

Adults Quick Guide

Permanent Residency Process for Practitioners

The **Adult Permanent Residency Request** is an optional form in Mosaic.

It should be completed to gain authorisation for all permanent residency (long term residential or nursing care) placements.

This process is not needed for LD or LPFT cases.

The **Adult Permanent Residency Request** is available within the **Adult My Assessment** and **Adult My Review** steps.

It is opened by clicking the **Forms and letters** icon  within those workflow steps and then selecting it from the 'Forms' list.

Some information in the form will pull through from the Adult My Assessment, Adult My Care and Support Plan, Adult My Review and Adult Support Plan Costings forms.

To ensure all appropriate information pulls through you must **complete** and **save** the assessment/review, plan and support plan costings forms **before** opening and completing this form.

Recording the Adult Permanent Residency Request

All appropriate sections of the form should be completed before it is finished.

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 not lock the section down nor save the section. We recommend ticking 'Section completed' for the relevant sections of this form before finishing the step. There is an option to select 'completed sections 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.

Blue cogged  fields prepopulate with the person's details. If some information is missing or incorrect, it can be edited by:

- clicking the **Show subject summary** icon  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  to update the information in these fields

Section 2. Permanent Residency

You must complete this section in full. This guide will only mention fields where guidance can be given.

Some information will pull through from the latest assessment, plan, review and support plan costings forms but most of this information can be edited to add additional detail where needed.

Remember - To ensure all appropriate information pulls through you should **complete** and **save** the assessment/review, plan and support plan costings forms **before** opening and completing this form.

Use the **Find** button to search for the residential / nursing home to record the '**Current location**'.

Use the **Add** button to record a '**Chronology of Relevant Significant Events**' in the popup window.

Use the **date picker** icon  to select the appropriate date for the entry and type details in the 'Event' textbox.

Click the **Add** button to add one entry and then add another, or click the **Add and close** button if only recording one entry or when all entries have been recorded. The **Close** button will close the popup without adding an entry.

When chronology entries have been recorded the following icons are displayed:

 **Edit** – to edit/amend an entry

 **Delete** – to delete/remove an entry

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

The '**Authorising Lead Practitioner**' subsection must be left blank as it is to be completed by the Lead Practitioner (LP).

The '**Rationale for Quality Assurance Group decision**' subsection must be left blank as it is to be completed by the Quality Assurance Group.

Once you have completed the form you need to send the **Adult Please review information and authorise** request to your LP:

- Click the **Requests** icon 
- Select **Adult Please review information and authorise** (this is mandatory in the Adult My Assessment: Area Team step)
- Use the **Pass to worker > Find** button to search for your LP
- Click the **OK** button
- Click the **Save** icon 

You must also send the **Adult Care Finance Frailty Permanent Residency check** request to the Adult Care Finance team:

- Click the **Requests** icon 
- Click **Send request**
- Select **Adult Care Finance Frailty Permanent Residency check**
- Add a **note**
- Use the **Pass to team** dropdown menu and select **Adult Care Finance**
- Click the **OK** button
- Click the **Save** icon 
- Exit the step using the **Close** icon  and say 'yes' to the save changes message

Your workflow step (assessment or review) will remain in your **Incomplete work** folder highlighted in **yellow** with the **Incomplete work** icon  showing with a blue arrow pointing the right to indicate a request has been sent.

Upon receiving the **Incoming request** your LP will review the forms for you and then either return the request to you, if more information is needed, or send the case to the Quality Assurance Group.

Requests Returned by LP:

If your LP believes more information is needed they will return the request to you (adding a note to say why).

Your workflow step (assessment or review) will remain in your **Incomplete work** folder but will now be highlighted in **red** with the **Incomplete work** icon  showing with a red arrow pointing to the left to indicate a request has been returned.

You will need to resubmit the case by sending the request back to your LP once you have added the extra information.

To resend the case:

- Click the **workflow step name** in your **Incomplete work** folder to access the workflow step summary screen for the step (assessment or review)
- Look at the note in **Requests** to see why the request was returned to you
- Click **Resume** in the sidebar menu to access the step (assessment or review) – it will open in a separate window
- Update the forms with relevant details / extra information as requested
- Click the **Requests** icon 
- Click the request text – **Adult Please review information and authorise**
- Click the **Send again** button
- Click the **OK** button
- Exit the step using the **Close** icon  and say 'yes' to the save changes message

Your workflow step (assessment or review) will remain in your **Incomplete work** folder highlighted in **yellow** again with the  icon to indicate a request has been sent.

