AMHP Guidance
V1.0

Document	AMHP Guidance.
Purpose	AMHP Guidance for AMHP's and AMHP Coordinator's.
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Owner	ICT Business Transformation Team
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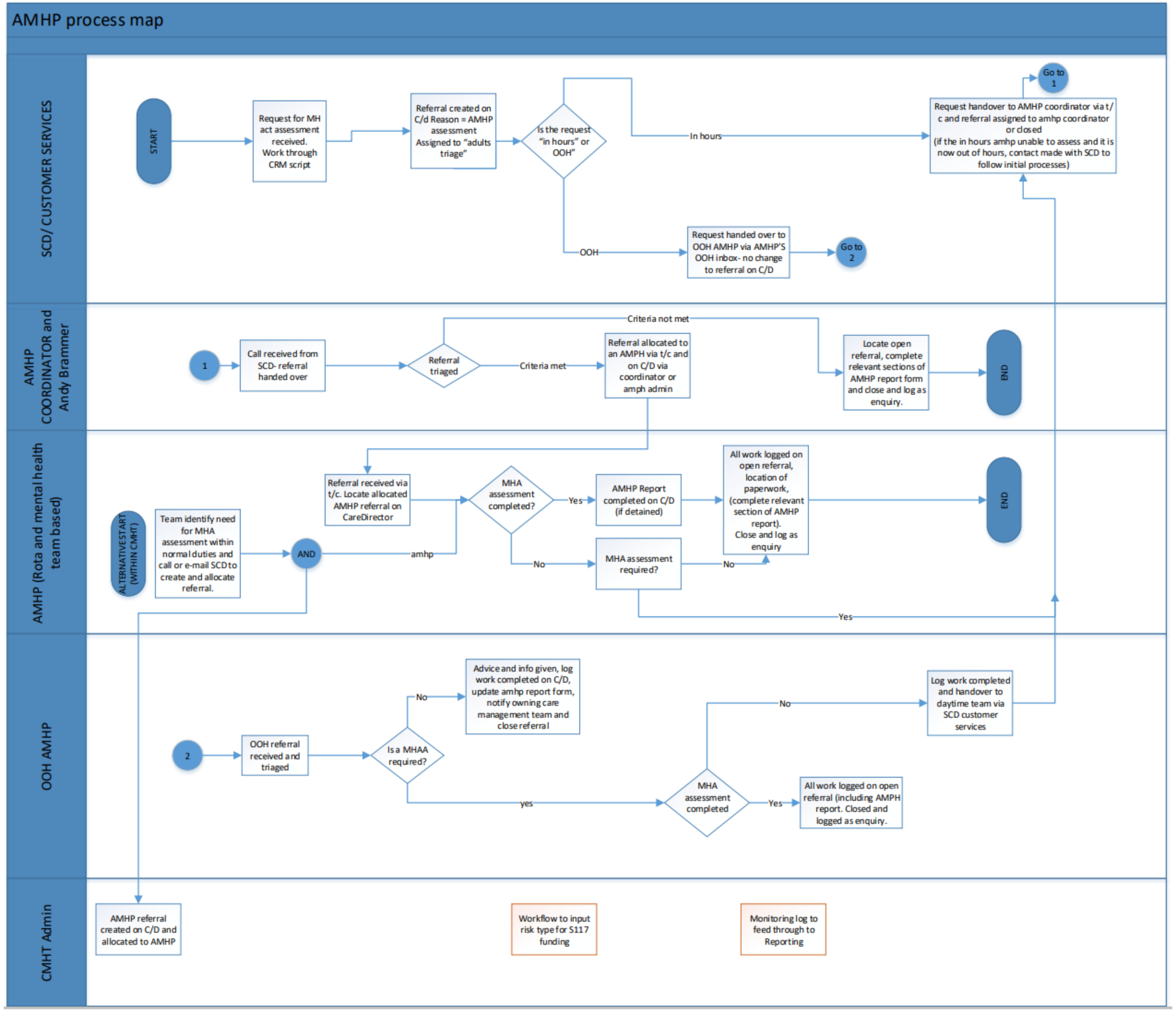
Contents



AMHP process map
SCD/ CUSTOMER SERVICES
START
Request for MH act assessment received. Work through CRM script
Referral created on C/d Reason = AMHP assessment Assigned to "adults triage"
Is the request "in hours" or OOH"
In hours
Request handover to AMHP coordinator via t/c and referral assigned to amhp coordinator or closed (if the in hours amhp unable to assess and it is now out of hours, contact made with SCD to follow initial processes)
Go to 1
OOH
Request handed over to OOH AMHP via AMHP'S OOH inbox- no change to referral on C/D
Go to 2
AMHP COORDINATOR and Andy Brammer
1
Call received from SCD- referral handed over
Referral triaged
Criteria not met
Criteria met
Referral allocated to an AMHP via t/c and on C/D via coordinator or amph admin
Locate open referral, complete relevant sections of AMHP report form and close and log as enquiry.
END
AMHP (Rota and mental health team based)
ALTERNATIVE START (WITHIN CMHT)
Team identify need for MHA assessment within normal duties and call or e-mail SCD to create and allocate referral.
AND
amhp
Referral received via t/c. Locate allocated AMHP referral on CareDirector
MHA assessment completed?
Yes
AMHP Report completed on C/D (if detained)
All work logged on open referral, location of paperwork, (complete relevant section of AMHP report). Close and log as enquiry
END
No
MHA assessment required?
No
Yes
OOH AMHP
2
OOH referral received and triaged
Is a MHAA required?
No
Advice and info given, log work completed on C/D, update amhp report form, notify owning care management team and close referral
yes
MHA assessment completed
No
Log work completed and handover to daytime team via SCD customer services
Yes
All work logged on open referral (including AMPH report. Closed and logged as enquiry.
CMHT Admin
AMHP referral created on C/D and allocated to AMHP
Workflow to input risk type for S117 funding
Monitoring log to feed through to Reporting

Mental Health Act Assessment Request Procedure

There are two way a request for a Mental Health Act Assessment can be received:

1. The need for a MH Act Assessment is identified by the Mental Health Team within normal duties or;
2. A request for a MH Act Assessment is received by Customer Services.

Mental Health Team Process

1. In this scenario, the AMHP will request the creation of the case by their administration team or contact Social Care Direct via email (social_Care_direct@wakefield.gov.uk) to create and assign a case to the Mental Health Team (Appendix 1).
2. Once the case is received, either the AMHP or request admin will allocate the case to Mental Health Team (Appendix 2).
3. This case will be then viewable via their WMDC Practitioner dashboard.
4. AMHP will have the responsibility to record their intervention on the **AMHP report form** (Appendix 3) and record any activities. If the paper form is attached to CareDirector the **AMHP report form** must still be completed.
5. If AHMP finishes the assessment and the case does not require a handover, they will **close and log as enquiry** (Appendix 4).
6. If AMHP has been able to assess and the case requires a handover, they will need to record any work/ information gathered along with "**MHA not completed handover to OOH AMHP**" on activities and handover to the **Out of Hours AMHP** by telephone/ email (AMHPsOutofHours@wakefield.gov.uk and **CC** adultstriage@wakefield.gov.uk). The case will also require

transfer on CareDirector to the **AMHP Coordinator Dashboard** (Appendix 5).

7. If OOH AMHP is unable to complete the assessment, they will need to record any work/information gathered along with "**MHA not completed handover to day rota**" on activities. If the **OOH AMHP** has allocated the case to themselves, they will need to transfer it to the **AMHP Coordinator Dashboard.**

8. If the AMHP is to hold the assessment until a later date then the case should be transferred back on the AMHP Coordinator Dashboard and an activity completed to state **"AMHP service holding the assessment, to be completed at a later date"** along with the reason why.

A request for a MH Act is received by Customer Services/ Social Care Direct

1. Following a telephone handover with Customer Services/ Social Care Direct, the **case** will be picked up by the AMHP Coordinator via the **AMHP Coordinator Dashboard** (Appendix 6).

2. Once opened, they will open an **AMHP report form** (Appendix 3).

3. They will then select **Allocate** in the **Case Status** and input themselves or another works name (Appendix 2).

4. Once a telephone handover has taken place between the AMHP Coordinator and allocated AMHP, the AMHP can locate the case via their **WMDC Practitioner dashboard**.

