

Mosaic Workflow: Mental Health

Next actions key:

- Workflow steps proposed
- Additional workflow steps that can be selected
- Dead end workflow step (ends the workflow chain)

Referral and Assessment

This workflow step is created from 'Start' and is the first step in the Mental Health workflow chain. It combines both the Referral step and Assessment step in one.

Person summary - Ms Tanija Test (2138438) born 19 Dec 1974 (49 years old)

Person details >

- Start >
- Case notes
- Documents
- Visits
- Education >

Summary | Case

Initial Record (New or returning adults only)

New...

Address


Start


Start one of the following for Ms Tanija Test (2138438).


- [Amend Reablement Services - Purchasing Team Only](#)
- [AMH/SAMH - Referral and Assessment](#) ←
- [Appointee Review](#)
- [ASC Case Closure](#)


Workflow step navigation


When the workflow step opens, your toolbar at the top is as follows:



 Save



 Refresh



 Finish


 PDF


 Notification

 (0)
 Attachments


 Go back to front screen

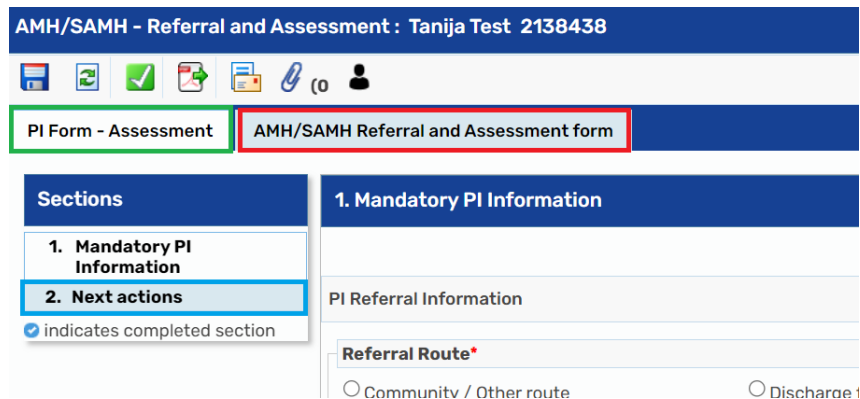

 Save and Close


Nicola Antoni/ Mosaic guidance August 2024

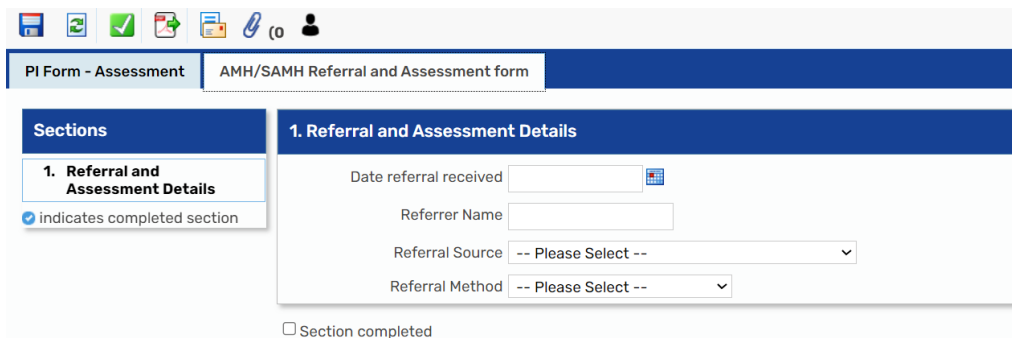
Forms for completion within the Referral and Assessment

You will note there are already forms waiting for you when you open this step.

