

# **LAS**

# **Recording**

# **Review/**

# **Reassessment**

*Version 1 – Sept 2020*

Delivering for Croydon

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## Access or Pick-up Review Task

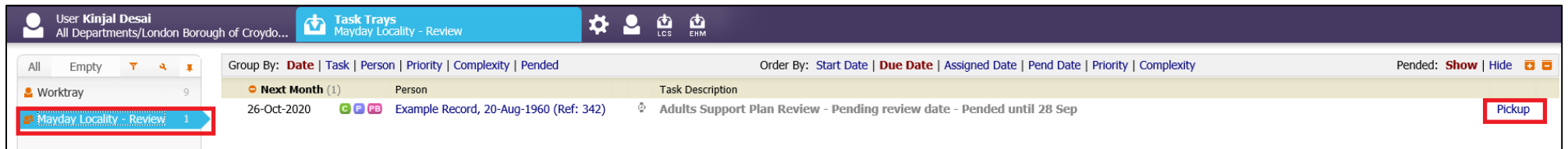
The review task should be available in the users work-tray as below. If so click on the task link to navigate to the review screen and follow the clicks Starting Review/Reassessment



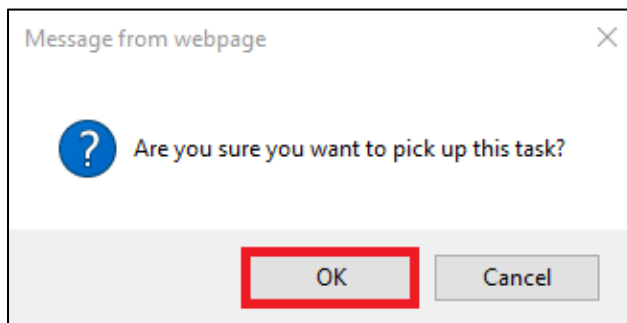
If this is not available the user can check if their teams review tray following the steps outlined below. Alternatively please log a support request via Tech Support Self Service.

The review task maybe allocated to a group tray. User must navigate to the relevant group tray and pick-up the review task first.

In the example below the review task is assigned to Mayday Locality- Review tray. To pick up the review task, user must therefore click on **Mayday Locality- Review** tray and find the task for the right client and then click on **Pickup**.



Next click **OK** on the confirmation prompt to move the task from the locality tray to the users work-tray.



Once the task is picked up the task will move to the users work-tray and the below task link will be available in the users worktray.

If either the tray or pick up button is not available please log a support request via Tech Support Self Service.

# Starting Review/Reassessment

Using the task link navigate to the screen from where the Review/Reassessment can be started.

C P PB Example Record, 20-Aug-1960 (Ref: 342) **Adults Support Plan Review - Pending review date**

Next click on **Start Review**

The screenshot shows a software interface for managing an Adults Support Plan. At the top, a navigation bar includes a user profile icon, the text 'Example Record 60 years 20-Aug-1960 (Ref: 342)', and several icons (person, gear, book, box, plus, stack of coins, person with speech bubble). A blue button labeled 'Care Pathway' is also present.

Below the navigation bar, there is a 'Home' button and a 'Local Map' dropdown. The main content area is titled 'Pending Review' and displays the following information:

- Active Task:** Kinjal Desai (Reassign)
- Started:** 14-Sep-2020
- Pending:** 28-Sep-2020
- Priority:** No Priority Given

Below this information, there are two tabs: 'Pending Adults Support Plan Review' (selected) and 'Task Details'. A yellow highlight box contains the text: 'What to do: This Adults Support Plan is pending review on 26-Oct-2020.' Below this, there are three buttons: 'Start Review' (highlighted with a red border), 'Update Plan', and 'Reschedule Review'.

