LAS
Support Plan

Version 1 – Sept 2020

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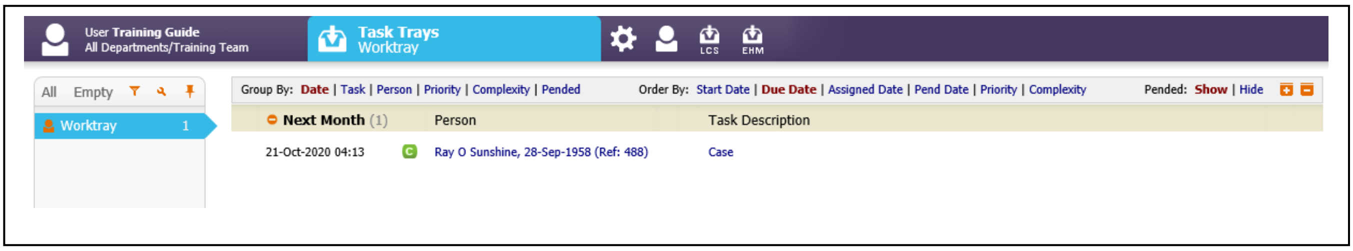
Contents

Starting the Support Plan – New Case

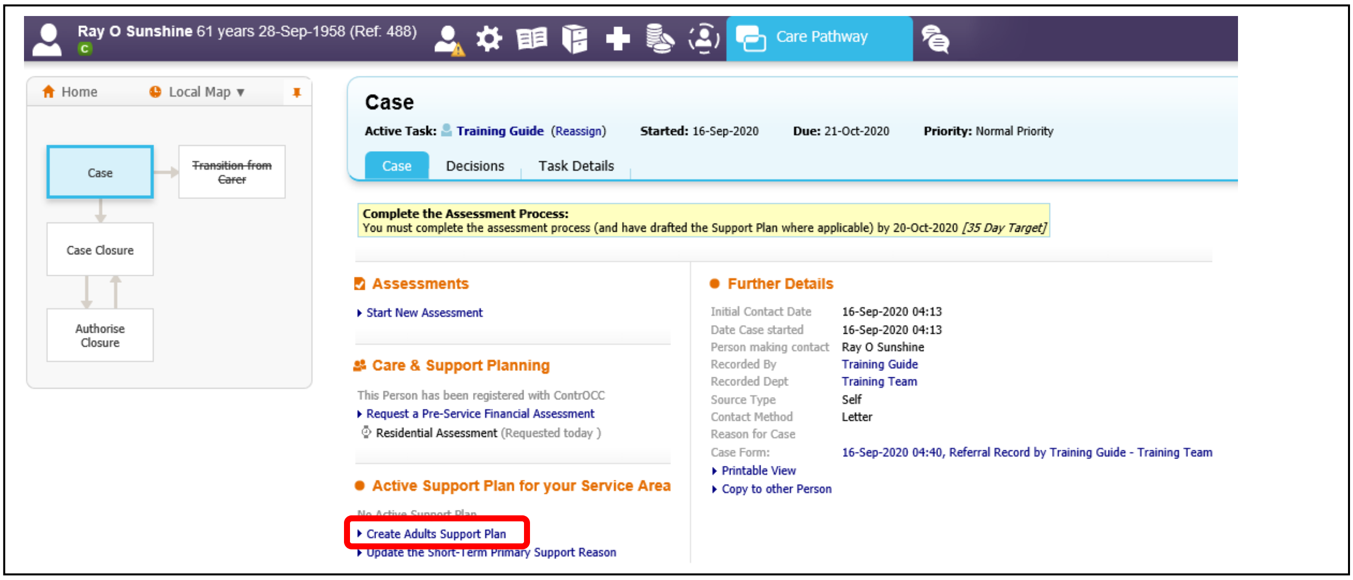
Contact – see LAS guide ‘Adding a Contact’. The outcome should be progress to new Case and the Case should be assigned to you.

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.



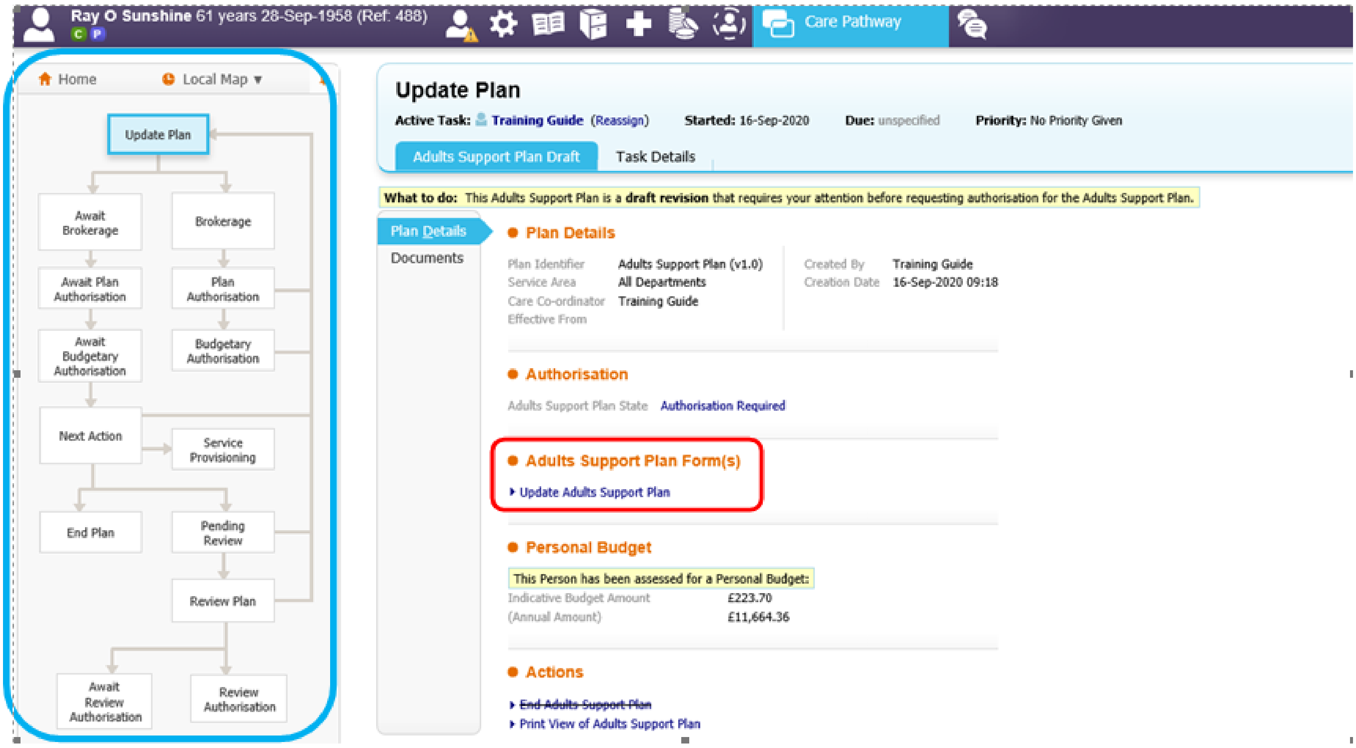
Click on the Case task (blue hyperlink), it will take you directly to the Case page of the Care Pathway.



