GUIDE

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.

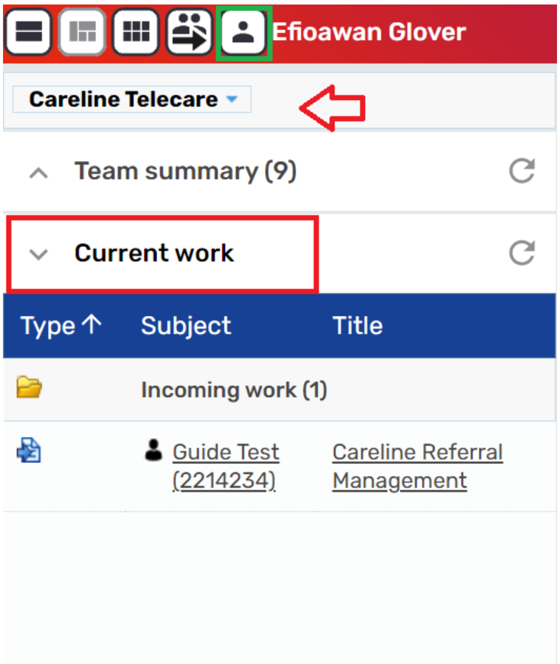
Summary of guide:

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

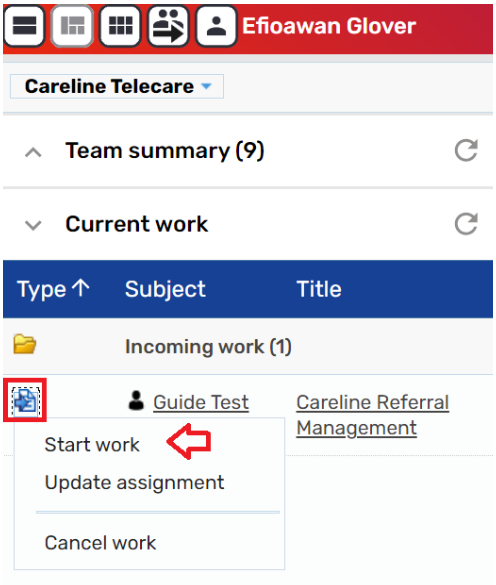
1. Finding the referral

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).

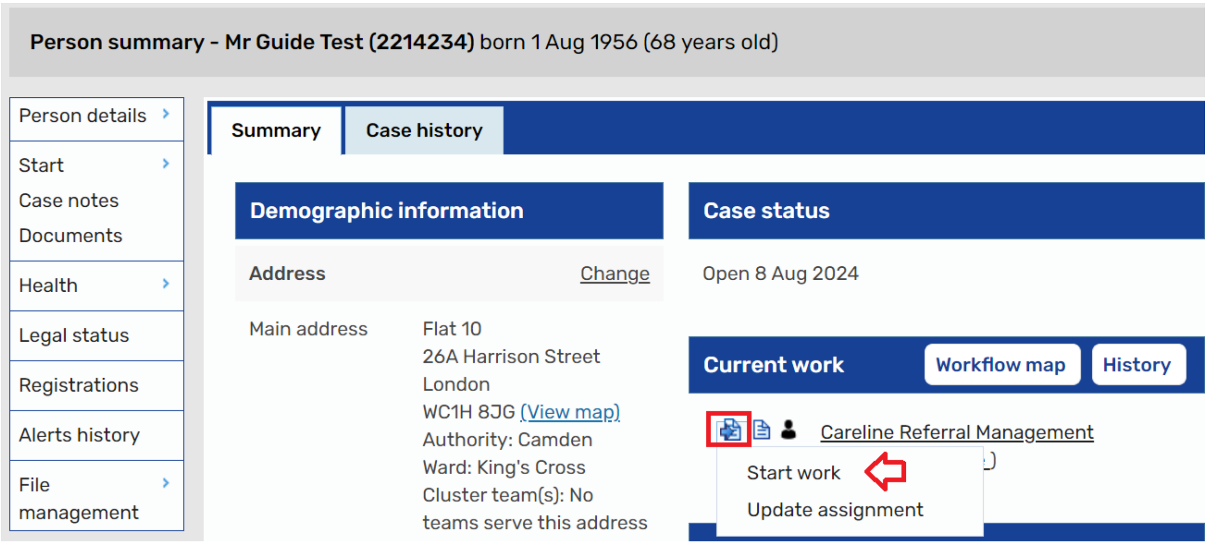
Underneath this, you will find the Careline Telecare's 'Current work' folder, where all the ***Careline Referral Management*** workflow steps are waiting for you to action:



