

# LAS Support Plan

*Version 1 – Sept 2020*

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## Starting the Support Plan – New Case

**Contact** – see LAS guide ‘Adding a Contact’. The outcome should be progress to new Case and the Case should be assigned to you.

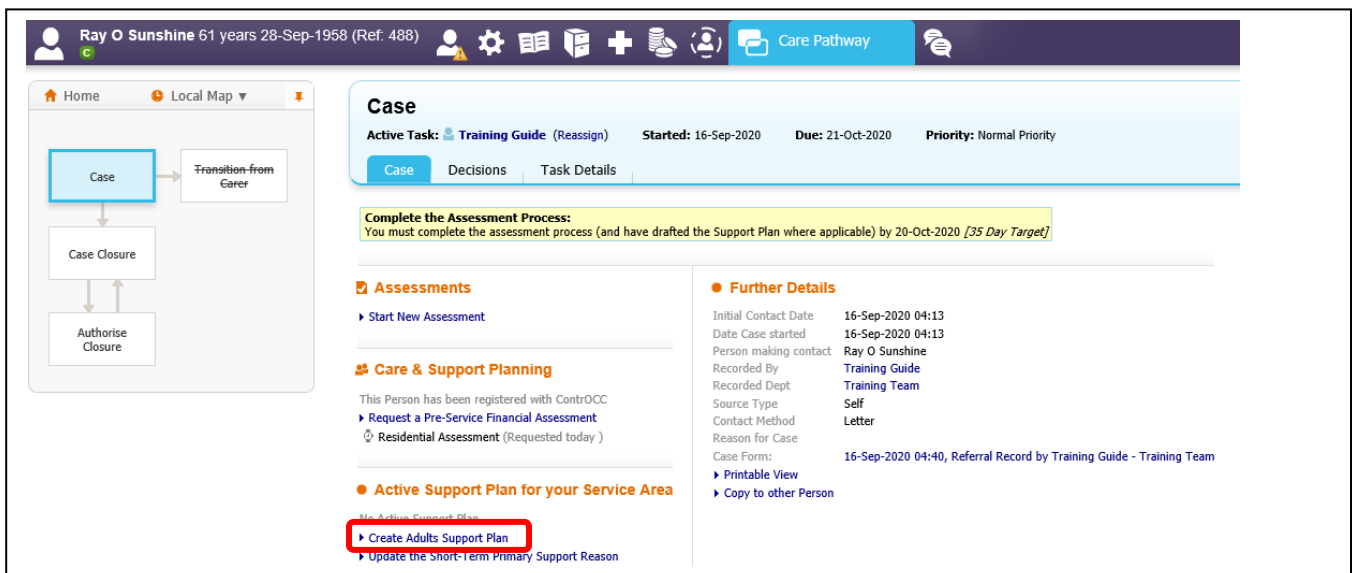
**Conversation (Assessment)** – see LAS Guide ‘Good Conversation Record’. Start the assessment via the green Case badge and blue hyperlink ‘Start New Assessment’. The assessment should be completed and authorised.

Start the Support Plan – the Case will be in your worktray.



The screenshot shows the 'Task Trays Worktray' interface. At the top, there's a navigation bar with 'User Training Guide' and 'All Departments/Training Team'. Below that, there are filters for 'Group By' (Date, Task, Person, Priority, Complexity, Pended) and 'Order By' (Start Date, Due Date, Assigned Date, Pend Date, Priority, Complexity). A 'Pended: Show | Hide' button is also visible. The main area shows a table with one task: 'Next Month (1)' with a due date of '21-Oct-2020 04:13' and a task description of 'Case'. The task is assigned to 'Ray O Sunshine, 28-Sep-1958 (Ref: 488)'.

Click on the Case task (blue hyperlink), it will take you directly to the Case page of the Care Pathway.



The screenshot shows the 'Case' page in the 'Care Pathway' for 'Ray O Sunshine 61 years 28-Sep-1958 (Ref: 488)'. The page has a navigation bar with 'Home', 'Local Map', and 'Care Pathway'. On the left, there's a flowchart showing the process: 'Case' leads to 'Transition-from Carer', which leads to 'Case Closure', which leads to 'Authorise Closure'. The main content area is titled 'Case' and shows 'Active Task: Training Guide (Reassign)', 'Started: 16-Sep-2020', 'Due: 21-Oct-2020', and 'Priority: Normal Priority'. Below this, there's a yellow warning box: 'Complete the Assessment Process: You must complete the assessment process (and have drafted the Support Plan where applicable) by 20-Oct-2020 [35 Day Target]'. The page is divided into sections: 'Assessments' with a 'Start New Assessment' link; 'Care & Support Planning' with links for 'Request a Pre-Service Financial Assessment' and 'Residential Assessment (Requested today)'; and 'Active Support Plan for your Service Area' with a red box around the 'Create Adults Support Plan' link and an 'Update the short-term Primary Support Reason' link. A 'Further Details' section on the right lists various case information like 'Initial Contact Date', 'Date Case started', 'Person making contact', etc.

