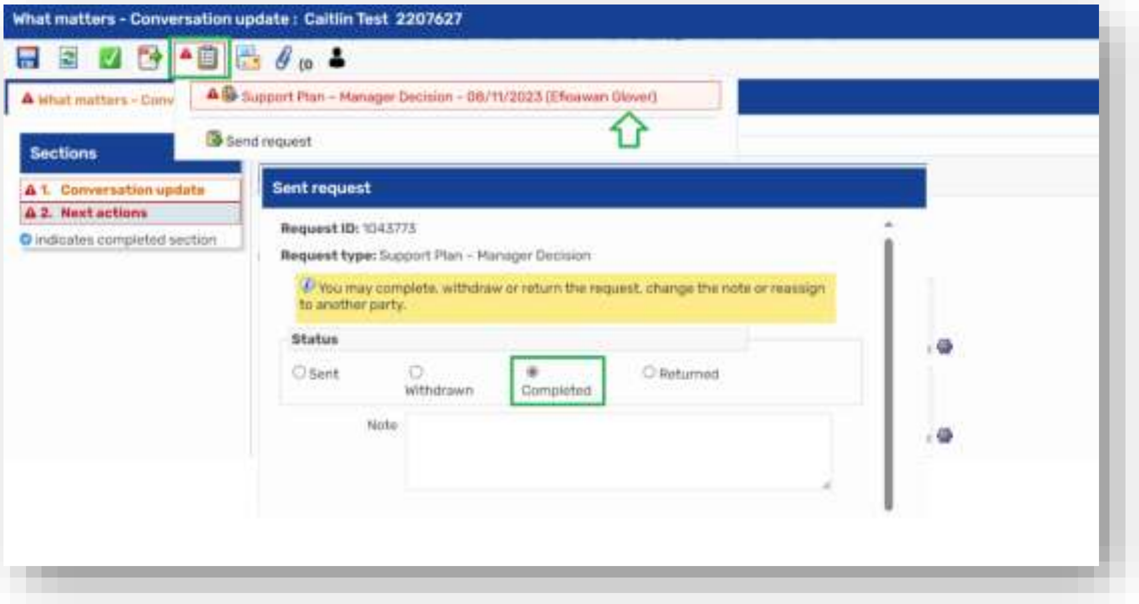
- Click on '*Support Plan – Manager Decision: What matters - Conversation update'* and click on **Resume**.

- Read Section 1 of the Conversation Update workflow, complete by the practitioner, and complete the authoriser section below:



1. **Details of decision/feedback –** manager to complete this section
2. **Authoriser details** – tick this box to display your name as the authoriser
3. **Total hours OR value being approved** – detail the hour or value agreed
4. **Authorisation outside of Mosaic** – not relevant when you're the manager, authorising in the step (can be left blank)

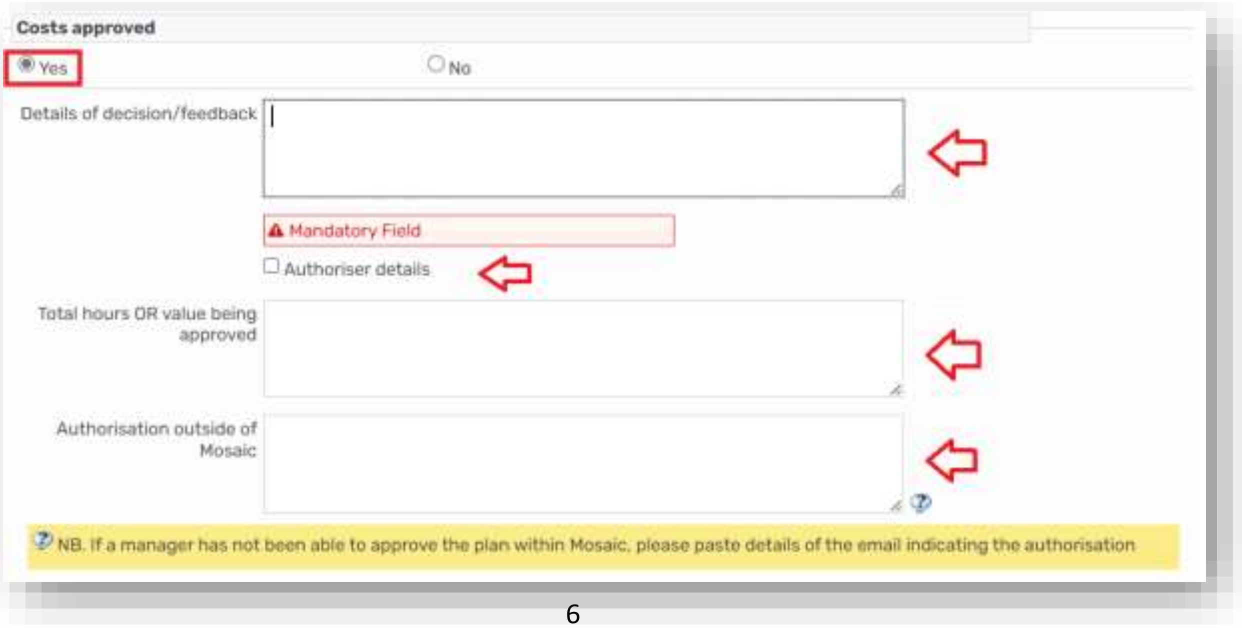
- To authorise the request/ task sent, click on the Requests icon and select **Support Plan – Manager Decision,** highlighted in red.



