

## Adults Quick Guide

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### Care Packages Provided Widget

Any **Services** recorded on a person's record will appear in the **Care Packages Provided** widget on the **Person Summary** screen.

This widget will be split into sections. These sections vary depending on the services provided to the person.

The three main section headings you may see are '**AS - Personal Budgets**', '**AS – Non-Personal Budgets**' and '**AS - Adults Equipment and Telecare**'.

An additional section heading called '**AS - Carer Services**' will also display if someone is a carer and has carer services.

- Ended services will display with "Lapsed" against them
- Planned services (with a future start date) will display with "Pending" against them
- Current/started services will not have anything against them

### Viewing Care Package Details

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Within the **Care Packages Provided** widget:

- Click the **AS – Adults Equipment and Telecare** hyperlink for details of equipment, adaptations and any telecare services (provided before April 2016)
- Click the **AS – Non-Personal Budgets** hyperlink for details of non-personal budget services (usually temporary services provided in an emergency – not costed for in the costings form within a plan/review)

- Click the **AS – Personal Budgets** hyperlink for details of personal budget services (costed for in the costings form within a plan/review)

Once one of these hyperlinks has been clicked the **Care package details** screen displays.


All services (depending on which hyperlink you clicked) are displayed at the top of the screen under the heading "**Service**"

**Available Care Package Types** – if there is more than one service type recorded, you can view the other service types by selecting the relevant option from the dropdown menu at the top of the page and clicking the **Go** button.

Details of individual services, including the elements of that service, can be viewed by clicking the relevant **Service** hyperlink. Individual service details can also be viewed directly by clicking the relevant **Service** hyperlink within the **Care Packages Provided** widget itself.

**"Status"** states whether a service is pending – not yet started/provided, current or ended.

The top half of this screen can be rearranged by clicking on any of the column headings.

The **Packages** icon  located down the right side of the screen is used to adjust, suspend and vary services. This icon is **only** used by workers in the Brokerage Team and Serco – Provider, Deferred and Direct Payments Team.


The screen can be filtered using the "**View options**" section of the screen. Radio buttons of 'All', 'Purchased' or 'Proposed' can be selected as necessary. The 'From date' and 'To date' fields can also be used to filter via a certain date range. Once options have been selected click the **Update View** button to filter the top half of the screen.

The bottom section on the screen displays a "**Finance Summary of the Current Care Package**".

### **Buttons at the bottom of this screen:**

- **View care package schedule** - displays a breakdown of all of the current and all proposed services -outlining the schedule (days and times etc.).

You can click the << Previous Week and Next Week >> hyperlinks to navigate to the previous and next week's schedule as required.

You can click the calendar icon  against each day on the schedule to view that day in detail.

Clicking the **OK** button at the bottom of the screen will close the schedule.

- **OK** - navigates you back to the **Person Summary** screen

Clicking the **OK** button will always navigate you back through the screens. If you have clicked through various hyperlinks and are trying to exit back to the **Person Summary** screen just keep clicking the **OK** button.

## Viewing Service Details

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From either the **Care Packages Provided** widget or from the **Care package details** screen:

- Click the relevant **Service** hyperlink

The **Service details – "Service"** screen displays.

All Elements for that particular service are displayed at the top of the screen under the heading **"Service element"**.

Details of individual elements can be viewed by clicking the relevant **Element** hyperlink.

**"Status"** states whether the element is pending (not yet started), is current or has ended.

Like the **Care package details** screen; the top half of this screen can be rearranged by clicking on any of the column headings, the screen can be filtered using the **"View options"** section of the screen and a **"Financial Summary of the Current Care Package"** can be viewed at the bottom of the screen.

### Buttons at the bottom of this screen:

- **View Care Package** - once clicked displays the **Care package details** screen
- **View Care Package schedule** - once clicked displays a breakdown of all of the current and all proposed services (outlining the schedule – days and times etc.)
- **OK** - navigates you back to the **Person Summary** screen

## Viewing Element Details

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From the **Care Packages Provided** widget click the relevant **Service** hyperlink to access the **Service details** screen:

- Click the relevant **Service Element** hyperlink

The **Service element details – "Element"** screen displays

This screen is split into tabs and each tab can be viewed by clicking on it.

The most relevant information for most services is likely to be found on the **Summary** tab. This is the default tab displayed when entering this screen.

Full details of the service including the provider (supplier), frequency, quantity etc. can be found in this screen.

A copy of the Purchase Order for the service can be reprinted from this screen by clicking on the purchase order hyperlink.

The **Schedule** tab gives a breakdown of the individual service (outlining the schedule – days and times etc.)

The **Costs** tab gives a breakdown of the weekly cost of the service.

The **Budget Codes** tab gives a summary of the account codes and cost centre details.

The **Variations** tab gives details of any variations that have been recorded against the service.

- Click **OK** (Button) to return to the **Service details – "Service"** screen