To start the Support plan click on the **Create Adults Support Plan** link. A pop up will ask you to confirm you want to start the support plan. Click OK on this.

# Update Plan

Care Pathway – [Blue circled area](#)

This is a map of the processes that you may need to go through if you are going to commission services. Not every case will go through all stages.

Click on the **Update Adults Support Plan** link, circled in red above.

### Copy Forward

Before starting the Record you have the option to copy forward the answers from the previous 2 Records for Ray O Sunshine, 28-Sep-1958 (Ref: 488).

- Select each of the Records you wish to include the answers from and click 'Copy Forward Selected'.
- Alternatively, if you DO NOT want to copy forward any answers then click 'Start Blank' to begin the Record afresh.

No Filter applied

	Created	Subject	Record	Started By
<input checked="" type="checkbox"/>	Today	Ray O Sunshine	1. Good Conversation Record (Wednesday, 16 September 2020, 06:44)	Training Guide
<input type="checkbox"/>	Today	Ray O Sunshine	Contact Record (Wednesday, 16 September 2020, 04:13)	Training Guide

Copy forward allows you to copy information either from the other forms directly into the support plan. This can save you a lot of time re-typing information, but you are responsible for your assessment, including any content you copy-forward.

To copy the information, use the select box to the left, to choose what you want to copy, and click the **copy forward selected** button.

If you don't want to copy forward, or there is nothing to copy, click on the **Start blank** button.

# Care Plan

Ray O Sunshine 61 years 28-Sep-1958 (Ref: 488)

Information Record Save Finalise Record Cancel Record Close

Print

Care Plan <sup>M</sup>

- Your Plan <sup>M</sup>
- Attachments (0)

### Care Plan

**Client details**

Please check basic personal details below, and update where necessary using the links provided:

**Basic Personal Details**

Person ID	488	Gender	Male
Title		NI Number	
Surname	Sunshine	<a href="#">Marital Status</a>	
Forename	Ray O		
Preferred Name			
Actual DOB	28-Sep-1958		

[Update Details](#)

**Address**

Primary Address 131 Farley Road  
from 28-Sep-1958 South Croydon  
CR2 7NL

[Address History / Update Addresses](#)

**Contact Methods**


Home 020 8765 1234


[Add/Update Contact Methods](#)

## General points

Anything in red writing is mandatory and you will need to record something against it or it will not let you finalise the record.

You will see some icons to the right of some questions

 This icon means that a comment can be added to this area, if there is something that you want to say about the section

 These are security icons. Usually you would not need to worry about these.

 These indicate that there are guidance notes linked to the question.

There are only two initial pages for the plan (menu to the left)

**Care Plan page** - this gives another chance to check that the client's details are correct. If anything is wrong, click into the "Update details" hyperlinks underneath the section. Anything that you change here will automatically update the client record without you needing to find the section in personal demographics.

The mandatory questions on this page were all mandatory on the assessment. If you have copied forward from the assessment, these will all be already filled in. You should check that nothing has changed since the assessment around any of these.

**Your Plan page** – This is getting in to the real detail about the plan. Several sections on this page will expand depending on what you answer, e.g. extra questions for a Direct Payment, or placement.

# Your Plan

Confirm that the plan has been discussed at the Peer Forum and agreed at the Challenge Panel (box for this coming soon).

The Level of support question is mandatory

### Level of Support

Long Term (Eligible)	End Of Life	Ongoing Low Level	Short Term (Other)	Other
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

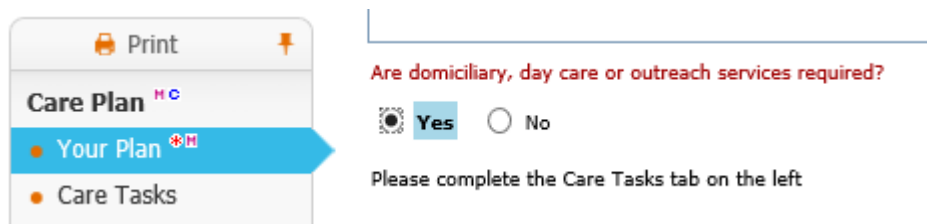
The needs and outcomes recorded on the GCR, pull through to a table as below – you can update if necessary by using the blue hyperlinks at the bottom.