- **Select Completed** and then OK. Save and close the workflow and let the worker know the request has been authorised. Note, you can select 'Returned' if decide to not authorise this/ the practitioner needs to provide more detail etc.

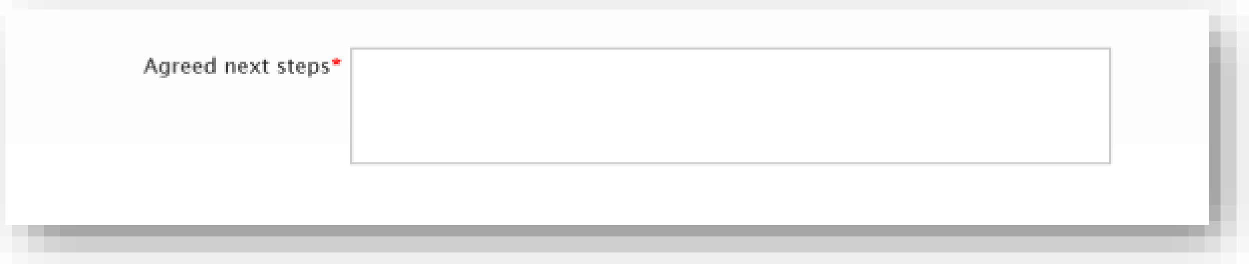
- The practitioner will complete the 'Agreed next steps'.

- **If you <u>are not</u> sending the cost for authorisation within the workflow** (it has been agreed by a manager outside of Mosaic), you will need to complete this section yourself- on behalf of your manager:



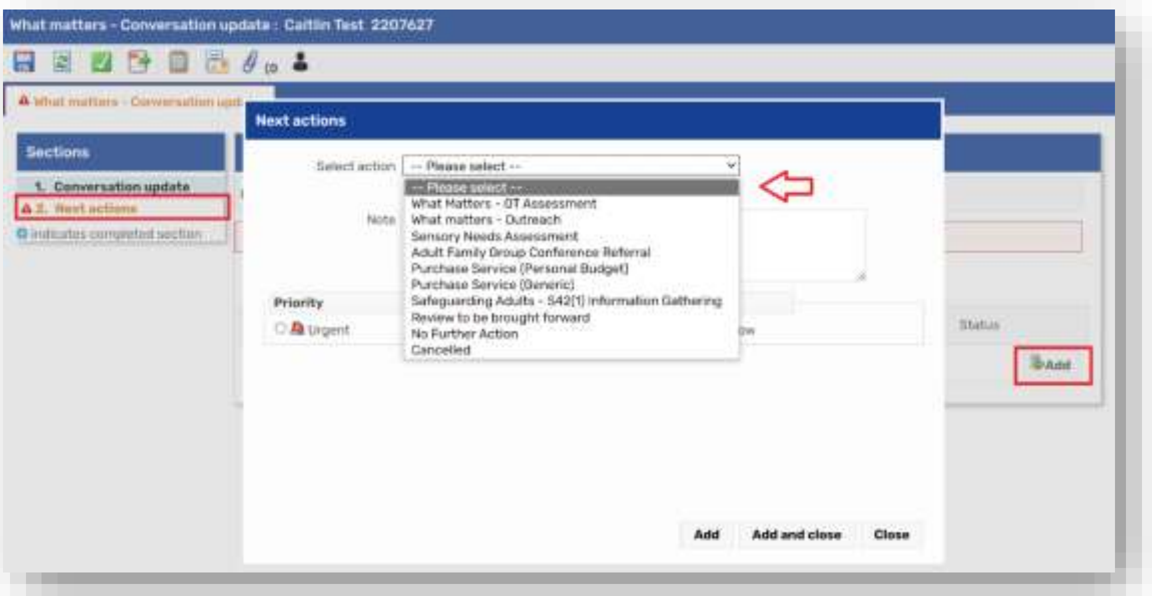
1. **Details of decision/feedback –** add details here if your manager has communicated any with you
2. **Authoriser details** – tick this box
3. **Total hours OR value being approved** – detail here the one off cost amount
4. **Authorisation outside of Mosaic** – if the cost was authorised via email, copy and paste this here, evidencing the authorisation.