5. Once the case is located it is the responsibility of the AMHP to record their intervention on the AMHP report form (Appendix 3) and record any activities required (Appendix 6).

6. If the AMHP finishes the assessment and the case does not require handover, they will **close and log as enquiry** (Appendix 4).

7. If the AMHP has not been able to assess and the case requires a handover, they will need to record any work/ information gathered along with **"MHA not completed handover to OOH AMHP"** on activities and handover to the Out of hour AMHP by telephone/ email (AMHPsOutofHours@wakefield.gov.uk and cc adultstriage@wakefield.gov.uk).

8. The case will also require transfer on CareDirector to the **AMHP Coordinator Dashboard** (Appendix 5).

9. If the AMHP is to hold the assessment until a later date then the case should be transferred back on the **AMHP Coordinator Dashboard** and an activity completed to state **"AMHP service holding the assessment, to be completed at a later date"** along with the reason why.

10. If the request for a mental health act assessment is received out of hours, customer services will Assign the case to the Adults Triage Team as per current procedures.

11. If the **OOH AMHP** is unable to complete the assessment they will need to record any work/ information gathered along with **"MHA not completed handover to day rota"** on activities, transfer the case to the **AMHP Coordinator Dashboard** and email the case link to Social Care Direct, Adults Triage and AMHP Service.

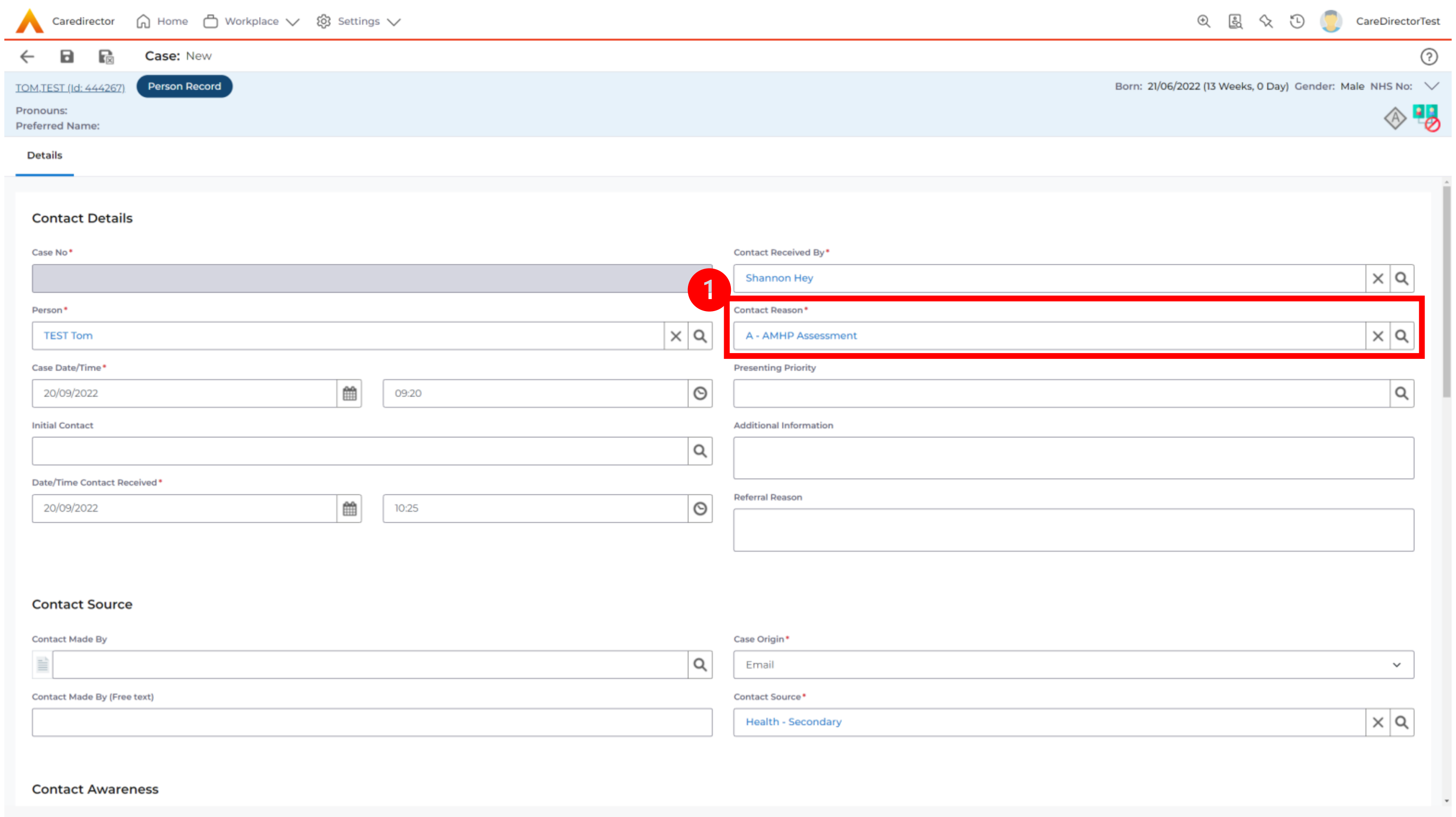
12. Once the **AHMP report form** has been completed on CareDirector a workflow creates an activity on the MCA dashboard for the S117 information to be recorded in risks.

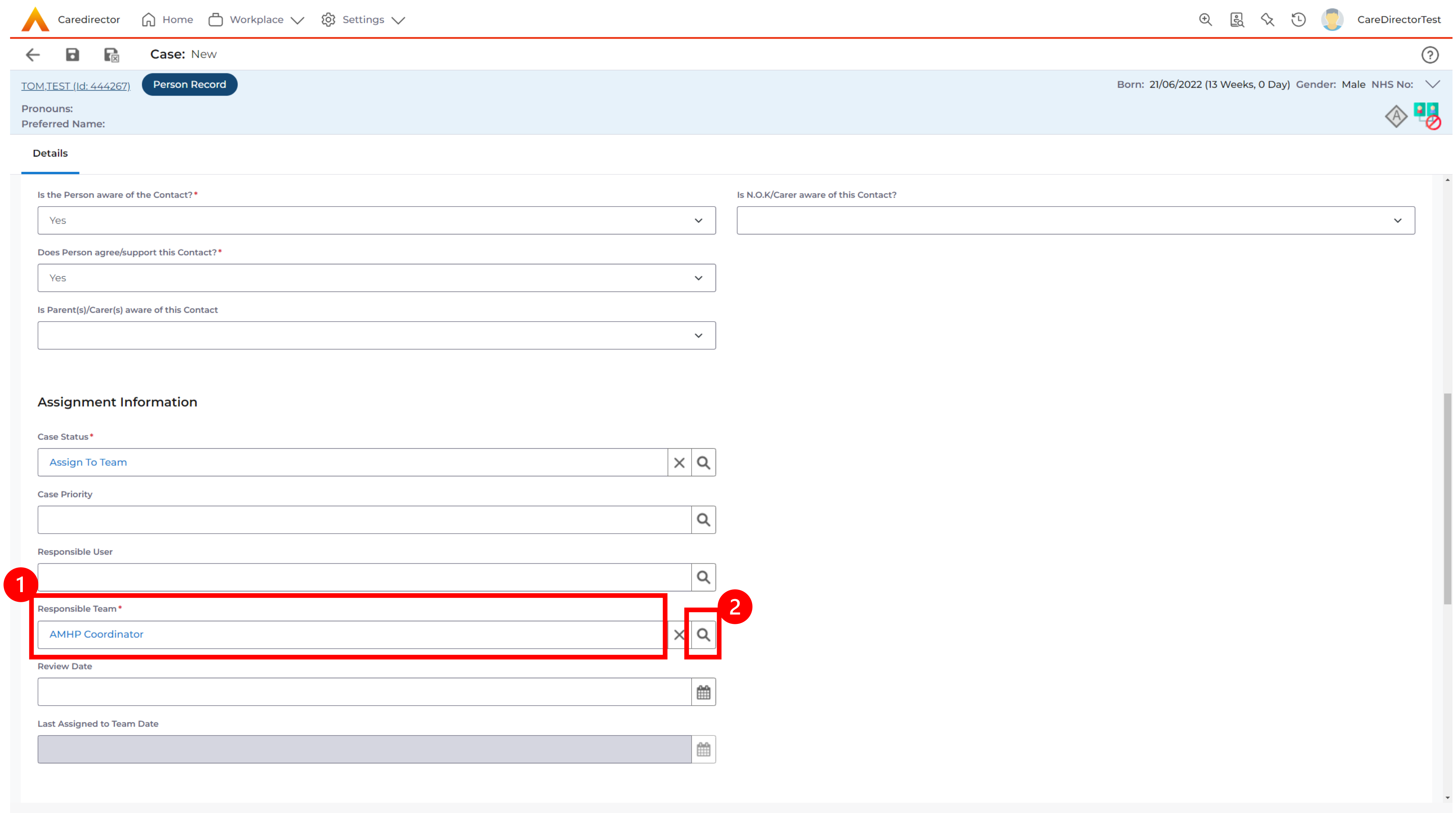
Mental Health Act Assessment Request Guide