This section is a summary of the needs that were identified from the Good Conversation and what the intended outcomes are

Needs	Outcomes
<p><b>Unmet</b></p> <p>Being able to make use of the home safely</p> <p>test</p>	<p><b>Unachieved</b></p> <p>test</p>
<p><b>Unmet</b></p> <p>Managing and Maintaining Nutrition</p> <p>test</p>	<p><b>Unachieved</b></p> <p>test</p>
<p><b>Unmet</b></p> <p>Maintaining a Habitable Home Environment</p> <p>test</p>	<p><b>Unachieved</b></p> <p>test</p>

[Update Need Statuses](#)      [Update Outcome Statuses](#)  
[Add Need to Plan](#)

Complete the other sections of the form. If you tick Yes to the mandatory question ‘Are domiciliary, day care or outreach services required?’ another tab on the left menu called ‘Care Tasks’ will appear to be completed.



Record the proposed Care tasks in as much detail as possible

Don't forget to record the Authorising Manager at the bottom of the Your Plan page

# Adding Services

Click on the Add Service hyperlink half way down the **Your Plan** page on the support plan.

Ray O Sunshine 61 years 28-Sep-1958 (Ref. 488)

Information Record Save Finalise Record Cancel Record Close

Print

Care Plan  
Your Plan  
Attachments (0)

### Support Planning

**The level of support required**  
Please tick **all** of the types of support which are in place on the plan.

- Typically, domiciliary, residential, and day care is counted as *Long Term Eligible*.
- OT services are usually counted as *Ongoing Low Level Support*.
- If ending the plan, or services are provided to the person only in their role as a carer, *Other* should be chosen.
- For further details, please refer to the SALT guidance from NHS Digital.
- Note that *Short Term Support to Maximise Independence* should be recorded in the LAS Reablement Plan.

**Level of Support**

Long Term (Eligible)	End Of Life	Ongoing Low Level	Short Term (Other)	Other
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

This section is a summary of the needs that were identified from the Good Conversation and what the intended outcomes are

Needs Outcomes

[Add Need to Plan](#)

This section gives a summary of what actions are now being taken to address your needs and outcomes

The plan should include commissioned and/or non-commissioned services aimed at meeting identified needs.

**Annual Budget: £11,664.36**

Group By: **None** | Main Beneficiary | Personal Budget | Service Status | Commissioned Status | Service Type Order By: **Creation Date** | Start Date | End Date | Provider | Type

What is to be put in place. When? By whom? (i.e. commissioned/non-commissioned) - Draft Adults Support Plan (v1.0)

[Add Service](#)

[Add Non-Commissioned Service](#)

This will add a box for proposed services just above the hyperlink. Double click on the heading line of the proposed service to open the Service Provisioning Wizard.

What is to be put in place. When? By whom? (i.e. commissioned/non-commissioned) - Draft Adults Support Plan (v1.0)

**Proposed\***

Starting: Ending: Main Beneficiary:

**Total Weekly Cost of Services: Nothing**

[Add Service](#)

[Add Non-Commissioned Service](#)

You can add more services and also non-commissioned services by clicking on the blue hyperlinks

# Complete the Service Provisioning Wizard

This pop-up form is completed for all services – some requests for service are sent to brokerage and others are not, see table below for guidance:

Service Type	Action required
<b>Residential Placement (including Respite &amp; Supported Living)</b>	Send to Placement Team using the <i>Send to Brokerage</i> button
<b>Nursing Placement (including Respite &amp; Supported Living)</b>	Send to Placement Team using the <i>Send to Brokerage</i> button
<b>Dom Care</b>	Send to Brokerage Team using the <i>Send to Brokerage</i> button
<b>Shared Lives</b>	Send Shared Lives using the <i>Send to Brokerage</i> button
<b>Transport</b>	Send to Brokerage Team using the <i>Send to Brokerage</i> button
<b>Direct Payment</b>	
<b>Day Care</b>	Social Worker completes the wizard – do not send to Brokerage
<b>NRPF - Accommodation</b>	NRPF Social Worker completes the wizard – do not send to Brokerage
<b>NRPF - Subsistence</b>	NRPF Social Worker completes the wizard – do not send to Brokerage
<b>Careline</b>	Create a contact with Contact Type Careline and complete contact. Careline team add package.