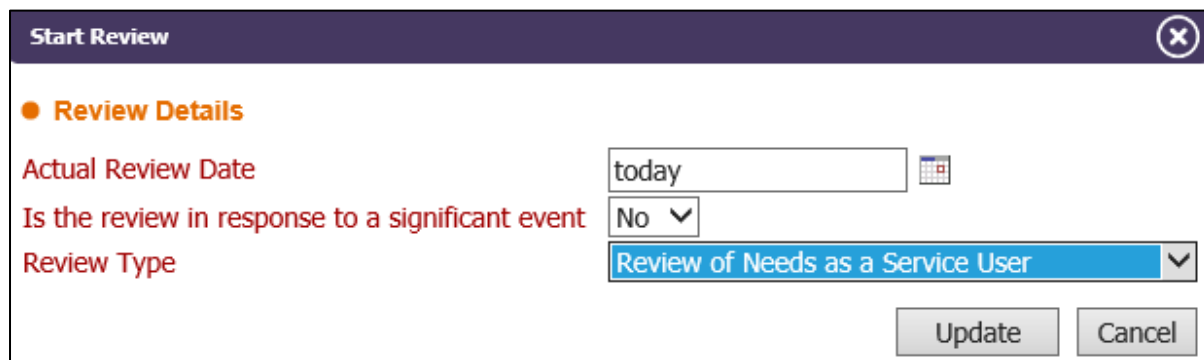
Underneath the buttons, there are three sections:

- Review Details:** 'Adults Support Plan to Review' with a link 'View Care Plan' and 'Revision' set to '1'.
- Review Dates:** 'Review Period' set to '6 weeks' and 'Proposed Review Date' set to '26-Oct-2020'.
- Actions:** A link 'End Adults Support Plan'.

At the bottom of the main content area, there is a link 'Back to: Next Action'.

On the left side of the interface, there is a flowchart showing the process flow. The flowchart starts with 'Update Plan', which branches into 'Await Brokerage' and 'Brokerage'. 'Await Brokerage' leads to 'Await Plan Authorisation', which then leads to 'Await Budgetary Authorisation'. 'Brokerage' leads to 'Plan Authorisation', which then leads to 'Budgetary Authorisation'. Both 'Await Budgetary Authorisation' and 'Budgetary Authorisation' lead to 'Next Action'. 'Next Action' branches into 'End Plan' and 'Service Provisioning'. 'Service Provisioning' leads to 'Pending Review', which then leads to 'Review Plan'. 'Review Plan' branches into 'Await Review Authorisation' and 'Review Authorisation'. The 'Pending Review' box in the flowchart is highlighted in green.

This will present the user with a pop up box – complete all the data and then click **Update**



**Start Review** [Close]

● **Review Details**

Actual Review Date:  [Calendar]

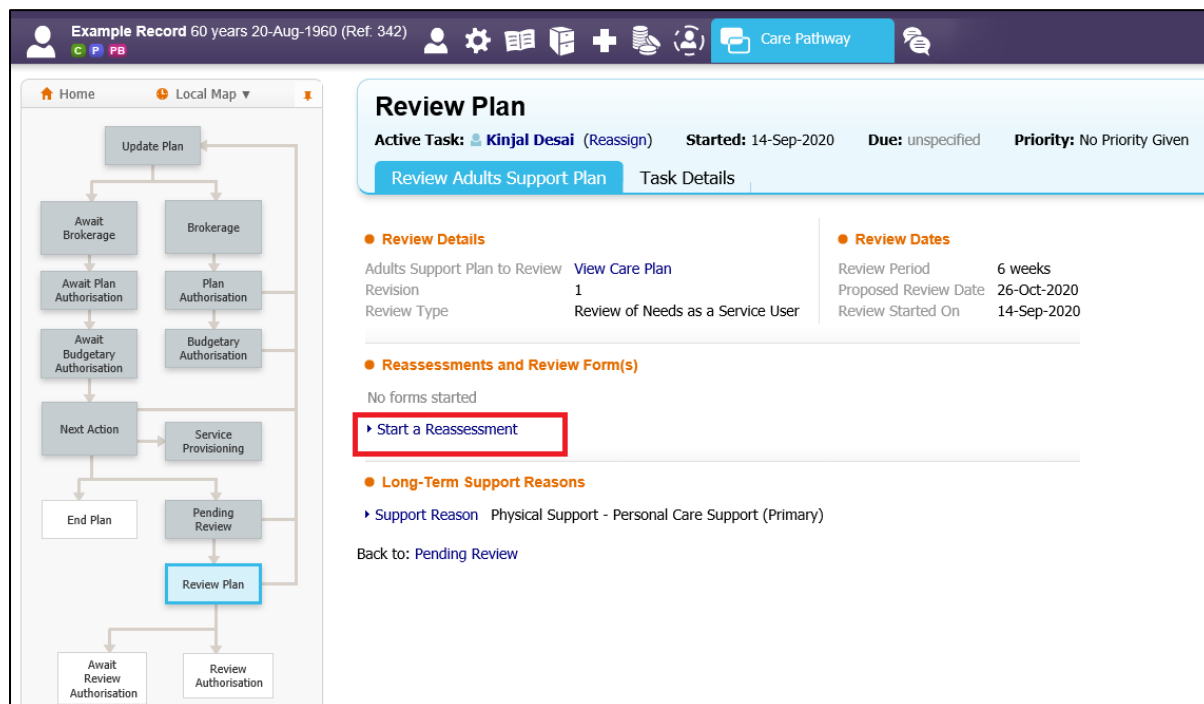
Is the review in response to a significant event:  [Dropdown]

