



Locality Hub Booked Appointments  
Adult Social Care  
Standard Operating Procedure  
Version 8  
February 2019

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## 1.0. Purpose

This Standard Operating Procedure will support the process for Booked Appointments in Adult Social Care (ASC). These appointments, primarily with face to face contact with an Adult Practitioner, will take place in the Community, in a 'Hub' which will be held in a variety of settings within the ASC locality areas. The booked appointments will free capacity within the teams to allow more contact availability for initial conversations.

The appointment sessions will be held a minimum of one per locality, per month and the lead for this work will be the Senior Adult Practitioner post holder in each locality, with oversight from the Team Leader.

Booked appointments will be made at the first point of contact with the member of the public.

This will be, in the first instance, through the commissioned Information and Advice Provider (My Choice) and the Telford and Wrekin ASC Family Connect Workers. The model of good conversations will lead the conversation and this will influence the decision to offer a booked appointment.

## 2.0 Good Conversations and the role of the My Choice Representative and Family Connect Advisor

Using the 'Good Conversations' model advisors should ascertain from the person what their expected outcomes are and why they have made contact (see appendix 1). From this advisors should:

- Ascertain whether to not the person can be signposted to another relevant service who can best support them in the first instance.
- Following the conversation if the adviser makes the decision that the person requires a conversation with an adult social care professional they should offer the person an appointment in their nearest hub (see appendix 1).
- If the person is unable to attend an appointment at their hub due to difficulties with mobility/mental health or any other disclosed difficulty, the person can still be seen in their own home but we will not be able to identify a date or time of when this will happen (refer to appendix 1 for further details).
- My Choice representatives who have identified that a person requires a booked appointment should complete the Family Connect referral form, clearly stating on the top of the form that a booked appointment has been made including the venue and date.
  - If an appointment has not been made because the person refuses or is unable to attend an appointment, then this should also be clearly stated on the referral form.
- My Choice representatives should ensure that as much information as possible is provided on the referral form.

- Once complete My Choice will send the referral form to Family Connect - see part 5.

### 3.0 Booking an Appointment

The booking system is set up through office 365. To access this you will need to go to:

[www.telford.gov.uk/ascbookedappointments](http://www.telford.gov.uk/ascbookedappointments)

This takes you to the booking page. Select the required hub, date and time from the options.

**New Appointment - Chilcott Gardens**

<div style="display: flex; justify-content: space-between; align-items: flex-start;"> <div style="text-align: left;"> <p>New Appointment - Parkwood</p> <p>1 hour</p> <p>Free</p> </div> <div style="text-align: right; color: #888;"> <span style="border: 1px solid #888; border-radius: 50%; padding: 2px 5px;">i</span> </div> </div>	<div style="display: flex; justify-content: space-between; align-items: flex-start;"> <div style="text-align: left;"> <p>New Appointment - Brookside Central</p> <p>1 hour</p> <p>Free</p> </div> <div style="text-align: right; color: #888;"> <span style="border: 1px solid #888; border-radius: 50%; padding: 2px 5px;">i</span> </div> </div>
<div style="display: flex; justify-content: space-between; align-items: flex-start; background-color: #009688; color: white; padding: 5px;"> <div style="text-align: left;"> <p>New Appointment - Chilcott Gardens</p> <p>1 hour</p> <p>Free</p> </div> <div style="text-align: right; color: white;"> <span style="border: 1px solid white; border-radius: 50%; padding: 2px 5px;">i</span> </div> </div>	<div style="display: flex; justify-content: space-between; align-items: flex-start;"> <div style="text-align: left;"> <p>New Appointment - Dawley Christian Ce...</p> <p>1 hour</p> <p>Free</p> </div> <div style="text-align: right; color: #888;"> <span style="border: 1px solid #888; border-radius: 50%; padding: 2px 5px;">i</span> </div> </div>
<div style="display: flex; justify-content: space-between; align-items: flex-start;"> <div style="text-align: left;"> <p>New Appointment - Leegomery</p> <p>1 hour</p> <p>Free</p> </div> <div style="text-align: right; color: #888;"> <span style="border: 1px solid #888; border-radius: 50%; padding: 2px 5px;">i</span> </div> </div>	<div style="display: flex; justify-content: space-between; align-items: flex-start;"> <div style="text-align: left;"> <p>New Appointment - Wrekin</p> <p>1 hour</p> <p>Free</p> </div> <div style="text-align: right; color: #888;"> <span style="border: 1px solid #888; border-radius: 50%; padding: 2px 5px;">i</span> </div> </div>

