

SS3(P) – 1 (Mr Eric Anderson)

Case in Monitor event (shown as CC), with an existing Desktop Review activity

Planned Review, Ongoing Services, back into Monitor CC

Specific Notes

Part 2:

Responsible Team / Worker - a Planned Review is always allocated to a named worker (page 2).

'Allocated' and 'Required' dates are not necessary, as the existing Desktop activity is carried forward into the Review, and already has these dates (page 3).

Part 3:

Ethnic Origin – can be left blank, if already recorded or has 'Declined to Answer' (page 5).

Part 5:

Review Type – the criteria for indicating whether the client's next planned Review should be at a Desktop or Face to Face level is noted in Appendix B, Practice Guidance for the Revised Review Process (Nov. 05). The Review activity is **not** determined by the level of care management of the case (for example, Helpdesk cases are not always Desktop and PCM are not always Face to Face).

SS3(P) – 2 (Mrs Emily Jackson)

Case in Monitor event (shown as CC), with an existing Desktop Review activity.

Planned Review, Services Ending (not eligible).

Specific Notes

Part 4:

Review Completion Date - is not the same as in Part 2 (when the Desktop Review was completed), as the Review event (and the case) must stay open until all services have ended (for example, due to phased ending of services) (page 6).

Close / NFA would also be used if all ongoing services are to be discontinued but the client has a 'one-off' service, such as a piece of equipment.

SS3(P) – 3 (Mr Henry Abbot)

Case in Monitor event (shown as CC), with an existing Desktop Review activity.

Planned Review, Desktop onto Face to Face Review, Ongoing Services, Transfer to Monitor PCM.

Specific Notes

Part 2:

Desktop activity – ‘Allocated’ and ‘Required’ dates are not needed, as the existing activity already has these, and this is carried forward into the Review event.

Face to Face activity – requires ‘Allocated’ and ‘Required’ dates, as a newly required / allocated activity.

Part 4:

Outcome of Transferred is selected, as the case is changing from one type of Monitoring to another (page 6).

SS3(P) – 4 (Mrs Ada Henry)

Case in Monitor event (shown as CC) with an existing Desktop Review activity.

Unplanned Review, Desktop reassessment completed, onto Waiting List, onto Face to Face, Ongoing Services continuing, into Monitor CC.

Specific Notes

An unplanned Review must always have a re-referral recorded on CareFirst with the outcome of Review.

Part 2:

Desktop activity – does not require 'Allocated' or 'Required' dates, as the activity is already on CareFirst, carried through into the Review event. A Desktop level of reassessment may be completed by a referral coordinator, or started by a referral coordinator and continued / completed by another worker.

Waiting List activity – full details required to record on a Practice Managers list. This may be required if the Desktop activity needs to be continued by another worker, and there is no worker immediately available.

Face to Face activity – full details required to allocate to a worker.

Part 5:

Review activity – the Monitoring (Monitor CC) is via the Helpdesk but the activity has been allocated to a worker.

As per guidance (Guidance 036, Rev. Nov 05, page 3) this is permitted to show that the worker has continued involvement with the case and has planned short term monitoring work – which has been diaried. When the short term monitoring has been completed (recorded on an SS6), the case continues in the Monitor event, and the existing Desktop activity will be re-assigned to WDA1 (the responsible locality HelpDesk team).

SS3(P) – 5 (Mrs Marjorie Ryde)

Case in a Monitor event (shown as CC) with an existing Desktop Review activity.

Unplanned Review, Desktop level completed, requires Face to Face (this is Abandoned), Ongoing Services, into Monitor CC

Specific Notes

Part 2:

Desktop activity – does not require ‘Allocated’ and ‘Required’ dates, as these are already present on the existing activity, when it is carried through to the Review event. This level of reassessment has been completed (it is **not** ‘Abandoned’ – page 3), and identified the need for further reassessment at a Face to Face level.

Waiting List activity – full details required to allocate to a Practice Manager.

Face to Face activity – marked as ‘Abandoned’ (in circumstances where this level of reassessment is not started or not completed) (page 4). The activity will be recorded as abandoned on CareFirst.

Part 4:

Outcome of Cancelled – this is selected where the Review process has not been completed, but where the existing care plan / ongoing services are still required. It is not used if the client dies during the Review process (page 6).

