

Adults Quick Guide

Adult Maximising Independence Service Worker

Once the Maximising Independence (MI) manager has screened and accepted a case the **Adult Maximising Independence Service** step will appear as **Incoming work** for the MI team.

The manager will reassign it to you (a MI worker) and record a **Worker relationship** – adding you (the MI worker) as an '**Involved Worker**'. You should add this if it has been missed. Refer to the **Worker Relationships** user guide for further guidance.

The **Adult Maximising Independence Service** step is intended to remain open for the duration of the Maximising Independence Service involvement.

Session activity should be added after each event.

Once the involvement/service is coming to an end, a closing report summary is completed by you (the MI worker) within this step and authorisation is sought from the manager via the required request.

The MI manager will then decide the next course of action and add relevant next actions.

Recording Adult Maximising Independence Service

To start / resume the **Adult Maximising Independence Service** step, from within the person's record:

- Click the **Incoming work** icon  / **Incomplete work** icon  within **Current work** on the **Person summary** screen
- Click **Start work / Resume work** from the menu

The **Adult Maximising Independence Service** will open in a separate window.

The **Adult Maximising Independence Service** form is split into 6 different sections - each section should be completed as appropriate.

Tips for completing the form

Click the **Section completed** checkbox at the end of each section to put a tick in the sections menu on the left. This will show you which sections you have completed and if you have missed anything, but will not lock the section down nor save the section or form. There is also an option to select 'completed section only' when printing the form.

Click the **Save** icon  throughout your recording in the form. It is recommended that you save your work at least at the end of each section, but the more often the better. Once you click save, any mandatory fields will be highlighted in red.

For detailed guidance on completing the form please refer to the **Working with Workflow Steps or Forms** user guide.

The information in the **Covid - 19** subsection within **Section 1** and the information within **Section 2** defaults in from the referral step but can be edited if necessary.

Section 3 should be updated throughout the MI involvement with the person. It is used to log all activity with the person.

Use the **Add** button to record the **Session / Activity Details**.

Within the popup window that opens, click the **Add** button to add one entry and then add another, or click the **Add and close** button if only recording one entry or when all entries have been recorded. The **Close** button will close the popup without adding an entry.

When entries have been recorded the following icons are displayed:

 **Edit** – to edit/amend an entry

 **Delete** – to delete/remove an entry

 **Move this row up** – to rearrange the order of the entries added (only displays if more than one entry is recorded)

Section 4 should only be completed once the MI involvement/activity is ending.

Once **Section 4** is complete you must send a request to the MI manager so they can authorise the end of the MI involvement or agree to a further period of intervention for the person.

Section 6 will usually be completed by the MI manager when they receive and complete or return the request.

There are a couple of exceptions - if you identify the need for a risk assessment or need to make a referral to the TEPAC pilot you can add these as next actions and assign them to yourself for completion while still working on the **Maximising Independence Service** step.

To do this;

- Click the **Add** button
- Select action = Select **Adult Maximising Independence Risk Assessment / Adult Telecare Referral (TEPAC pilot only)** *(as applicable)*
- Tick the **Send Immediately?** checkbox
- Click the **Assign to Me** button
- Click the **Add and close** button *(if both actions are needed click the **Add** button repeat the process to add the second action and then click the **Add and close** button)*
- Click the **Save** icon  - the status of the action should change from 'Proposed (Send on Save)' to 'Sent'

To send the Authorisation Request (at the end of the MI service period)

- Click the **Requests** icon 
- Select the **Required Adult Please review information and authorise** request using the radio button
- Add a **Note** in the textbox if required
- Pass to team = Select **Maximising Independence Service** from the dropdown menu
- Click the **OK** button to return to the main workflow step
- Click the **Save** icon 

- Exit the step using the **Close** icon  - Click 'Yes' on the popup window to save again

While waiting for authorisation the **Maximising Independence Service** step will remain in your **Incomplete work** folder and will be highlighted in **yellow** to indicate the request has been sent.

The MI manager will complete the request if they accept the end of the MI intervention or agree to a continued intervention and will return the request if there is insufficient information.

If the request is returned the MI manager will add a note to explain why.

If returned the **Maximising Independence Service** step will remain in your **Incomplete work** folder and will be highlighted in **red**.

You will need to click the **work** icon  and then **Resume work** to open the step and complete any updates before resending the request to the MI manager.

To resend the authorisation request,

- Click the **Requests** icon 
- Click on the request text (of the request you previously sent)
- Click the **Send again** button
- Save and exit the step as previously detailed

You can refer to the [Returned Requests](#) user guide for further information.

Workflow steps can only be finished when all requests sent have been completed. The MI manager will therefore **Finish** the step once they have recorded an appropriate next action in **Section 6** and have completed the request.

Once the request is completed and the step finished the **Maximising Independence Service** step will vanish from your **Incomplete work** folder.

Unless a new **Maximising Independence Service** step is assigned to you for continued work with the person you should now end your **Worker relationship**. Refer to the **Worker Relationships** user guide for guidance.