



Careline Referral Management Guidance

This guide details the process where a Careline referral has been completed by a practitioner, and the next stage/ workflow step has been sent to Careline, to schedule an appointment.

Summary of guide:

1. Finding the referral in Careline Telecare's incoming work
2. Completing the Careline Referral Management workflow, including next actions
3. Sending a notification to the referrer
4. Finishing the workflow

1. Finding the referral

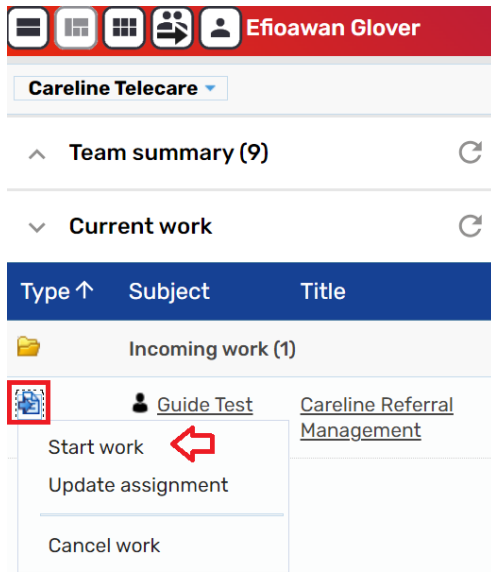
You will find five icons by your name, in the top left corner of Mosaic. The fifth icon opens up your team's folder- called Careline Telecare (arrowed below).

Underneath this, you will find the Careline Telecare's 'Current work' folder, where all the **Careline Referral Management** workflow steps are waiting for you to action:

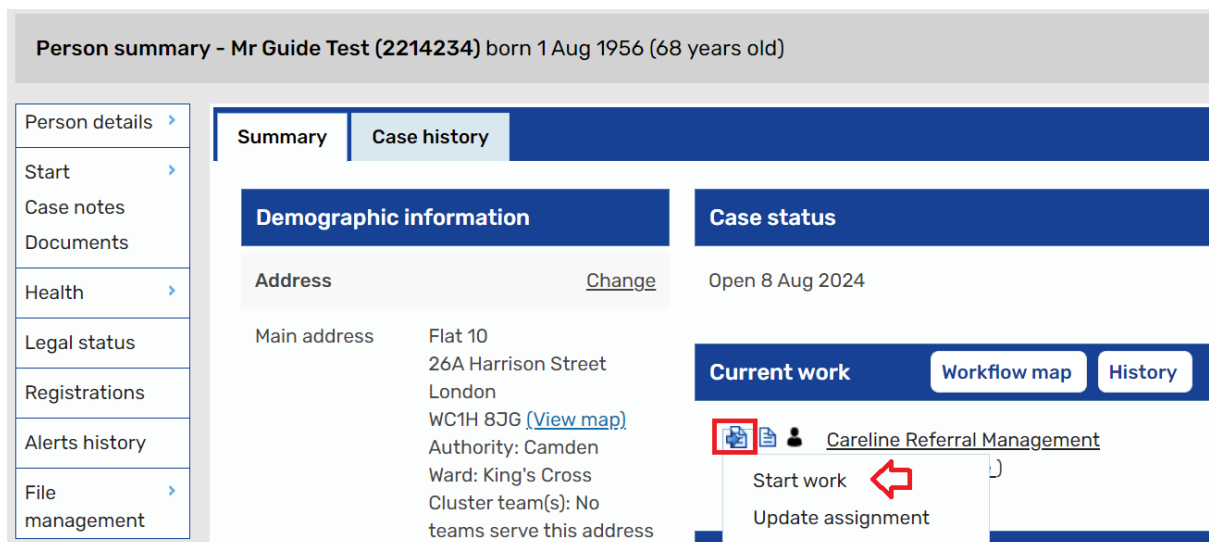
The screenshot shows the Mosaic interface for user Efoawan Glover. At the top, there are five icons representing different views or folders. The fifth icon, a person with a checkmark, is highlighted with a green box. Below this, the user's name 'Efoawan Glover' is displayed. Underneath, there is a dropdown menu labeled 'Careline Telecare' with a red arrow pointing to it. Below the dropdown, there are two main sections: 'Team summary (9)' and 'Current work'. The 'Current work' section is highlighted with a red box. Below this, there is a table with columns 'Type', 'Subject', and 'Title'. The table shows one item under 'Incoming work (1)':