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**26 February**

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February 2019

Mo	Tu	We	Th	Fr	Sa	Su				
				1	2	3		10:00	11:00	12:00
								13:00	14:00	
4	5	6	7	8	9	10				
11	12	13	14	15	16	17				
18	19	20	21	22	23	24				
25	26	27	28							

Enter the details of the person the appointment is for including:

- Name of the person
- Email address (see 2.1 if they do not have one of their own)
- Telephone number
- In the notes enter the reason for the appointment, i.e. Carer advice (please do not enter any specific medical information or any other personal information).
- Enter who has made the appointment i.e. Family Connect and which GP practice they are registered with.
- Ensure that the customer is aware of the privacy notice
- Then select "Book".

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### Add your details

Fiona Managh

fiona.managh@telford.gov.uk

01952 380320

Please let us know if you have any special requests.  
Thank you.

Carer advice

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### Provide additional information

Who has made this booking?

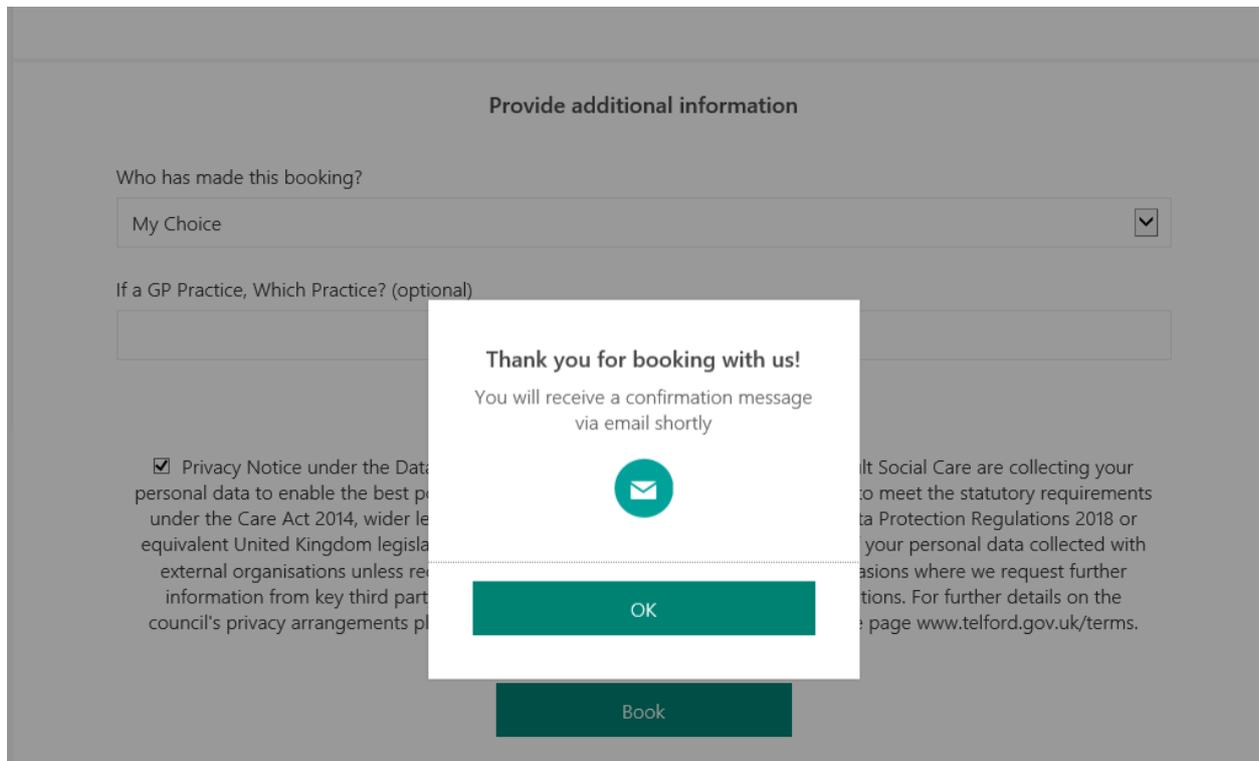
My Choice



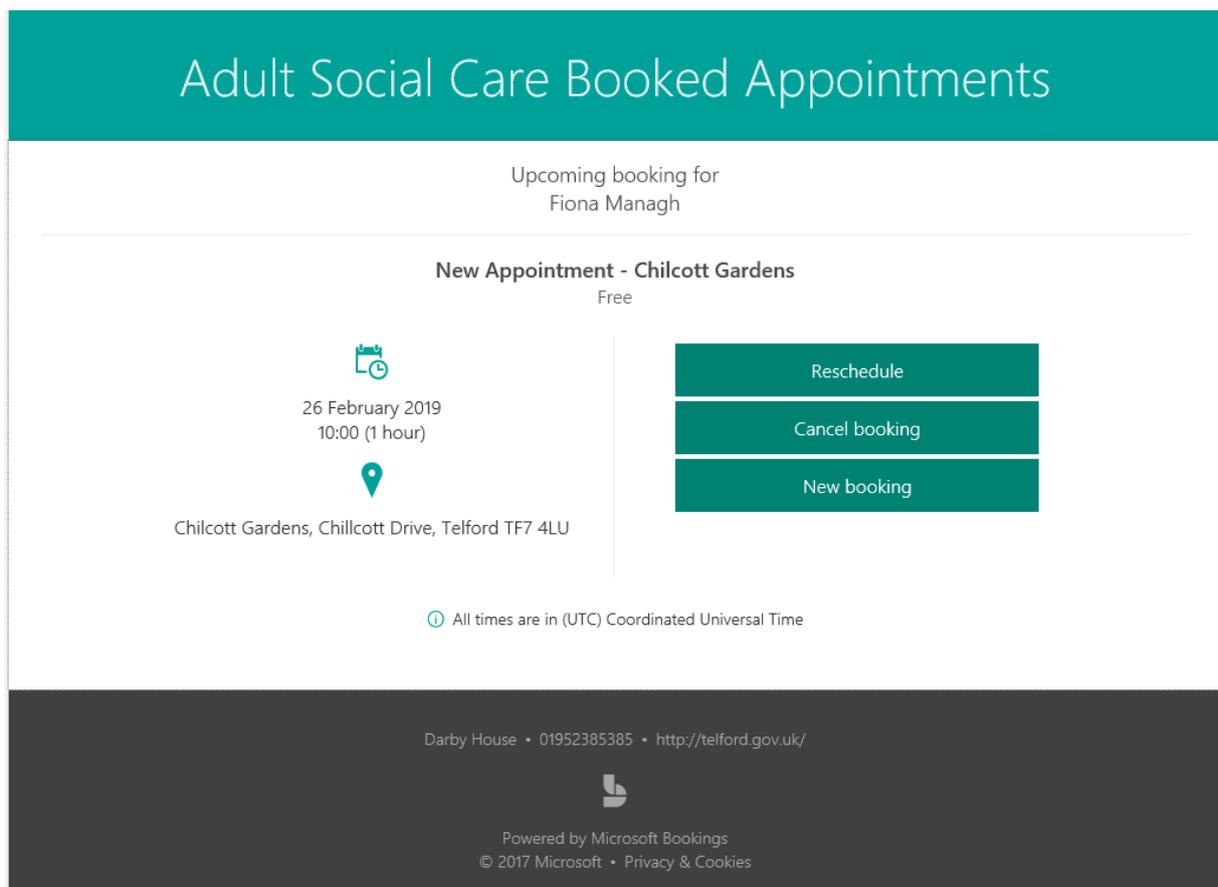
If a GP Practice, Which Practice? (optional)