If required, click the send to brokerage box and go through the fields to let the brokerage teams know what kind of service the person will need.

**Search for Services**

By Service Type Folder

Search the available services by completing the fields below. Only services that are active and have availability will be displayed.

**Brokerage info** Starts on Friday, one call a day

**Service Type Folder** Domiciliary Care

**Service Type Folder** Domiciliary Care

**Service Type** Domiciliary - Personal Care

**Service Provider** This service type may require budgetary authorisation

**Proposed Dates** Start: 16-Sep-2020 End: Decision To Supply: 16-Sep-2020

**Is Equipment?**

**Proposed Delivery Schedule**

All	Mon	Tue	Wed	Thu	Fri	Sat	Sun	From	To	Comment
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	08:30	09:30	

**Frequency** (every N Weeks)

**Budget Specific Funding**

**Main Beneficiary** Me as a Person

**Other Details**

**Important Information**

**Comments**

**Care Support Tasks Required**

**Access/Transport/Health & Safety Issues**

Reset Send to Brokerage Save to Draft Save and Close Cancel Printable View



## Service Provision – required information

- When completing the Brokerage Info please ensure to use the following format:  
**Task Request:** Confirm the action i.e. New / Change in Provider / Increase / Decrease / Suspension / Closure  
**Description:** Provide detail of the action required and summarise the case i.e. Client requires increase in Domiciliary Care, previously morning and lunchtime call only. Now requires afternoon and evening call.

Brokerage info	Task Request: Increase in Domiciliary Care Description: Client requires increase in Domiciliary Care, previously recieved morning and lunchtime call only. Now requires afternoon and evening call as shown below.
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- The **Service Type Folder** fields and **Service Type** field give dropdowns when you click into them. What you enter in the first field decides what is available in the second field.

Service Type Folder	▼ Domiciliary Care
Service Type Folder	▼ Domiciliary Care
Service Type	▼ Domiciliary - Personal Care

- Do not complete the **Service Provider** field if you are sending to brokerage / placements

Service Provider	▼
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- You will need to enter a proposed start date, but this is something that the brokers can change if the dates change.
- For domiciliary services you will need to enter a proposed delivery schedule. Click on the + symbol at the end of the row to add more rows if needed. There should be more detail around the service requirements on your support plan (Care Tasks tab described above), but this needs to be filled out to get the information to the brokerage services, and on to ContrOCC.
- The **Proposed Delivery Schedule (Domiciliary Care & Day Care Only)** should have lines for all the required calls. You should tick on the days care is required and record the duration using the **From** and **To** (time frames will be recorded in the Care Grid).

Under **Comments** give a brief description of tasks required and ensure to add **New –** to clearly identify the new calls.

Proposed Delivery Schedule											
All	Mon	Tue	Wed	Thu	Fri	Sat	Sun	From	To	Comment	
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	09:00	10:00	Tasks Listed	+
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	12:00	13:00	Tasks Listed	+
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	14:00	15:00	New - Tasks Listed	+
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	17:00	18:00	New - Tasks Listed	+

- Frequency is 1 – as in every one week.

- Make sure that the correct Budget Specific funding is picked so that the budget authorisation task is sent to the correct budget tray – delays are caused if the task goes to the wrong tray

