

A guide to carrying out and recording

A Conversation Record



The conversation record has been created to support a different type of conversation/assessment to the one previously recorded. Our conversations are now more focused on what people want to tell us and what they want us to know, not just about what we want to ask them, which is why there are no service or needs led questions. However, where there are specific concerns or risks, you will need to explore these and consider information we are required to record on our system.

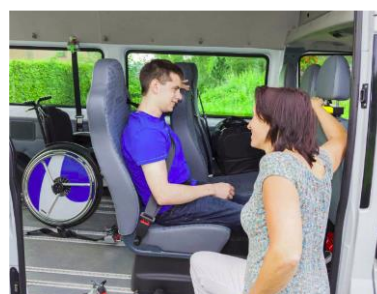
The most important point to remember is that this document allows you to be creative.

There is no prescriptive way of doing it or documenting it; but the outcome should be a positive record of the person whilst also identifying what issues are affecting their lives. The type of conversation may differ dependant on the situation. So be flexible! If the person is in a crisis situation or has an urgent need, the actions may be about putting a plan together that attempts to ease or resolve the main problem, in order to create stability.



The conversation is about listening and connecting people to things that make their life work without us. It should consider, and be a discussion about, all the resources and support that we can connect the person to, within their community and networks, in order to help them get on with their lives.

A conversation you undertake is not just about establishing if they meet the eligibility criteria, but about understanding what has happened or changed that caused them to approach Adult Social Care. Similarly, a conversation with an existing resident is about establishing what has occurred that led to the need for a review and not about raising their expectations that their long term package will be increased.



It is useful to consider what type of conversation you are anticipating based on the information available to you prior to meeting/speaking with the resident/rep. This will help you to prepare for the discussion.

- Is this a conversation about establishing what is going on – and then helping the person to re-establish connections with family, community, and their neighbourhood?
- Is this conversation about a short-term crisis requiring temporary intervention, hospital discharge or prevention, all with the aim of gaining stability?
- Is this conversation in relation to someone who clearly has long term support needs?

This type of conversation will only take place following one or both of the initial conversations.

The conversation

- Do your groundwork. Before starting any conversation, it is vital that you have a good awareness of the resources available within the local community
- Learn the background – What has happened?
- What does the person do or what did they enjoy doing?
- What is the person trying to get back to, i.e., what was 'normal' before the crisis, change or deterioration?
- If the resident user lacks capacity gather the information from the people who know them best as well as recording the resident's point of view.
- Establish the way forward – what is the one key thing that needs to change? What needs to happen now?
- Who is available to help? What network of support and resources are available to them?
- You don't have to come up with solutions straight away. Advise the resident and family that you will have a look at what options are available and discuss with others in your team.



Things to consider:

- Check LAS before meeting someone to identify if there is any demographic **information missing** (Relationship contacts, GP, LPA, Appointee etc.)
- Check LAS before meeting someone to identify if there is any risk to you that you need to be aware of
- Consider **capacity** and record your findings
- If there is a need to discuss **financial matters** or **advanced planning arrangements**, make sure this is recorded
- Remember to consider and record any immediate **risks or safeguarding issues** including **fire safety**
- Consider whether a routine enquiry about **Domestic Violence and abuse** is appropriate at this point
- Consider whether any **basic equipment** is needed
- Consider **religion, ethnicity, gender and sexuality** where appropriate
- Consider **communication** and **Accessible Information** needs
- Consider **advocacy**
- Consider any **carers needs**
- Consider the **impact on informal carers** and their ability to maintain the current level of support
- **If required, a [prompt sheet](#) is available with all the main key points!!**

Actions

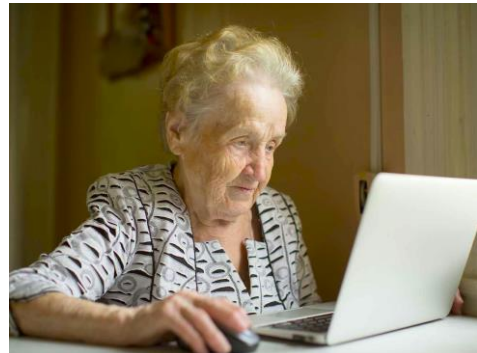
- Create a plan for the short term, not long term, and stick with the person through it
- What is the plan? What are we looking to achieve?
- Who is involved?
- Who is doing what and when?
- What is the cost?
- When will we know things have improved?

Recording the conversation

- Record the conversation as it happened to give the reader a genuine representation of the discussion
- Record the discussions you had with others such as carers/ family and other professionals
- Make sure that the actions and who is completing them are clearly defined as bullet points
- Consider and analyse the conversation and come to a conclusion

The following information should be updated in LAS

- Relationship contacts/ GP details/ financial rep/ carer
- Health conditions
- Accessible Information Needs
- Ethnicity
- LPA – enhanced decisions



Eligibility

Whilst the initial conversation is not about establishing eligibility it is important that it is still considered and that you can evidence that the person can be supported safely through signposting or a short-term plan.

If the person is not eligible – The conversation record should be updated to include detail about the discussion regarding eligibility to ensure that the decision can be justified. It may be useful in these circumstances to refer to the Eligibility Decision Tool for guidance.

If it is confirmed that the person has long term support needs and formal support is required, the Eligibility Decision Tool will be used to determine eligibility.

If the person is eligible - The conversation record will not be amended but the detail of the needs and outcomes will be recorded on the support plan.

Checklist of Core Duties

Local Authorities must:

- Carry out an appropriate and proportionate assessment:
- Support the individual to lead the process
- Involve an advocate (a family member, friend or independent advocate) to help the individual through the process where the individual has capacity but has substantial difficulty understanding, retaining and using the relevant information
- Involve a person who has specific training and expertise where appropriate to carry out a safeguarding enquiry where a person may be at risk of abuse or neglect
- Ensure that the assessment is completed in a suitable time period
- Ensure that the assessment is accurate and complete - reflecting the individual's needs



Frequently Asked Questions



What if I have more than one conversation?

It is likely that once you are allocated a case, you will have several conversations with a resident as their situation changes. Many of these conversations will be recorded as case notes but where there is a significant discussion that leads to a change to the original actions, it should be recorded on a conversation document. Use your discretion to determine if additional information can be added to the

original document creating a second version or completing a new one altogether.

The needs assessment used to record all the needs domains, where should I record this now?

The conversation you are having is determined by the presenting issues for the resident and they or the person who knows them best will tell you about the most relevant areas of their life that they are struggling with. If we go on to provide support whether it is long or short term, the needs and outcomes and how they can be met will be detailed in the support plan where the main headings are already present.

NOTE: The support plan will eventually change – but for now utilise the current support plan in LAS.

Click on this link to see how.

There is not enough information on the conversation document for a provider service

As mentioned above, the support plan will detail the needs and outcomes.

There is nowhere to record the relationships, financial information, CHC or health conditions

This information can be recorded as free text as part of the conversation record and then added to LAS on your return to the office.