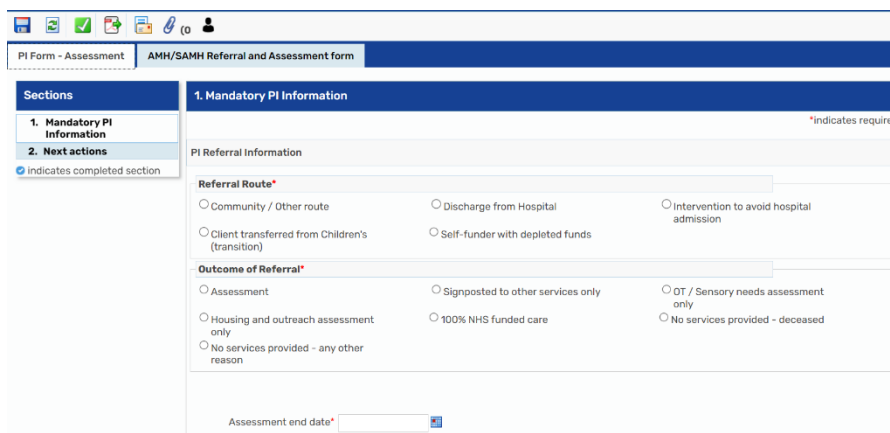
- AMH/ SAMH Referral and Assessment form
- PI form- Assessment (which includes a section for 'Next actions')



AMH/ SAMH Referral and Assessment form: It requires minimal information to be inputted here. However, you should also be uploading the word document version of your Conversation 3/ Care Act Assessment, which will include a support plan. You can upload this via the  icon in the toolbar (it will then automatically appear under documents on the person's main file).



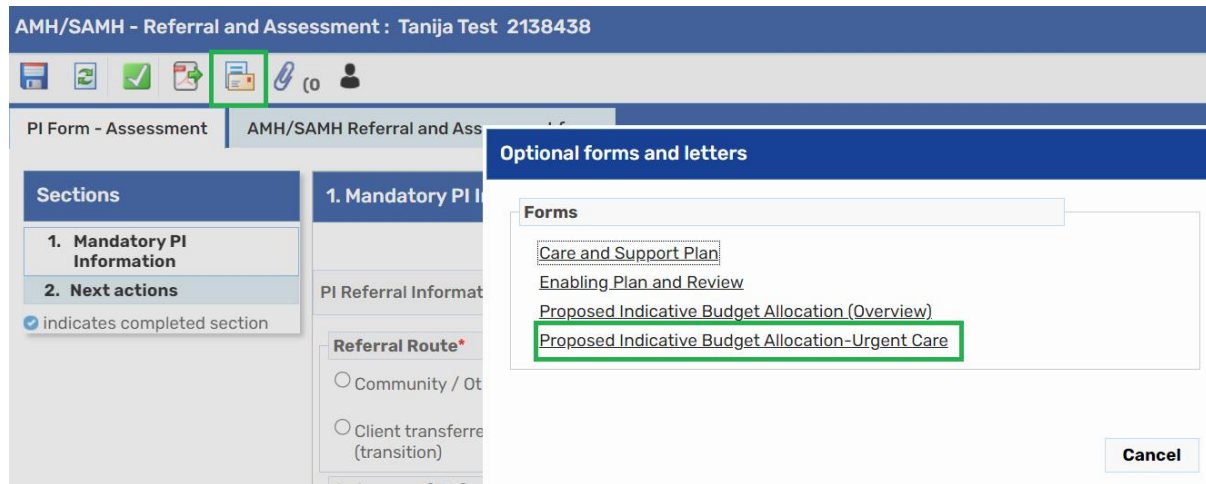
PI Form – Assessment: You will need to answer all questions listed on this form, for reporting reasons.



If you're completing this step on behalf of a mental health practitioner, they need to provide you with all this information.