Privacy Notice under the Data Protection Act 2018 Telford & Wrekin Council Adult Social Care are collecting your personal data to enable the best possible advice, care or support to be provided and to meet the statutory requirements under the Care Act 2014, wider legislation and Article 9(2)(c) & (h) of the General Data Protection Regulations 2018 or equivalent United Kingdom legislation. Telford & Wrekin Council will not share any of your personal data collected with external organisations unless required to do so by law. However, there may be occasions where we request further information from key third party organisations such as Health or Provider organisations. For further details on the council's privacy arrangements please view the privacy page on the council's website page [www.telford.gov.uk/terms](http://www.telford.gov.uk/terms).

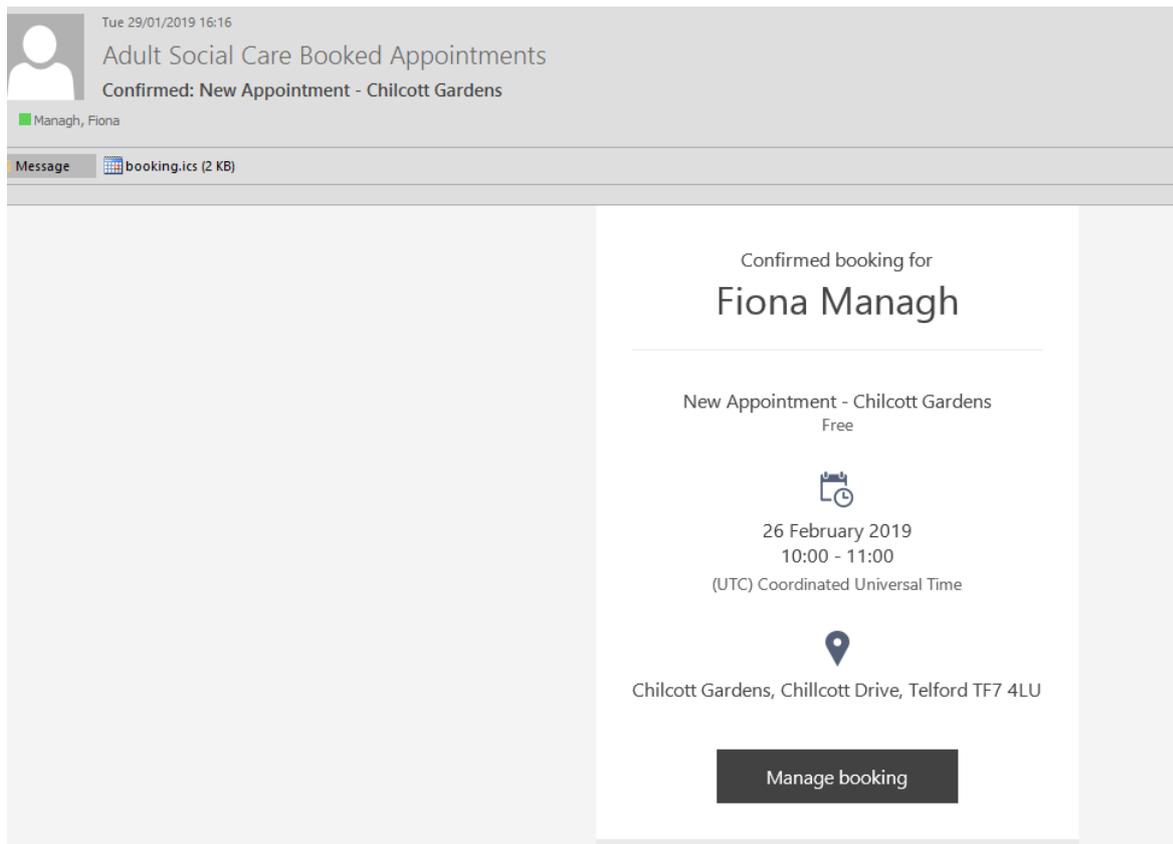
This displays that the booking has been made and an email will be received shortly. Confirmation will go to the inbox of the locality hub who the booking is with and to the service user (if an email address is supplied).