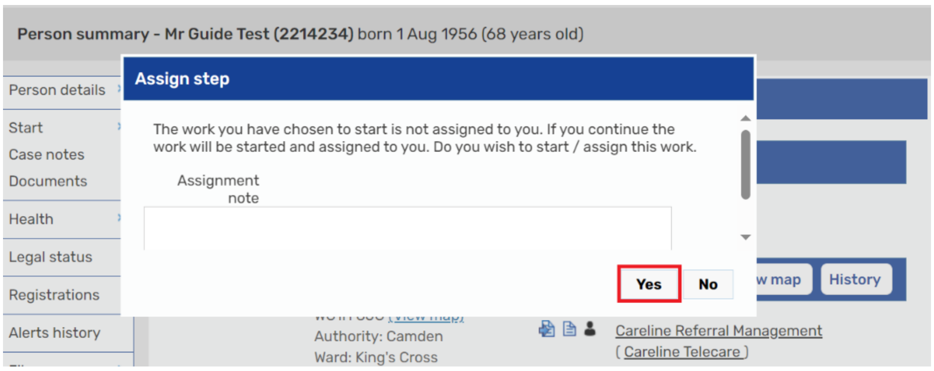
You can start the ***Careline Referral Management*** workflow step in two ways. Either by starting it here, in the Current Work folder:



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':

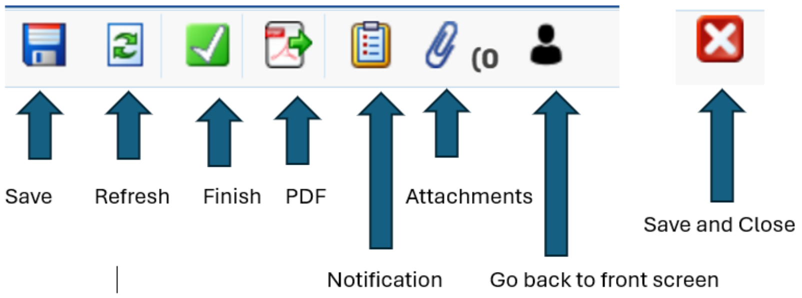


GUIDE

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.

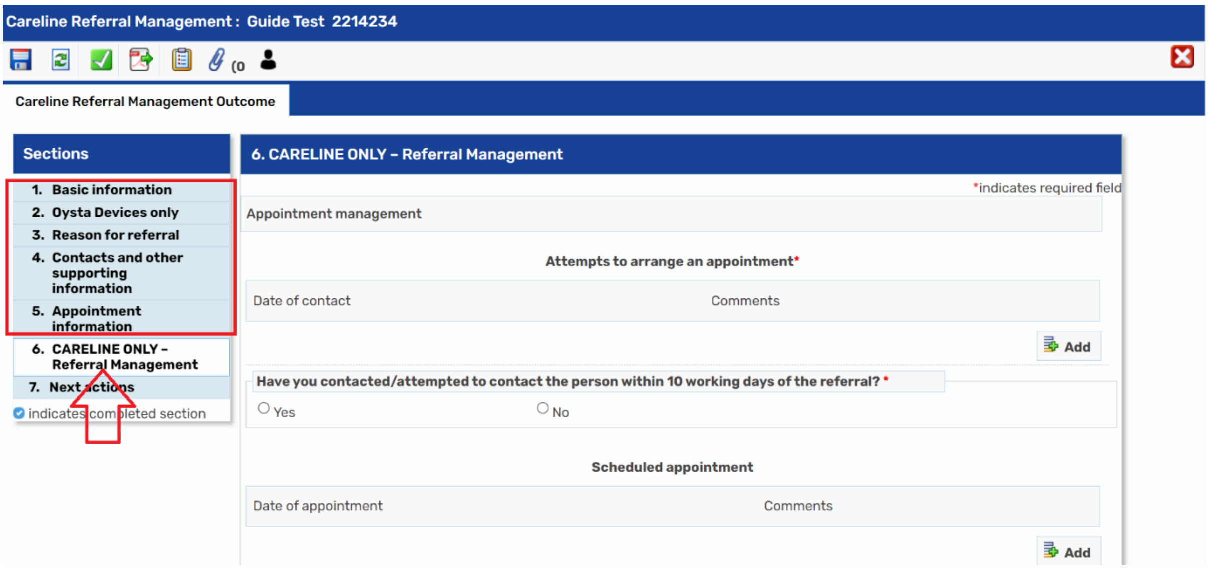
Attachments: This enables you to attach word documents etc. that you have on file, to the workflow if required. It is unlikely that you will need to use this.