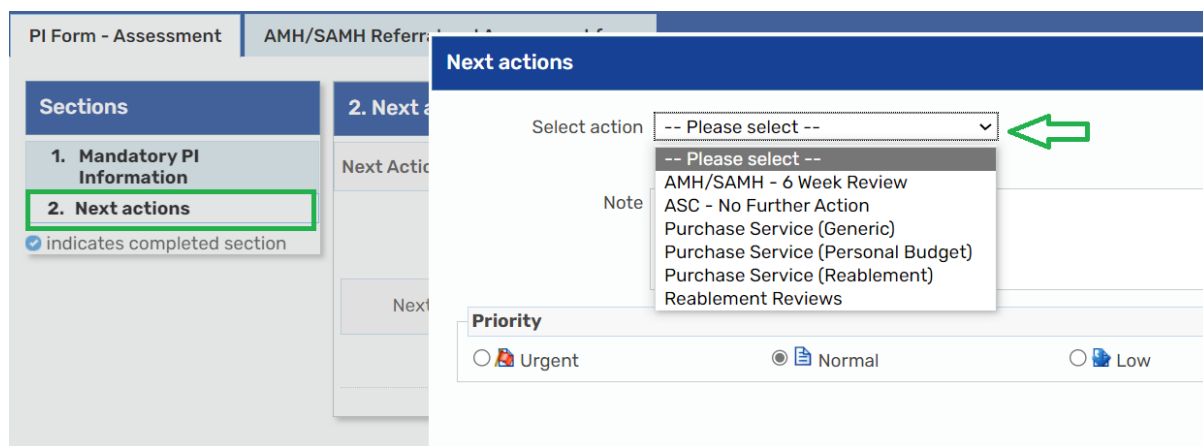
Optional forms within this step:

Under the forms/letters icon in the toolbar, you will find optional forms available. These are mainly old forms we no longer use. However, please do use the Proposed Indicative Budget Allocation-Urgent Care form, to generate a budget, before sending your request to the purchasing team:

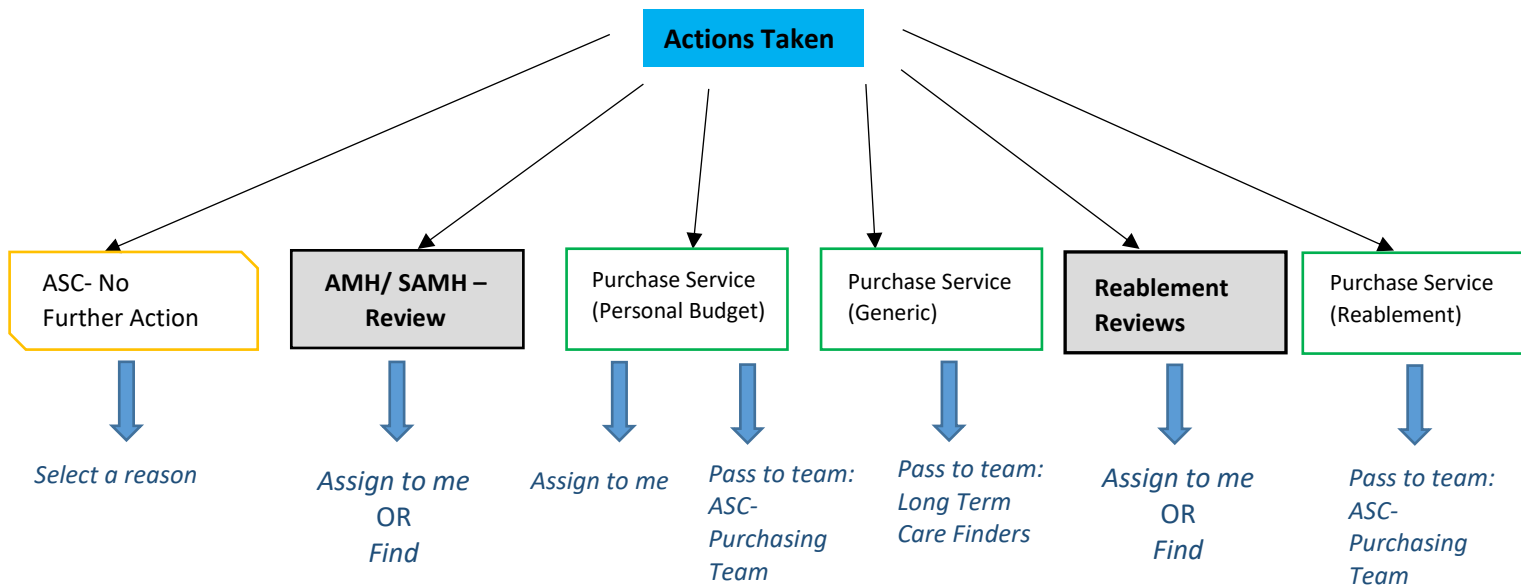


Choosing a Next action

The **Next actions** listed below, are all the possible actions that can be selected as an outcome of this workflow step.



- If requesting for ongoing services to be put in place, you would select **AMH/ SAMH- 6 Week Review**, **AND** either **Purchase Service (Personal Budget)** if it's community support **OR** **Purchase Service (Generic)** if it's a residential or nursing placement.
- If requesting for a reablement service to be put in place, you would select **Reablement Reviews**, **AND** **Purchase Service (Reablement)**. *Please note, you would also have uploaded a Conversation 2 word document form prior to this.*






Remember to choose the **FINISH** icon in the toolbar once completed .

Review

As the person will already have a service in place, an **AMH/ SAMH Review** workflow step will be available on the person’s main file under ‘Current work’. This can simply be started.


Person summary - Ms Tanija Test (2138438) born 19 Dec 1974 (49 years old)

<ul style="list-style-type: none"> Person details > Start > Case notes Documents Visits Education > Health > Consent Legal status 	<ul style="list-style-type: none"> Summary Case history