Appendix 1 - Creation of Case

1. An AMHP Case is created in CareDirector with the **Contact Reason** of **AMHP Assessment** and the **Responsible Team** of **AMHP Coordinator.**

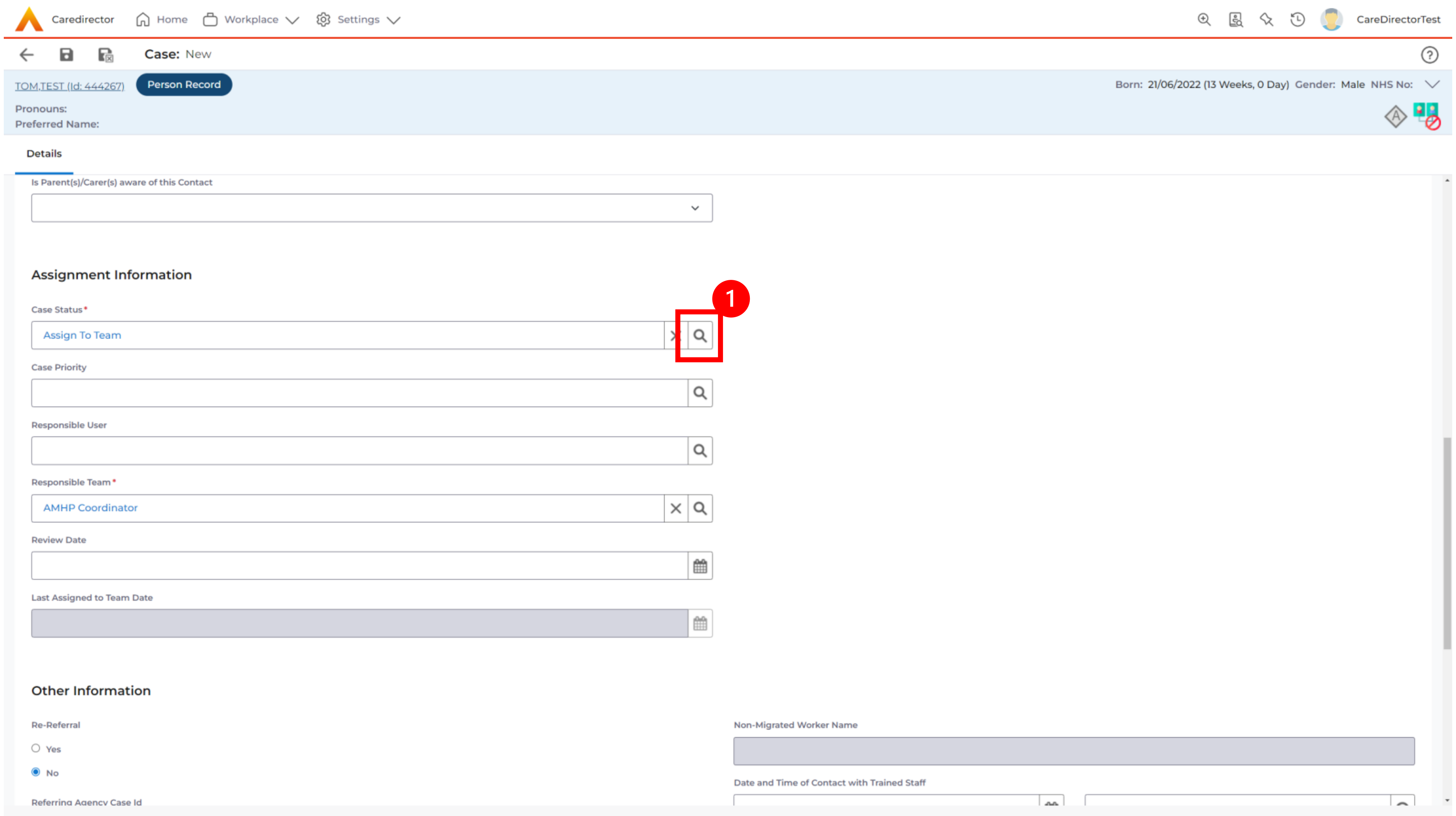
2. To **Assign** to **AMHP Coordinator**, select the **Lookup** function in **Responsible Team** and search for **AMHP Coordinator**.



