|  |  |  |  |
| --- | --- | --- | --- |
|   | **CARERS CHECK LIST** | **Extra info** | **Check** |
| **First Contact** | Check carer is created on AIS |   |   |
| Stage 1-First contact workers & Duty Worker if new contact | Find carer on AIS - Person search, press clear first, search using name , DOB and Address with wild card %, if not created see step 2. |   |   |
| 2.1 Press create, and gather details; Title, Forename (s), Surname, Gender and Date of Birth |   |   |
| 2.2 Add address ( log fault to create address) |   |   |
|   | 2.3 Enter telephone number and only link if landline |   |   |
|   | 2.4 Click on the additional Person Details and enter the Carer’s ethnic origin and any other relevant details.  |   |   |
|   | 2.5 Click save and now PID number will be generated |   |   |
|   | Ensure all details are gathered |   |   |
|   | Add involvements - Main assessor, Key worker, Key team, Informal Carer, Person Cared For, GP, Emergency Cover Team if no emergency contact and having emergency cover service and any other significant person - link all |   |   |
|   | Check relationships - and link including emergency contacts ( may need to be created) |   |   |
|   | Add health conditions for carer and person cared for on PCF record |   |   |
|   | Check referral source, self, GP, other. Check on AIS (If self completion of assessment duty responsible) |   |   |
|   | Gather background information to inform contact generation and start assessment process |   |   |
|   | Explain 5 step process - carers pathway ( if assessment declined ensure this is documented on AIS) |   |   |
|   | Contact Allocated- Check AIS for either New Contact or Assessment Update required. |   |   |
|   | Worker to check they are on AIS involvements as main assessor. Key team (If CMT involvement before 01/07/2017 transfer to correct team)  |   |   |
|   | Read information gathered from SID and/or other source. |   |   |
|  | Privacy notice for Adult Social Care has been issued. |  |  |
|   | Determine if the carer would like to continue with first contact or prefer to do this another way? online, assessment sent by email, post,  |   |   |
|   | If it is evident the carer requires a HOME VISIT arrange and pass to stage 2 worker. |   |   |
|   | Complete case notes to reflect actions taken |   |   |
|   | In all cases ensure the first contact used has been downloaded from the intranet(latest version) |   |   |
|   | **NB if circumstances have changed reassessment is required start first contact process and eligibility** |   |   |
| **First Contact Assessment** | Complete Carers First contact assessment and ensure all details are recorded. |   |   |
|   | For email, postal assessments check content and validate responses prior to eligibility determination. |   |   |
|   | Ensure consent is explained and obtained ( if obtaining over the phone ensure this is evidenced) explain privacy notice, including website |   |   |
|   | Carers assessment to be signed by carer, if completed over the phone indicate this |   |   |
| **Eligibility Determination** | Determine eligibility using criteria embedded into first contact assessment. |   |   |
|   | Detail outcome of contact ( eligibility met, eligibility not met ), eligibility, services agreed, advice and information provided and signposting |   |   |
|   | If carers personal budget is required pass onto stage 2 worker for support planning |   |   |
|   | Input assessment on AIS (See AIS User Guide) |   |   |
|   | To register and receive we care newsletter need of we care must be identified on carers assessment recorded on AIS |   |   |
| If Eligible with No PB | Complete support plan if no PB required (see Support Plan Check List)  |   |   |
|   | Send eligibility letter and outline support made and copy of assessment and support plan |   |   |
|   | Add Review ( annual - from date of completed initial review ) status DUE linking completed support plan |   |   |
|   | End involvement of assessor / keyworker |   |   |
|   | Scan and index all letters / assessment / support plan sent |   |   |
| Not Eligible | If not eligible no review is required, send not eligible letter and any support outlined during assessment |   |   |
|   | End involvement of assessor / keyworker |   |   |
|   | Scan and index all letters / assessment sent |   |   |
|  | Confirm Privacy notice has been sent/discussed and recorded |  |  |
