

Adults Quick Guide

Referring to Extra Care Housing (ECH)

All referrals for Extra Care Housing (ECH) are to be recorded in Mosaic.

To refer a person to ECH you must complete the **Adult Referral to Extra Care Housing**, which is available as a next action from most Adult Care workflow steps.

Remember to tick the '**Send immediately?**' checkbox and assign to self using the **Assign to Me** button when adding the next action, to allow you to start the **Adult Referral to Extra Care Housing** before finishing your current workflow step.

This guide will only cover the Mosaic ECH referral process.

Please refer to the [Adult Care Procedures, Practice Guidance and Tools](#) for full practice guidance on the referral process.

Basic Mosaic ECH Referral Process

Referring Practitioner:

1. Complete sections 1 to 4 of the **Adult Referral to Extra Care Housing** form
2. Generate sections 1 to 4 as a PDF and either email or post to the Extra Care Housing Scheme manager along with any relevant supporting documents (based on the scheme requirements)
3. Send the **Adult Referral to Extra Care Housing sent to Virtual Worker** notification to the relevant Adult Care Area Team – this will then be reassigned by the duty worker to the dedicated ECH Champion within the team

4. Reassign the incomplete **Adult Referral to Extra Care Housing** step to the relevant ECH virtual worker
5. **OT Only** – Complete an **Adult Internal Contact** to refer the person to the relevant Adult Care Area Team. Ensure you include a note to highlight the **Adult Referral to Extra Care Housing** step has been reassigned to the relevant ECH virtual worker

ECH Champion:

6. Complete section 5 of the **Adult Referral to Extra Care Housing** with the 'Date application submitted for consideration at panel' and the 'Outcome from the Extra Care panel' along with further details as necessary
7. Once the person has been allocated a place, or the person's circumstances change and so the referral is no longer required, complete/update sections 5 and 6 of the **Adult Referral to Extra Care Housing** and finish the step

Recording the Adult Referral to Extra Care Housing

To start the **Adult Referral to Extra Care Housing**, 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 Referral to Extra Care Housing** step will open in a separate window.

The **Adult Referral to Extra Care Housing** form is split into 6 sections.

Sections 1 to 4 should be completed by the **referring practitioner**, prior to the referral being sent to the Extra Care Housing Scheme manager

Sections 5 and 6 should be completed by the **ECH Champion**. These sections should only be completed once an outcome from the ECH panel is known and either the person has been accepted into the scheme and has been allocated a place, or the person's circumstances have changed and so the referral is no longer required.

This guide will only cover fields where we can specify an answer or where there is something specific to highlight.

Mandatory fields will be highlighted in red and must be completed before the referral can be finished.

All fields should be completed as thoroughly as possible based on the information you have obtained.

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 you 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 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.

Section 1. Person Details

Information will prepopulate into the fields marked with the **blue cog**  symbol. Any missing or incorrect information can be added or edited by:

- Clicking the **Show subject summary** icon  to minimise the referral 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 referral window and then clicking the **Refresh current form** icon  to update the information in these fields

GP details - a red warning message will display if -

- there is no named GP or GP Surgery recorded on the person's record
- the named GP and GP Surgery already recorded do not match
- the GP Surgery has previously been recorded as not known, or the person has been recorded as not registered with a GP Practice.

Refer to the **GP Details** user guide for guidance on how to record/update the GP or surgery if needed.

Use the **Find** button to perform a person search to record '**Details of person(s) living with you**' (if you say 'No' to the question 'Do you live alone?') and '**Emergency Contact(s)**'

Use the **Find** button to perform a person or organisation search if there is someone appointed formally to act on the person's behalf (if you say 'Yes' to this question). Remember to use the appropriate tab when searching.

Important note: The **Manual Input** tab should only be used as a last resort:

- If a person being searched for is not found, after searching using three different criteria, you will need to create them in Mosaic. Refer to the **Creating a Person** user guide for further information.
- If the organisation being searched for is not found, you should request they are created by completing the relevant form via Our Intranet > Mosaic Requests.