Requests Accepted by LP:

If the LP is happy with the forms they will complete the '**Authorising Lead Practitioner**' subsection and then send the case to the Quality Assurance Group for their consideration by reassigning the **Adult Please review information and authorise** request.

Your workflow step (assessment or review) will still remain in your **Incomplete work** folder highlighted in **yellow** with the **Incomplete work** icon  showing with a blue arrow pointing the right to indicate a request has been sent.

Requests Returned by Quality Assurance Group – resubmission required:

If the case is not approved, e.g. because they need further information, the Quality Assurance Group will return the request to you (adding a note to say why).

Your workflow step (assessment or review) will remain in your **Incomplete work** folder but will now be highlighted in **red** with the **Incomplete work** icon  showing with a red arrow pointing to the left to indicate a request has been returned.

You will need to resubmit the case by sending the request back to the Quality Assurance Group once you have added the extra information.

To resend the case:

- Click the **workflow step name** in your **Incomplete work** folder to access the workflow step summary screen for the step (assessment or review)
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- Click **Resume** in the sidebar menu to access the step (assessment or review) – it will open in a separate window
- Update the forms with relevant details / extra information as requested
- Click the **Requests** icon 
- Click the request text – **Adult Please review information and authorise**
- Click the **Send again** button
- Click the **OK** button
- Exit the step using the **Close** icon  and say 'yes' to the save changes message

Your workflow step (assessment or review) will remain in your **Incomplete work** folder highlighted in **yellow** again with the **Incomplete work** icon  showing with a blue arrow pointing the right to indicate a request has been sent.

Requests Returned by Quality Assurance Group – resubmission not required:

If the case is not approved and will not need to be resubmitted to the Quality Assurance Group, e.g. because the Quality Assurance Group feel the residential/nursing placement is not appropriate at this time, or the person has changed their mind/passed away etc, the Quality Assurance Group will return the request to you (adding a note to say why).

Your workflow step (assessment or review) will remain in your **Incomplete work** folder but will

now be highlighted in **red** with the **Incomplete work** icon  showing with a red arrow pointing to the left to indicate a request has been returned.

You will need to amend the assessment or review, plan and support plan costings forms as necessary and then send the request to your LP for them to authorise the changes.

You must not delete the **Permanent Residency Request** form – this should be retained for reference on the person's record.

To resend the request to your LP:

- Click the **workflow step name** in your **Incomplete work** folder to access the workflow step summary screen for the step (assessment or review)
- Click **Resume** in the sidebar menu to access the step (assessment or review) – it will open in a separate window
- Update the forms with relevant details
- Click the **Requests** icon 
- Click the request text – **Adult Please review information and authorise**
- Click the **Send again** button
- Update the **note** to highlight why the case does not need resubmitting and the changes made to the assessment/review, plan and support plan costings forms
- Use the **Pass to worker > Find** button to search for your LP

- Click the **OK** button
- Exit the step using the **Close** icon  and say 'yes' to the save changes message

Your workflow step (assessment or review) will remain in your **Incomplete work** folder highlighted in **yellow** again with the **Incomplete work** icon  showing with a blue arrow pointing the right to indicate a request has been sent.

Remember - Your workflow step (assessment or review) will remain in your **Incomplete work** folder until your LP completes the request and finishes the step.

Requests Accepted by Quality Assurance Group:

If the case is approved the Quality Assurance Group will send an '**Adult Notification of approved Permanent Residency request**' notification to inform you.

The Area Quality Assurance Group will also send the same notification to Business Support.

Once they have sent the notification(s) and completed the request they will then finish the step.

You will receive the **Adult Notification of approved Permanent Residency request** notification in your **Incoming requests** folder.

Your workflow step (assessment or review) will 'vanish' from your **Incomplete work** folder and any next actions e.g. Purchase Service Request will appear in your Incoming work folder.

Remember - Your workflow step (assessment or review) will remain in your **Incomplete work** folder until the Quality Assurance Group approves the permanent residency placement (Area cases only).