Type	Subject	Title
	Incoming work (1)	
	Guide Test (2214234)	Careline Referral Management

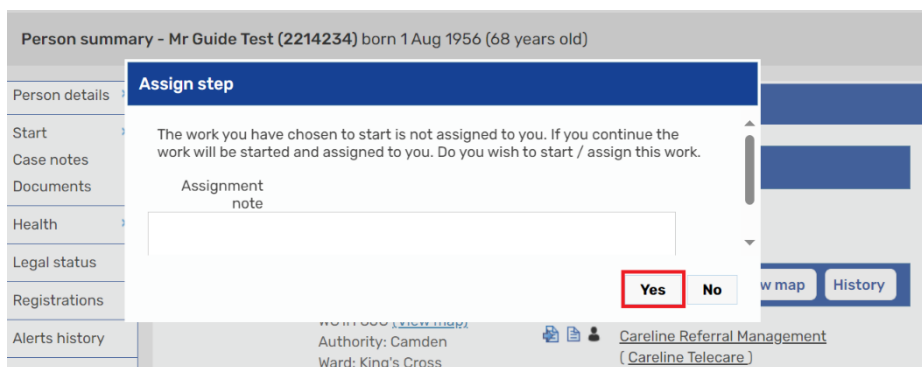
You can start the **Careline Referral Management** workflow step in two ways. Either by starting it here, in the Current Work folder:



Or by starting it on the individual's front page:



When starting a workflow step from a team folder, you will be asked to confirm you wish to assign this to yourself. Select 'Yes':

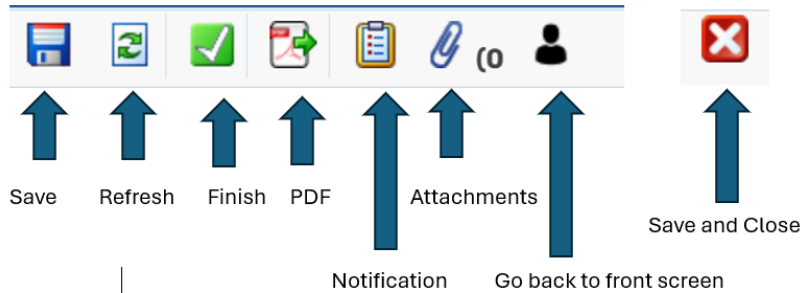




2. Completing the Careline Referral Management workflow

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. Once finished, the future actions/ workflow steps can be started (i.e. Careline Provision workflow step). If your workflow remains open, it will reflect that the referral management 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, as to the outcome of this workflow; whether an appointment has been scheduled or not.

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.



- **The Careline Referral Management Outcome 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 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 are required to complete the first two tables in Section 6:

Use the first table (highlighted in green) - *Attempts to arrange an appointment*- to document your involvement in arranging the Careline appointment.

By using the 'Add' button, you can add each attempt at contacting the individual/ family etc. to schedule the Careline assessment:



Appointment management

Attempts to arrange an appointment*

Date of contact: 08/08/2024

Comments: Telephone call to Mr Test. No answer. Message left to contact....etc.

Buttons: Add, Add and close, Close

Enter the date of contact, and complete the comments text box with the details.

When selecting 'Add and Close', you can see this has now been added to the table, and you can continue to add each contact by using 'Add' again:

Careline Referral Management : 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

6. CARELINE ONLY - Referral Management

Appointment management

Attempts to arrange an appointment*

Date of contact	Comments
08/08/2024	Telephone call to Mr Test. No answer. Message left to contact....etc.

Buttons: Add

Have you contacted/attempted to contact the person within 10 working days of the referral? *

Yes No

You will need to state 'Yes' or 'No' as to whether you contacted/attempted to contact the person within 10 working days of the referral.