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.

Copy Forward Selected | Start Blank | *No Filter applied* | Update Filter | Clear Filter

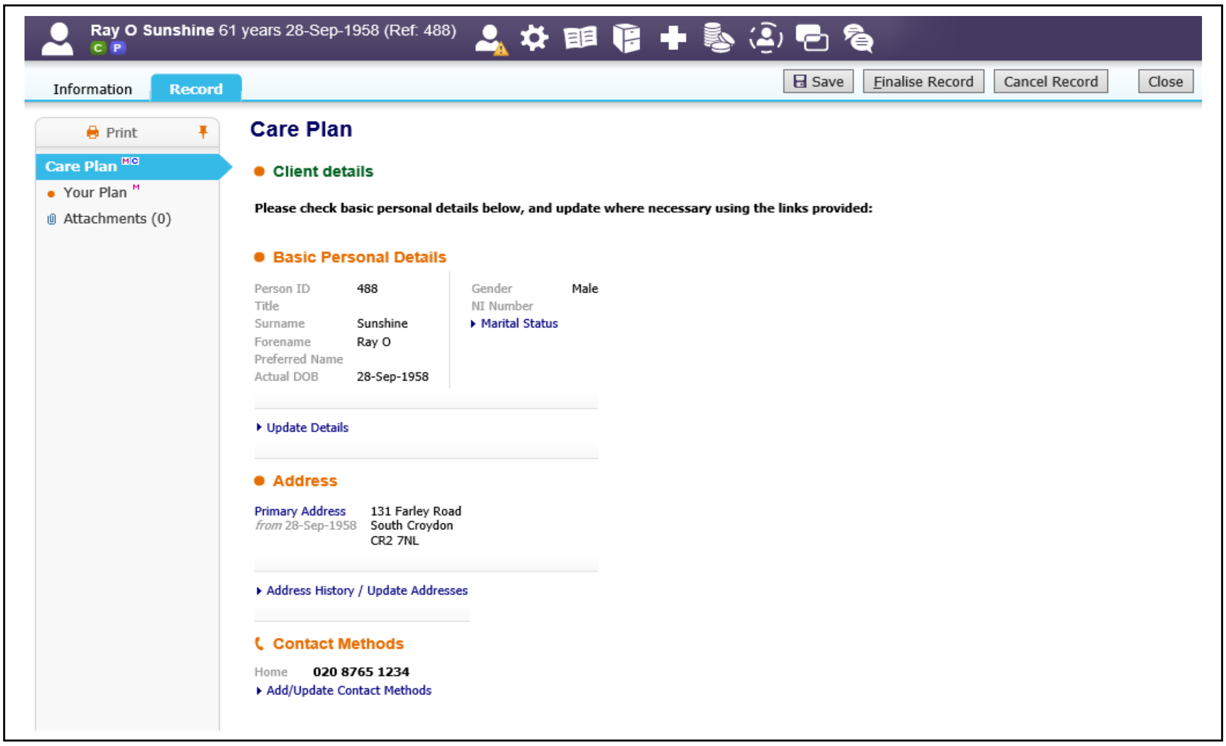
	Created	Subject	Record	Started By
☑	Today	Ray O Sunshine	1. Good Conversation Record (Wednesday, 16 September 2020, 06:44)	Training Guide
☐	Today	Ray O Sunshine	Contact Record (Wednesday, 16 September 2020, 04:13)	Training Guide

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



<u>General points</u>
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.

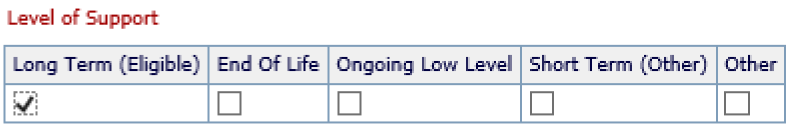
The mandatory questions on this page were all mandatory on the assessment. If you have copied forward from the assessment, these will all be already filled in. You should check that nothing has changed since the assessment around any of these.

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.