The system then offers you the option to change or cancel the booking if the service user has changed their mind.



This option also appears on the confirmation email to the service user so they are able to change or cancel the appointment if they cannot make it.



The assigned worker for the service delivery will then contact the service user by telephone two working days prior to the appointment to confirm attendance by accessing the Outlook calendar for the locality hub.

As the appointments synchronise with the calendar for the locality hub, if a service is not going to be delivered at a hub, for example, because the worker is off sick it must be blocked out in the generic hub calendar, i.e. Chilcott Gardens

#### **What to do if the customer does not have an e-mail address**

They can use a nominated persons such as a relative or friend, if this is not possible then the person booking the appointment should use their e-mail address but should explain to the customer that they will not be able to manage their appointment online and will need to call My Choice of Family Connect to make any changes.

#### **4.0 Privacy Notice**

It is imperative that the advisor booking the appointment reads out the privacy notice to the customer before the booking is confirmed.

- The advisor should advise the customer that they will read out the privacy statement
- After reading the advisor should ask the customer if they are happy to proceed with the booked appointment
- If the customer agrees, the advisor should tick the box to state that the privacy notice has been read and understood, as shown in the screenshot below.

Privacy Notice under the Data Protection Act 2018 Telford & Wrekin Council Adult Social Care are collecting your personal data to enable the best possible advice, care or support to be provided and to meet the statutory requirements under the Care Act 2014, wider legislation and Article 9(2)(c) & (h) of the General Data Protection Regulations 2018 or equivalent United Kingdom legislation. Telford & Wrekin Council will not share any of your personal data collected with external organisations unless required to do so by law. However, there may be occasions where we request further information from key third party organisations such as Health or Provider organisations. For further details on the council's privacy arrangements please view the privacy page on the council's website page [www.telford.gov.uk/terms](http://www.telford.gov.uk/terms).

## 5.0 Recording the booked appointment information and outcome on LAS

All records of appointments and their outcomes need to be recorded into LAS using the standalone 'booked appointment' form and a new contact. This enables us to extract data from LAS to measure the progress of this process and improve as necessary.

The form is completed in 2 stages:

- Stage 1 - completed by the person recording the appointment onto LAS in the first instance; for the majority of cases this will be done by the Family Connect CSA advisors for appointments coming through via My Choice, however there may be occasions where practitioners create appointments and in these instances they should start the booked appointments form in LAS.
- Stage 2 – completed by the practitioner with whom the appointment took place.

### The step by step process is as follows:

(if appointment is booked and created by Family Connect then skip to step 3)

1. My choice create a booked appointment for the customer using 365
2. My choice send an e-mail (via SCS) to Family Connect with details of the booked appointment, that must include:
  - The heading of the e-mail should read: "new booked appointment" to allow Family Connect to filter the inbox.
  - A copy of the completed referral should be attached
  - The main body of the e-mail should contain:
    - i. Customers details (name, dob, address, contact number and e-mail)
    - ii. Date, time and venue of appointment
3. Family Connect receive the e-mail and search LAS for an existing record, if there is no existing record the CSA should create a new one.
4. CSA Starts a new contact
  - Contact Type - select 'Booked Appointments' (creates a link to the booked appointments form)
  - Source of contact - this should be recorded as My Choice if the appointment was booked by them
  - In 'reason for contact':
    - i. **If the appointment generated from My Choice** - add 'booked appointment made by My Choice and appointment date/time and attach the referral form received from My Choice
    - ii. **If the appointment is generated by Family Connect-** add brief details of the needs/concerns/reason for appointment.
  - Outcome – select 'link to existing case' or 'new case'
  - Route of access to service - select 'Community/ Other Route'
  - Now click the link to the booked appointments form, this will assign the form to your tray.
  - Finalise the contact record

