Direct Payment Suspension Monitoring

Direct payment services can be suspended using the **Adult Change in Care Package Delivery Request** workflow step. See the **Change in Care Package Delivery Request** and **Suspending or Terminating Direct Payments** user guides for further details.

If you are completing the **Adult Change in Care Package Delivery Request** to suspend direct payment services you will be prompted to add the next action **Adult Direct Payment Suspension Monitoring**.

The **Adult Direct Payment Suspension Monitoring** step should be used to evidence the monitoring of a person's case and situation while the direct payment is suspended and is to be used to record all discussions that take place during the scheduled monitoring period.

Each scheduled monitoring period should be recorded within a new **Adult Direct Payment Suspension Monitoring**.

Adult Direct Payment Suspension Monitoring can therefore also be selected as a next action from itself when it is decided the suspension is to continue and so further monitoring is required.

The next action of **Adult Direct Payment Suspension Monitoring** should usually be assigned to self but can be assigned to another worker if needed. The 'scheduled date' defaults in as 4 weeks but can be amended if required.

The step will display in your **Current work > Future work** folder. A week before the scheduled start date, the step will display in your **Current work > Incoming work** folder as a reminder to contact the person, their financial representative, their family etc.

As with all workflow steps, the **Adult Direct Payment Suspension Monitoring** can be started early if required

While the direct payment is suspended there must be an **Adult Direct Payment Suspension Monitoring** step open or scheduled on the person's record, to allow for details of discussions to be recorded and the monitoring of the suspension evidenced.

A new monitoring step should be used for each monitoring period. For example, you could record 5 calls this week and then add a new **Adult Direct Payment Suspension Monitoring** action to schedule a follow up monitoring step in 2 weeks.

The current monitoring step must be finished for the new (scheduled) monitoring step to display in your **Future work** folder.

Recording the Adult Direct Payment Suspension Monitoring

To start/resume the **Adult Direct Payment Suspension Monitoring**, from within the person's record:

- Click the **Incoming work** icon / **Incomplete work** icon within **Current work** on the **Person summary** screen
- Click **Start / Resume work** from the menu

The **Adult Direct Payment Suspension Monitoring** will open in a separate window

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 but will not lock the section down or save the section or 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. Once you click save, any mandatory fields or sections will be highlighted in red.

You must complete all three sections of the form.

Section 1. Person Details

Information will prepopulate into the fields marked with the **blue cog** 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 (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

If someone has a financial representative (you answer 'yes' to that question) you should use the **Find** button to perform a search for them so their details display in **Financial Representative Details**.

Important: The **'Manual Input'** button should only be used as a last resort:

- If a person is not known in Mosaic they should be created. To avoid duplicate records, you should always search using at least 3 different search criteria before creating them. See the **Creating a Person** user guide for full details.
- If a worker or organisation is not known in Mosaic you must complete the relevant form via Our Intranet > Mosaic Requests to request they are created.

Section 2. Monitoring Record

This section should be used to record details of all discussions with the person, their financial representative, their family etc during each scheduled monitoring period.

Use the **date and time picker** icon to select the **Date and time of contact**.

Select the **Method of contact** e.g. telephone call, face to face etc

If 'Other' is selected you will see a mandatory textbox to record the details

Record the **Name(s) of person/s contacted** and complete the **Details of discussion** text box with appropriate details.

The **'Worker recording activity'** field will default in with your information but can be updated if required using the **Find** button. This highlights who has recorded the discussion if there are multiple workers dealing with the case.

The **Insert Section** button should be used to repeat this section to allow multiple discussions to be recorded during this monitoring episode.

The **Outcome** should only be recorded once a decision has been made as to whether the suspension needs to continue, the direct payment should be ended completely, the direct payment should be restarted or if the case now needs to close i.e. because the person has died.

Select the **Outcome** using the dropdown menu. This field is mandatory and will prompt you to record the corresponding next action within **Next actions**.

Section 3. Next actions

Click the **Add** button to select an action. The action you select must correspond with the **'Outcome'** recorded in section 2.

Next Action	When to use	Who to assign to
Adult Direct Payment Suspension Monitoring	If the suspension needs to continue and so there is a need to schedule further monitoring. The 'scheduled date' will default in as 4 weeks but can be amended if required	Self using the **Assign to Me** button. Or, another worker using the **Pass to Worker > Find** button
Adult Change in Care Package Delivery Request	If the direct payment services need to be restarted.	Self using the **Assign to Me** button
Adult End Services	If the person's case needs to remain open but the direct payment services need to be ended. **Important:** You will need to update the **Support Plan Costings** form ('untick' the direct payment service) in the plan or review as soon as possible.	Self using the **Assign to Me** button

Next Action	When to use	Who to assign to
Adult Proposed Case Closure	If a full case closure is required e.g. where the person has died	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

The **Finish** icon  is to be used once the current monitoring period is over and the form is complete.

All finished **Adult Direct Payment Suspension Monitoring** forms can be found in the **Forms and letters** tab of the **Documents** section.