 Budget Specific Funding

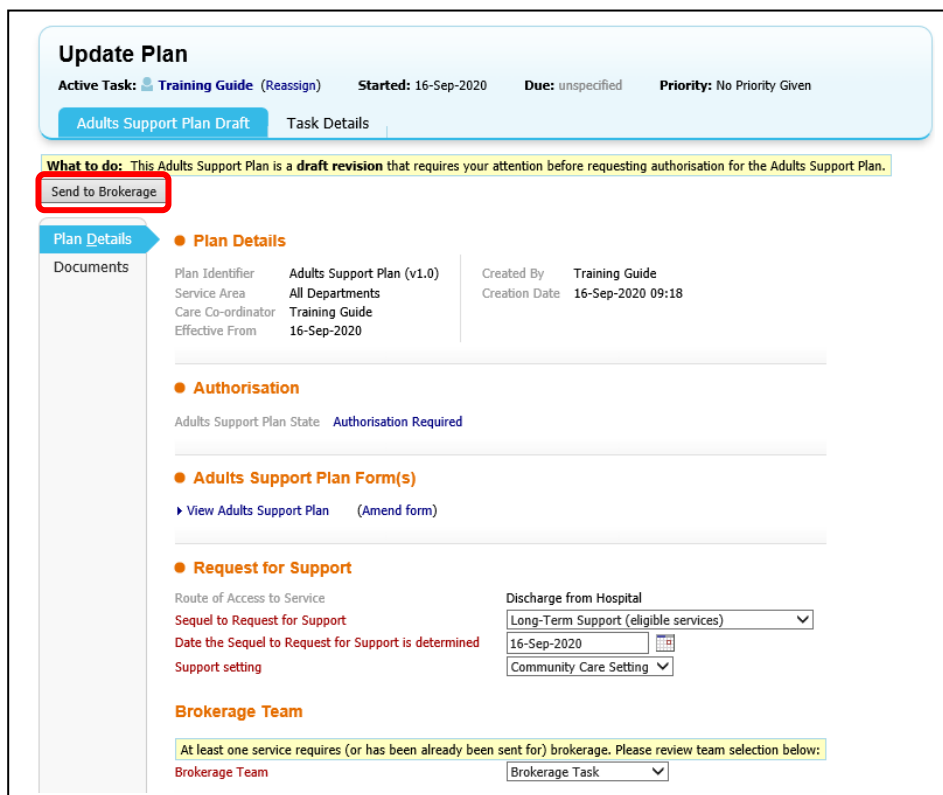
 OP Localities - Thornton Heath

NB – some funding is determined by the Primary Support Group (PSR), in particular, mental health. Please be careful to choose a PSR that matches the known budget responsibility. For example, a person with dementia could have a PSR of ‘Support with memory and cognition’, not Mental Health.

- Click on the Send to Brokerage button. Please note that although this is ready to go to brokerage and ContrOCC at this stage, the brokerage teams will not receive anything until you have finished the plan off and finalised it.

## Finalise Plan

You can save and close the plan as often as you like, and return to edit it. However, once the plan is ready, use the Finalise Record button to the top right. A pop-up will appear asking you to confirm that you really are ready to complete your plan, click OK on this.



**Update Plan**

Active Task: [Training Guide](#) (Reassign)    Started: 16-Sep-2020    Due: unspecified    Priority: No Priority Given

[Adults Support Plan Draft](#)    Task Details

**What to do:** This Adults Support Plan is a **draft revision** that requires your attention before requesting authorisation for the Adults Support Plan.

[Send to Brokerage](#)

**Plan Details**

Documents

**Plan Details**

Plan Identifier: Adults Support Plan (v1.0)    Created By: Training Guide  
 Service Area: All Departments    Creation Date: 16-Sep-2020 09:18  
 Care Co-ordinator: Training Guide  
 Effective From: 16-Sep-2020

**Authorisation**

Adults Support Plan State: **Authorisation Required**

**Adults Support Plan Form(s)**

[View Adults Support Plan](#)    (Amend form)

**Request for Support**

Route of Access to Service    Discharge from Hospital  
 Sequel to Request for Support    Long-Term Support (eligible services)   
 Date the Sequel to Request for Support is determined    16-Sep-2020   
 Support setting    Community Care Setting

**Brokerage Team**

At least one service requires (or has been already been sent for) brokerage. Please review team selection below:  
 Brokerage Team    Brokerage Task

All the fields on this Support Plan Draft page are mandatory. Once you have completed these fields click on the **Send to brokerage** button.

# Brokerage and Authorisation stages

Finalising the support plan triggers two tasks:

- **Draft Adults Support Plan Awaiting Brokerage** – goes to the relevant service brokerage group tray. Once they have processed this, you will receive a task in your group tray to action.
- **Draft Adults Support Plan Brokerage** – goes to your own worktray, reminding you that you are waiting to hear back from brokerage. You do not need to do anything with this task while it goes through this process, unless you wish to chase up on a case that is not progressing as quickly as it needs to.

Brokerage colleagues will now receive the task and action it. They will look at the support plan from here and will **Return to Plan Co-ordinator** if you have not provided enough information or **Complete Brokerage**. (Please see separate guidance on the intranet for full details of the brokerage process).