<p>Demographic information</p> <p>Address Change</p> <p>Main address 1 TEST SQUARE LONDON AA1 1AA View map Authority: Camden Ward: Holborn and Covent Garden Cluster team(s): No teams serve</p>	<p>Case status</p> <p>Open 12 Aug 2024</p> <p>Current work Workflow map History</p> <p>  AMH/SAMH - Review Assigned to: Nicola Antoni </p>

Forms for completion within the AMH/ SAMH Review

Within the Review workflow, you will only find the **PI Form- Review (On-going)** form, where the necessary information needs to be completed for reporting reasons. As before, the ‘Next actions’ are a section of this form:


AMH/SAMH - Review : Tanija Test 2138438



PI Form - Review (On-going)

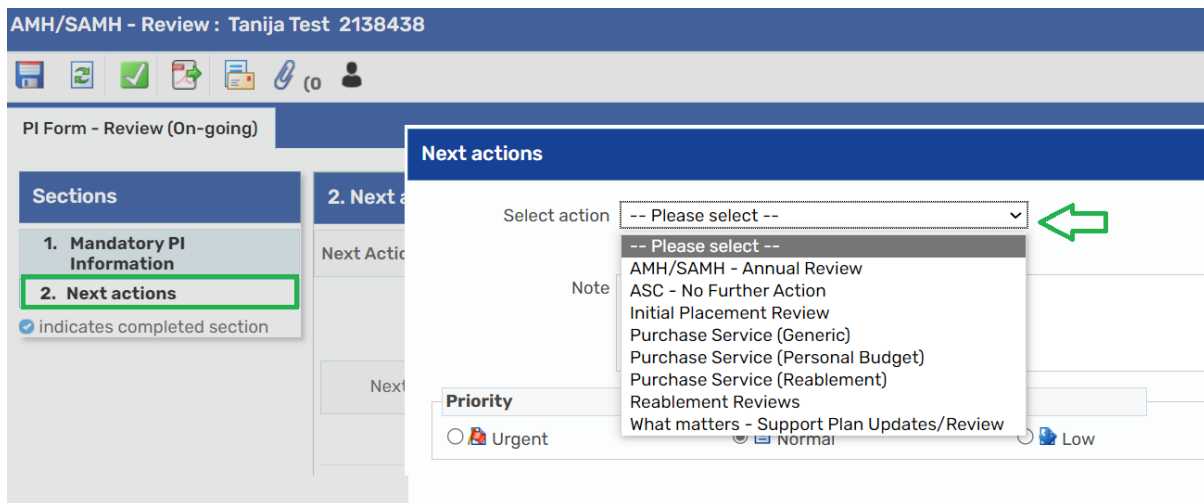
<p>Sections</p> <ul style="list-style-type: none"> 1. Mandatory PI Information 2. Next actions <p><input checked="" type="checkbox"/> indicates completed section</p>	<p>1. Mandatory PI Information</p> <p>PI Referral Information</p> <p>Referral Route*</p>
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If you're completing this step on behalf of a mental health practitioner, they need to provide you with all this information.

