



Adults Quick Guide

Adult Carer Review

Following assessment and plan activity, an open case (someone with services) will have a workflow step called **Adult Carer Review** scheduled to a team or worker. This will display in **Current work** on the **Person summary** screen.

It is essential that the review is used when further or additional involvement is required. You must not cancel the review to initiate another workflow.

If the review is assigned to you, another member of your team, or your team then you will be able to start it. By doing so, the review will be automatically assigned to you when you click 'save'.

If the review assigned to CSC or Carers First it should be completed by the allocated team/worker unless it is agreed the other team/worker can complete it. The allocated team/worker will need to reassign the review to the team/worker who will be completing the review

To start the Adult Carer Review 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 Review will open in a separate window

Recording Adult Carer Review

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

Details of the plan and/or previous review will prepopulate (pull forward) into the review. It is particularly important to review and update the information to ensure it reflects the person's current situation.

General 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 sections only' when printing the review.

Click the **Save** icon **a** throughout your input to the form. We recommend 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.

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 ¹⁵ 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 ² to update the information in these fields

In **Section 2. Review Details** once you get to the question: 'Is there a significant change in your circumstances which would indicate we should progress straight to a new assessment?'

If you select 'Yes' an additional mandatory textbox and prompt message will display.

As per the message displayed, complete all mandatory fields (highlighted in red) and then go to **Section 5. Actions Taken** and select **'Adult Carer Assessment'.**

The **Light Touch / Annual Review** subsection only displays if '*No*' is selected in answer to the question '*Is there a significant change in your circumstances which would indicate we should progress straight to a new assessment?*'. You will be prompted to answer the mandatory question '*Is this a light touch review or annual review?*'

Depending on your answer, different subsections will appear in the section below, please complete all the appropriate sections.

The light touch review can be used for reviews following the provision of new services or additional services, providing the carer's needs are unchanged.

Adult Carer Review Adults Quick Guide June 2022, Version 5.0 The full review must always be completed for annual reviews.

In Section 3. What Needs to Happen Now and Who Will Do It? if you answer 'Yes' to the question, 'Is an increase or decrease to existing services required?' a prompt will display.

Please note: This question relates to personal budget services only

To action you will need to:

- Complete the optional form Adult Carer's Support Plan Costings to record the necessary changes (located in the Forms and letters icon
- Select the next action Adult Carer Purchase Service Request and assign to self for completion (along with a next action of Adult Carer Review)
- Send the Adult Please review information and authorise request to your manager (using the Requests icon)

Your manager can then review your work and complete the **Adult Please review information and authorise** request.

Within **Section 3. What Needs to Happen Now and Who Will Do It?** your manager must enter their details in the 'Increase/Decrease authorised by' field. Once this is done, they can finish the review.

If there is a change in the person's needs and/or new services are required an Adult Carer Assessment, Adult Carer Support Plan and Adult Carer Purchase Service Request should be completed.

The Adult Carer Change in Care Package Delivery Request should be used for temporary changes and other changes when there is no change in need or costs e.g. service re-starts, suspensions, change of payment recipient. For the full list of scenarios, please refer to the Adult Carer Change in Care Package Delivery Request user guide. In **Section 4. Completion Details** the first question is: *'Review 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 review cancelled'.

You must record the mandatory 'Date' unless you have selected 'yes' to the 'Review to be abandoned / cancelled?' question.

Section 5. Actions Taken

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

All cases with new or ongoing services must have a review scheduled.

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)
- Where necessary check and amend the scheduled date (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 Assessment	If the current plan is not meeting the carer's needs and outcomes and so a full (re)assessment is required Remember you will only need to complete up to the 'ls there a significant change in your circumstances which would indicate we should progress straight to a new assessment?' question in Section 2. Review Details and select 'Yes' if you are recording this next action.	Self using the Assign to Me button
Adult Carer Review	If the carer has services a review is always required. The scheduled date defaults in but can be amended if required.	Adults Carers Service - Inbox using Pass to worker > Find button or Carers First team using Pass to team dropdown menu
Adult Carer Purchase Service Request	If the carer requires a permanent increase or decrease in the duration or cost of existing personal budget services e.g. uplift in direct payment provider's Important: Section 3. What Needs to Happen Now and Who Will Do It? and the Adult Carer's Support Plan Costings form must be completed if this action is being recorded. You must also ensure you have sent your review for authorisation by assigning the 'Adult Please review information and authorise' request to your manager.	Self using the Assign to Me button

Action	When to use	Who to assign to
Adult Carer Change in Care Package Delivery Request	 If the carer - requires a temporary reduction in service has a change in third party representative has a change in payment recipient, payment frequency or change in payment method Please check Adult Carer Change in Care Package Delivery Request user guide for full details of uses for this step 	Self using the Assign to Me button You can tick 'Send Immediately?' when adding this action.
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 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
Adult Bring Forward Scheduled Direct Payment Audit	If the review highlights the need for the carer's direct payment audit to be completed early	Customer Finance Audit team using the Pass to team dropdown menu
Adult Contact to be Recorded on 'Cared For' 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

Action	When to use	Who to assign to
Adult Complete/Updat e Carer Emergency Response Plan	If the carer requires a new emergency response plan creating or an existing plan needs updating	Self using the Assign to Me button or Adults Carers Service - Inbox using Pass to worker dropdown menu or Carers First team using Pass to team dropdown menu
Adult Notification for Carers First	Used to notify Carers First that universal services are needed or that the carer needs to be added to the mailing list for carers leaflets.	Self using the Assign to Me button Or Carers First Team using the Pass to team dropdown menu
Adult Referral to Other Agency	If the case needs to be referred to an external agency	Self using the Assign to Me button
Adult No Further Action Required	If no further action is required following the review, 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, e.g. the review has been completed but no ongoing services are needed and current 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 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

Toolbar Icons

Before finishing your review 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 \mathcal{I} to attach relevant supporting documents created outside of Mosaic.

You may need to complete one of the optional forms or letter templates available via the **Forms and letters** icon **a**. Remember if you are increasing or decreasing 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 via the **Requests** icon \blacksquare .

Request (R) / Notification (N)	When to use	Who to assign to
(R) Adult Please review information and authorise	To be used if an increase/decrease from the review is identified.	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 review 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
(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'

Request (R) / Notification (N)	When to use	Who to assign to
(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
(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

Clicking the **Finish** icon **V** will finish and complete your review. The review 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 review and no further input can be made.

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

The **Actions Taken** section of your review 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.