Review Type:  [Dropdown]

[Update] [Cancel]

## Starting the Reassessment i.e. Good Conversation Record.

Clicking on Update will present the user with the screen below – click on **Start a Reassessment** as highlighted below.



**Example Record** 60 years 20-Aug-1960 (Ref: 342) [User] [Settings] [Documents] [Add] [Stack] [Person] [Care Pathway] [Help]

Home Local Map [Dropdown]

### Review Plan

Active Task: [Kinjal Desai](#) (Reassign) Started: 14-Sep-2020 Due: unspecified Priority: No Priority Given

[Review Adults Support Plan](#) Task Details

- **Review Details**
  - Adults Support Plan to Review [View Care Plan](#)
  - Revision: 1
  - Review Type: Review of Needs as a Service User
- **Review Dates**
  - Review Period: 6 weeks
  - Proposed Review Date: 26-Oct-2020
  - Review Started On: 14-Sep-2020
- **Reassessments and Review Form(s)**

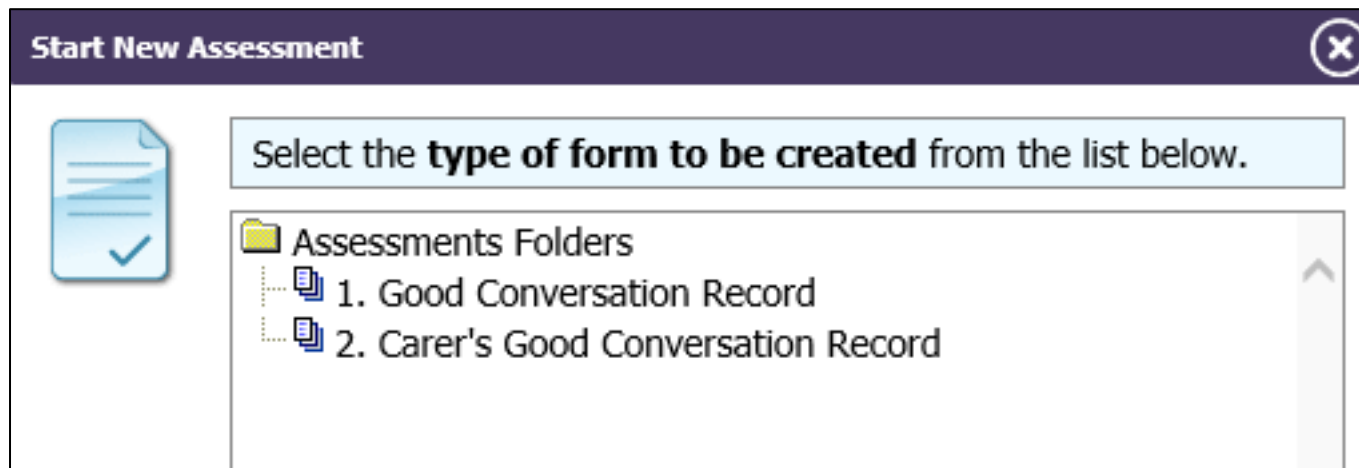
No forms started

  - ▶ **Start a Reassessment**
- **Long-Term Support Reasons**
  - ▶ Support Reason: Physical Support - Personal Care Support (Primary)