You will also need to upload the word document version of the What matters Review, which includes the support plan. You can upload this via the  icon in the toolbar (it will then automatically appear under documents on the person's main file).

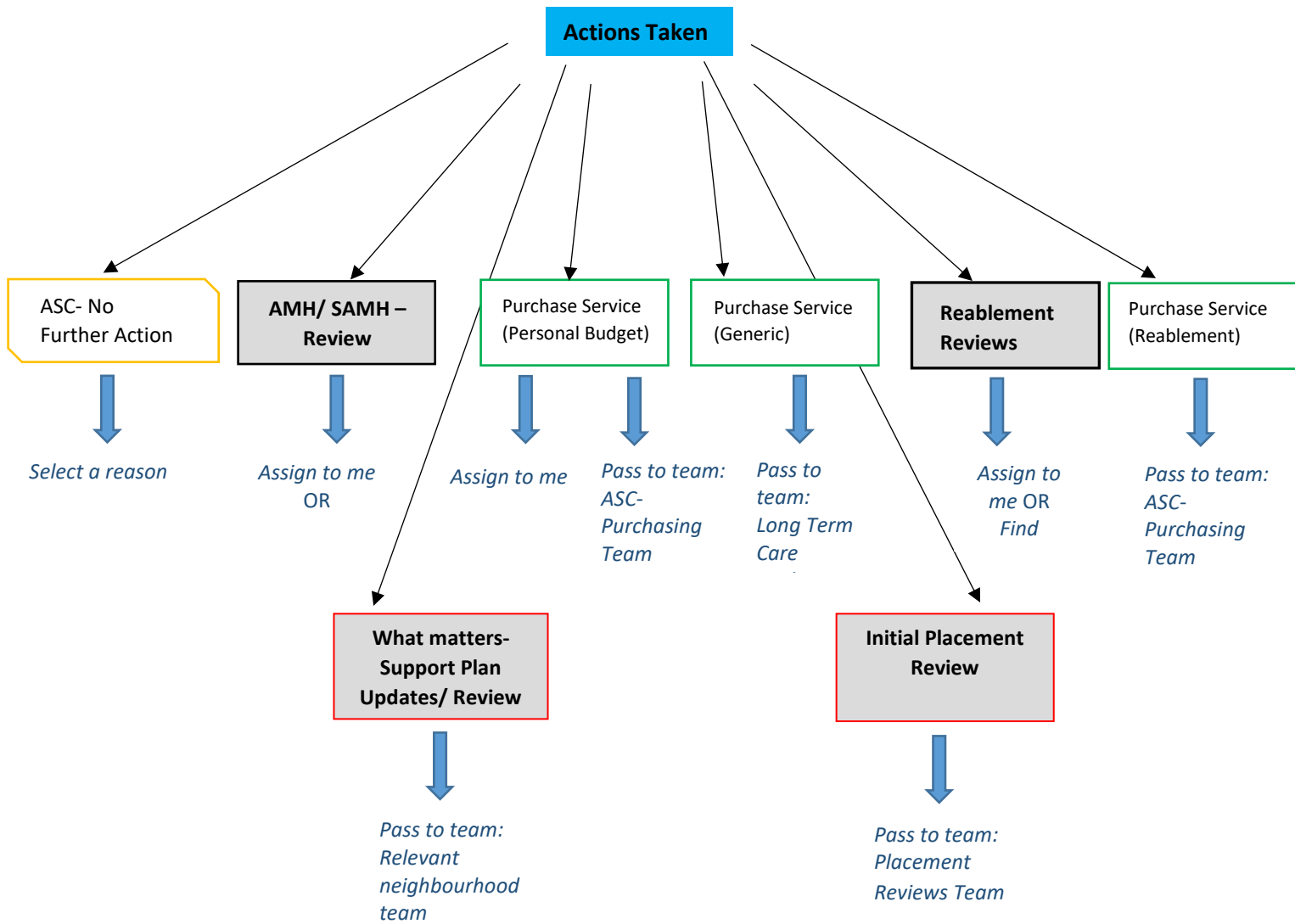
Choosing a Next action

The **Next actions** listed below, are all the possible actions that can be selected as an outcome of this workflow step.



The screenshot shows a web form titled "AMH/SAMH - Review : Tanija Test 2138438". The form has a toolbar with icons for document, checkmark, refresh, and user. Below the toolbar, there are sections for "PI Form - Review (On-going)" and "Next actions". The "Next actions" section has a dropdown menu open, showing a list of options: "-- Please select --", "AMH/SAMH - Annual Review", "ASC - No Further Action", "Initial Placement Review", "Purchase Service (Generic)", "Purchase Service (Personal Budget)", "Purchase Service (Reablement)", "Reablement Reviews", and "What matters - Support Plan Updates/Review". A green arrow points to the dropdown menu. Below the dropdown, there is a "Priority" section with radio buttons for "Urgent", "Normal", and "Low".

- If the ongoing service is going to continue, you would select **AMH/ SAMH- Annual Review**.
- If you need to make amendments to the service, you will also need to send a purchasing outcome to the Purchasing Team- either **Purchase Service (Personal Budget)** if it's community support **OR Purchase Service (Generic)** if it's a residential or nursing placement.
- If requesting for a reablement service to be put in place, you would select **Reablement Reviews, AND Purchase Service (Reablement)**. *Please note, you would also have uploaded a Conversation 2 word document form prior to this.*
- If you are passing on the case to ASC, you would select one of their reviews- either **What matters- Support Plan Updates/ Review** for the community or **Initial Placement Review** for residential or nursing placement.



Remember to choose the **FINISH** icon in the toolbar once completed .

Reablement

From your previous workflow step (either AMH/ SAMH - Referral and Assessment or AMH/ SAMH - Review), you would have selected two actions, **Reablement Reviews** and **Purchase Service (Reablement)**.


Within the Reablement Reviews step, you will find the PI Form- Reablement form where the necessary information needs to be completed for reporting reasons:

Reablement Reviews : Tanija Test 2138438

PI Form - Reablement

Sections	1. Mandatory PI Information
<ul style="list-style-type: none"> 1. Mandatory PI Information 2. Hospital Discharge ONLY 3. Next actions <p><input checked="" type="checkbox"/> indicates completed section</p>	<p>PI Referral Information</p> <p>Referral Route*</p> <p> <input checked="" type="radio"/> Community / Other route <input type="radio"/> Discharge from Hospital <input type="radio"/> Intervention to admission </p> <p> <input type="radio"/> Client transferred from Children's (transition) <input type="radio"/> Self-funder with depleted funds </p> <p>Outcome of Referral*</p> <p> <input checked="" type="radio"/> Assessment <input type="radio"/> Signposted to other services only <input type="radio"/> OT / Sensory need </p>

