Adults Quick Guide

Adult Change in Care Package Delivery Request

The **Adult Change in Care Package Delivery Request** step **can only** be used for the types of change listed in the table within the Can be used for section of this guide.

The type of change you can be varies based on the type of service you are trying to change so please refer to the table for full details.

Cannot be used for

It is important to note it **cannot** be used for:

- extensions to temporary admission (short term) residential or nursing care

This should be processed using the **Adult Extension to Temporary Admission Request** - Refer to the **Extending Temporary Admission** user guide for further details

- to purchase a new service

This should be processed using the **Adult Purchase Service Request** - Refer to the **Commissioning Planned Services** user guide for further details

- to permanently change an existing service, where the change amends the cost of the care package, or is a result of a change in the person's needs

This should be processed using the **Adult Purchase Service Request** - Refer to the **Commissioning Planned Services** user guide for further details

For further details on which workflow steps are needed for new services, amending services or ending services refer to the **Purchasing Steps – Quick Reference** user guide.

Can be used for

The **Adult Change in Care Package Delivery Request** step **can** be used for:

Service Type (Checkbox)	Type of Change (Checkbox)
Homecare and **Non - Residential (Non-Homecare / Non-Direct Payment)**	o Service restart o Service suspension o Temporary increase / decrease o Change of schedule (Homecare only) – *change in time or day of visit where there is no change in need or costs* o Change in day of visit (Daycare) o Change of provider / address (Homecare / Shared accommodation only) – *where there is no change in need or costs* o Change of provider (Non shared accommodation only) – *where there is no change in need or costs* o Change of next of kin (Homecare only)
Shared Lives	o Service restart o Service suspension o Temporary increase / decrease
Residential and Nursing *(temporary admissions and permanent residency)*	o Rolling respite renewal (LD only) o Rolling respite / rolling temporary admission usage (Non-LD only) – *for respite which has already been costed for in the support plan costings* o Change to first party payer o Change of third party payer o Change in room number / top-up amount o Change in provider – *where there is no change in need or costs* o Change to FNC level / continence payment

Service Type (Checkbox)	Type of Change (Checkbox)
Direct Payments	o Service suspension[*]/ restart o Change of financial representative o Change in payment recipient o Change of payment frequency o Move to / from Virtual Wallet or pre-paid card o Missing Direct Payment set-up costs - *first year only*

*If you are **suspending a direct payment** service, complete **Section 3** and send the **'Adult Authorise DP Termination/Suspension'** request (located in the **Requests** icon) to your manager.

You will also be prompted to add a next action of **Adult Direct Payment Suspension Monitoring** in **Section 5**.

Refer to the **Suspending or Terminating Direct Payments** and **Direct Payment Suspension Monitoring** user guides for full details.

Recording the Adult Change in Care Package Delivery Request

To record an **Adult Change in Care Package Delivery Request** you will need to have added it as a next action from a relevant Adult Care workflow step and assigned to self (using the **Assign to Me** button).

To start the **Adult Change in Care Package Delivery Request** step, from within the person's record:

- Click the **Incoming work** icon within **Current work** on the **Person summary** screen

- Click **Start work** from the menu

The **Adult Change in Care Package Delivery Request** will open in a separate window

You must complete all necessary sections of the form.

Section 1 will prepopulate with the person's details and **Section 4** will prepopulate with your details.

Section 2. Change Details

This is the important section, where details of the reason for completing the form are recorded.

If necessary, changes to multiple different services can be recorded in one form but some changes are not permitted together, e.g. a temporary increase and decrease of the same 'Service Type'.

To record details of the change(s) needed select the appropriate **'Service Type'** checkbox(es)

The screen will expand with a heading for each 'Service Type' selected.

Complete all the questions / fields displayed and use the **Show guidance** icon for help to complete them where applicable.

Section 5. Next actions

Click the **Add** button to select a next action

Next Action	When to use	Who to assign to
Adult Change in Care Package (Homecare/Shared Lives Services)	For <u>brokered</u> homecare and shared lives services	Appropriate inbox, via the 'Pass to worker' dropdown menu
Adult Change to Care Package (Non-Homecare Services)	For non-homecare services including direct payments. This option should also be used for <u>non-brokered homecare</u> by LD and LPFT.	Appropriate inbox, via the 'Pass to worker' dropdown menu

Next Action	When to use	Who to assign to
Adult Change in Care Package Request No Longer Required (NFA)	When a change in care package delivery request is no longer required. **Important note:** You must ensure all 'Service Type' checkboxes are <u>unticked</u> in Section 2 if you are adding this action.	This is a terminating, no further action (NFA), action and does not need assigning to anyone.
Adult Financial Assessment Referral (assign to self)	If the person's financial circumstances have changed and they need a new financial assessment	Self using the **Assign to Me** button.
Adult Direct Payment Suspension Monitoring	If you are suspending direct payment services. The 'scheduled date' defaults is as 4 weeks but can be amended.	Self using the **Assign to Me** button.

> The next actions **'Adult Change to Care Package (Non-Homecare Services)'** and **'Adult Change to Care Package (Homecare/Shared Lives Services)'** should both be added if changes are required for both homecare and non-homecare services.

The **Finish** icon is to be used once the form is complete, and no further input is required.

If you have sent a request to your manager, they will click 'Finish' once the request has been completed.

The **Adult Change in Care Package Delivery Request** must be 'Finished' to send the next workflow step(s) (Adult Change in Care Package Delivery Admin) to Serco and/or Brokerage so they change in service is processed.