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.

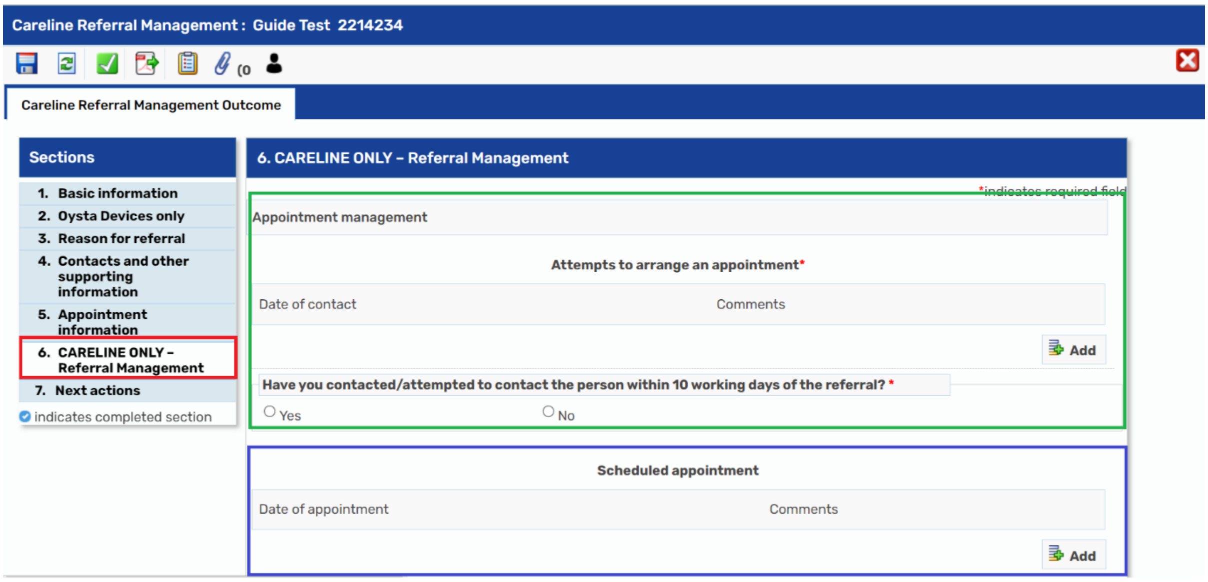
- **The Careline Referral Management Outcome form**

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):



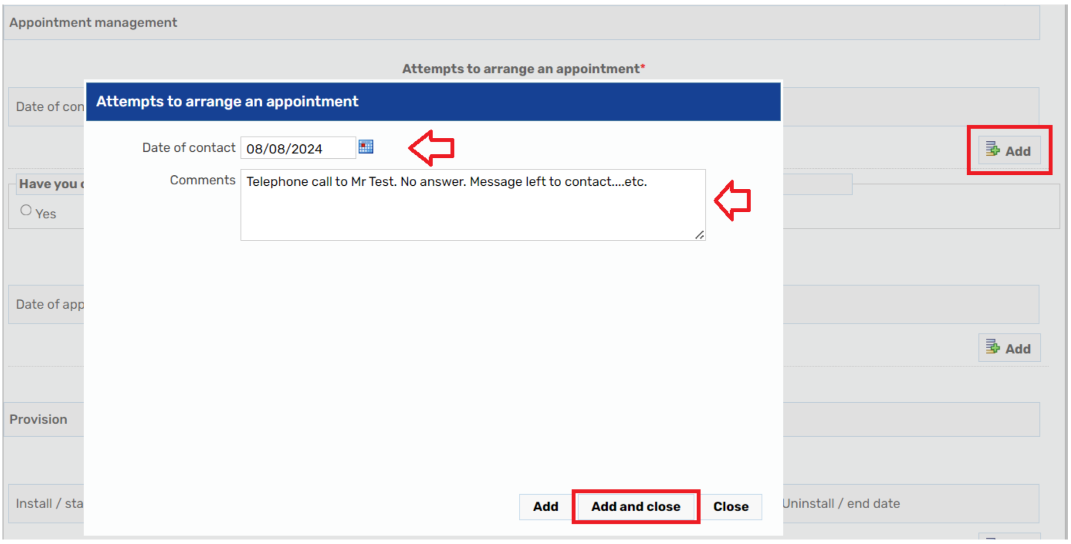
Section 6 of the form, *CARELINE ONLY- Referral Management*, is the section you will need to complete (arrowed above).