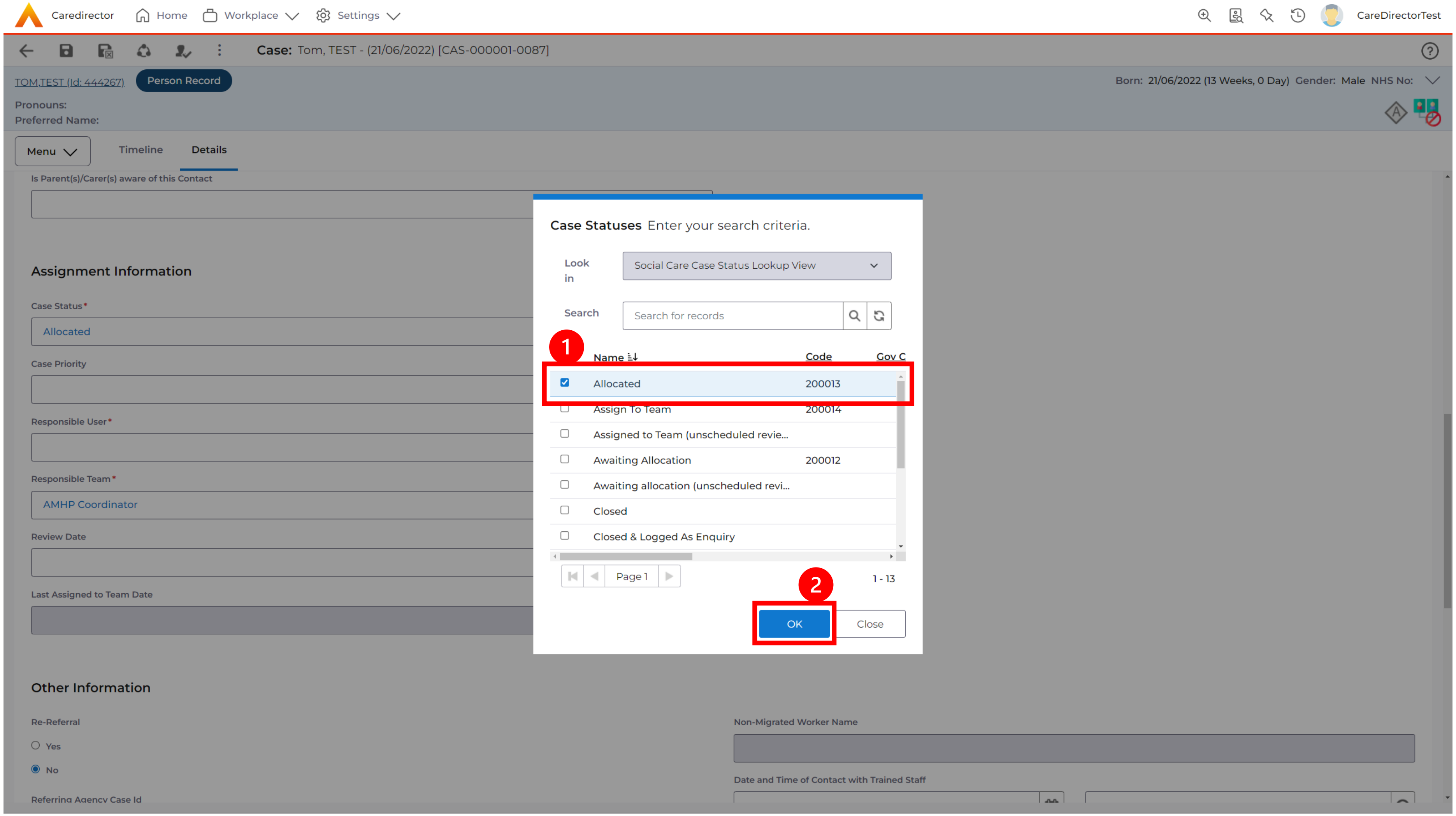

Caredirector
Home
Workplace
Settings
CareDirectorTest
Case: New
TOM,TEST (Id: 444267)
Person Record
Born: 21/06/2022 (13 Weeks, 0 Day) Gender: Male NHS No:
Pronouns:
Preferred Name:
Details
Is the Person aware of the Contact?*
Yes
Is N.O.K/Carer aware of this Contact?
Does Person agree/support this Contact?*
Yes
Is Parent(s)/Carer(s) aware of this Contact
Assignment Information
Case Status*
Assign To Team
Case Priority
Responsible User
1
Responsible Team*
AMHP Coordinator
2
Review Date
Last Assigned to Team Date

Appendix 2 - How to Allocate a Case Part 1

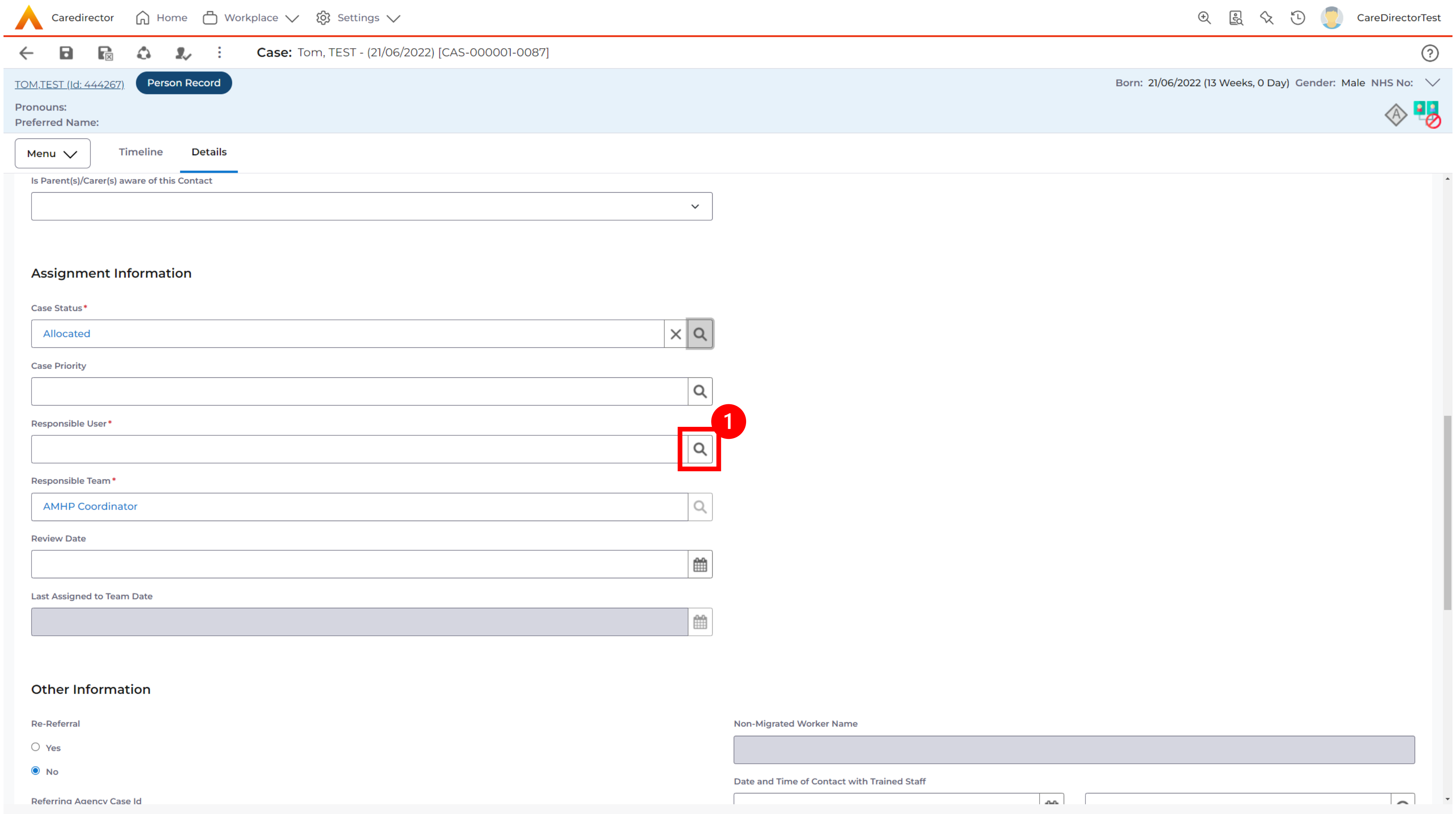
1. Select the **lookup** function next to **Case Status** field.



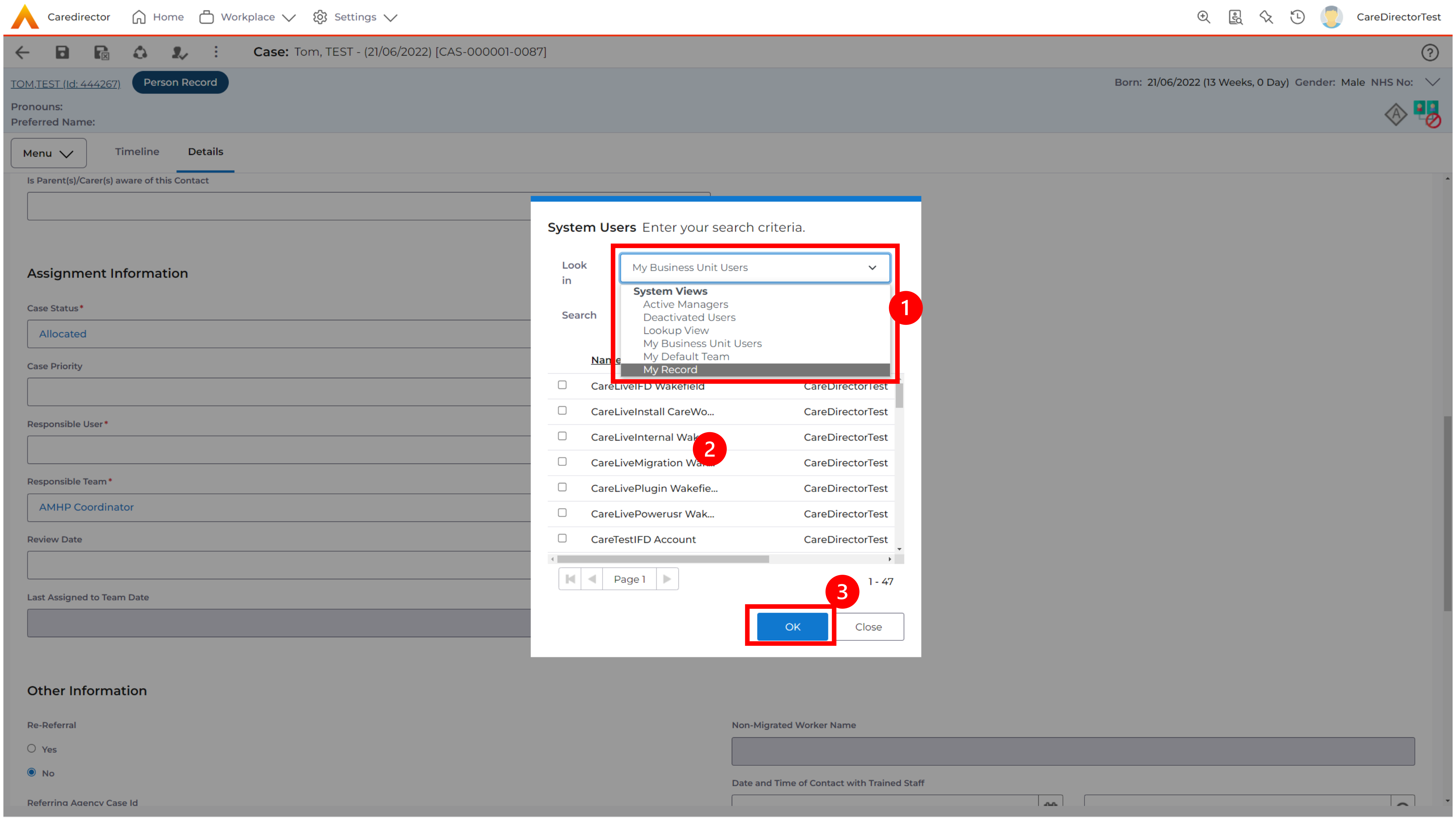
2. The following screen will be displayed, select **Allocated.** Then **OK.**