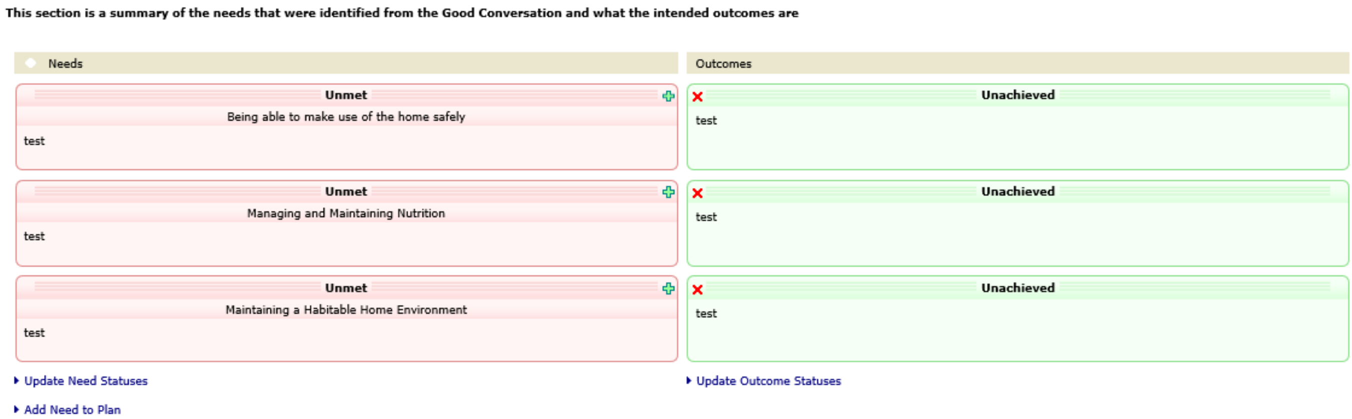
Your Plan

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

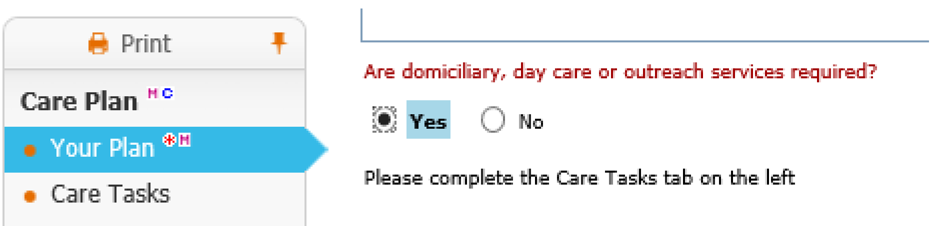
The Level of support question is mandatory