You are required to complete the first two tables in Section 6:



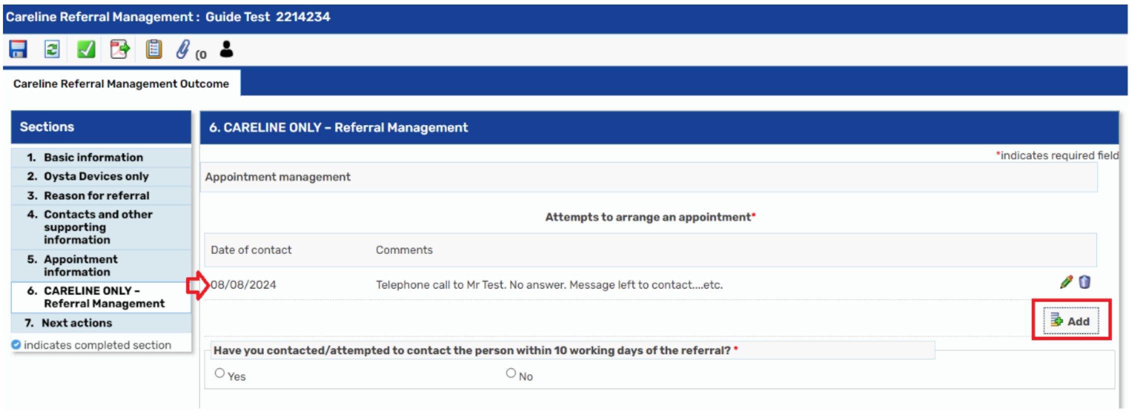
Use the first table (highlighted in green) - *Attempts to arrange an appointment*- to document your involvement in arranging the Careline appointment.

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

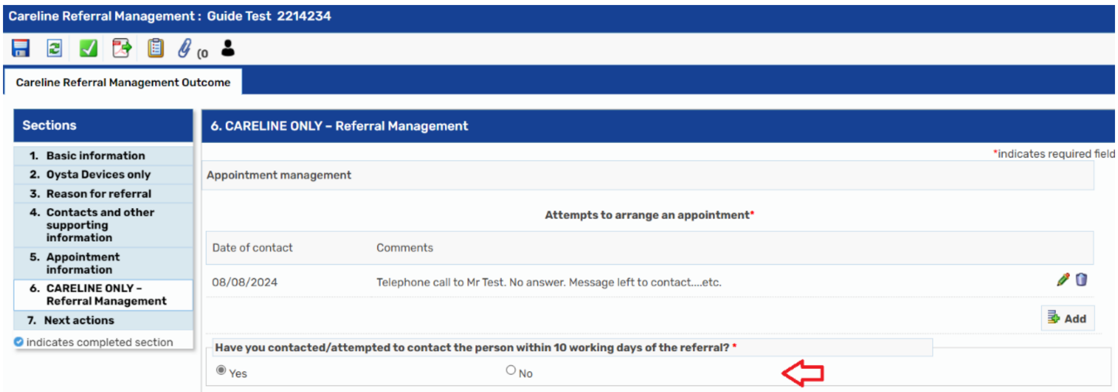


Enter the date of contact, and complete the comments text box with the details.