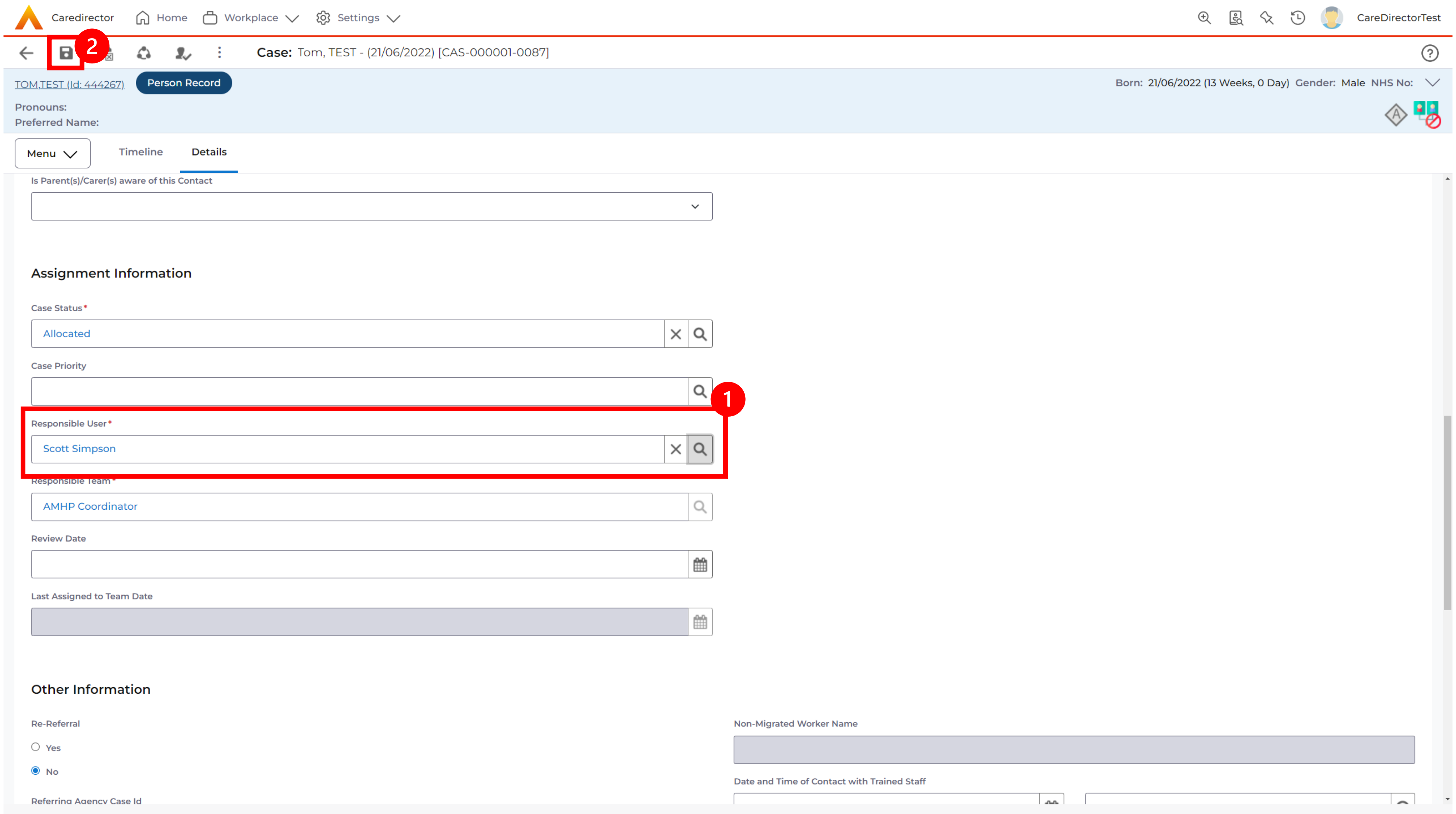
3. Select **Lookup** function next to the **Responsible User** field.



4. This will open a new window, select where to **Look In** and either select **My Record** or **My Default Team**. Select the relevant person. Then select **OK.**