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



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

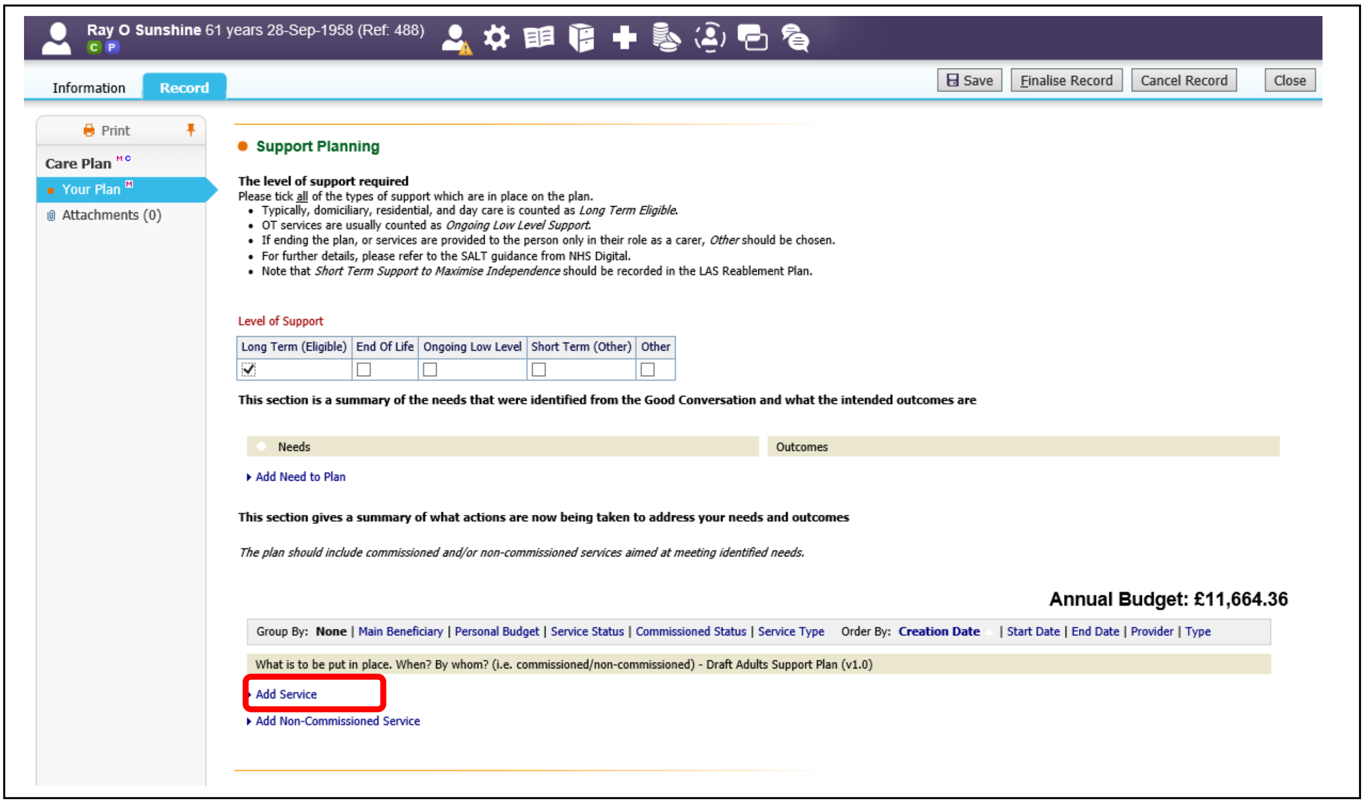


Record the proposed Care tasks in as much detail as possible

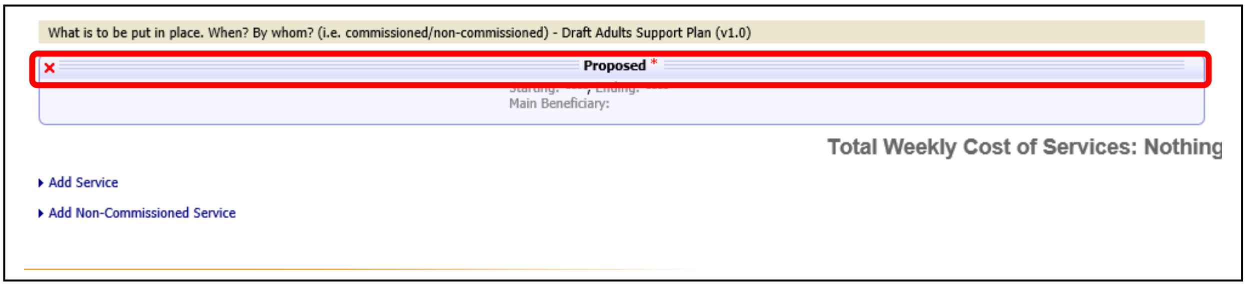
Don’t forget to record the Authorising Manager at the bottom of the Your Plan page

Adding Services

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



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.



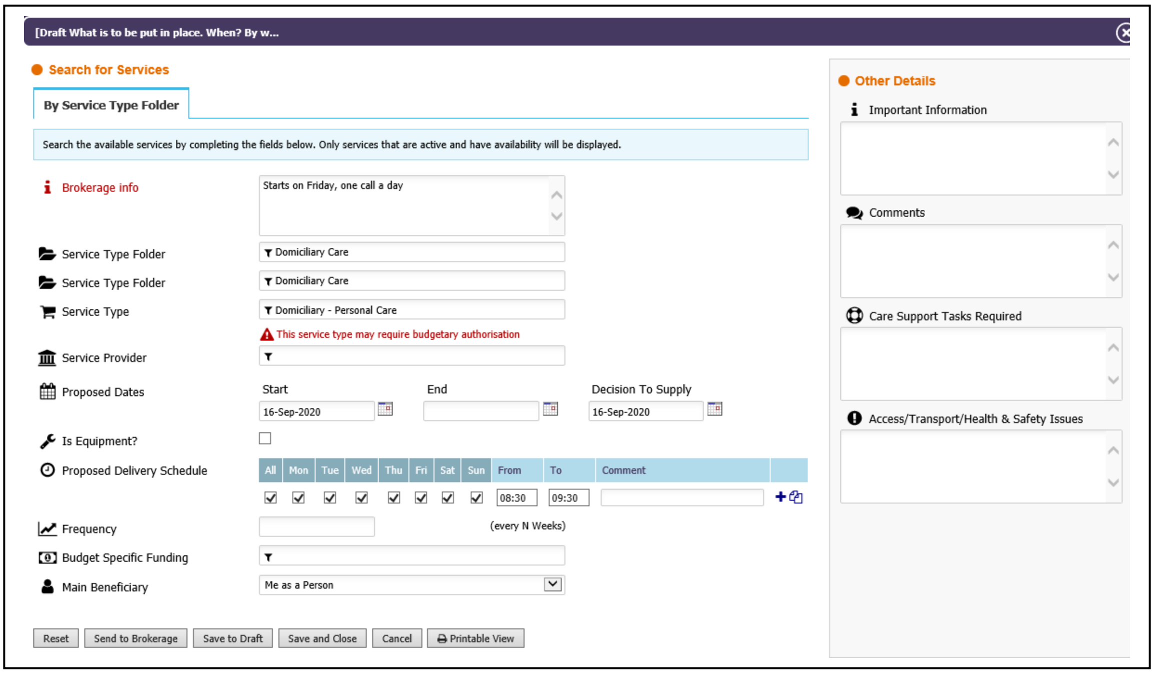
You can add more services and also non-commissioned services by clicking on the blue hyperlinks

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:

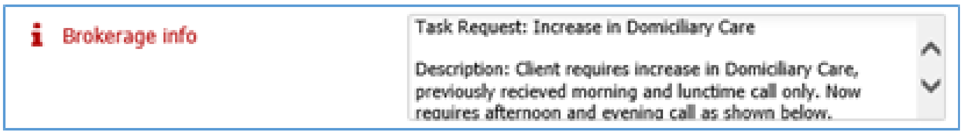
Service Type	Action required
Residential Placement (including Respite & Supported Living)	Send to Placement Team using the *Send to Brokerage* button
Nursing Placement (including Respite & Supported Living)	Send to Placement Team using the *Send to Brokerage* button
Dom Care	Send to Brokerage Team using the *Send to Brokerage* button
Shared Lives	Send Shared Lives using the *Send to Brokerage* button
Transport	Send to Brokerage Team using the *Send to Brokerage* button
Direct Payment	
Day Care	Social Worker completes the wizard – do not send to Brokerage
NRPF - Accommodation	NRPF Social Worker completes the wizard – do not send to Brokerage
NRPF - Subsistence	NRPF Social Worker completes the wizard – do not send to Brokerage
Careline	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.

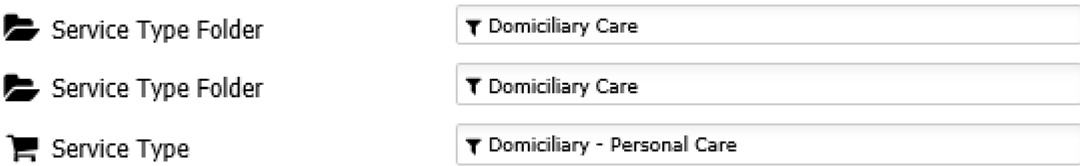


Service Provision – required information

- 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.



- 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.



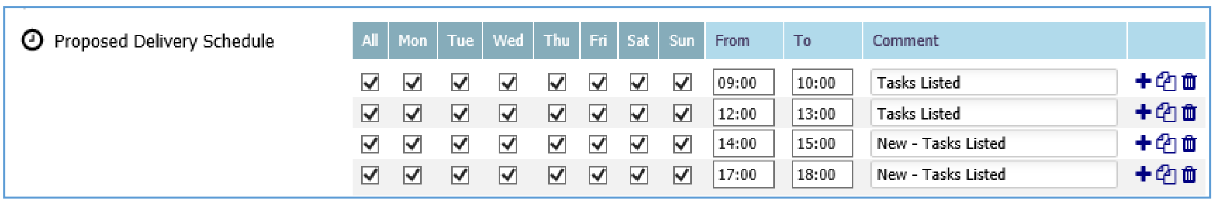
- Do not complete the **Service Provider** field if you are sending to brokerage / placements

- 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.



