Adults Quick Guide

Adult Carer Support Plan

The **Adult Carer Support Plan** is recorded if needs have been identified during assessment, new services are required or existing services are to continue.

To start the **Adult Carer Support Plan** 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 Carer Support Plan** will open in a separate window

Recording Adult Carer Support Plan

The form is split into 5 different sections. Each section should be completed with relevant information.

Details from the assessment and previous plan, if there is one, will prepopulate (pull forward) into the plan, which you can then edit. It is particularly important to review and update the information to ensure it reflects the person's current situation.

The plan needs to include the costings for all current and new personal budget (PB) carer services – these costings are recorded within the separate **Adult Carer's Support Plan Costings** optional form located in the **Forms and letters** icon . See the **Commissioning Carers Services** user guide for further details.

General Tips for completing the form

Clicking on the **Show guidance** icon will give you additional information to assist in answering the associated question.

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 which sections you have completed and if you have missed anything, but will not lock the section down or save the section or form. There is also an option to select 'Completed sections only' when printing the plan.

We recommend that you click the **Save** icon to save your work at least at the end of each section, but the more often the better. Once you click save, any section's containing uncompleted mandatory fields will be highlighted in red.

In **Section 1. Carer Details** information will prepopulate into the fields marked with the symbol. If some information is missing or incorrect, it can be added or edited by:

- clicking the **Show subject summary** icon to minimise the workflow step window
- editing the information on the **Person summary** screen (user guides on updating the person's details can be found on the **Mosaic Hub**)
- maximising the workflow step window and clicking the **Refresh current form** icon to update the information in these fields

In **Section 2. My Support Plan** the needs listed at the top of this section are the areas of need identified in the carer's assessment. The outcomes recorded in this section of the plan should relate to the needs listed here.

The outcomes recorded in this section of the plan should relate to the needs listed here. **Do not** tick any needs not identified in the assessment – if you do you will see a warning message on screen.

If you have missed capturing all relevant needs in your assessment you will need to complete the **Change Person Record / Workflow** form on MyPortal > Mosaic Requests to arrange for your plan to be deleted, assessment to be re-opened and a new plan then recorded.

In **Section 3. My Personal Budgets** make sure you say 'Yes' to the first question if the plan needs to include Personal Budget (PB) carer services. The screen will expand with additional fields and will also display a prompt reminding you to open and complete the **Adult Carer's Support Plan Costings** optional form (located in the **Forms and letters** icon).

In **Section 4. Completion Details** the first question is: *'Carer's support plan to be abandoned / cancelled?'* You should **only** select *'yes'* if the reason is listed in the dropdown menu.

If '*yes'* is selected, two additional mandatory questions will display: *'If yes, please provide a reason' and 'Date carer's support plan cancelled'.*

You must record the mandatory *'Date'* unless you have selected *'yes'* to the *'Carer's support plan to be abandoned / cancelled?' question.*

Section 6. Actions Taken

Next actions are mandatory in all forms. At least one next action must be added before **the Adult Carer Support Plan** can be finished.

Depending on your answers to certain questions, you may be prompted to add certain actions. A red message will display stating which actions are still needed.

To record a next action:

- Click the **Add** button
- Select the relevant action from the **'Select action'** dropdown menu
- Tick the **'Send Immediately?'** checkbox where necessary (only available for certain actions)
- 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 Carer Purchase Service Request	For **Personal Budget** services only. If the carer requires new services, a change in service or has some services which need ending whilst other services are to remain. **Important:** You must update the **Adult Carer's Support Plan Costings** optional form before adding this action	Self using the **Assign to Me** button
Adult Carer Review	If the carer requires review of services. The scheduled date defaults in but can be amended if required. **Important:** There should only be one Carer Review scheduled	Self using the **Assign to Me** button Or Carers First Team using the Pass to team dropdown menu
Adult Carer Emergency Response Plan	To be used if the carer requires a plan to be set up for emergency situations	Self using the **Assign to Me** button Or Carers First Team using the Pass to team dropdown menu
Adult Contact to be Recorded on Cared for's Record (NFA)	If you have identified that the person the carer supports requires an assessment by Adult Care. You must contact the CSC by telephone. Record a note using the 'Note' box to state what action you have taken	This is a terminating (no further action) action, so does not need to be assigned
Adult Telecare Referral	If a referral for LCC commissioned Telecare services is needed.	Self using the **Assign to Me** button You can tick **'Send Immediately?'** when adding this action
Adult Referral to Other Agency	If the case needs to be referred to an external agency (one that does not use Mosaic)	Self using the **Assign to Me** button

