

Health and Wellbeing Directorate

OP/PD

Short Term Pathways to Adult Community Team Case Transfer process

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Owner:	Emma Hollett Area Support manager South Kent Coast and Thanet

STP to ACT process

Decision - Home care

E-mail to purchasing to arrange homecare provision

STP practitioner holds case* for 48 hours from discharge. During this time, all paperwork should be put onto G Drive and AIS should be up to date (see checklist)

A case note must be added that includes:

A summary so far

The provision put in place (who, what, when)

Proposed next steps

Any other key info

48 Hours after discharge-

E-mail to STP senior for senior to agree and senior to forward to ACT mailbox for case to be allocated to ACT team

If there is already an allocated worker, please include them

All info above must be complete

Decision - Residential Placement (inc short term placements)

To Seniors for Authorisation via STP authorisations mail box

Once authorised all paperwork sent to CPT to arrange placement

STP practitioner holds case* for 5 days from discharge. During this time, all paperwork should be put onto G Drive and AIS should be up to date (see checklist)

A case note must be added that includes:

A summary so far

The provision put in place (who, what, when)

Proposed next steps

Any other key info* If it is a short term placement and there is already an allocated worker in ACT, contact the allocated worker to arrange a review

5 days after discharge-

E-mail to STP senior for senior to agree and senior to forward to ACT mailbox for case to be allocated to ACT team

If there is already an allocated worker, please include them

All info above must be complete

Decision - Direct Payment

If no assessment or review has taken place. Add a case note with all relevant info and E-mail ACT mailbox for Allocation on discharge

where we are aware of hospital admission -BSO to do DP stop form for 5 days or more

If a review or assessment has taken place, **STP practitioner holds case* for 48 hours from discharge.** During this time, all paperwork should be put onto G Drive and AIS should be up to date (see checklist)

A case note must be added that includes:

A summary so far

The provision put in place (who, what, when)

Proposed next steps

Any other key info

48 Hours after discharge-

E-mail to STP senior for senior to agree and senior to forward to ACT mailbox for case to be allocated to ACT team

If there is already an allocated worker, please include them

All info above must be complete

Other relevant info

* Case holding STP CMs will only deal with issues that can be dealt with over the phone. If a visit or further action is required during STP case holding period, a verbal conversation must take place between STP CM and ACT duty person about actions needed -This does not negate the need for the G Drive, case notes and e-mail for allocation, this will still need to be completed after 48 hours/ 5 days .

There will be occasions when it is not appropriate to follow these guidelines. If the 48 hour/ 5 days is at a critical time, it is important that we maintain continuity for the service user. Joint visits and reviews may be required in this case.

What paperwork/ data entry should be completed and saved to the client e-file when the case is transferred to ACT?

Checklist for Case Workers and Seniors authorising transfer

	E-mailed	In E-file	AIS/SWIFT
Signed assessment form		✓	
Eligibility criteria and decision form		✓	
Signed finance letter		✓	
Evidence of discussion about charging. Policy charging booklet given			✓
Finance referral	✓	✓	
Cost setting tool		✓	
Signed care and support plan		✓	✓
Email communication of update to allocated key worker	✓		
CPT referral form & supporting statement or other Purchasing Team contact to arrange provision	✓	✓	
Mental Capacity Assessment and Best Interest Meeting minutes (if appropriate)		✓	
CHC Check list (If appropriate)		✓	
Authorisation via Panel (If appropriate)	✓		
Services input on AIS	✓		✓
If any of this information is missing, there should be an explanation within the case note on AIS/SWIFT The case note on AIS/SWIFT should also include: <ul style="list-style-type: none"> • A summary so far • The provision put in place (who, what, when) • Proposed next steps* • Any other key info * Please ensure your proposed plans are clearly proposals, as the plans may change or circumstances may mean that it is not possible to deliver.			✓
There will be occasions when it is not appropriate to follow these guidelines. If the 48 hour/ 5 days is at a critical time, it is important that we maintain continuity for the service user. Joint visits and reviews may be required in this case.			