- Frequency is 1 – as in every one week.

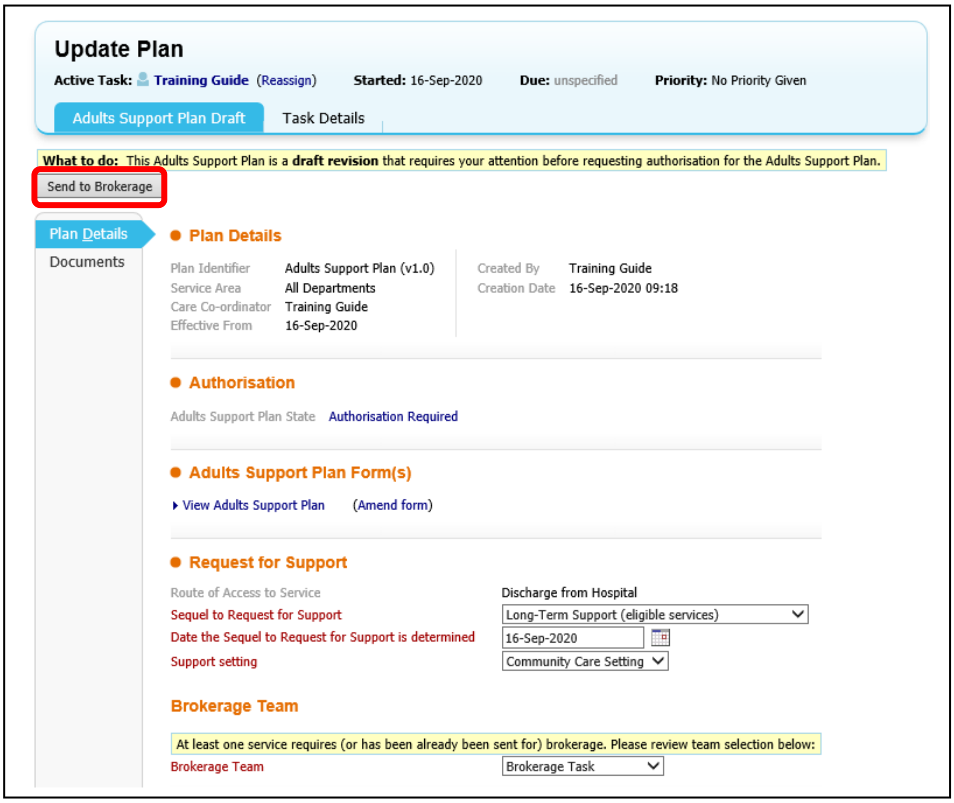
- Make sure that the correct Budget Specific funding is picked so that the budget authorisation task is sent to the correct budget tray – delays are caused if the task goes to the wrong tray

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 dementai sould 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.



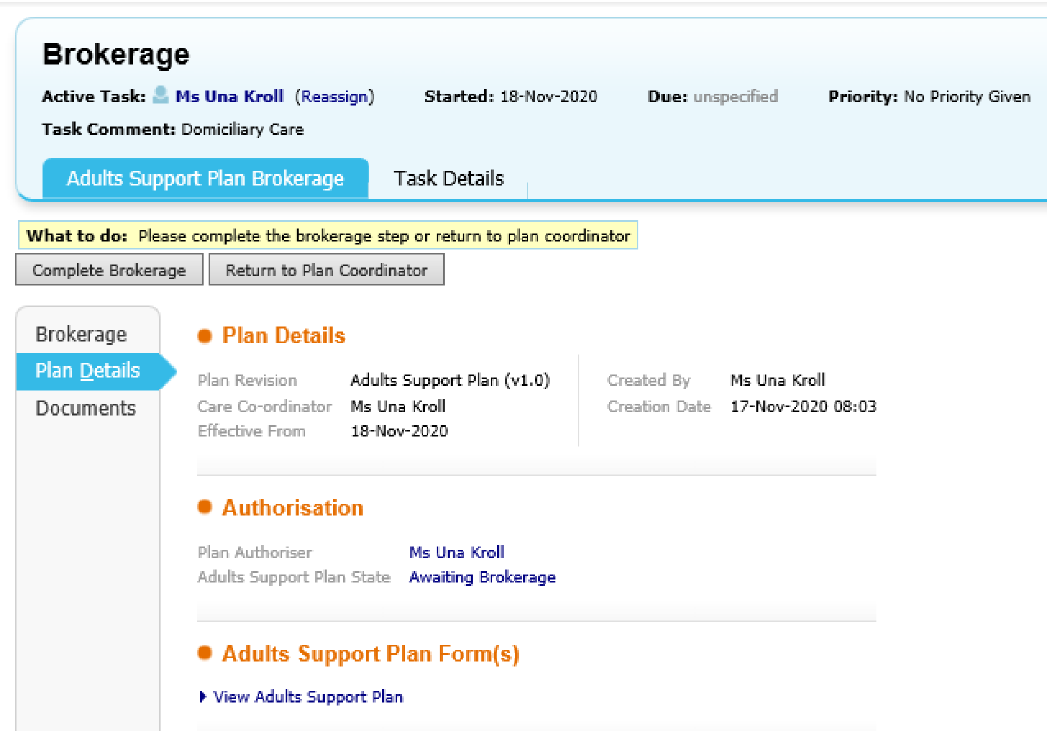
All the fields on this Support Plan Draft page are mandatory. Once you have completed these fields click on the **Send to brokerage** button.