Careline Referral Management : 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

6. CARELINE ONLY - Referral Management

Appointment management

Attempts to arrange an appointment*

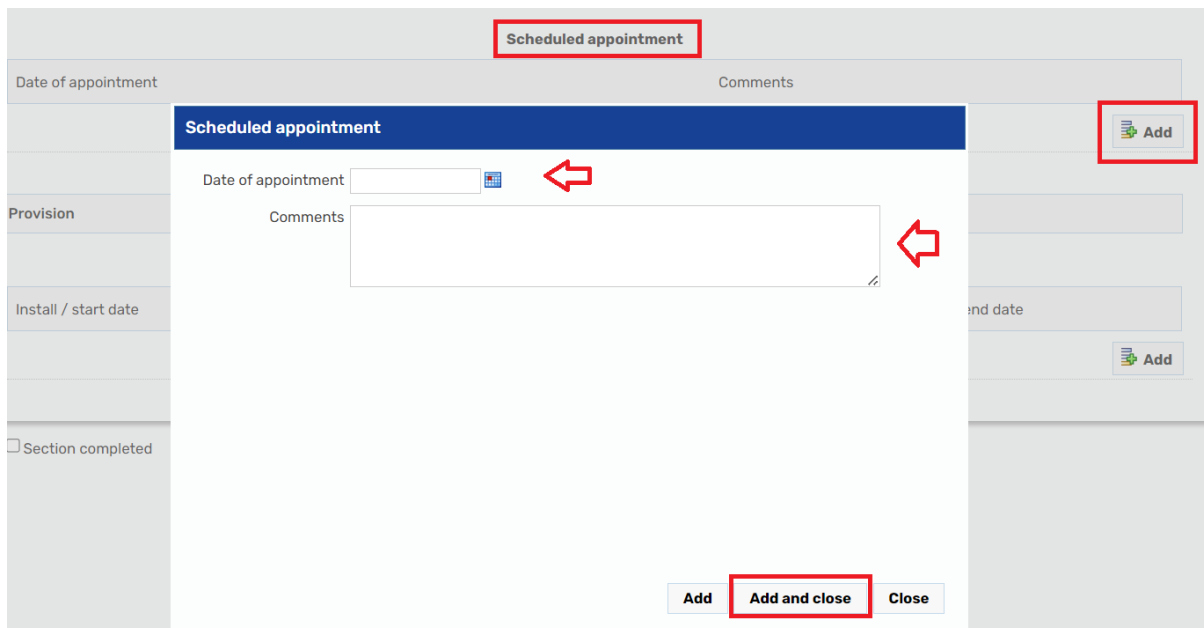
Date of contact	Comments
08/08/2024	Telephone call to Mr Test. No answer. Message left to contact....etc.

Buttons: Add



Have you contacted/attempted to contact the person within 10 working days of the referral? *


Yes No


If you have been successful in arranging an appointment, please enter the specific details in the 'Scheduled appointment' table, below.




Scheduled appointment

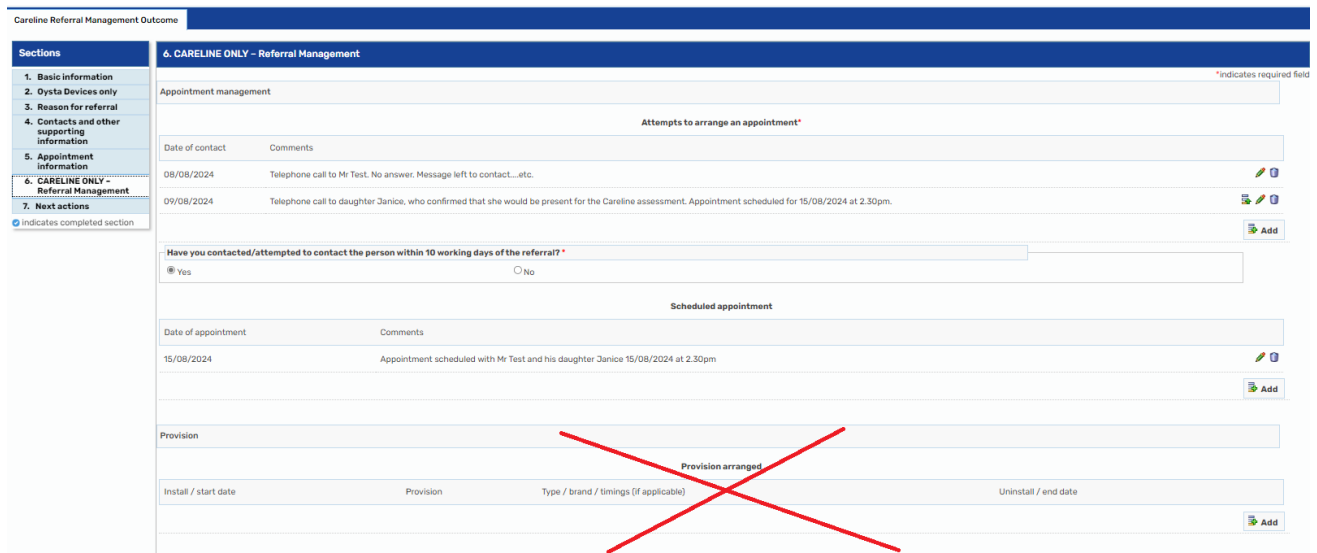
Date of appointment: [Field]  