Back to: Pending Review

**Flowchart:** Update Plan → (Await Brokerage, Brokerage) → (Await Plan Authorisation, Plan Authorisation) → (Await Budgetary Authorisation, Budgetary Authorisation) → Next Action → (Service Provisioning) → (End Plan, Pending Review) → Review Plan → (Await Review Authorisation, Review Authorisation)

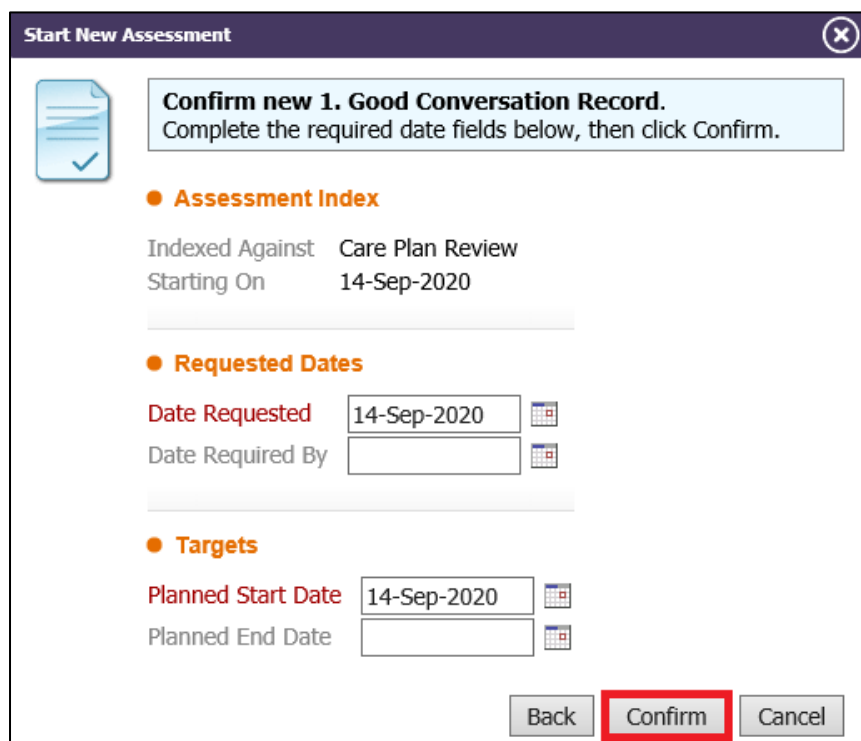
This will present the screen to select the type of assessment – click **1. Good Conversation Record**.



The screenshot shows a dialog box titled "Start New Assessment" with a close button in the top right corner. On the left is a document icon with a checkmark. The main area contains a light blue instruction box: "Select the **type of form to be created** from the list below." Below this is a list under the heading "Assessments Folders":

- 1. Good Conversation Record
- 2. Carer's Good Conversation Record

Next review dates and update if required and click on **Confirm**



The screenshot shows the "Start New Assessment" dialog box with the "Confirm new 1. Good Conversation Record" screen. It includes a document icon with a checkmark and an instruction box: "Confirm new **1. Good Conversation Record**. Complete the required date fields below, then click Confirm." The form is organized into three sections:

- Assessment Index**: Indexed Against: Care Plan Review; Starting On: 14-Sep-2020.
- Requested Dates**: Date Requested: 14-Sep-2020; Date Required By: [empty].
- Targets**: Planned Start Date: 14-Sep-2020; Planned End Date: [empty].

At the bottom are three buttons: "Back", "Confirm" (highlighted with a red border), and "Cancel".