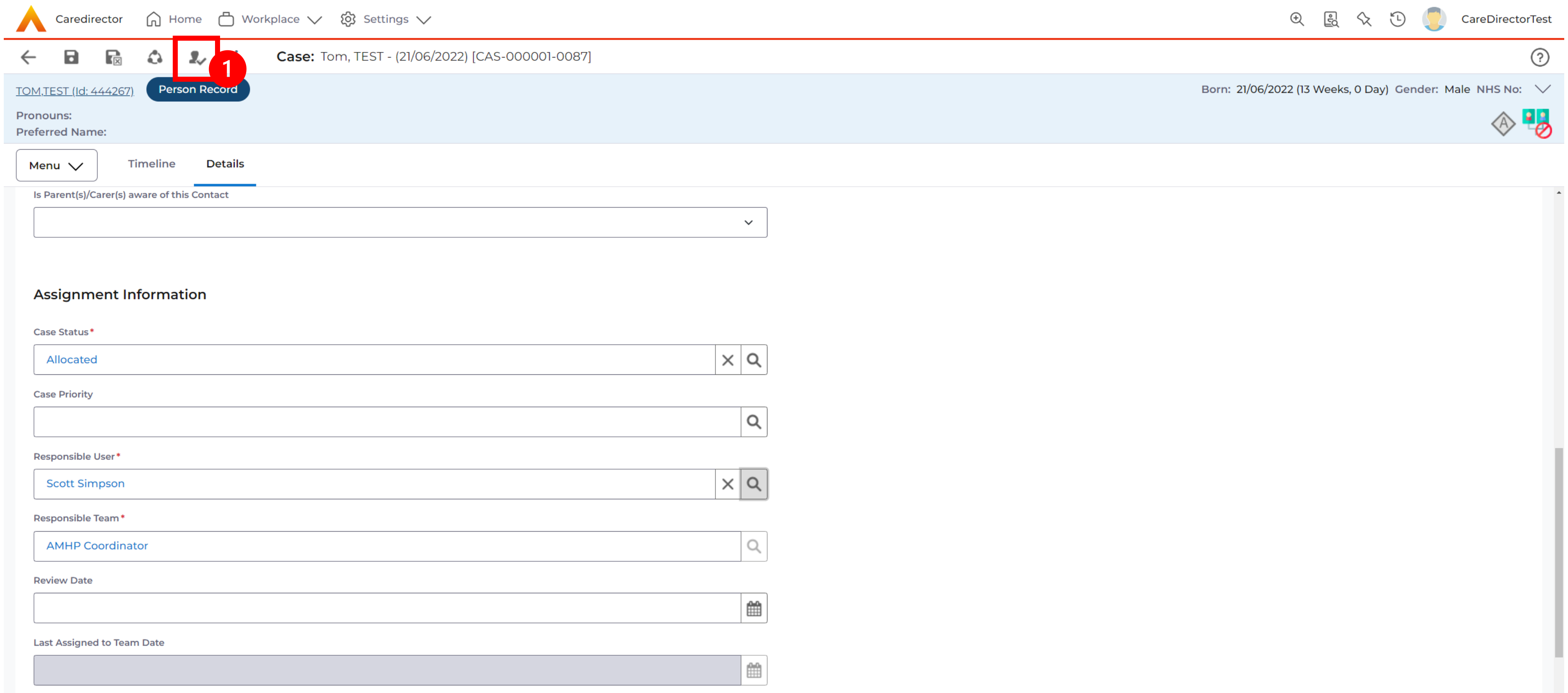


5. When the case has a **Responsible User Allocated,** select **Save** from the toolbar. The case is now **Allocated.**

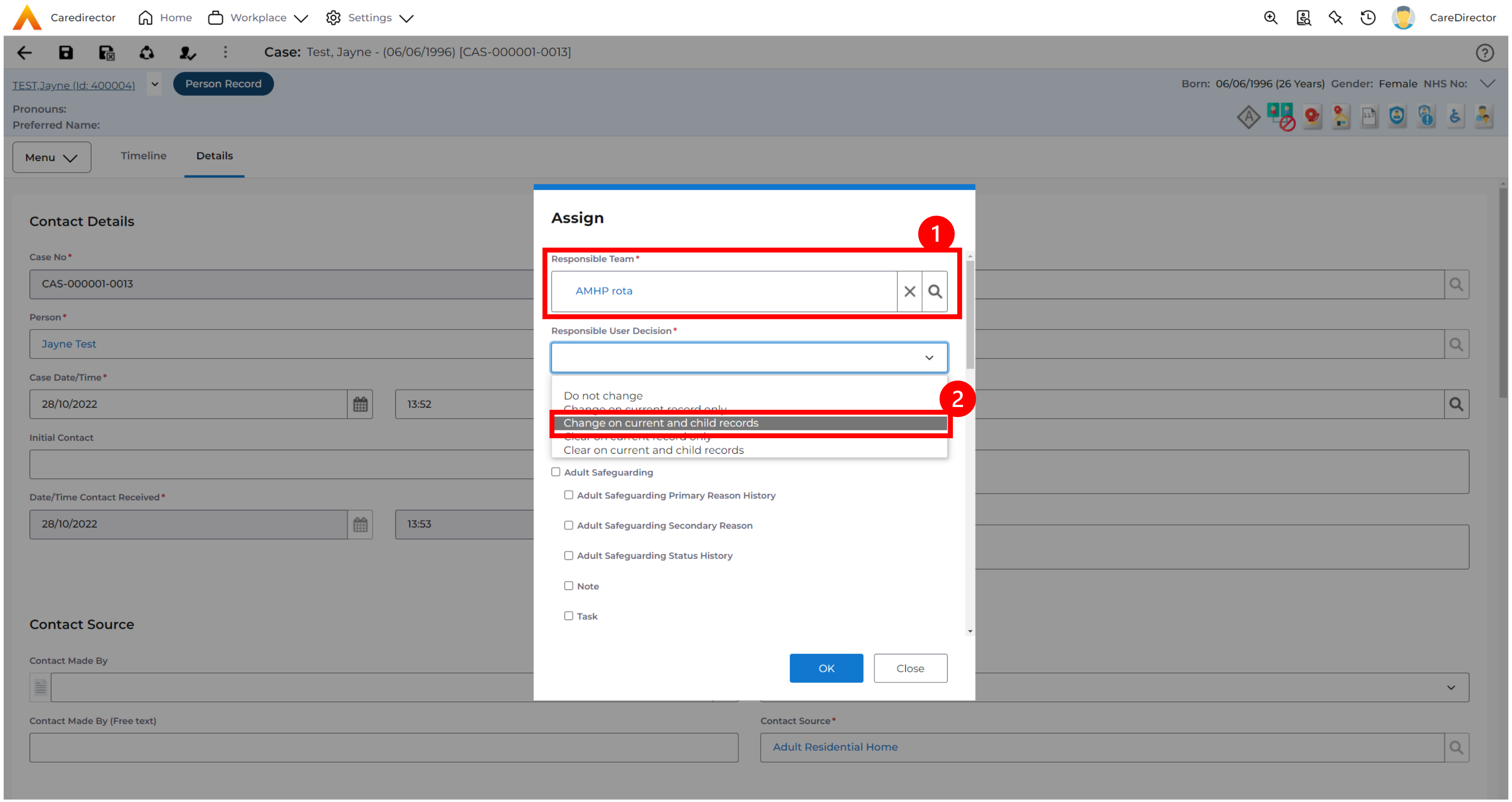


Appendix 2.1 – How to Allocate a Case Part 2

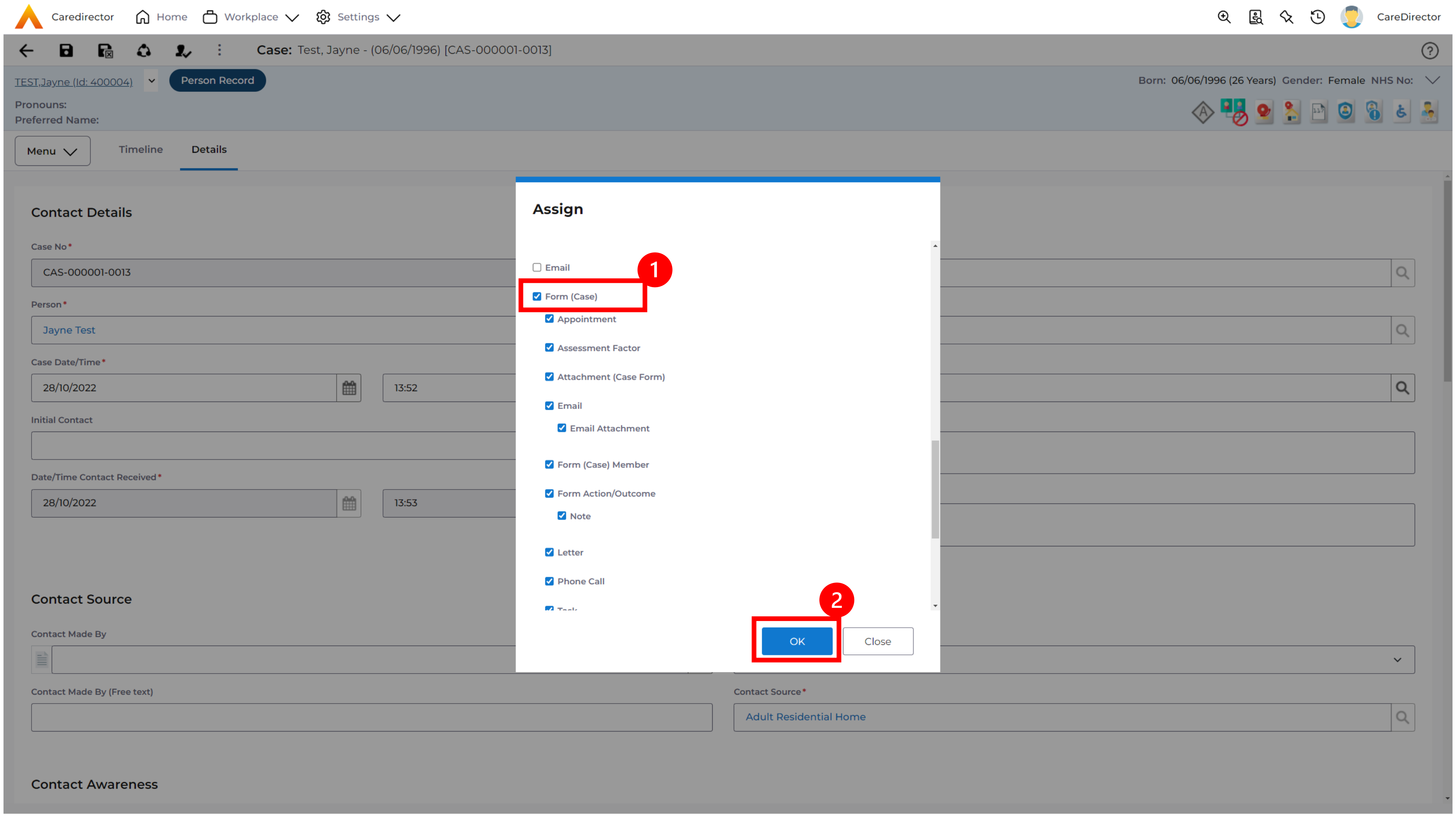
1. Once Part 1 has been saved. If they require to change the **Responsible Team** or **Change the Responsible User/ Team** on the **AMHP Form,** then select the **Assign this Record to another team.**



2. This will open a new window. Choose the **Responsible Team** first, then under **Responsible User Decision** select **Change on Current and Child Records.** This will give you another field that will have the list of System Users from the **Responsible Team** you just selected.

