

## Adults Quick Guide

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### Maximising Independence Service Manager

Adult Care Practitioners need to record the **Adult Referral Maximising Independence** step and send the mandatory **Required Adult Please review information and authorise** request to refer a case to the MI service.

This request is to be used to allow you to screen and authorise (accept) or return/reject the referral.

You will complete the request if you are accepting the referral and will return the request if there is insufficient information or it is an inappropriate referral.

If the referral is returned you need to add a note to explain why.

You can only **Finish** the referral step once you have completed **Section 4**, recorded an appropriate next action in **Section 5** and have completed the request.

### Screening and Accepting/Rejecting the Referral

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Requests received will display in the MI team's **Incoming requests** folder within the **Current work** section.

To screen the referral and complete/return the request:

- Access the **Team workview** by clicking the **Show team workview** icon 
- Open the **Incoming requests** folder
- Click on the **Title** of the request

The workflow step summary screen for the referral will display.

- Click **Resume** in the sidebar menu

The referral will open in a new window.

Read the referral by clicking into each section.

Once you have decided whether or not to accept the referral you will need to complete or return the request and record the relevant next action.

- Click on the **Requests** icon 

The outstanding request will display in red text.

- Click on the **red text** to open the outstanding request
- Select the **Completed** radio button if accepting or **Returned** radio button if rejecting

A note should be added if rejecting to explain why and the workflow step should be exited, using the **Close** icon  rather than finished.

This will send the case back to the referring practitioner.

- Click the **OK** button
- Click the **Save** icon 

In **Section 4** record the **Referral status** and **Rationale**.

Use the **Find** button to record your details in the **Authorised by** subsection in **Section 4**

## Section 5. Next actions

At least one next action must be added before the **Adult Referral Maximising Independence** can be finished.

To record a next action:

- Click the **Add** button
- Select the relevant action from the '**Select action**' dropdown menu
- Assign to = Select/Find as appropriate - Not required for NFA (no further action) actions

- Note = record any necessary information – recommended when assigning a next action to another team/worker
- Priority = select radio button as appropriate – use the 'Note' field to explain why you have changed the 'Priority' from 'Normal' if you change it
- Click the **Add** button if more than one next action is required or click the **Add and close** button if only adding one next action or once all actions are added

Action	When to use	Who to assign to
Adult Maximise Independence Service	To be used when the referral to the Maximising Independence Service is appropriate	Assigned to the <b>Maximising Independence Service</b> via Pass to team dropdown
Adult Maximising Independence Risk Assessment	To be used when the referral is appropriate and a risk assessment is required	Assigned to the <b>Maximising Independence Service</b> via Pass to team dropdown
Adult Referral to Other Agency	To be used when the person needs referring to another agency outside of Mosaic	Assigned to the practitioner who completed the referral form via Pass to worker > Find button
Adult No Further Action Required	To be used when the referral to the Maximising Independence Service is not appropriate but the case is remaining open to other teams/services	This is a terminating (no further action) action, so does not need to be assigned
Adult Proposed Case Closure	To be used when a full case closure is required i.e. person has died or left the area	Assigned to the practitioner who completed the referral form via Pass to worker > Find button

Action	When to use	Who to assign to
Adult Case Closure Already Started (NFA)	To be used when a full case closure is required and has already be initiated  <b>Important: Adult Proposed Case Closure</b> or <b>Adult Case Closure in Progress</b> must be visible within <b>Current work</b> if you are selecting this action.	This is a terminating (no further action) action, so does not need to be assigned

Once **Section 4** has been completed, the appropriate next action(s) has been recorded and the request completed, click the **Finish** icon  to finish and lock down the referral.

## Allocating the Case

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Once the referral has been accepted, and there is the capacity to do so, the case should be allocated to a MI worker.

You will need to record the MI worker as an involved worker and will need to assign the Maximising Independence Service step (and risk assessment where necessary) to the worker.