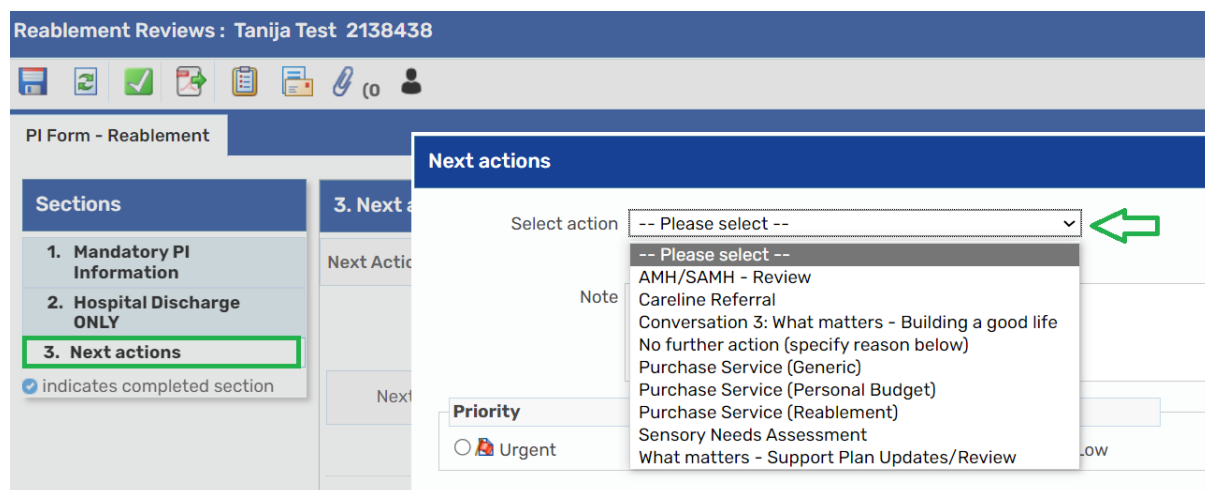
As before, the **'Next actions'** are a section of this form. You will not need to complete section 2. of the form.

You will also need to upload the updated word document version of the Conversation 2 [form/](#) Reablement goal and timetable, which details your reviews. You can upload this via the  icon in the toolbar (it will then automatically appear under documents on the person's main file).

If ongoing services are required as an outcome of reablement, a Conversation 3/ Care Act assessment would also need to be uploaded here.

Choosing a Next action

The **Next actions** listed below, are all the possible actions that can be selected as an outcome of this workflow step.



The screenshot shows the 'Next actions' dropdown menu in the 'PI Form - Reablement' for 'Tanija Test 2138438'. The dropdown is open, showing a list of actions. A green arrow points to the dropdown menu. The actions listed are:

- Please select --
- AMH/SAMH - Review
- Careline Referral
- Conversation 3: What matters - Building a good life
- No further action (specify reason below)
- Purchase Service (Generic)
- Purchase Service (Personal Budget)
- Purchase Service (Reablement)
- Sensory Needs Assessment
- What matters - Support Plan Updates/Review