Comments: [Text Area] 

Add 

Add and close  **Close**

You do not require the 'Provision arranged' table in Section 6. This is for the Careline installation team in the next workflow step:



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

6. CARELINE ONLY - Referral Management

Appointment management *Indicates required field


Attempts to arrange an appointment*

Date of contact	Comments	
08/08/2024	Telephone call to Mr Test. No answer. Message left to contact...etc.	
09/08/2024	Telephone call to daughter Janice, who confirmed that she would be present for the Careline assessment. Appointment scheduled for 15/08/2024 at 2.30pm.	

Have you contacted/attempted to contact the person within 10 working days of the referral? *


Yes No

Scheduled appointment

Date of appointment	Comments	
15/08/2024	Appointment scheduled with Mr Test and his daughter Janice 15/08/2024 at 2.30pm	

Provision

~~Provision arranged~~

Install / start date	Provision	Type / brand / timings (if applicable)	Uninstall / end date	
				



- **Selecting the next action**

The final task in this form is to select the relevant 'Next actions' (section 7 of the form), as an outcome of this Careline Referral Management workflow.

Select 'Add':

Careline Referral Management: 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

7. Next actions

Next Actions

A next action and recipient must be selected before this form can be finished

Next action	Assigned to	Reason	Note	Priority	Status
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Add

From the drop down options, either select 'Appointment confirmed' if you have managed to schedule an appointment, or 'No appointment made (referral closed)' if this was unsuccessful:

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

7. Next actions

Next Actions

A next action and recipient must be selected before this form can be finished

Select action

Next actions

Note

Priority

Urgent Normal Low

Add Add and close Close

If selecting Appointment confirmed-

- Input the *Scheduled Date* of the appointment
- Under *Pass to team*, pass this outcome to the 'Careline Installation/Response Team' (this creates the next workflow step for the Careline Installation/Response team to pick up)
- You can add further detail in the *Note* text box
- Then 'Add and close'

Next actions

Select action

Scheduled Date

Pass to team

Note

Priority

Urgent Normal Low


Add Add and close Close

If selecting **No appointment made (referral closed)**-

- Select a *Reason* from the drop down list
- You can add further detail in the *Note* text box
- Then 'Add and close'

Next actions

Select action No appointment made (referral closed) ▾

Reason* -- Please Select -- ▾ 

Note

Client considering/Brochure sent

Client deceased

Client declined due to cost

Client declined equipment and services (please give details below)

Client in hospice care

Client in hospital (awaiting discharge date)

Client moving out of borough

Client/NOK no response after 3 times or more

Equipment already provided/duplicated/not suitable

Family/Carer declined equipment and services

Housing association - can't cut keys, silver not suitable

Key refusal

Practitioner/Duty refusal to help

Sheltered housing provide pendant alarms (Referral closed)

Priority

Urgent

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


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 actions						
Next action	Assigned to	Reason	Note	Priority	Status	
 Appointment confirmed	Careline Installation/Response Team		Appointment scheduled with Mr Test and his daughter Janice 15/08/2024 at 2.30pm		Proposed	 



3. Sending a notification to the referrer

Before finishing this workflow step, you will need to notify the referrer of the outcome of their referral, especially if further follow up from them is required.