**Brokerage**

Active Task: [Ms Una Kroll](#) (Reassign)    Started: 18-Nov-2020    Due: unspecified    Priority: No Priority Given

Task Comment: Domiciliary Care

Adults Support Plan Brokerage    Task Details

**What to do:** Please complete the brokerage step or return to plan coordinator

Complete Brokerage    Return to Plan Coordinator

Brokerage

**Plan Details**

Plan Revision    Adults Support Plan (v1.0)    Created By    Ms Una Kroll

Care Co-ordinator    Ms Una Kroll    Creation Date    17-Nov-2020 08:03

Effective From    18-Nov-2020

**Authorisation**

Plan Authoriser    Ms Una Kroll

Adults Support Plan State    Awaiting Brokerage

**Adults Support Plan Form(s)**

▶ View Adults Support Plan

Once Brokerage colleagues have completed the service provisioning, they will click on **Complete Brokerage** and a pop-up box will appear asking for the plan authoriser:

**Plan Authoriser**

Please select a user to authorise this Plan

Case Allocated To    [Ms Una Kroll](#)

Other...   

Comments:

please authorise

Assign    Cancel

## Plan Authorisation

Once the Plan authoriser has been assigned, that authoriser will receive an **Adults Support Plan Authorisation** task in their worktray. They will be able to see the indicative budget from here and link through to Support plan to see the proposed service provision.

NB – if you are the authoriser, at this stage you are authorising the proposed Support Plan and service provision, this is not the budget authorisation.

### Plan Authorisation

**Active Task:** Ms Una Kroll (Reassign)    **Started:** 18-Nov-2020    **Due:** unspecified    **Priority:** No Priority Given

**Task Comment:** please authorise

Adults Support Plan Authorisation    Task Details

**What to do:** This Adults Support Plan has been sent to you for **Authorisation**. Please take time to review the plan, then once you have decided whether to authorise or deny authorisation complete your reasons in the box provided and click 'Authorise' or 'Deny'.

Grant Authorisation    Deny Authorisation

#### Plan Details

● Plan Details

Documents

Plan Identifier	Adults Support Plan (v1.0)	Created By	Ms Una Kroll
Service Area	All Departments	Creation Date	17-Nov-2020 08:03
Care Co-ordinator	Ms Una Kroll		
Effective From	18-Nov-2020		

As plan authoriser, you will need to approve the Personal Budget as indicated by the RAS. If the service has not gone to brokerage e.g. for a direct payment, you will need to enter the amount. If brokered and the provision amount differs from the RAS, you will need to state a **Reason for budget variation**.

### ● Personal Budget

This Person has been assessed for a Personal Budget:

Indicative Budget Amount	£418.90
(Annual Amount)	£21,842.64
Agreed Personal Budget	<input type="text" value="£137.45"/>
Reason for budget variation	<input type="text" value="RAS judged to be inaccurate despite accurate assessment"/> ▼

Up-date the budget details as necessary and then click on **Grant Authorisation** at the top of the page. A pop-up box will ask you to confirm; you can add a comment here.

## Budget Authorisation

Once the Support Plan is authorised, the Budget Authorisation will be triggered to the relevant budget tray – this is determined by the **Budget Specific Funding** choice or **Primary Support Reason** as explained above. An **Adults Support Plan Budget Authorisation** task will appear in the budget tray; this will need to be picked up by a manager with the appropriate spending limit to be authorised.

A **Non Plan Service – budgetary authorisation required** task will appear in your tray

## Service Activation

When the budget has been authorised, the service then needs to be activated – this is done by the Brokerage or Placements officer if the service provisioning has been completed by them or by the manager who authorises if it hasn't – see table above (page 8) for what services go to brokerage.

## Adults Support Plan Next Action

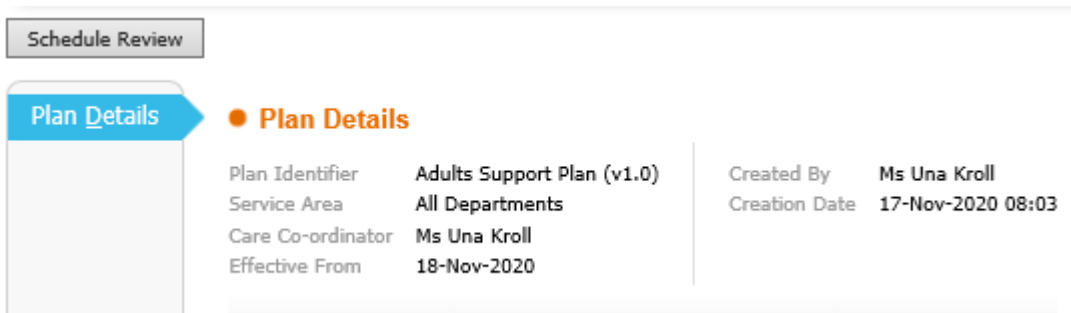
Once the service provisioning has been completed, the brokerage tasks will disappear from your worktray and you will now see a task called **Adults Support Plan Next Action**.