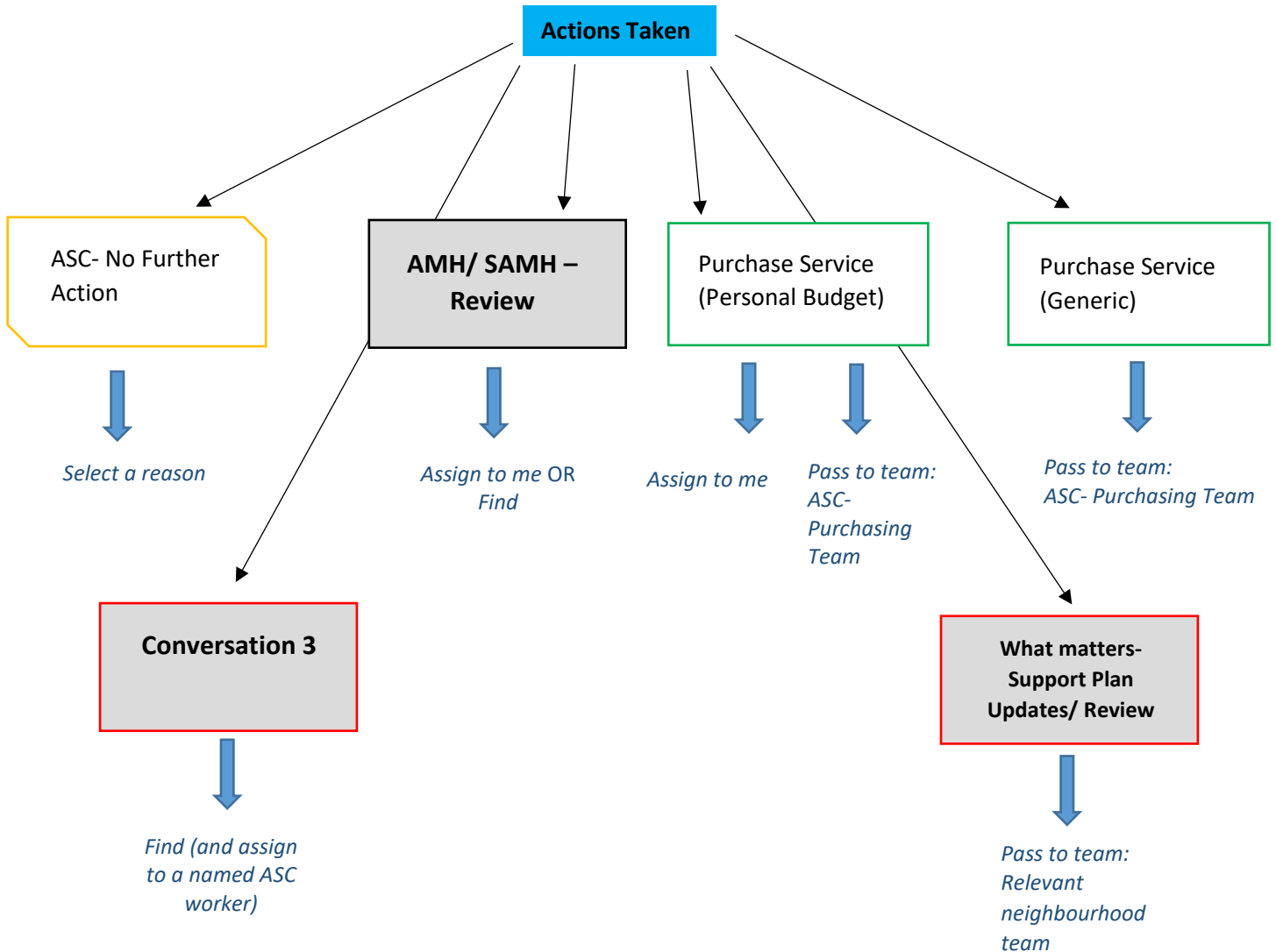
The 'Priority' section shows 'Urgent' selected.

- If you need to make amendments to reablement during the 4 week period, you would choose **Purchase Service (Reablement)**, to make this request with the Purchasing team.
- If an ongoing service is required as an outcome of reablement, you would select **AMH/SAMH- Review. AND** either **Purchase Service (Personal Budget)** if it's community support **OR Purchase Service (Generic)** if it's a residential or nursing placement.
- If an ongoing service is required, but this needs to be passed to ASC for assessment, **Conversation 3: What matters- Building a good life** can be selected and sent to the relevant neighbourhood team.
- If the ongoing service is already in place as an outcome of reablement, but the Review needs to be sent to ASC, **What matters- Support Plan Updates/ Review** can be selected and sent to the relevant neighbourhood team.

- You can also refer to Careline via **Careline Referral**, or to Sensory needs via **Sensory Needs Assessment (not shown in the actions taken below)**.

For Careline: You would send the Careline Referral workflow to yourself to complete.

For Sensory Needs: You would send the Sensory Needs Assessment to *Sensory Deaf and Hard of Hearing ASC* or *Sensory Vision ASC*.



Remember to choose the FINISH icon in the toolbar once completed .