### To record the worker relationship:

- Access the **Team workview** by clicking the **Show team workview** icon 
- Open the **Current work > Incoming work** folder
- Click the **person's name**

The person's record will display within the right side of the screen in **Narrow workview**

- Click **Person details > Worker relationships** in the sidebar menu
- Click the **Add** button
- Worker = Click the **Find** button and search for the worker
- Click the worker's name to pull it through
- Role = Select **Involved Worker**

- Update the 'From' date if necessary
- Click the **Save** button
- Click the **OK** button to return to the **Person summary** screen. The worker will display within **Professional and organisational relationships**

### To assign the workflow step:

- From within the person's record, click the **Incoming work** icon  within **Current work** on the **Person summary** screen
- Click **Update assignment** from the menu
- Pass to worker = Click the **Find** button and search for the worker
- Add a note if needed
- Click the **OK** button

Where required, repeat this process for the risk assessment.

Alternatively both steps can be assigned at the same time (using **Bulk Assign**) from the MI Team's **Incoming work** folder. Refer to the **Assigning Work** user guide for further details.

## End of MI period - Accepting/Returning the Authorisation Request

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An authorisation request, to sign off the case at the end of the MI period, will display in the MI Team's **Incoming requests** folder within the **Current work** section.

- Access the **Team workview** by clicking the **Show team workview** icon 
- Open the **Current work > Incoming requests** folder
- Click on the **Title** of the request

The workflow step summary screen will display.

- Click **Resume** in the sidebar menu

The workflow step will open in a separate window.

Read the form by clicking into each section.

Once you have decided whether or not the MI period can end you must complete or return the request and record the relevant next action.

- Click on the **Request** icon 

The outstanding request(s) will display in red text.

- Click on the **red text** to open the outstanding request
- Select the **Completed** radio button if accepting or **Returned** radio button if rejecting

A note should be added if returning to explain why and the workflow step should be exited using the **Close** icon  rather than finished.

This will send the case back to the MI worker.

- Click the **OK** button

The workflow step screen displays

- Click the **Save** icon 

There are two notifications which can be used by you (the MI Manager) to inform the referring practitioner of the outcome of the MI service:

- **Adult inform referrer of outcome, Maximise Independence work complete** – to be used if the MI work is complete
- **Adult Maximise Independence Service ending** – to be used if the MI period is ending early for any reason

You should send one of these notifications if you are completing the closure request and will therefore be finishing the **Adult Maximising Independence Service** step.

## To send the notification:

- Click the **Requests** icon 
- Click **Send request**
- Select the appropriate **notification** using the radio button
- Add a **Note** in the text box if required
- Pass to worker = Search for the referring practitioner
- Click the **OK** button to return to the main workflow step - The notification will be sent when you next click the **Save** icon 

## Section 6. Next actions

At least one next action must be added before the **Adult Maximising Independence Service** can be finished.

To record a next action:

- Click the **Add** button
- Select the relevant action from the '**Select action**' dropdown menu
- Assign to = Select/Find as appropriate - Not required for NFA (no further action) actions
- Note = record any necessary information – recommended when assigning a next action to another team/worker
- Priority = select radio button as appropriate – use the 'Note' field to explain why you have changed the 'Priority' from 'Normal' if you change it
- Click the **Add** button if more than one next action is required or click the **Add and close** button if only adding one next action or once all actions are added

Action	When to use	Who to assign to
Adult Maximising Independence Service	To be used when a further period of Maximising Independence Service is necessary	Assigned to MI worker via Pass to worker > Find button
Adult Maximising Independence Risk Assessment	To be used when a risk assessment is required.	Assigned to MI worker via Pass to worker > Find button
Adult Maximising Independence Evaluation	To be used at the end of the MI period to evaluate the service	Assigned to the referring practitioner via Pass to worker > Find button
Adult Telecare Referral (TEPAC pilot only)	If a referral to the TEPAC pilot is required. <b>Important note:</b> Must not be used to refer to Telecare	Assigned to MI worker via Pass to worker > Find button
Adult No Further Action Required	To be used when the Maximising Independence Service involvement is ending but the case is remaining open to other teams/services.	This is a terminating (no further action) action, so does not need to be assigned
Adult Proposed Case Closure	To be used when a full case closure is required i.e. person has died or left the area	Assigned to the referring practitioner via Pass to worker > Find button
Adult Case Closure Already Started (NFA)	To be used when a full case closure is required and has already be initiated <b>Important: Adult Proposed Case Closure or Adult Case Closure in Progress</b> must be visible within <b>Current work</b> if you are selecting this action.	This is a terminating (no further action) action, so does not need to be assigned

Once the appropriate next action(s) has been recorded and the appropriate notification sent (if needed) click the **Finish** icon 