Any people searched for and referenced in the form should also be added as a '**Personal Relationship**' on the person's record via **Person details > Personal relationships** in the sidebar menu. Refer to the **Personal Relationships** user guide for further information.

The following icons are displayed once a person or organisation has been added in each section:

 **Edit** – to edit/amend a row in the table

 **Delete** – to delete/remove a row in the table

 **Move this row up** – to rearrange the order displayed (only displays if more than one row is recorded)

Section 2. Referral Details

Depending on how you answer certain questions you may see additional fields to complete e.g. If you say 'Yes' to the question '**Have you completed an application with an 'Extra Care Scheme' provider?**' you will need to use the dropdown menu to select the '**Extra Care Scheme' provider**

Use the **date picker** icon  to record relevant dates within this section.

Section 3. Assessment of Needs

Use the checkboxes to indicate the person's needs for each domain listed in this section.

Note that you can select multiple checkboxes for each domain where needed and you may be required to provide further details depending on the option(s) selected.

For '**Mobility**' you will also see a prompt reminding you to upload (attach) the Moving and Handling Plan, unless 'Fully Mobile' is selected.

You can do this using the **View documents** icon  - select **AC Equipment and Adaptations** as the main category and **Moving and Handling** as the sub-category. Refer to the **Uploading Documents** user guide for further information.

Section 4. Details of Support Required

Use the **Add** button to record details of the **Personal Care Support Required**:

- which days are required (select individual days or whole week)
- the number of carers
- the call time
- the call length

To add additional calls click the **Add** button or once all calls are added, click the **Add and close** button

When calls have been added the following icons are displayed:

 **Edit** – to edit/amend call details

 **Delete** – to delete/remove call details

 **Move this row up** – to rearrange the order of the calls logged (only displays if more than one call is recorded)

Use the **date picker** icon  to record the date the Care and Support Plan has been provided to the ECH provider (you have said 'Yes' to this question)

As per the onscreen prompt you must generate sections 1 to 4 as a PDF and either email or post to the Extra Care Housing Scheme manager along with any relevant supporting documents (based on the scheme requirements)

To Generate the PDF of Sections 1 to 4:

- Click the **Output current document** icon 

An **Output options** window will open

- In the '**Sections**' subsection either, select '**Completed sections only**' if you have section completed sections 1 to 4 (can see ticks in the sections menu) or select '**Sections**' and then type **1 – 4** in the textbox
- Click the **Output to PDF** button
- Save the PDF (this may need to be opened from your downloads bar) and then either email or print as necessary.

Refer to the **Printing Documents** user guide for further information.

Send the Notification

Once the PDF has been generated and the referral has been sent to the Extra Care Housing Scheme manager you must send a notification to the relevant Adult Care Area Team to inform them of the case.

- Click the **Requests** icon 
- Select the **Adult Referral to Extra Care Housing sent to Virtual Worker** notification **radio button**
- Note = Record any relevant information or to highlight any specific instructions
- Search for the relevant team using the 'Pass to team' **Find** button
- Click the **OK** button to close the popup window
- Click the **Save** icon  to send the notification

Refer to the **Requests and Notifications** user guide for further information

The Adult Care Area Team's duty worker must reassign this notification from the Team's **Incoming requests** folder to the ECH Champion within their team.

To Reassign the Notification

From the Team's **Incoming requests** folder:

- Click the **Incoming request** icon  (this will look like a **yellow cog**  when you hover over it)
- Click **Assign** from the mini menu
- Find the appropriate worker (ECH Champion) using the 'Pass to worker' > **Find** button
- Click the **OK** button

Reassign the Incomplete Adult Referral to Extra Care Housing

Once the notification has been sent you must exit the referral using the **Close** icon  and reassign the incomplete **Adult Referral to Extra Care Housing** step to the relevant ECH virtual worker.