Brokerage and Authorisation stages

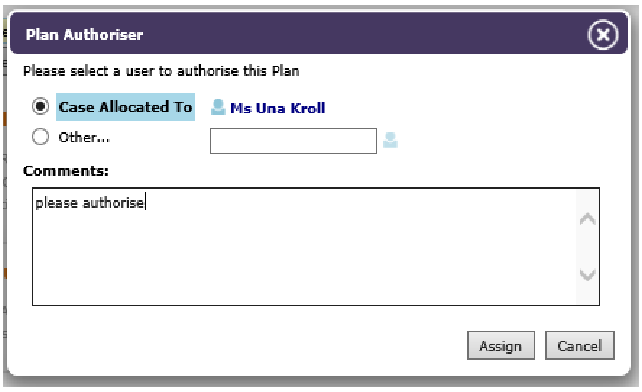
Finalising the support plan triggers two tasks:

- **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).



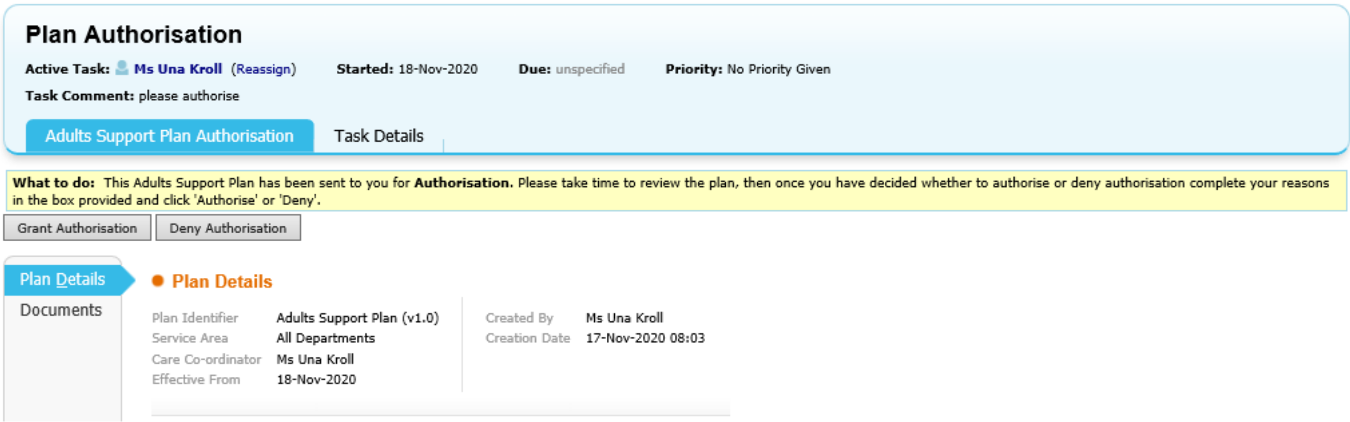
Once Brokerage colleagues have completed the service provisioning, they will click on **Complete Brokerage** and a pop-up box will appear asking for the plan authoriser:



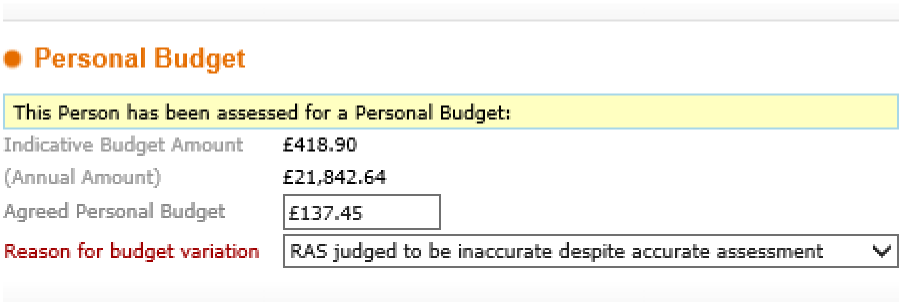
Plan Authorisation

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.



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.**



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 coment 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.

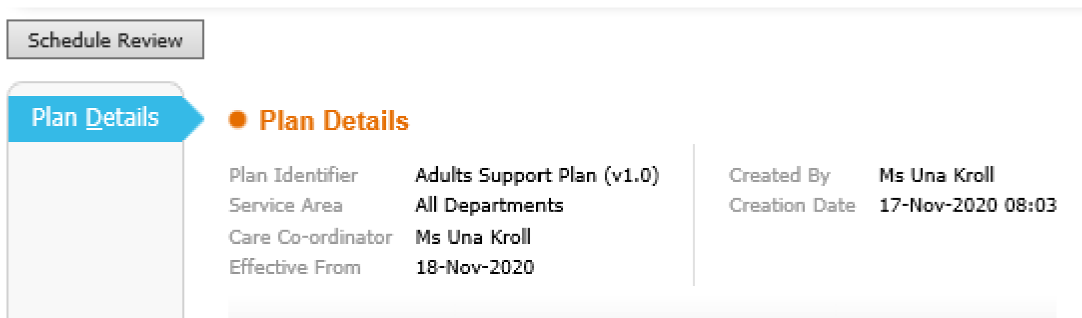
Adults Support Plan Next Action

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.**

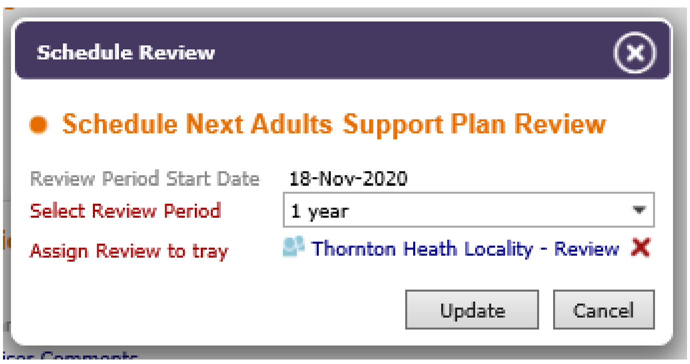
Click on the task name (blue hyperlink) – circled red

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.