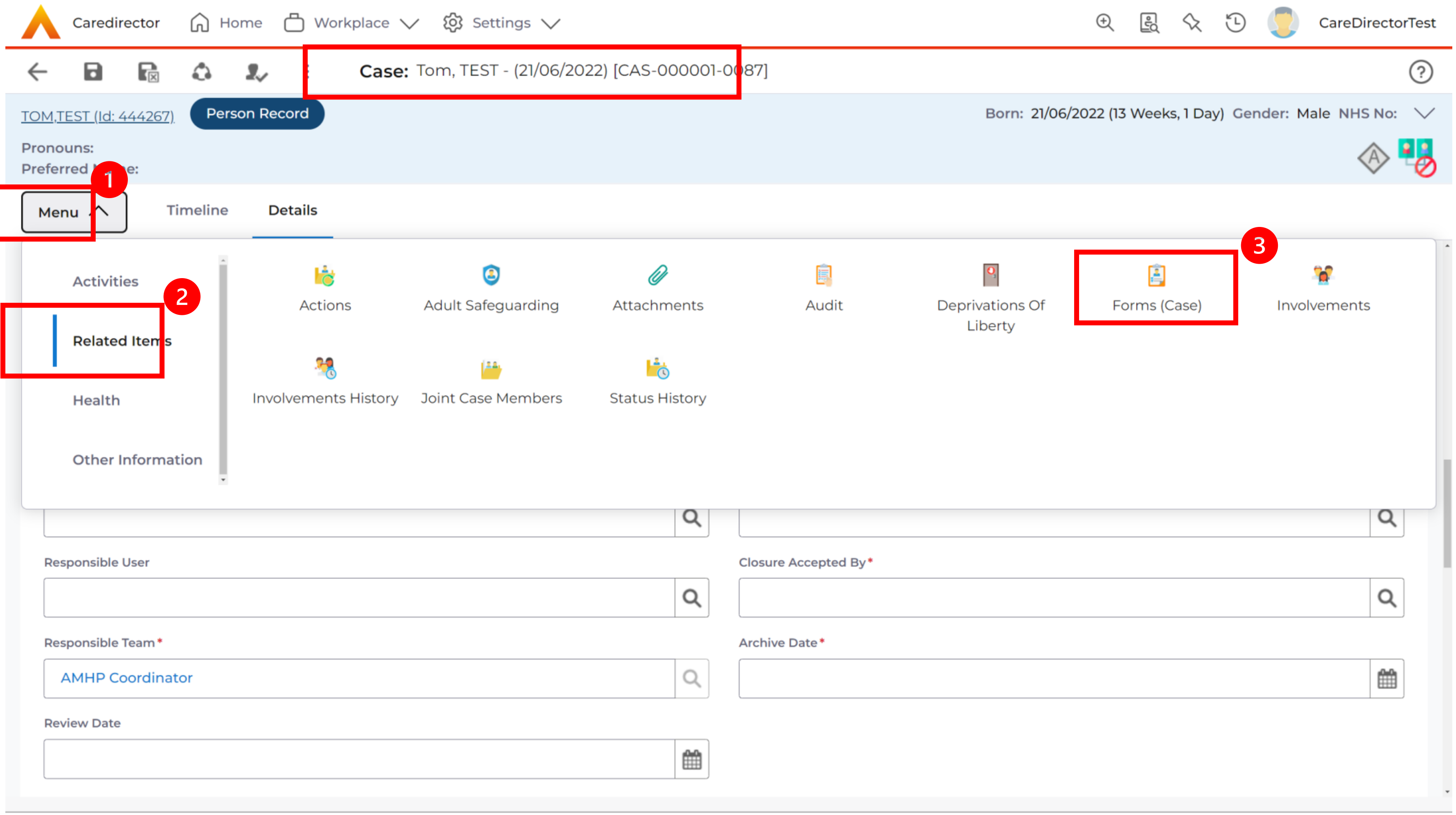


3. After selecting the user from the list, under **Related Records to Include** find the checkbox next to **Forms (Case)** and select it. Then **OK**.



Appendix 3 - How to create and launch the AMHP report form

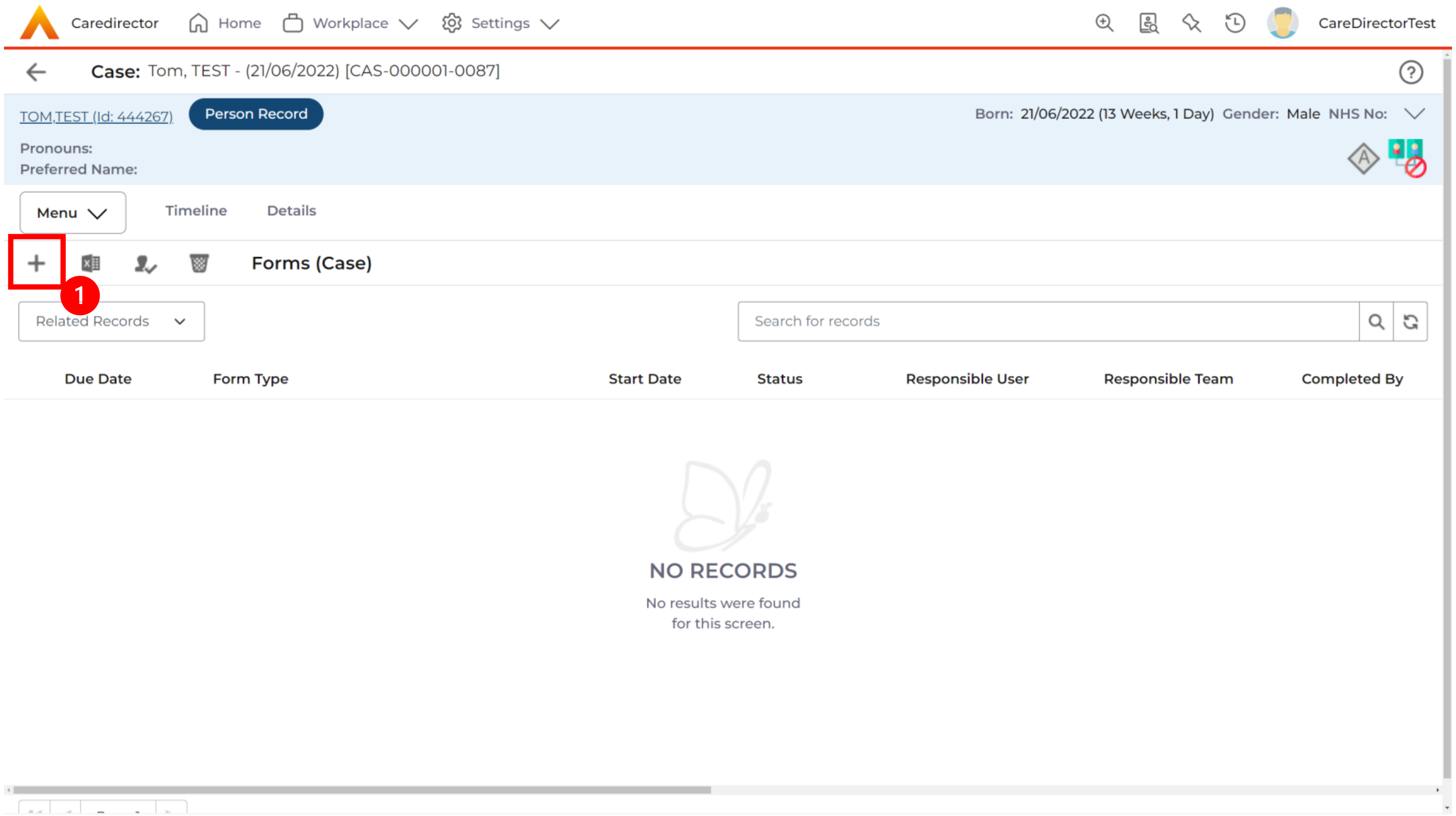
1. Select the **Menu** drop down list within the **Case Record**. Then select **Related Items** then **Forms (Case)**.