| **Carers services and referrals** | Make referrals to all appropriate services |   |   |
| **Not eligible** | **Carers Emergency Cover and Contact Card** - emergency cover required workflow on AIS - **552543** |   |   |
|   | **Carers Contact Card Only** - email first page of assessment (contact details and pcf information) to support.driffieldhub@eastriding.gov.uk  |   |   |
|   | Explain what actions need to be taken by lifeline New card, Replacement card, Check information details. |   |   |
|   | **Health trainer referral** - complete health trainers referral form (found on the intranet) Please explain reason for referral attach to email and send to address on from |   |   |
|   | **Passport to Leisure** - complete electronic application form(found on the intranet) attach to email and send to leisure@eastriding.gov.uk |   |   |
| **Additional services ( eligible only)** | **Carer Relief Sitting Service** - carer relief required workflow on AIS - **552543** |   |   |
|   | **Emergency Cover & Relief Sitting Service** - emergency cover and carer relief required workflow on AIS - **552543** |   |   |
|   | **Carers Short Breaks** ( cottage/caravan )- Provide carers with information ( found on the intranet ) Ring carers support to book. |   |   |
|   | **One to One Emotional Support** - referral carers support workflow on AIS - **550018** |   |   |
|   | Complete case notes on AIS |   |   |
|   | Registration only - close involvement, key team, leave need open of we care newsletter |   |   |
| **Support Planning** | Complete support plan from Carers Assessment |   |   |
|  | Send copy and index to AIS with Carers Assessment  |   |   |
| **Carers PB options** | Seek funding agreement from TM or PPDO (check delegation) (risk management - Carers) Complete Panel Paper |   |   |
| Stage 2 worker if PB identified from CA | Contact carer inform funding decision and inform of carers personal budget arrangements |   |   |
| Virtual Budget - Commissioned by Local Authority ( see separate process) |   |   |
| Direct payment - Direct payment ( All Pay or Managed Account, discuss options) ( referral to DP support) |   |   |
|   | One off payment - Direct payment ( one off - paid into carers bank account) ( see separate process) |   |   |
|   | Complete E Forms, cert forms etc. if funding identified |   |   |
|  | Complete support plan onto AIS |   |   |
|   | Put on an initial review date for 6-8 weeks time |   |   |
|   | Send eligibility letter and 2 copies of support plan ( one to be signed and returned, then indexed) |   |   |
| **Carers services and referrals** | Make referrals to all appropriate services |   |   |
| **Not eligible** | **Carers Emergency Cover and Contact Card** - emergency cover required workflow on AIS - **552543** |   |   |
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|   | **Carers Short Breaks** ( cottage/caravan )- Provide carers with information ( found on the intranet ) Ring carers support to book. |   |   |
|   | **One to One Emotional Support** - referral carers support workflow on AIS - **550018** |   |   |
|   | Complete case notes on AIS |   |   |
| **Review** | Complete initial review paperwork |   |   |
| Review stage - review workers | Detail outcome of review (Eligible or Eligible P/B) |   |   |
|   | Complete review, add outcomes, Add needs ('We Care' and Carers eligible for support - identifying services required) status completed, If PB identified see support plan |   |   |
|   | Add Review ( annual - from date of completed initial review ) status DUE |   |   |
|   | Link latest plan (Amend where necessary) |   |   |
|   | Print copy of plan and review letter to send out to carer. |   |   |
|   | Complete case notes on AIS |   |   |
|  | **Privacy notice to be issued/discussed with Carer** |  |  |
|   | **NB if circumstances have changed reassessment is required start first contact process and eligibility** |   |   |
| **Carers services and referrals** | Make referrals to all appropriate services |   |   |
| **Not eligible** | **Carers Emergency Cover and Contact Card** - emergency cover required workflow on AIS - **552543** |   |   |
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|   | **One to One Emotional Support** - referral carers support workflow on AIS - **550018** |   |   |
|   | Complete case notes on AIS |   |   |

Please index into ESCR once completed.