5. CSA starts a new 'booked appointments' form in the persons record by picking up the form that they have assigned to their tray
6. CSA completes stage 1 of the form, ensuring that the correct option is selected for 'booked by', i.e. if appointments are made by My Choice then 'My Choice' should be selected).
7. Once stage 1 is completed the CSA should **send** the form to the relevant teams 'in tray' on LAS.
8. CSA does not complete stage 2 of the form
9. CSA does not finalise.
10. CSA adds a case note confirming that a booked appointment has been made
11. END OF PROCESS FOR Family Connect CSA'S
12. Senior AP then reassigns the booked appointments forms to the practitioners who are delivering the hubs
13. Once the hub is complete the AP then records to outcome of the appointment by completing stage 2 of the form
14. AP finalises the form.
15. If the person requires further assessment or support – create the relevant assessment form
16. If the person does not require further support – complete case closure
17. END OF PROCESS.

## **6.0 Data Analysis and Reporting**

The data for booked appointments will be extracted from the completed booked appointment forms within LAS by the Research and Intelligence Team.

The reports will include:

- Number of booked appointments made per locality
- Number of appointments completed
- Number of appointments cancelled or DNA (with sub categories for reasons)
- Number of cancelled or DNA appointments that have received a follow up contact
- Outcomes of booked appointments
- Number of incomplete forms where the date of the appointment has expired (forms in draft).

## **7.0 Role of the Business Support Officer**

The Senior BSO, in each locality, will have overall responsibility for maintaining the calendars for booked appointments in their locality.

They will be responsible for setting up diary pages for the dates arranged by the Senior Adult Practitioner/Team Leader.

These calendar pages will be available at least 2 months ahead and will be set up with appointment times as agreed with the Senior Adult Practitioner/Team leader

## **8.0 Role of the Adult Practitioner**

Two working days before a booked appointment session, the delegated Adult Practitioner will telephone all the people who have booked appointments.

If un-booked appointments are available at this time, appointments can be continued to be booked by My Choice/Family Connect.

It is the delegated Adult Practitioners responsibility for checking the list and preparing for the booked appointment session.

The Adult Practitioner will complete the LAS process, for each person who has a booked appointment. This process is for ALL people and is not dependent on their attendance on the day.

## 9.0 Appendices

1. Appendix 1 Booked Appointments 'Good Conversation'
2. Appendix 2 The person's locality session will be identified By the My Choice/Family Connect operator through the use of the Post code Checker
3. Appendix 3 Flow Chart
4. Appendix 4 LAS process map

### Appendix 1

#### Booked appointments For Locality Hubs

Booked appointments should be used where it is determined that there is no immediate harm or risk to the person. Where there is harm or risk these people should be passed directly to Telford & Wrekin Council Family Connect (Adults).

**These are guidelines of how you might construct a conversation and are by no means to be used as a checklist.**

#### Start of the call

"What do you want out of this conversation?"

#### Once assessment has been ascertained

"Having discussed this with you, I feel that you would benefit from attending one of our booked appointment sessions to meet with one of the/our Adult Social Care staff. These are held in your local community, the nearest one is ..... I can offer you an appointment on ..... At..... or ..... at....."

If they decline to travel to a booked appointment, have a good conversation which will include the following:

- Do you get out of your house?
- How do you manage that?
- Can you get to your doctors surgery?
- How do you get your shopping?
- Do you have someone that could support you to a locality hub for an appointment?

These are to be used as a prompt and not to be used as a direct question and answer. The conversation that the advisor has should listen and be used to prompt the conversation in this direction.

#### **If they refuse to travel to a hub**

Inform that they will be placed onto a waiting list and we cannot at this stage identify a date and time for the meeting at their own home.