To acknowledge the notification:

- From your **Incoming requests** folder, click the **notification title** to access the workflow step summary screen for the step (assessment or review) it was sent from

- Click the **Acknowledge** hyperlink (found under the heading **Requests**)
- Add a note if required
- Click the **OK** button

Hospital Practitioners (Acute and Community) Only

All cases will be passed to Hospital Area Manager for final authorisation by the Hospital Leads.

Requests Returned by the Hospital Area Manager – resubmission required:

If the case is not approved, e.g. because they need further information, the Hospital Area Manager will return the request to you (adding a note to say why).

Your workflow step (assessment or review) will remain in your **Incomplete work** folder but will now be highlighted in **red** with the **Incomplete work** icon  showing with a red arrow pointing to the left to indicate a request has been returned.

You will need to resubmit the case by sending the request back to the Hospital Area Manager once you have added the extra information.

To resend the case:

- Click the **workflow step name** in your **Incomplete work** folder to access the workflow step summary screen for the step (assessment or review)
- Look at the note in **Requests** to see why the request was returned to you
- Click **Resume** in the sidebar menu to access the step (assessment or review) – it will open in a separate window
- Update the forms with relevant details / extra information as requested
- Click the **Requests** icon 

- Click the request text – **Adult Please review information and authorise**
- Click the **Send again** button
- Click the **OK** button
- Exit the step using the **Close** icon  and say 'yes' to the save changes message

Your workflow step (assessment or review) will remain in your **Incomplete work** folder highlighted in **yellow** again with the **Incomplete work** icon  showing with a blue arrow pointing the right to indicate a request has been sent.

Requests Returned by the Hospital Area Manager – resubmission not required:

If the case is not approved and will not need to be resubmitted to the Hospital Area Manager, e.g. because the manager feels the residential/nursing placement is not appropriate at this time, or the person has changed their mind/passed away etc, the manager will return the request to you (adding a note to say why).

Your workflow step (assessment or review) will remain in your **Incomplete work** folder but will now be highlighted in **red** with the **Incomplete work** icon  showing with a red arrow pointing to the left to indicate a request has been returned.

You will need to amend the assessment or review, plan and support plan costings forms as necessary and then send the request to your LP for them to authorise the changes.

You must not delete the **Permanent Residency Request** form – this should be retained for reference on the person's record.

To resend the request to your LP:

- Click the **workflow step name** in your **Incomplete work** folder to access the workflow step summary screen for the step (assessment or review)
- Click **Resume** in the sidebar menu to access the step (assessment or review) – it will open in a separate window

- Update the forms with relevant details
- Click the **Requests** icon 
- Click the request text – **Adult Please review information and authorise**
- Click the **Send again** button
- Update the **note** to highlight why the case does not need resubmitting and the changes made to the assessment/review, plan and support plan costings forms.
- Use the **Pass to worker > Find** button to search for your LP
- Click the **OK** button
- Exit the step using the **Close** icon  and say 'yes' to the save changes message

Your workflow step (assessment or review) will remain in your **Incomplete work** folder highlighted in **yellow** again with the **Incomplete work** icon  showing with a blue arrow pointing the right to indicate a request has been sent.

Remember - Your workflow step (assessment or review) will remain in your **Incomplete work** folder until your LP completes the request and finishes the step.

Requests Accepted by the Hospital Area Manager:

If the case is approved the Hospital Area Manager will send an **Adult Notification of approved Permanent Residency request** notification to inform you.

They will also send the same notification to Business Support.

Once they have sent the notification(s) and completed the request they will then finish the step.

You will receive the **Adult Notification of approved Permanent Residency request** notification in your **Incoming requests** folder.

Your workflow step (plan or review) will 'vanish' from your **Incomplete work** folder and any next actions e.g. Purchase Service Request will appear in your Incoming work folder.

Remember - Your workflow step (assessment or review) will remain in your **Incomplete work** folder until the Hospital Area Manager approves the permanent residency placement.

To acknowledge the notification:

- From your **Incoming requests** folder, click the **notification title** to access the workflow step summary screen for the step (assessment or review) it was sent from
- Click the **Acknowledge** hyperlink (found under the heading Requests)
- Add a note if required
- Click the **OK** button