

Adults Quick Guide

Purchasing Steps – Quick Reference

This guide is intended to give you a quick reference as to which purchasing step you should use to arrange different types of services, including new services, emergency services, extending temporary admissions, changing current services etc.

For full details on recording the relevant workflow steps you should refer to the specific user guides.

Type of Purchase	Purchasing Step	Workflow/Notes
New Service	Purchase Service Request	<p>New Case = My Assessment including My Care and Support Plan, Support Plan Costings and Permanent Residency Request (Permanent Residency Placement only) or Request to Approve Temporary Admission (immediate Temporary Admission Placements only – not needed for rolling respite) > Purchase Service Request</p> <p>Open Case = My Review including My Assessment (if there is a change in need or circumstances) and the other forms as listed above.</p> <p>Important – Personal Budget Letter should also be completed within the assessment / review and provided to the person / their representative</p>

Type of Purchase	Purchasing Step	Workflow/Notes
Permanent Change (Increase or Decrease)	Purchase Service Request	<p>My Review including My Assessment (if there is a change in need or circumstance), My Care and Support Plan and Support Plan Costings > Purchase Service Request</p> <p>Important – Personal Budget Letter should also be completed within the review and provided to the person / their representative</p>
Rolling Respite (STC – Residential or Nursing)	<p>Purchase Service Request – to set up</p> <p>Change in Care Package Delivery Request – when an episode happens (non LD) or to renew for new financial year (LD)</p>	<p><u>To set up</u> – My Assessment including My Care and Support Plan and Support Plan Costings > Purchase Service Request</p> <p><u>When an episode happens (non LD)</u> – My Review / Contact (Open Case) > Change in Care Package Delivery Request</p> <p><u>To renew in April (LD)</u> – My Review > Change in Care Package Delivery Request</p>
Extending Temporary Admission (STC – Residential or Nursing)	Extension to Temporary Admission Request	<p>Extension to Temporary Admission Monitoring* > Extension to Temporary Admission Request</p> <p>*Extension to Temporary Admission Monitoring can be added from the My Assessment, Purchase Service Request or My Review steps</p>
Emergency Services (urgent services required)	Immediate Emergency Service Request	Contact (New Case) / Contact (Open Case) / Conversation Record > Immediate Emergency Services Request
Interim bed (block)	None	Workflow for the homecare service remains, no additional workflow needed

Type of Purchase	Purchasing Step	Workflow/Notes
Interim bed (spot)	Adult Interim Bed Request (Recorded by Brokerage)	Workflow for the homecare service remains, no additional workflow completed by practitioners. Brokerage record Adult Interim Bed Request step
Temporary increase or decrease	Change in Care Package Delivery Request	My Review / Hospital Discharge Request / Community Transfer of Care Case Monitoring > Change in Care Package Delivery Request
Other changes where there is no change in need or cost e.g. change in day for day care	Change in Care Package Delivery Request	My Review > Change in Care Package Delivery Request
Ending services	End Service Request – if just ending some services Purchase Service Request – if ending services while also amending services or arranging new services Proposed Case Closure (practitioner) and Case Closure in Progress (business support) – if all services need to end and the case is fully closing	<u>Ending some services</u> – My Review including My Care and Support Plan and Support Plan Costings > End Service Request <u>Ending some services while amending others or arranging new services</u> – My Review including My Assessment, My Care and Support Plan and Support Plan Costings > Purchase Service Request <u>Ending all services as part of a case closure</u> – Proposed Case Closure > Case Closure in Progress* *Case Closure in Progress is completed by business support only