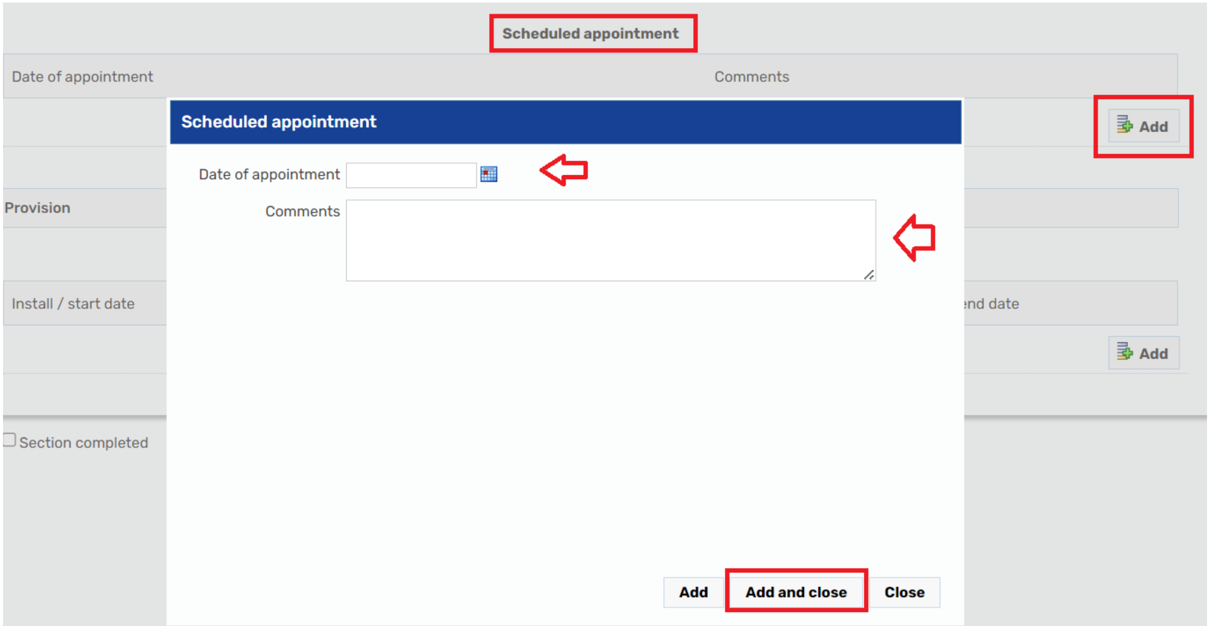
When selecting 'Add and Close', you can see this has now been added to the table, and you can continue to add each contact by using 'Add' again:



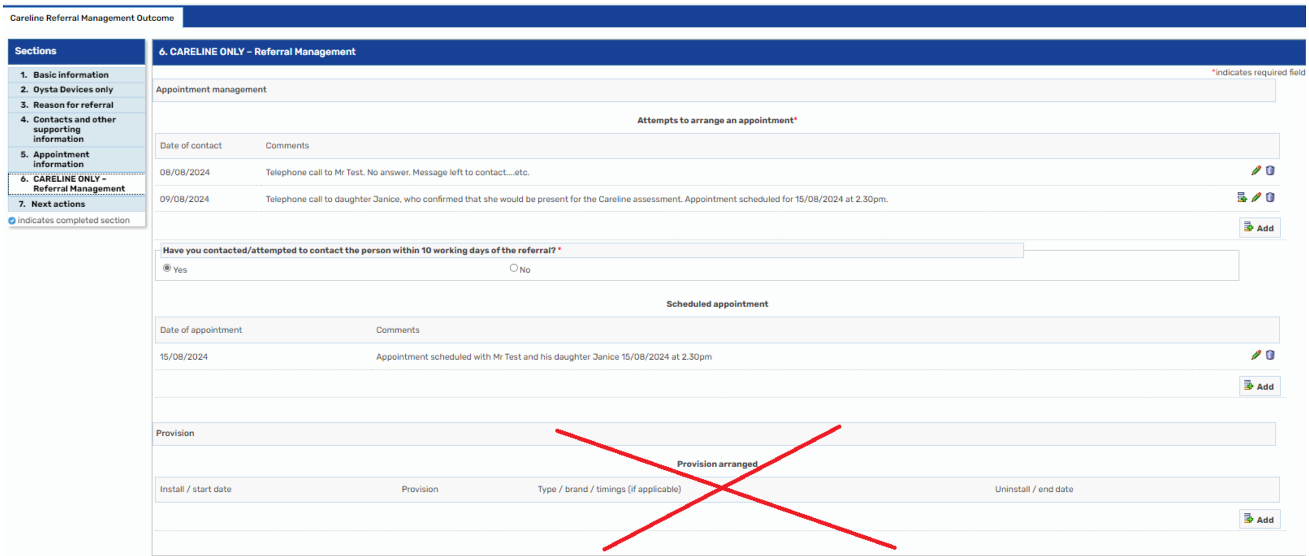
You will need to state 'Yes' or 'No' as to whether you contacted/attempted to contact the person within 10 working days of the referral.