- Regardless of what this Conversation update step has been used for, detail the **Agreed next steps** in the text box provided (which you will find is mandatory):



3. Selecting a next action

- Section 2 of the form is to select a next action/s:

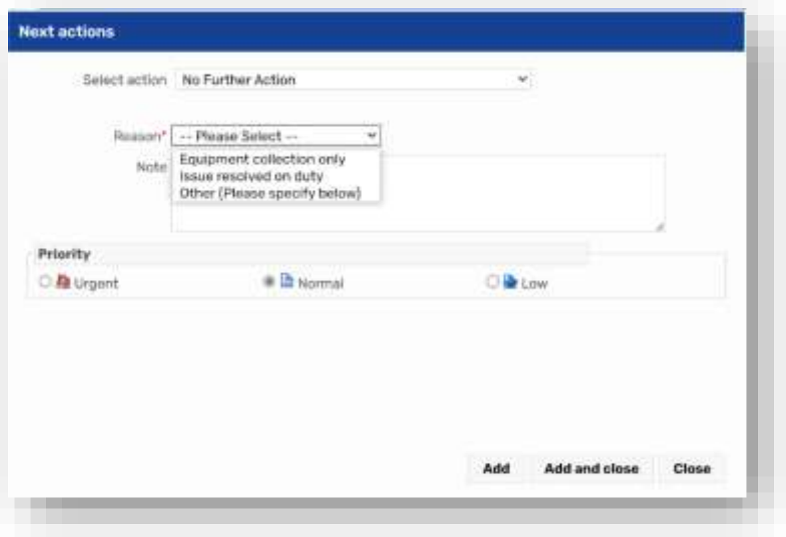


- **If you have created this Conversation Update to refer to OT, Outreach, Sensory Needs or Family Group Conference**, then select the relevant next action/ step pertaining to your referral, and send this to the corresponding team folder. This will then be picked up by the relevant workers.

- **If you have created this Conversation update to purchase a one-off**, then you can select **Purchase Service (Personal Budget)**, and either assign this to the Purchasing team or to yourself (if it's a Direct Payment for instance). Please note, the Purchasing team will not accept a purchasing task from this step for ongoing changes to services; only for one-offs.

- **If you have created this Conversation update to detail a discussion with the person or to complete a task on Duty, and as a result their Review needs to be picked up**, then select **Review to be brought forward**, and inform the relevant manager. Once the person has been assigned a worker, they can pick up the existing Review workflow.

- **If you have created this Conversation update to detail a discussion with the person or to complete a task on Duty, and nothing further is required**, you can select **No Further Action**, and select one of the following reasons:



- Note, you can also start the Safeguarding workflow from this step, by selecting the action **Safeguarding Adults- S42(1) Information Gathering**.

- The **Cancelled** option, is only to be used if this Conversation update was opened in error.

Once you have selected the relevant next action, you can 'Finish' this Conversation update step via the green tick icon in the toolbar.