#### **If they are unable to attend a hub**

If the person is unable to attend an appointment at their hub due to difficulties with mobility/mental health or any other disclosed difficulty, the person can still be seen in their own home but we will not be able to identify a date and time of when this will take place. It is important to note that any persons who are *unable* to attend their appointment will not be disadvantaged as all referrals are assessed and prioritised accordingly.

**Issues/Risks**

1. What are the actions if AP's are unable to contact after the 2 week follow-up?

**Outcome** – Discuss with Team leader and weigh up the risk

2. What happens if they don't arrive for a booked appointment?

**Outcome** – Follow up with a phone call by the AP, manage the risk following a discussion with the Team leader

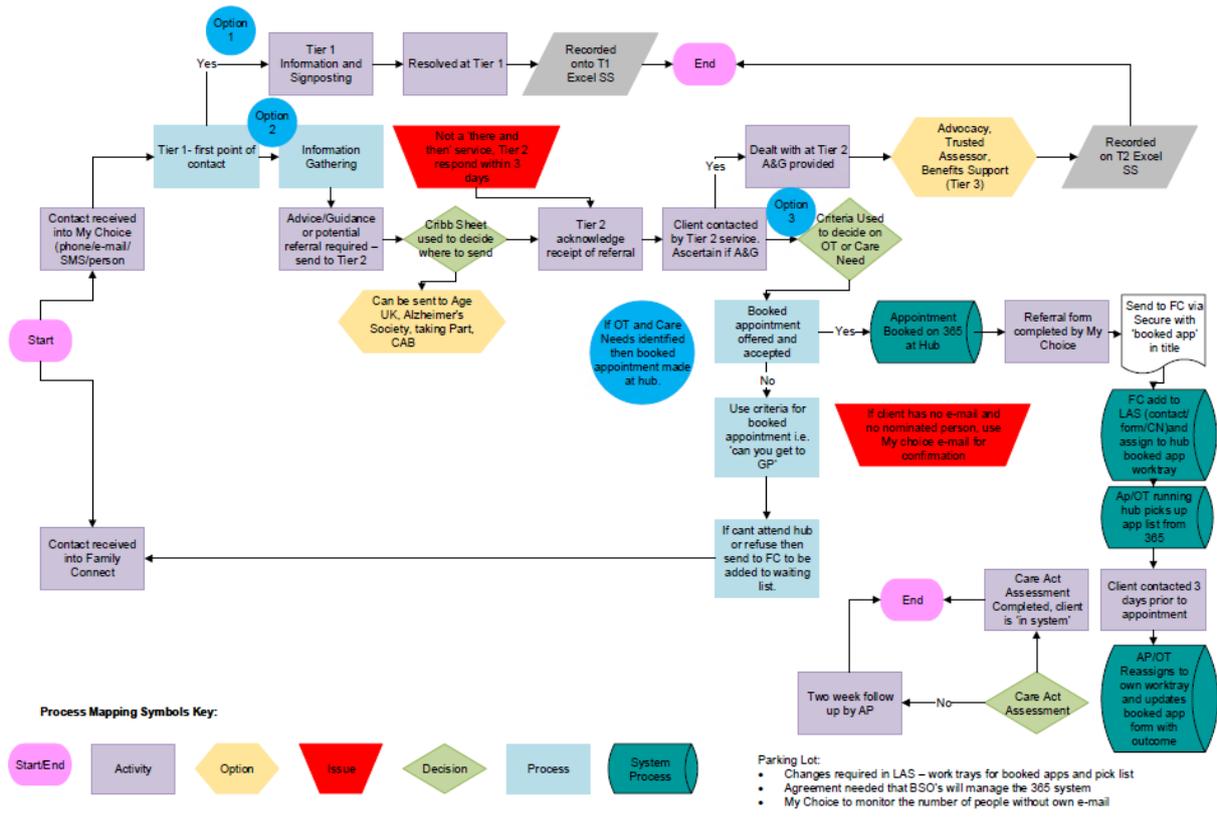
**Appendix 2**



Postcode to Family Centre lookup Dec 2

**Appendix 3**

**Booked Appointments – 'To Be' Process Map**



# Appendix 4

