

Quick Guide, Mosaic Adults

Commissioning Carers Services

The workflow required to plan for and request new personal budget carers services and for significant permanent changes to existing personal budget carers services is:

- Adult Carer Assessment > Adult Carer Support Plan > Adult Carer Purchase Service Request

You cannot purchase new services or significant* permanent changes without completing an assessment, plan and purchase service request.

*Small permanent changes to existing personal budget services, including provider uplifts, can be made from the Adult Carer Review. Please see the **Adult Carer Review** guide for further details

Support Plan Costings

Services should be costed within the **Adult Carer Support Plan Costings** form. This form is located within the 'Adult Carer Support Plan' and the 'Adult Carer Review'.

Please refer to the guides **Adult Carer Support Plan** and **Adult Carer Review** for further guidance recording a plan or review.

To cost for services you must select the relevant 'Service Type' checkbox.

New services should only be costed for within the plan. Existing ongoing services should automatically display, these can be amended as required.

Small changes to existing services can also be made within the review.

To ensure that the 'proposed cost of services per year/per week' is correct, services must have the correct number of units (days, nights, or hours dependent on service type) and the correct unit cost. The weekly cost will default in for some service types.




The direct payment frequency is a mandatory for each service.

At the end of your plan or review, you will need to:

- make sure you have recorded a next action of **Adult Carer Purchase Service Request** and assigned it to yourself (Assign to me button)
- make sure you have recorded a next action of **Adult Carer Review** and assigned it to yourself (Assign to me button), another worker (pass to worker) or the relevant team (pass to team) as appropriate
- add any other relevant next actions

Carer Purchase Service Request

Section 1. Personal Details

Information will prepopulate into the fields marked with the  symbol. If some information is missing or incorrect, it can be added/updated by clicking the **Show subject summary** icon , adding/updating the information on the Person Summary screen and maximising the workflow step window. Once the window opens, click the **Refresh** icon  to refresh the prepopulated information.

The two mandatory fields in this section will default in as follows:

- **Purchasing Team*** = **Carers Purchasing**
- **Budget Code*** = **L13344**

Section 2. Carer Services

This section will populate with information recorded in the Support Plan Costings form within the plan or review.

If details are incorrect you will need to arrange for the purchase service request to be deleted and then plan/review to be re-opened so the costings can be amended and re-authorised before you start a new purchase service request.

To do this, contact the **Mosaic Service Desk**

- **Carers Service (CSC)** should use MyPortal>My IT>Mosaic Requests>Change Person Record/Workflow
- **Carers First** should call 01522 555555

Existing or ongoing services will display alongside any new services being requested.

You must complete all necessary details for each service.

You will not be able to finish the Carer Purchase Service Request until all the mandatory fields have been completed.

Section 3. Services No Longer Required

This section can be used to request services are ended.

Use the **Add** (button) to specify the type of service, end date and other relevant details regarding the service(s) to be ended.

Next Actions

At the end of your Purchase Service Request, you should record the relevant next action.

- **Adult Carer Purchase Service Admin**


To be used to request all Carers services are setup or ended.

It should be assigned to the **Direct Payments inbox*** via the pass to worker dropdown menu.

- **Adult Purchase Request No Longer Required**

To be used if Carers services are no longer required.

This is a terminating action and does not need to be assigned to a worker or team. When using this next action you may also need to consider if a 'Proposed Case Closure' step is required. Please see the **Adult Proposed Case Closure** guide for further guidance.


Once you have recorded the relevant next action(s), you must consider whether you need to use the toolbar icons and then finish the workflow step by clicking the **Finish** icon .

Requests

There are optional Requests available in the **Requests** icon 

- **Adult Authorise DP termination/suspension**

To be assigned to your manager if ending a direct payment service (recorded in section 3).

The '**DP Suspension and Termination Checklist**' optional form must also be completed. This is located in the **Forms and Letters** toolbar icon 

- **Adult Please review information and authorise**

To be assigned to your manager if required. This is not routinely used as services are authorised in the plan or review.

Optional Forms

Optional forms and letter templates are located in the **Forms and Letters** icon 

Remember if you are ending a service (recorded in section 3) you must complete the '**DP Suspension and Termination Checklist**' optional form and send the Request **Adult Authorise DP termination/suspension**.

Please note that if completing the form '**Referral to Penderels Trust**', it should be saved as a PDF and emailed to Penderels as Penderels do not have access to Mosaic.