Careline – LAS Process (simplified)

Detailed below is the process of receiving a referral, creating an assessment through to 6 week / Annual Reviews.

1) Referral to Careline Plus:
   - The worker who needs to send a referral to the Careline Plus Service will create a 'Contact' workflow step. The referral is then automatically generated (at the end of this Contact) and is automatically sent to the 'Careline Duty' worktray.

2) Careline Duty worktray
   - Careline Referral is received within the 'Careline Duty' worktray.
   - The screeners access this worktray select the task 'New Careline Referral', and click 'View Related Data' to read the referral. 'Close' and select back arrow.
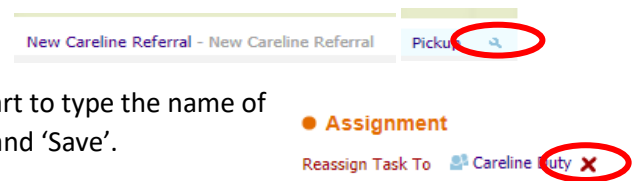
3) Careline or Telecare?

   If Careline is required – the referral would normally be reassigned to an individual's worktray.
   Or
   If Telecare is required – the referral should be assigned to the Telecare Duty worktray (could then be assigned to an individual's work tray if required).

   To reassign – click the spanner icon:

   - Click the X to remove 'Careline Duty', and start to type the name of the worktray. Select the required worktray, and 'Save'.

4) Creating the Careline Plus Episode
   - Access the worktray that holds the referral and click the name of the client. Then select 'Careline Plus'.

   - Select 'Start New Episode', adding the 'Title', 'Start date', and then selecting 'Create'.
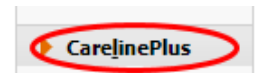
5) Creating a Careline / Telecare Assessment:
   - Within the Careline Plus (Episode) select 'Forms and Documents', then 'Attach a New Form'. Select 'Telecare & Careline Assessment Form' (and 'OK'). Copy forward the Contact detail.

6) Completing the Assessment
   - Complete the assessment and if installing – select 'Install' from the Outcomes (Section – 'Plan').

   If funding is required:

   - Record a Case Note (using the 'Notify' option to advise the referrer) to ask for confirmation that funding is approved. 'Save' and 'Close' until confirmation is received.
   - That worker will then need to respond to confirm funding, via a Case Note>Notify.
   - If funding is approved, resume the Telecare & Careline Assessment Form. In the 'Plan' Section – answer the question 'Was the funding approved?'

To complete the assessment:

- 'Install details' – tick'
- 6 week Review (type your name into the field and select).
- If 'Installing' has been added to the 'Plan' Section of the form. Select – 'Send for Approval'. This will send to the 'Careline Manager Approvals' worktray.
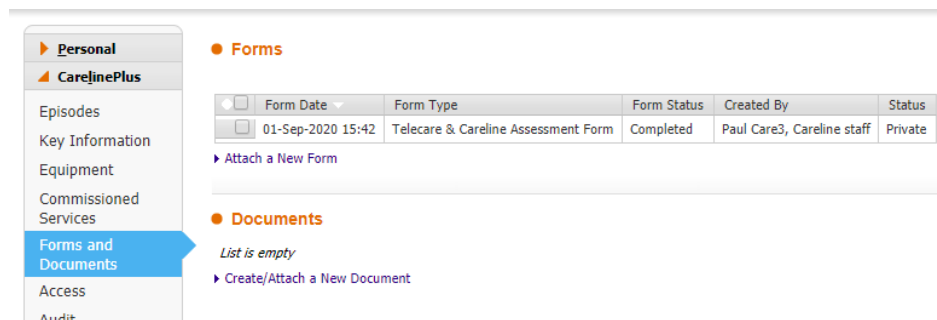
7) Approval

- The appropriate manager will access the 'Careline Manager Approvals' worktray, and beside the task selects 'Pickup'.
- Manager views and selects 'Approve and Schedule 6 week Review'

8) 6 week Review

- Select the 'Telecare & Careline Assessment Form' – workers own worktray.
- Complete 'Section – 6 week review'.
- The Annual Review – assign to 'Careline Reviews'.
- 'Schedule Annual Review' – select.

9) Annual Review.

- Screeners will either 'Pickup' the 'Telecare & Careline Assessment Form' task (which allows them to complete themselves) or assign to a worker.
- Worker will start task. In Section – 'Action of Next Annual Review', select 'Review' or 'Reassessment'. Both options will ask you to 'Please finalise & close this form and create a new Assessment form to reflect your Reassessment'. Note – the reason it wants you to close and create a new assessment is for reporting purposes (as it will state if a Review or Reassessment is being undertaken and when).
- 'Finalise & Close' – select.
- Select or 'Find' the clients name.
- Select 'Careline Plus' and 'Attach a New form'.

- Complete as before, and 'Send for Approval.'

10) Approval

- The appropriate manager will access the 'Careline Manager Approvals' worktray, and selects 'Pickup'.
- If ongoing review process is required this would cycle through the 6 week / Annual Reviews.

<u>Equipment</u>

- Once the Equipment has been ordered / installed, select the **Equipment** option within the Careline Plus Episode.
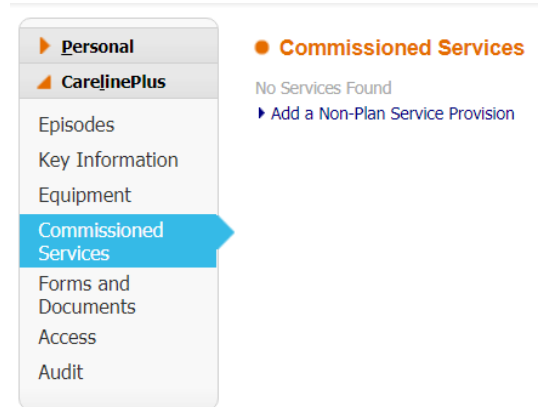- Select **New Equipment**
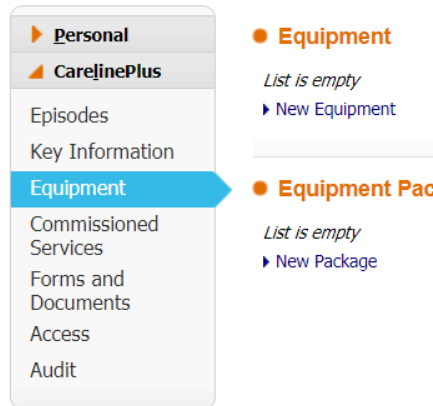
- Complete the fields and **Create.**
- Repeat if more than 1 service.

<u>Add a Non-Plan Service Provision</u>

If a client needs to be billed for Careline Services:

- Within the Careline Plus Episode select **Commissioned Services.**
- Select **Add a Non-Plan Service Provision.**
- Select **Update Service Provision.**
- Complete the fields (note – will not need to be sent to Brokerage)

- **Search**
- Will show fixed costs – click line to select
- **Complete.**
- **Proceed**

Budgetary approver will then need to approve:

- Budget approver would access the Budget folder.
- **Pickup** – select
- **Grant budgetary authorisation** – select
- **Activate service**
- **Save**

Note:

This service would then display in **Case Files>Support Plans>Service Provisions** (will show weekly costs)