To Reassign the Incomplete Work

From your **Incomplete work** folder:

- Click the **Incomplete work** icon  (this will look like a **yellow cog**  when you hover over it)
- Click **Update assignment** from the mini menu
- Find the ECH virtual worker using the 'Pass to worker' **Find** button

The **ECH virtual workers** are named as follows:

Adult Care Area Team name – ECH name

- Adult Care Skegness – Barratt Court
- Adult Care Louth – Bill Baker Court
- Adult Care Grantham – Brick Kiln Place
- Adult Care Hykeham – De Wint Court
- Adult Care Louth – Elizabeth Court
- Adult Care Sleaford – Eslaforde Gardens
- Adult Care Boston – Mayfields
- Adult Care Lincoln North – Olsen Court
- Adult Care Stamford/Bourne – Worth Court

To search for the ECH virtual worker type '**%ECH name**' (as listed above) in the **Last Name** field e.g. Last Name = %Barratt

- Add a 'Note' if needed
- Click the **OK** button

OT Only – Complete Adult Internal Contact

As per the onscreen prompt in section 4 for any cases referred to an Extra Care Housing Scheme by the OT Service an **Adult Internal Contact** must also be completed to refer the person to the relevant Adult Care Area Team.

You must ensure you have stated within the contact that the case has been referred to the Extra Care Housing Scheme and that the referral has been reassigned to the ECH virtual worker

Refer to the **Internal Contacts – Referring to OT or SW** user guide for full details

Complete Section 5 of the Adult Referral to Extra Care Housing

Once a case is submitted to panel and an outcome is received the ECH Champion should complete section 5 of the **Adult Referral to Extra Care Housing**.

Use the **date picker** icon  to record the '**Date application submitted for consideration at panel**' and '**Outcome date**'

Use the dropdown menu to select the '**Outcome from Extra Care panel**'

Record further details as necessary in the textbox provided.

Resume and Finish the Adult Referral to Extra Care Housing

Once the person has been allocated a place or the person's circumstances have changed and so the referral is no longer required the **Adult Referral to Extra Care Housing** should be resumed, sections 5 should be completed/updated if needed, section 6 should be completed and the step finished.

Section 5. Completion Details

If needed, use the **date picker** icon  to select/update the '**Date application submitted for consideration at panel**' and '**Outcome date**'

Use the dropdown menu to select/update the '**Outcome from Extra Care panel**'

Record further details as necessary in the textbox provided.

In the **Completion Details** subsection the **Name and Designation** and **Team** will default in as the details of the worker who started the referral. The **Date completed** will also pull through as the date the referral was started. This subsection should be updated so the correct details are showing – date referral completed (today) and the worker who is finishing the step.

Section 6. Next actions

Next actions are mandatory in all forms. At least one action must be added before the **Adult Referral to Extra Care Housing** can be finished.

To record a next action:

- Click the **Add** button
- Select the relevant action from the '**Select action**' dropdown menu
- Assign to = Find as appropriate - Not required for NFA (no further action) actions
- 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

Next Action	When to use	Who to assign to
Adult Referral to Extra Care Housing Complete (NFA)	Once the person has a place in the ECH Scheme	This is a 'no further action' (NFA) action and so does not need assigning

Next Action	When to use	Who to assign to
Adult Referral to Extra Care Housing No Longer Required (NFA)	If referral is no longer required e.g. the person's circumstances have changed and ECH is no longer suitable.	This is a 'no further action' (NFA) action and so does not need assigning
Adult Proposed Case Closure	When the case needs fully closing down as there are no other open workers/teams/services.	Self using the Assign to Me button
Adult Case Closure Already Started (NFA)	When the case needs fully closing and someone else has already started this process. To record this action you must be able to see Adult Proposed Case Closure or Adult Case Closure in Progress in Current work on the Person summary screen.	This is a 'no further action' (NFA) action and so does not need assigning

Once sections 5 and 6 are complete the **Adult Referral to Extra Care Housing** should be finished.

It 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.

Remember

The **Adult Referral to Extra Care Housing** should **only** be finished once the person has been allocated a place in the ECH Scheme or the person's circumstances have changed and so the referral is no longer required.