Action	When to use	Who to assign to
Adult End Services Request	To be used when the carer's case is to remain open but some of the personal budget services need ending. A mandatory **Reason** must be selected to show why this action is being added. **Important:**: You will need to make sure you have 'unticked' the relevant 'Service Type' checkbox(es) in the **Adult Carer's Support Plans Costing** form for any personal budget services you are ending	Self using the **Assign to Me** button You can tick **'Send Immediately?'** when adding this action.
Adult Information and Advice Provided (NFA)	If the outcome of the plan includes providing information and advice.	This is a terminating (no further action) action, so does not need to be assigned
Adult No Further Action Required	If no further action is required following the plan, and a full case closure is not to be completed because there are services in place or other workers or teams are still working with the case etc.	This is a terminating (no further action) action, so does not need to be assigned
Adult Proposed Case Closure	If a full case closure is required, i.e. the plan is completed with no services needed, the carer does not already have services, or current services and involvement from all involved teams are to close	Self using the **Assign to Me** button
Adult Case Closure Already Started (NFA)	If a full case closure is required and is already underway To add this action, you must be able to see an **Adult Proposed Case Closure** or **Adult Case Closure in Progress** step within **Current work** on the **Person summary** screen	This is a terminating (no further action) action, so does not need to be assigned

Toolbar Icons

Before finishing your plan you should always consider whether you need to use any of the toolbar icons at the top of the screen.

You should use the **View documents** icon to attach relevant supporting documents created outside of Mosaic.

You may need to complete one, or more, of the optional forms or letter templates available via the **Forms and letters** icon.

Remember if you are commissioning personal budget services you must complete the **Adult Carer's Support Plan Costings** form.

You must consider if you need to send a request or notification using the **Requests** icon.

It is mandatory that the plan is authorised. You must send the mandatory request '**REQUIRED Adult Please review information and authorise'** to your manager before your plan can be finished.

When your manager completes the request to authorise the plan they should also finish the plan in order to prevent further editing following authorisation.

Request (R) / Notification (N)	When to use	Who to assign to
(R) REQUIRED Adult Please review information and authorise	Mandatory authorisation to be used for all plans	Your manager using the 'Pass to Worker > Find button'
(N) Adult Carers admin output request	To be used to request a finished version of the plan is generated and posted out to the carer/their representative You should use the note box to record specific instructions	Another worker using the 'Pass to Worker > Find button' Or Carers First using the 'Pass to Team' dropdown menu

Request (R) / Notification (N)	When to use	Who to assign to
(R) Adult Please action	This request appears in most workflow steps and can be used as and where required	Another worker or team as appropriate using the 'Pass to Worker/Team > Find button'
(R) Adult Please action (QA use only)	Used by Carers First workers for cases where there are no personal budget services but a quality audit is needed	Another worker using the 'Pass to Worker > Find button'
(N) Adult Notification to CSC Carers Team	Used by Carers First workers to notify the CSC Carers Service that a Carers Emergency Response Plan needs to be created. You should use the note text field to give specific details.	Adult Carers Service - Inbox using the 'Pass to Worker' dropdown menu
(N) Adult EDT Alert	To be used to alert the Approved Mental Health Professionals (AMHP) service to a case where there could be issues out of hours. The **EDT Alert** optional form should be completed if you are sending this notification	Approved Mental Health Professionals (AMHP) using the 'Pass to Team' dropdown menu

Clicking the **Finish** icon will finish and complete your plan. The plan cannot be finished if there are any incomplete mandatory fields or if there are any requests which need completing.

If the **Finish** icon is clicked while there are outstanding mandatory sections, a system message will display explaining the form cannot be finished as "mandatory items" are outstanding.

Once the **Finish** icon can be clicked, it will lock down your plan and no further input can be made. Your manager will finish the plan following completion of the authorisation request.

You will find your finished plan in the **Documents** section. Only finished versions of the **Adult Carer Support Plan** should be shared. A PDF version of your finished plan should be generated from the **Documents** section.

The **Actions Taken** section of your plan will automatically appear on the output unless the 'Output Options' are amended before printing. This section should not be included on any outputs for the carer or their representative.

For further guidance, please refer to the **Printing Documents** user guide.