Adults Quick Guide

Reablement Triage

This guide is for reablement workers only.

Referrals for reablement are received from two referral pathways:

1. Directly e.g. from hospitals and GP surgeries (external to Mosaic) - Reablement admin workers will complete the **Adult Referral to Reablement** step

2. Via Mosaic from Adult Care practitioners - Adult Care practitioners will complete the **Adult Referral to Reablement** step themselves

For both pathways, a next action of **Adult Reablement Triage** step is assigned to Reablement for screening.

Starting the Adult Reablement Triage

For referrals from Adult Care practitioners, the **Adult Reablement Triage** step will always appear as **Incoming work** for the Reablement team.

Direct referrals will either appear as **Incoming work** for the Reablement team or as **Incoming work** for the reablement worker who completed the referral if they have assigned the Triage step to self for completion.

To start an Adult Reablement Triage step assigned to the Team:

- Access the **Team workview** by clicking the **Show team workview** icon

Please note: When you are in **Team workview**, the icon will change to the **Show individual workview** icon

- If needed, close the **Team summary** and open **Current work** by clicking **Current work** at the bottom of the screen

- Access the **Incoming work** folder

- Click the **person's name** to access their record (**Person summary** screen) – this will allow you to check for warnings and other useful information before contacting the person

- Click the **Incoming work** icon within **Current work** on the **Person summary** screen and then click **Start work** from the menu

- Click the **'Yes'** button on the popup window

The **Adult Reablement Triage** will open in a separate window

Please note: The **Adult Reablement Triage** step will be assigned to you once you start the form and click **Save** icon the first time – this will then be in your **Incomplete work** folder until finished.

To start an Adult Reablement Triage step assigned to yourself:

- In **Full** or **Narrow workview** access your **Incoming work** folder in **Current work**

- Click the **person's name** to access their record (**Person summary** screen) – this will allow you to check for warnings and other useful information before contacting the person

- Click the **Incoming work** icon within **Current work** on the **Person summary** screen and then click **Start work** from the menu

The **Adult Reablement Triage** will open in a separate window

Recording the Adult Reablement Triage

All sections of the form should be completed.

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.

> This guide will only cover fields where we can specify an answer or where there is something specific to highlight.
>
> Remember mandatory fields will be highlighted in red and must be completed before the triage step can be finished.

Sections 1 – 5

Information prepopulates from the **Adult Referral to Reablement** step and cannot be edited.

In **Section 1**, information will prepopulate into the fields marked with the **blue cog** ⚙. If any information is missing or incorrect, it can be added/edited by:

- Clicking the **Show subject summary** icon 👤 to minimise the triage window

- Editing the information on the **Person summary** screen (guides on updating the person's details can be found on the **Mosaic Hub**)

- Maximising the triage window and then clicking the **Refresh current form** icon 🔃 to update the information in these fields

In **Section 2**, there are two fields that are editable:

- **'Route of access'** - this should only be amended if recorded incorrectly in the Adult Referral to Reablement step.

- **'Past medical history'** – additional information about the person's health conditions can be added here.

Please note: Current health conditions should also be added as a 'Condition / Disability' on the person's record via **Health > Conditions / Disabilities** in the extended sidebar menu – refer to the **Health Conditions** user guide for further information.

Section 6. Reablement Triage (Reablement use only)

Referral accepted? = select 'Yes/No' as appropriate

- o If ''No' is selected you no further questions display – you can move to the next section and record the relevant next action in section 8 to indicate why the referral was declined.

- o If 'Yes' is selected, additional mandatory questions will display.

Are HART going to be involved? = The answer recorded in the referral will prepopulate but can be edited if required.

Triage started by = Use the **Find** button to search for yourself. Click on the hyperlink to pull your name into the form.

Section 7. Reablement Triage Completion Details

Triage to be abandoned / cancelled? = You should **only** select 'Yes' if the reason is listed in the 'reason' dropdown menu.

If you are not abandoning / cancelling the Triage step leave this as 'Please select'.

Important note: The name of the worker who started the step and the date they started it will default into this section. This information should be amended if the triage step is being completed by a different worker or on a different date.

Section 8. Next actions

Next actions allow you to record what is required next and who is going to do it.