Click on the task name (blue hyperlink) – circled red

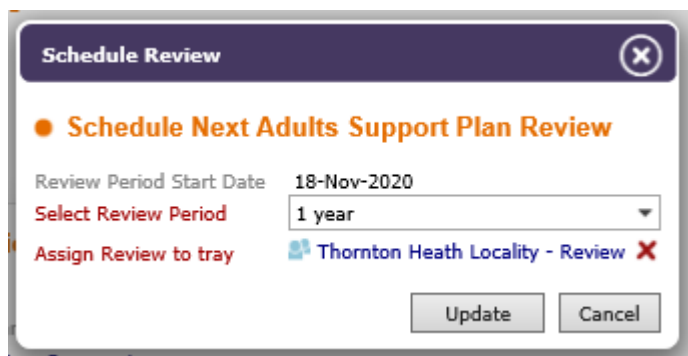


This is where you will schedule the review

Click on the grey **Schedule Review** button



Pick a review period and assign to the relevant tray, depending on who is to complete the review. Click update.



## Up-dating the Support Plan – on-going service

If the plan needs to be up-dated, a follow-up good conversation record (review) should be completed but at present you have the ability to up-date the plan without completing the GCR / Review.

To up-date the plan before the next review, you will need to find the Pending Review task. In the example below, it is in the Thornton Heath review tray – this task will need to be reassigned to you.

The easiest way to find where the task is, is to look in Professional involvements. Note though that if you open the task from there, it will only open the **Update Plan** option as below.

### Pending Review

Active Task: [Thornton Heath Locality - Review](#) Started: 18-Nov-2020

Pending Adults Support Plan Review Task Details

**What to do:** This Adults Support Plan is **pending review** on 18-Nov-2021.

Update Plan

#### Review Details

Adults Support Plan to Review [View Care Plan](#)  
Revision 1

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#### Review Dates

Review Period 1 year  
Proposed Review Date 18-Nov-2021

The task must be assigned to you or you can pickup from the tray, but only if you are a member of that group. As below, the option to start the review or update the plan is now available.

### Pending Review

Active Task: [Ms Una Kroll \(Reassign\)](#) Started: 18-Nov-2020 Pending: 21-Oct-2021 Priority: No Priority Given

Pending Adults Support Plan Review Task Details

**What to do:** This Adults Support Plan is **pending review** on 18-Nov-2021.

Start Review Update Plan Reschedule Review

#### Review Details

Adults Support Plan to Review [View Care Plan](#)  
Revision 1

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#### Review Dates

Review Period 1 year  
Proposed Review Date 18-Nov-2021

If you want to review before the scheduled review date, you will be asked to give a reason for an unscheduled review.

If the Pending Review task is in a group tray that you are not a member of, a manager or senior will need to reassign the task to you.

While the task is still pending (with a review date in the future) the review and ability to up-date the plan will be unavailable. The task can be un-pended by the person reassigning, or by you when you open the task – Go to **Task Details** and use the hyperlink **Click here to change the pending date**, circled red below.

### Pending Review

Active Task: **Ms Una Kroll** (Reassign)    Started: 18-Nov-2020    Pending: 21-Oct-2021

Pending Adults Support Plan Review    **Task Details**

#### Task Details

Assigned To: **Ms Una Kroll**  
Task: Adults Support Plan Review - Pending review date  
Date Started: 18-Nov-2020 09:22  
Pending Date: 21-Oct-2021  
Due Date: 18-Nov-2021  
Priority: No Priority Given  
Complexity: No Complexity Given  
Assigned By: **Ms Una Kroll**  
[Click here to reassign this task...](#)  
[Click here to change the pending date...](#)  
[Click here to change Priority/Complexity...](#)  
[Export Calendar Event](#)

When you return to the **Pending Adults Support Plan Review** tab, the options to start the review or up-date the plan will now be available.

Click on **Update Adults Support Plan**. Unlike when you start a new plan – to up-date, you start from an **Update Plan** screen, not from the **Case**.