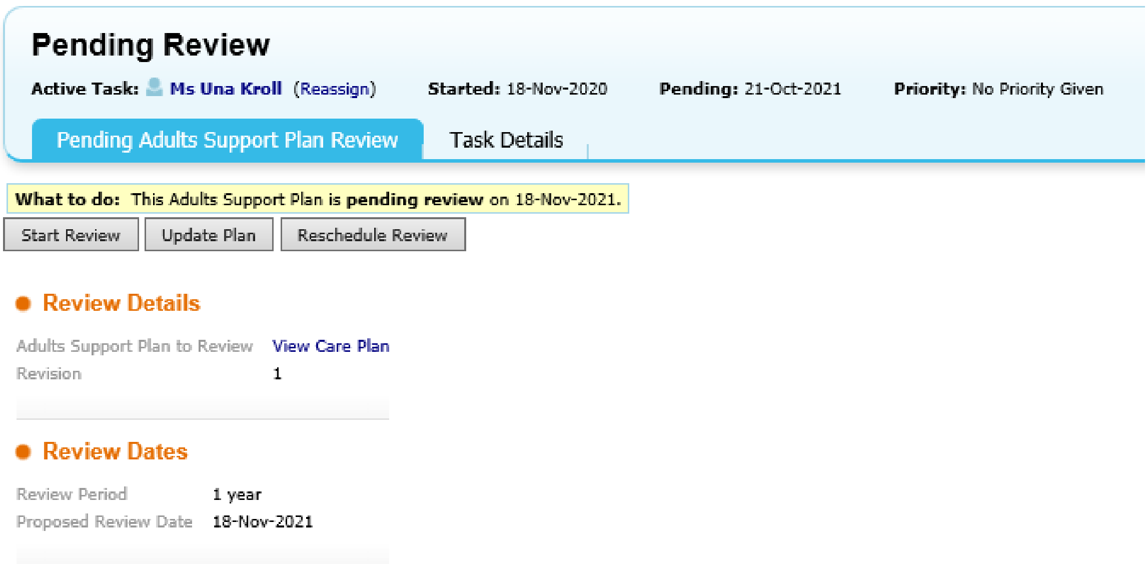
Up-dating the Support Plan – on-going service

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.

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.



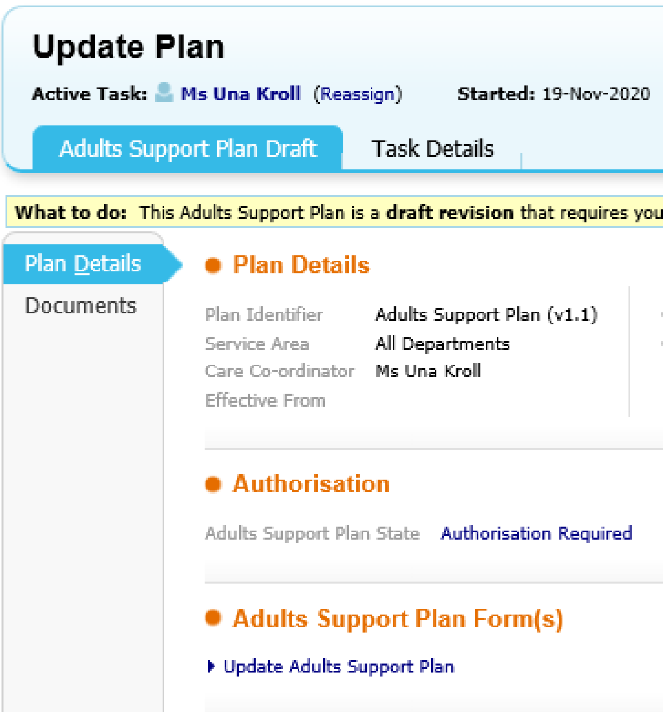
If you want to review before the scheduled review date, you will be asked to give a reason for an unscheduled review.

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.

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.

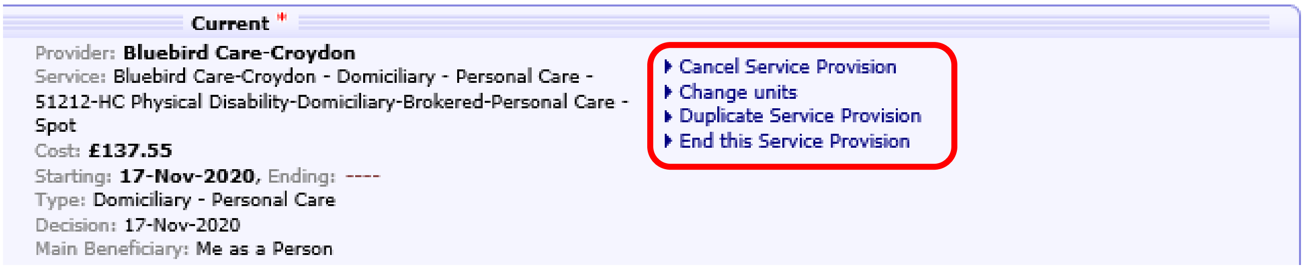
Click on **Update Adults Support Plan.** Unlike when you start a new plan – to up-date, you start from an **Update Plan** screen, not from the **Case**.



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.