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



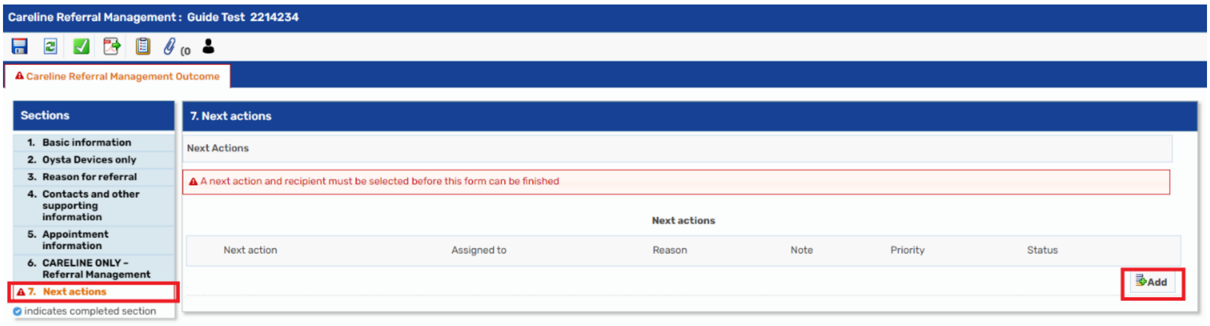
You do not require the 'Provision arranged' table in Section 6. This is for the Careline installation team in the next workflow step:



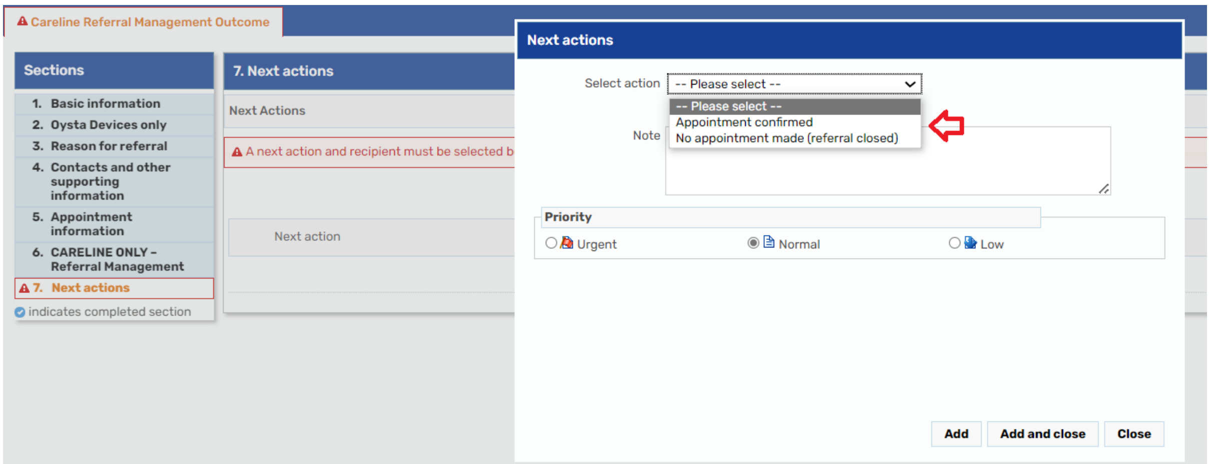
- **Selecting the next action**

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’:

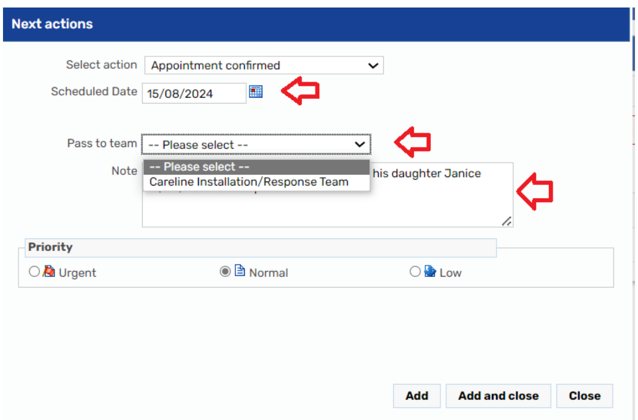


From the drop down options, either select ‘Appointment confirmed’ if you have managed to schedule an appointment, or ‘No appointment made (referral closed)’ if this was unsuccessful:



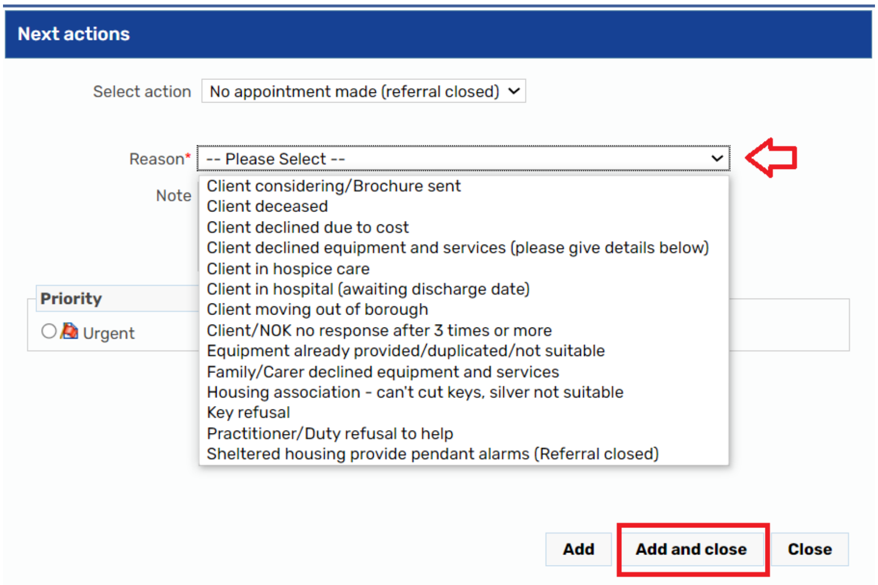
If selecting **Appointment confirmed**-

- 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’

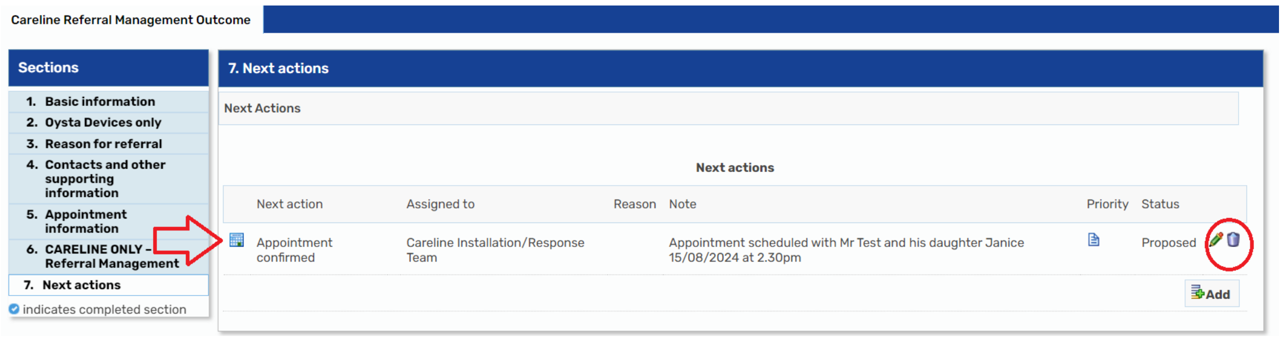


If selecting **No appointment made (referral closed)**-

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



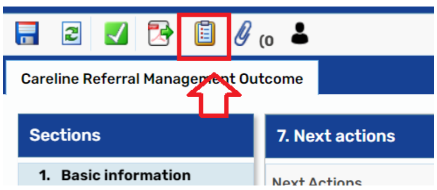
You can see this action has been added, below. If required, this can be amended via the pencil icon, or deleted via the dustbin icon:



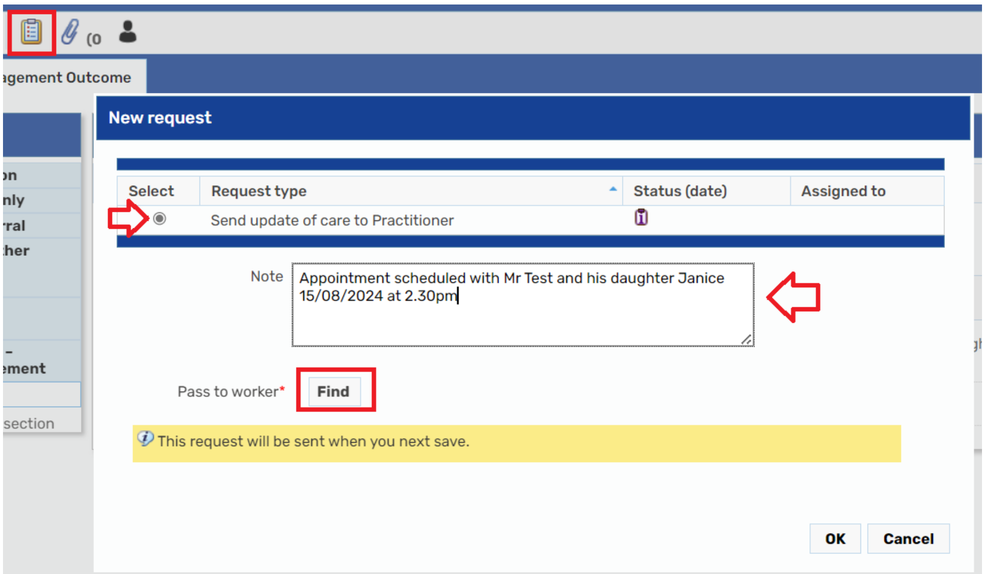
3. Sending a notification to the referrer

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.