Part 5:

Review Date – as a full Review has not been completed, a practice decision is required as to when a next Review is needed.

Note: A new Review Date would also be needed in the circumstances where the original Desktop level had been completed, and a Waiting List (for a Face to Face activity) had been ‘Abandoned’ (page 7).

Part 8:

As per guidance (page 9), if a Review has not been completed (and thus with the outcome of Cancelled), do not complete this section.

SS3(P) – 6 (Mr Peter Atkins)

Case in Monitor event (shown as CC) with an existing Face to Face Review Activity.

Unplanned Review, onto Waiting List, Face to Face activity Abandoned, ongoing services continuing, back into Monitor CC.

Specific Notes

Part 2:

Waiting List activity – there is no worker immediately available to undertake the Face to Face reassessment. Full details required.

Face to Face activity – marked as 'Abandoned' (in circumstances where this level of reassessment is not started or not completed), however, as per guidance (pages 4 and 7), the activity will not be recorded as abandoned on CareFirst. It will be 'kept' and carried through into the next Monitor event.

Note: Where the original Review Activity (Desktop or Face to Face) has not been completed (marked as Abandoned on the process form), this will **not** be 'abandoned' on CareFirst, but will be kept and carried forward to the next Monitor event.

If the case has a Desktop Activity originally, and this level has been completed and moved onto a Face to Face (or a Waiting List for a Face to Face), if the Waiting List or Face to Face is Abandoned, this will be 'abandoned' on CareFirst, and will require a new Review activity when the case moves back into Monitoring (Part 5).

Part 4:

Outcome of Cancelled - this is selected where the Review process has not been completed, but where the existing care plan / ongoing services are still required. It is not used if the client dies during the Review process.

Part 5:

Review Activity – no next 'Review Date', 'Allocated to' or 'Type' details are needed, as the original Face to Face activity (which has not been completed) will be 'Kept' and carried through to the new Monitor event. See above at Part 2 above.

Part 8:

This section is not completed, as the outcome in Part 4 is Cancelled.

SS3(P) – 7 (Mrs Betty Tapper)

Case in a Monitor event (shown as CC) with a Care Plan Review activity.

Planned Review, Ongoing Services, into Monitor CC.

Note: As per guidance (Guidance 036 - Rev. Nov 05, Appendix B), this would also apply in circumstances where a re-contact has triggered a Review because the client's Care Plan Review activity is overdue or due within three months.

Specific Notes

Part 2:

Desktop / Face to Face activity – no 'Allocated' or 'Required' dates are needed. Although a Desktop or Face to Face level of Review is recorded on the Process Form, this is not input or recorded on CareFirst.

As per guidance (Guidance 036, Rev. Nov 05, Appendix B), Desktop and Face to Face activities are **not** added to the Review event, it is only the Care Plan Review activity that is 'completed' when the Review work is finished.

Part 5:

Desktop / Face to Face activity – the appropriate type is indicated for the client's next review.

SS3(P) – 8 (Mr Arnold Fitzpatrick)

Case in Monitor event (shown as CC) with an existing Care Plan Review activity.

Unplanned Review, (existing Care Plan Review activity is not over-due or due within three months), a Desktop level completed, Waiting List activity for Face to Face, Ongoing Services, Transfer to Monitor PCM.

Specific Notes

The existing Care Plan Review activity is abandoned on CareFirst, and Desktop and Face to Face activities are recorded (as per Guidance 036, Rev. Nov 05, Appendix B).

Part 2:

Desktop activity – full details required to record on CareFirst.

Waiting List activity – full details required to allocate on a Practice Managers list.

Face to Face activity – full details required to allocate to a worker.

Part 5:

Review Date – review date set up for maximum of 52 weeks.

Review Type – as indicated by the client / case circumstances.

As per guidance (Practice Guidance for Revised Review Process, Nov 05, point 3.8), as part of a planned process, and agreed within the care plan, that the case will transfer to the Helpdesk within a short period of time (following the Review), this does not require another Review, but can be completed as part of the monitoring work (point 4.6).

In such circumstances, when the worker has completed the monitoring / check activity (and recording on an SS6) the case would be transferred to the Helpdesk, and the existing Review activity is reassigned to the responsible locality team.