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



Careline Referral Management Outcome

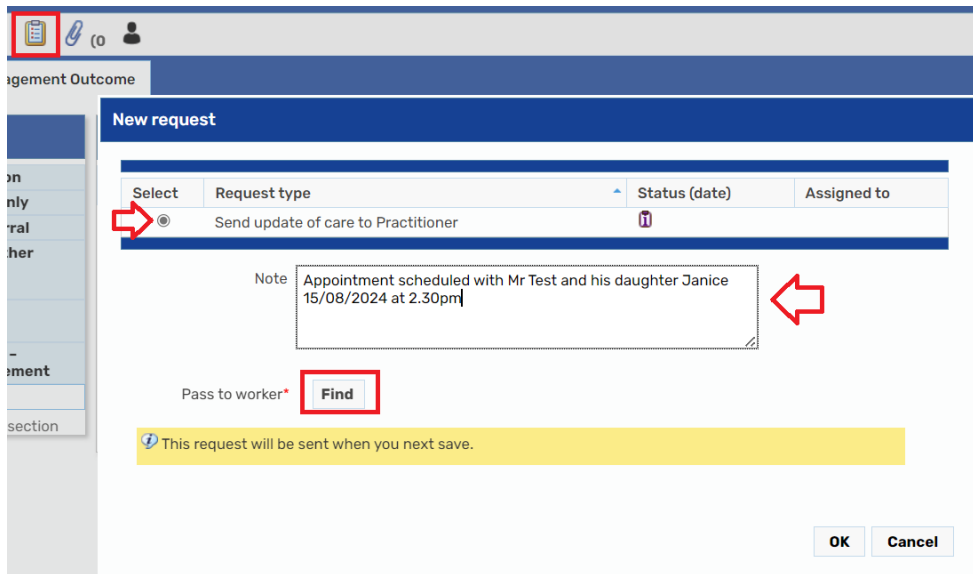
Sections

1. Basic information

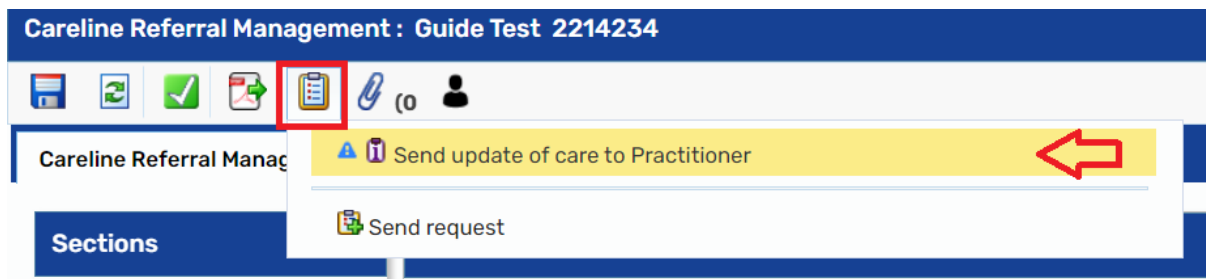
7. Next actions

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:

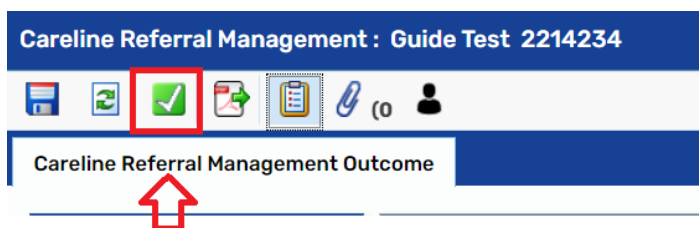


If you select the Request icon again, you can see your notification has been sent to the referrer:



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 either ready to shut this step down with no further action, or send the next workflow step to the Careline installation team.



Once you finish this step- if you scheduled an appointment, and sent an outcome to the Careline installation team- you can see the workflow step waiting to be picked up, on the individual's front page:

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

Summary Case history

Demographic 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 Cluster team(s): No teams serve this address	Current work Workflow map History Careline Provision (Careline Installation/Response Team)

This will also be in the Careline installation team's incoming work folder.