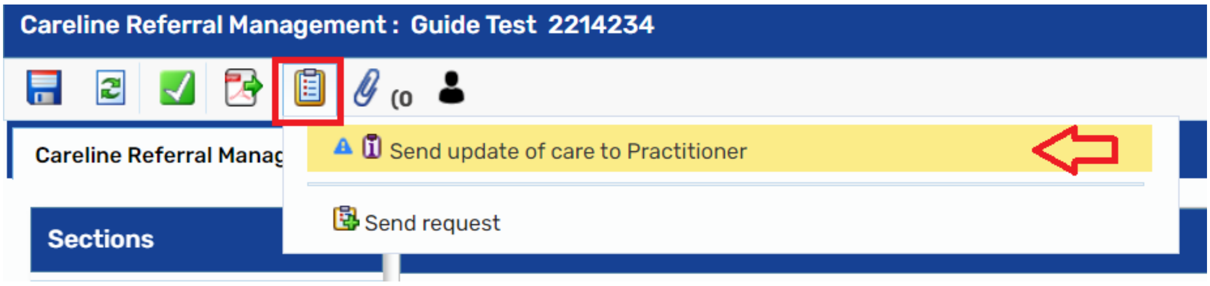
You can do this via the **Request** icon in the toolbar:



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:

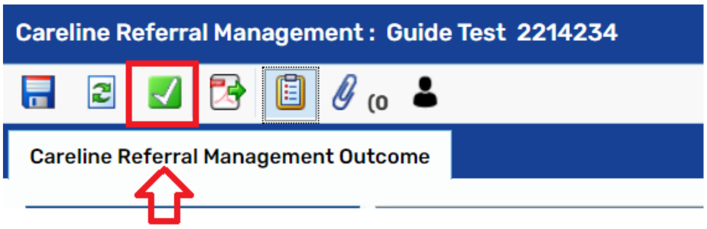


If you select the Request icon again, you can see your notification has been sent to the referrer:



4. Finishing the workflow step

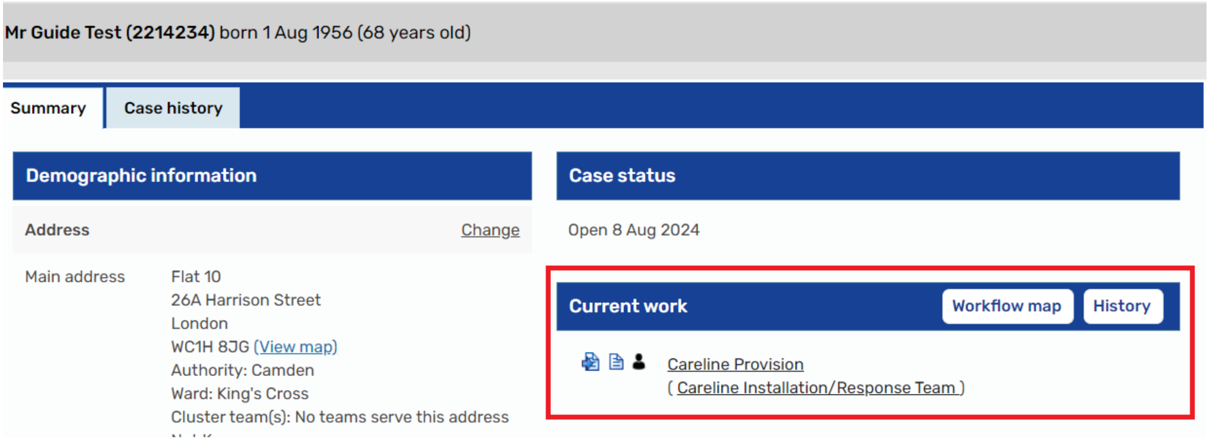
To finish this workflow step, you need to select the 'Finish' icon in the toolbar- the green tick:



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:



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