This will present the user with the copy forward screen – **select the forms available/needed** by placing a tick and then click on **Copy Forward Selected**.

**Copy Forward**

Before starting the Assessment you have the option to copy forward the answers from the previous 3 Assessments for Adults Support Plan Review, Revision 1.

- Select each of the Assessments 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 Assessment afresh.

Copy Forward Selected   
  Start Blank   
 No Filter applied   
    

	Created	Subject	Assessment	Started By
<input checked="" type="checkbox"/>	Today	Example Record	Care Plan (Monday, 14 September 2020, 15:04)	Kinjal Desai
<input checked="" type="checkbox"/>	Today	Example Record	1. Good Conversation Record (Monday, 14 September 2020, 12:29)	Kinjal Desai
<input type="checkbox"/>	3 weeks 4 days ago	Example Record	Contact Record (Thursday, 20 August 2020, 18:46)	Kinjal Desai

The Good Conversation record form has now been created and the worker will have a task link available in their work-tray to access the form as required.

Example Record, 20-Aug-1960 (Ref: 342)      **Assessment - Assessment Data: 1. Good Conversation Record**

The worker will have to answer various key questions which will determine how the form is dynamically created. Please review all the sections of the form as highlighted below.

**Remember to click**

**Save** after completing a few clicks and before moving from one section to another.

**Finalise Assessment** to mark this form complete and to send it for authorisation.

Example Record 60 years 20-Aug-1960 (Ref: 342)

Information **Assessment** Delegate Revisions

Save Finalise Assessment Cancel Assessment Close

Print

### Good Conversation Record

**Client details**

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

**Basic Personal Details**

Person ID	342	Gender	Male
Title		NI Number	
Surname	Record	<a href="#">Marital Status</a>	
Forename	Example		
Preferred Name			
Actual DOB	20-Aug-1960		

[Update Details](#)

**Address**

Primary Address Flat 89  
from 20-Aug-1960 Green Side Views  
38 Mill Green Road  
Mitcham Junction  
CR4 4FQ

[Address History / Update Addresses](#)

**Contact Methods**

[Add/Update Contact Methods](#)

[Export document](#)



# Progress - Update Plan or Schedule Next Review

Once the Reassessment is finalised and authorised, user will have the below task in their tray to progress as appropriate.

**C** **P** **PB**Example Record, 20-Aug-1960 (Ref: 360)**Review Adults Support Plan**

User must complete the mandatory questions and select **Update Plan** or **Schedule the next review** as required.

Following reassessment if no changes are required to the support plan then Schedule Next Review may be selected.

If reassessments finds that changes are required to services and/or support package then Update Plan may be selected – please refer to separate guidance on how to complete the clicks.

**Example Record 60 years 20-Aug-1960 (Ref: 360)**

**Review Plan**  
Active Task: **Kinjal Desai** (Reassign) Started: 22-Sep-2020 Due: unspecified Priority: No Priority Given

**Review Adults Support Plan** Task Details

**What to do:** This Adults Support Plan has been completed. Please choose to either update the Adults Support Plan or schedule the next review.

**Update Plan** **Schedule Next Review**

- Review Details**  
Adults Support Plan to Review [View Care Plan](#)  
Revision 1  
Review Type Review of Needs as a Service User
- Review Dates**  
Review Period 2 weeks  
Proposed Review Date 16-Jul-2020  
Review Started On 01-Sep-2020
- Reassessments and Review Form(s)**  
View Review Form - 1. Good Conversation Record (Currently finalised) (Amend form)  
Start a Reassessment
- Review Completion Details**  
Reviewer **Kinjal Desai** ✕  
Department (at time of review) London Borough of Croydon - Local Authority Social Services Department  
Actual Review Start Date 01-Sep-2020  
Actual Review End Date 22-Sep-2020  
Sequel to Review No change in long-term support
- Combined Assessment Details**  
Is this a Combined Carer(s)/Cared-For Person Assessment?  No - Carer Refused  **No - Not Applicable**  Yes - Combined Assessment