### Update Plan

Active Task: **Ms Una Kroll** (Reassign)    Started: 19-Nov-2020

Adults Support Plan Draft    Task Details

**What to do:** This Adults Support Plan is a **draft revision** that requires you

#### Plan Details

● **Plan Details**

Plan Identifier	Adults Support Plan (v1.1)
Service Area	All Departments
Care Co-ordinator	Ms Una Kroll
Effective From	

● **Authorisation**

Adults Support Plan State: **Authorisation Required**

● **Adults Support Plan Form(s)**

▶ Update Adults Support Plan

# Amending Care Services

Any amendment to a Care Package; a change in Provider, Cost, or End of a Care Package must be initiated from within the Support Plan.

From the **Your Plan** tab of the Care plan, go to the service provision (purple box), from where you should have four hyperlinks to allow you to amend the service provision.

**Current \***

Provider: **Bluebird Care-Croydon**  
Service: Bluebird Care-Croydon - Domiciliary - Personal Care - 51212-HC Physical Disability-Domiciliary-Brokered-Personal Care - Spot  
Cost: **£137.55**  
Starting: **17-Nov-2020**, Ending: ----  
Type: Domiciliary - Personal Care  
Decision: 17-Nov-2020  
Main Beneficiary: Me as a Person

- ▶ Cancel Service Provision
- ▶ Change units
- ▶ Duplicate Service Provision
- ▶ End this Service Provision

- **Cancel Service Provision** – do not use this, it will cancel the whole service and ContrOCC will try to retrieve payments already made.
- **Change units** – use for amendments to the provision

You will be prompted to confirm the action, click OK.

**Note:** Changing the units will end the existing Service Provision and create a new one.

Enter a planned start date and make changes to the **Proposed Delivery Schedule** as necessary.

Note – at this stage you cannot change other details but once complete you can re-open the wizard to make further changes. Click complete.

## ● New Units Schedule

Send to Brokerage?

Brokerage info

Planned Start Date

Proposed Delivery Schedule

All	Mon	Tue	Wed	Thu	Fri	Sat	Sun	From	To	Comment	
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	09:00	09:45	personal care assistance	+
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	12:00	12:30	lunch preparation and meds	+

Frequency

 (every N Weeks)

## ● Current Service Provision Details

Service Description Bluebird Care-Croydon - Domiciliary - Personal Care - 51212-HC Pt

Start Date 17-11-2020



There will now be two boxes – one for the current provision and one for the proposed. The dates which are in red italics are proposed and will be confirmed once the service provisioning is complete.

**Current**

Provider: **Bluebird Care-Croydon**

Service: Bluebird Care-Croydon - Domiciliary - Personal Care - 51212-HC Physical Disability-Domiciliary-Brokered-Personal Care - Spot

Cost: **£137.55**

Starting: **17-Nov-2020**, Ending: *19-Nov-2020*

Type: Domiciliary - Personal Care

Decision: 17-Nov-2020

Main Beneficiary: Me as a Person

Important Information: test

[▶ Cancel Service Provision](#)  
[▶ Duplicate Service Provision](#)  
[▶ End this Service Provision](#)

**Awaiting Provider Selection**

Provider: **Bluebird Care-Croydon**

Starting: *20-Nov-2020*, Ending: ----

Type: Domiciliary - Personal Care

Decision: 19-Nov-2020

Main Beneficiary: Me as a Person

Important Information: test

[▶ Duplicate Service Provision](#)  
[▶ Change to Non-Plan Service Provision](#)







Now you should be able to go into the service provisioning **Awaiting Provider Selection** to make further amendments.

Follow the instructions from page 8 on how to complete the Service provisioning.

- **Duplicate Service Provision** – will do the same thing as Change units, it will give you another Service Provisioning Wizard from which you can amend the units and other details.
- **End this Service Provision** – allows you to end the service. Complete the end date and reason, click OK.

● **End Service Details**

Please provide an end reason.

 Service Description	Bluebird Care-Croydon - Domiciliary - Personal Care - 51212-HC Ph
 Actual Dates	Start 17-Nov-2020
 <b>Planned Dates</b>	<b>End</b> 19-Nov-2020 
 <b>End Reason</b>	Adult - Provision Ended 

When you finalise the plan to end a service, you will be asked to send for authorisation (not budget authorisation). Once authorised, the option to send to brokerage should be picked. Brokerage will then complete the Service deactivation.

You should also have the option to **Add service** or **Non-commissioned Service** from the blue hyperlinks underneath the current service provisions. These should be used for additional different services. **If you use this route to amend a package, you must add a provisional end date to the current service.** If you amend the package by the **Change units** or **Duplicate Service Provision** route as above, the system will automatically add the end date.