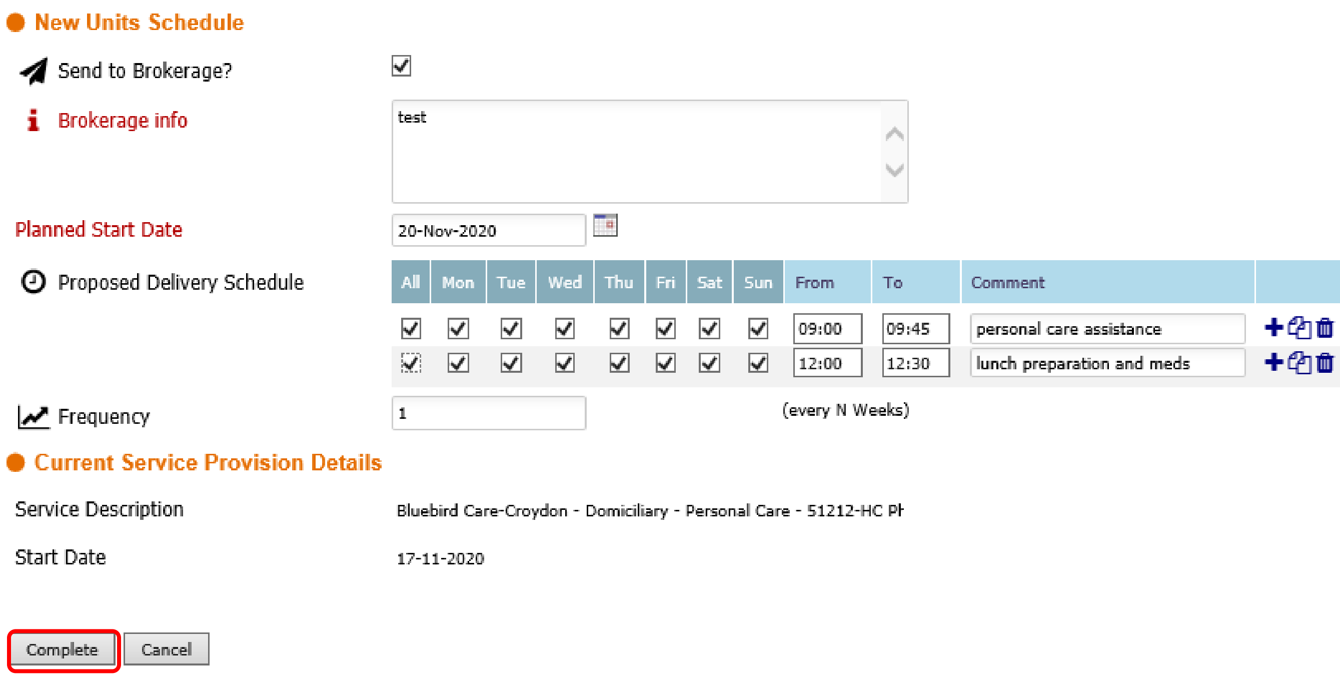
- **Cancel Service Provision –** do not use this, it will cancel the whole service and ContrOCC will try to retrieve payments already made.

- **Change units –** use for amendments to the provision

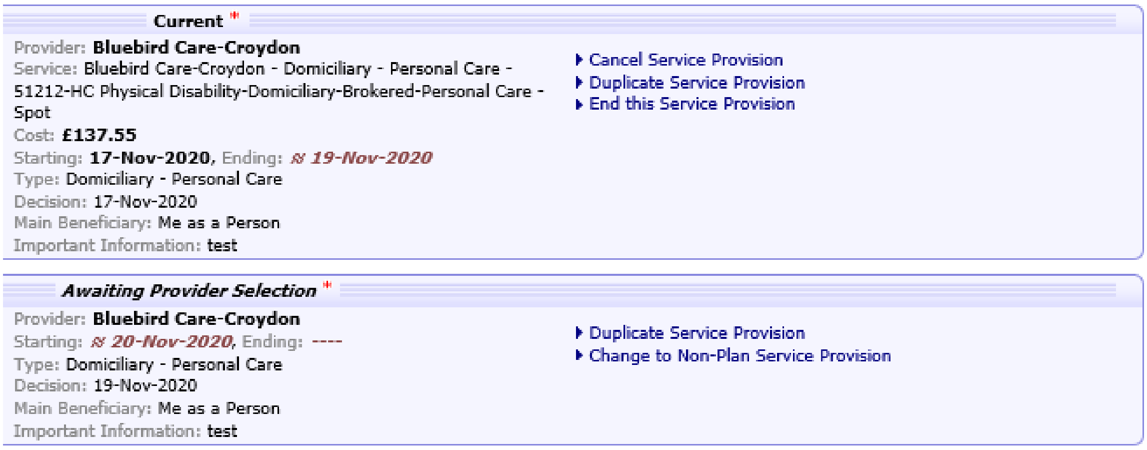
You will be prompted to confirm the action, click OK.
Note: Changing the units will end the existing Service Provision and create a new one.

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.



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 provisoning is complete.

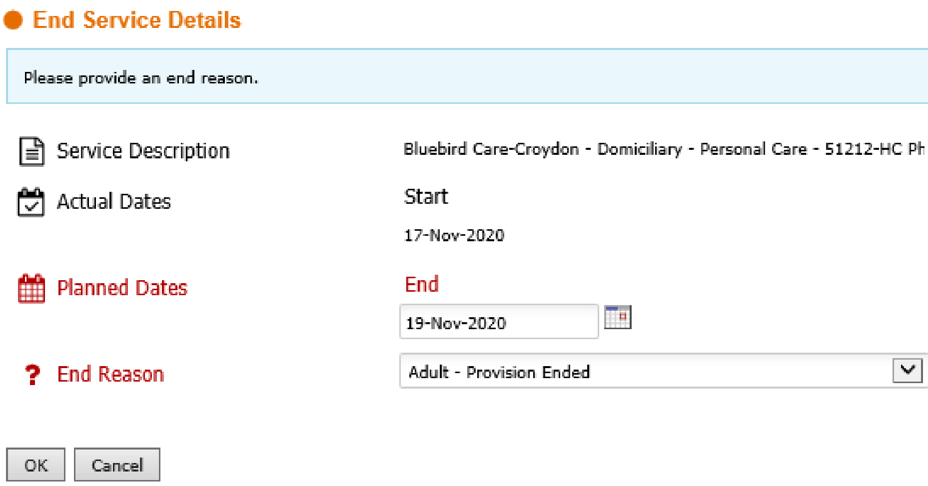


Now you should be able to go into the service provisioning **Awaiting Provider Selection** to make further amendments.

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.



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.