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

- Notes = Record any necessary information

- Priority = Select radio button as appropriate

- 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 Reablement Summary	For referrals accepted into reablement.	Relevant **reablement inbox** based on where the person lives via the Pass to worker dropdown menu.
Adult Reablement Declined – No Capacity (NFA)	If the case has been declined due to lack of capacity.	This is a terminating (no further action) action, so does not need to be assigned.
Adult Reablement Declined - Referral Not Appropriate (NFA)	If the case has been declined as not appropriate.	This is a terminating (no further action) action, so does not need to be assigned.
Adult Reablement - Failed Start (NFA)	If the reablement service has been unable to start e.g. delayed hospital discharge.	This is a terminating (no further action) action, so does not need to be assigned.
Adult Reablement Referral – Abandoned / Cancelled (NFA)	If the triage step has been abandoned/cancelled.	This is a terminating (no further action) action, so does not need to be assigned.
Adult Referral to Wellbeing (assign to self)	If a person requires screening for the Wellbeing Service – this action should be **'Sent immediately'**	Self using the **Assign to me** button
Adult Proposed Case Closure	If a full case closure is required e.g. the case is not progressing and there are no services or other involved teams/workers.	Self using the **Assign to me** button

Action	When to use	Who to assign to
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 **Adult Proposed Case Closure** or **Adult Case Closure in Progress** within **Current work** on the **Person summary** screen	This is a terminating (no further action) action, so does not need to be assigned.

Referrals from Adult Care Practitioner:

As well as recording the relevant next action, you must also send the relevant outcome notification to the referring worker.

- Click the **Requests** icon

- Select the relevant **Notification**

Notification	When to use	Who to send to
Adult Notification outcome of reablement referral – referral accepted	Used to notify the referring worker that the person has been accepted into reablement.	Referring worker using the Pass to worker > Find button
Adult Notification outcome of reablement referral – - referral not appropriate	Used to notify the referring worker that the person has been declined as the referral not appropriate.	Referring worker using the Pass to worker > Find button
Adult Notification outcome of reablement referral – no capacity	Used to notify the referring worker that the referral has been declined due to lack of capacity.	Referring worker using the Pass to worker > Find button
Adult Notification outcome of reablement referral – failed start	Used to notify the referring worker that the service has failed to start.	Referring worker using the Pass to worker > Find button

Notification	When to use	Who to send to
Adult Notification outcome of reablement referral – abandoned / cancelled	Used to notify the referring worker that the referral has been abandoned / cancelled.	Referring worker using the Pass to worker > Find button

- Use the **Note** box to add a note if needed

- 'Pass to worker' = Click **Find** button and search for referring worker

- Click the **OK** button

- Click the **Save** icon 💾

Declined or Cancelled Referrals:

If the person is not open to any other team prior to the reablement workflow being recorded the case will need to be closed using the **Adult Proposed Case Closure** next action.

The **Adult Proposed Case Closure** step available from the **Start > New…** sidebar menu if you forget to add it as a next action.

For further details, please refer to the **Case Closures – Full, Team or Involvement** user guide on the Mosaic Hub.

Toolbar Icons

Before finishing the triage step you should always consider whether you need to use any of the other toolbar icons at the top of the screen.

The **View documents** icon 📎 (0) is used to upload (attach) external documents to the workflow step. Refer to the **Uploading Documents** user guide for further information.

The **Output current document** icon 📄 is used to generate a PDF version of the triage step which can then be printed if required. Refer to the **Printing Documents** user guide for further information.

The **Requests** icon 📋 is used to send messages (requests or notifications) to other workers or teams if required.

Remember for referrals from Adult Care practitioners you must send the relevant outcome notification to the referring worker

> You must click the **Finish** icon ✅ once you have completed the triage step to 'send' the **Reablement Summary** step.
>
> The triage step cannot be finished if there are any incomplete mandatory fields. 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.
>
> Complete these "mandatory items" then click the **Finish** icon ✅ again.

Recording Reablement as an Involved Team

This is required for all cases **accepted** for the reablement service. From the **Person summary** screen of the person's record:

- Click **Person details** > **Organisational relationships** in the extended sidebar menu

- Click the **Add** button

- Click the **Find** button and search for **Reablement** - click the **Reablement** hyperlink to select

- Relationship Type = Select **Involved Team** from dropdown menu

- Click the **Save** button

- Click the **OK** button to return to the **Person summary** screen

If recorded correctly, **Reablement** should be visible within **Professional and organisational relationships** on the **Person summary** screen.