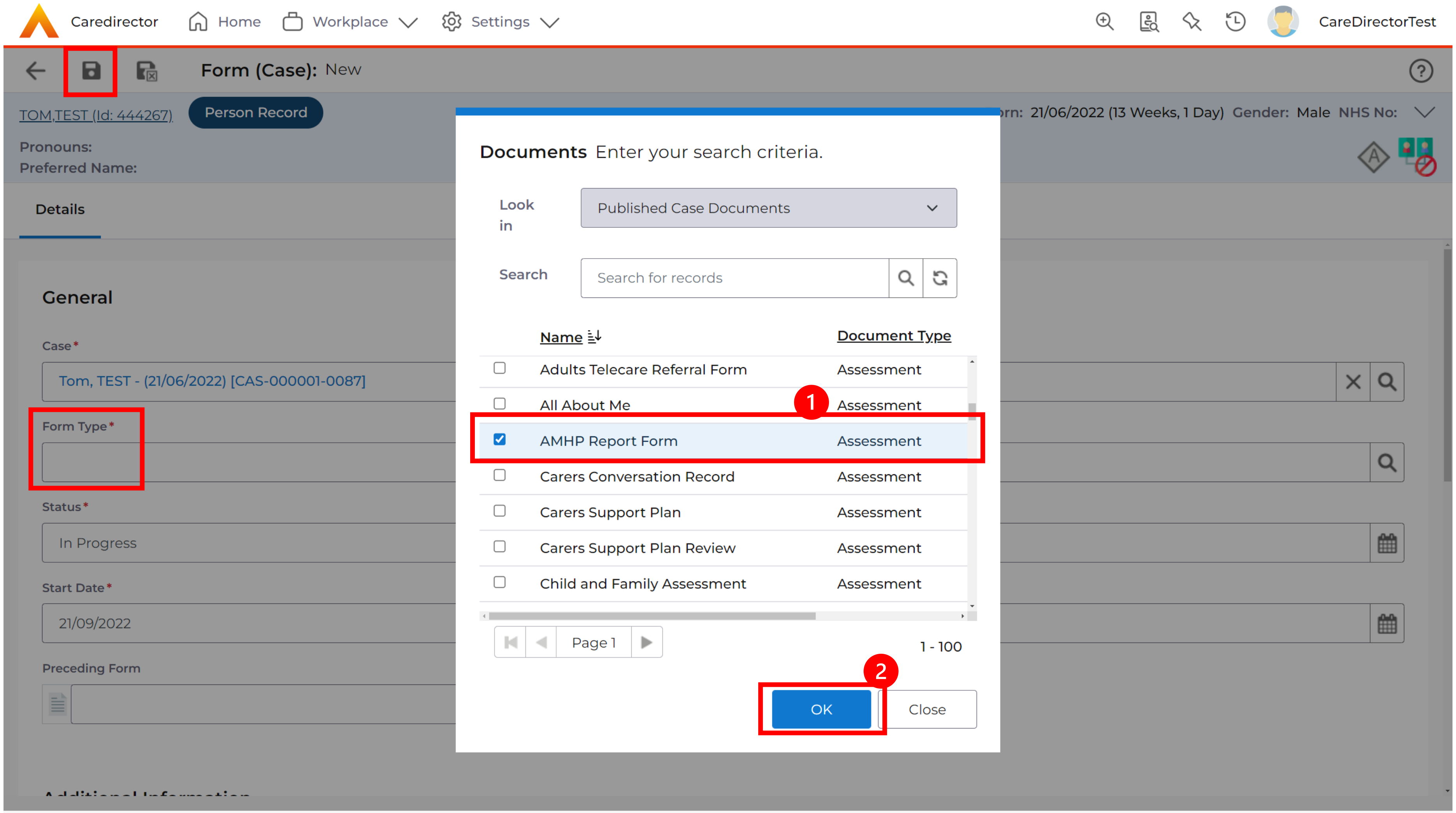
2.

3. Please note: If you see that there is another open **AMHP Report Form** against this **Case**, that someone else has completed or part-completed you can still open and complete your form. You just need to be mindful that when you have finished your work and need to close the Case down, you will need to contact the other Practitioner to tell them to close their form.

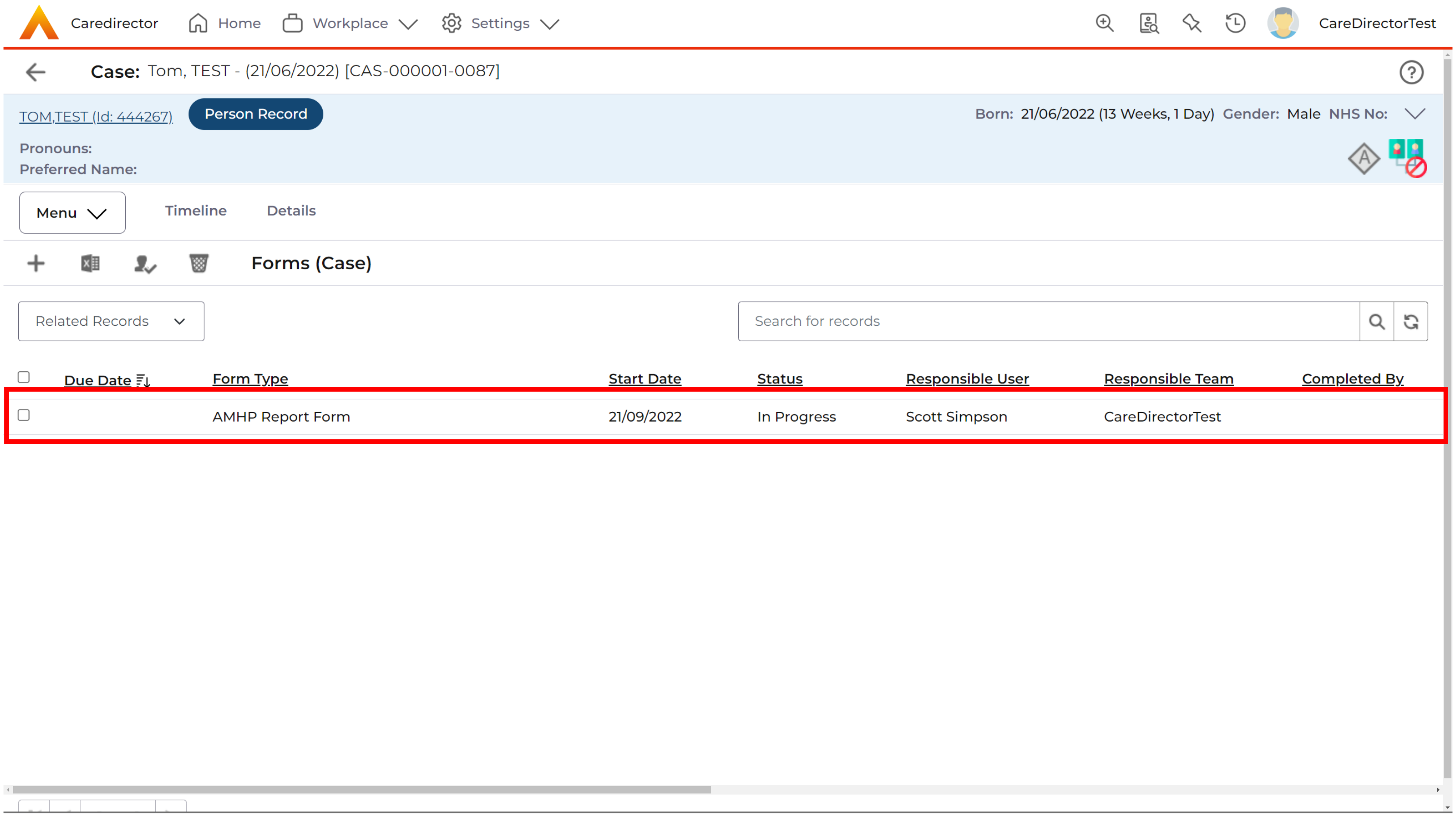
4. If there is not a **AMHP Report Form,** create one by select the **Create New Record** icon on the widget toolbar.



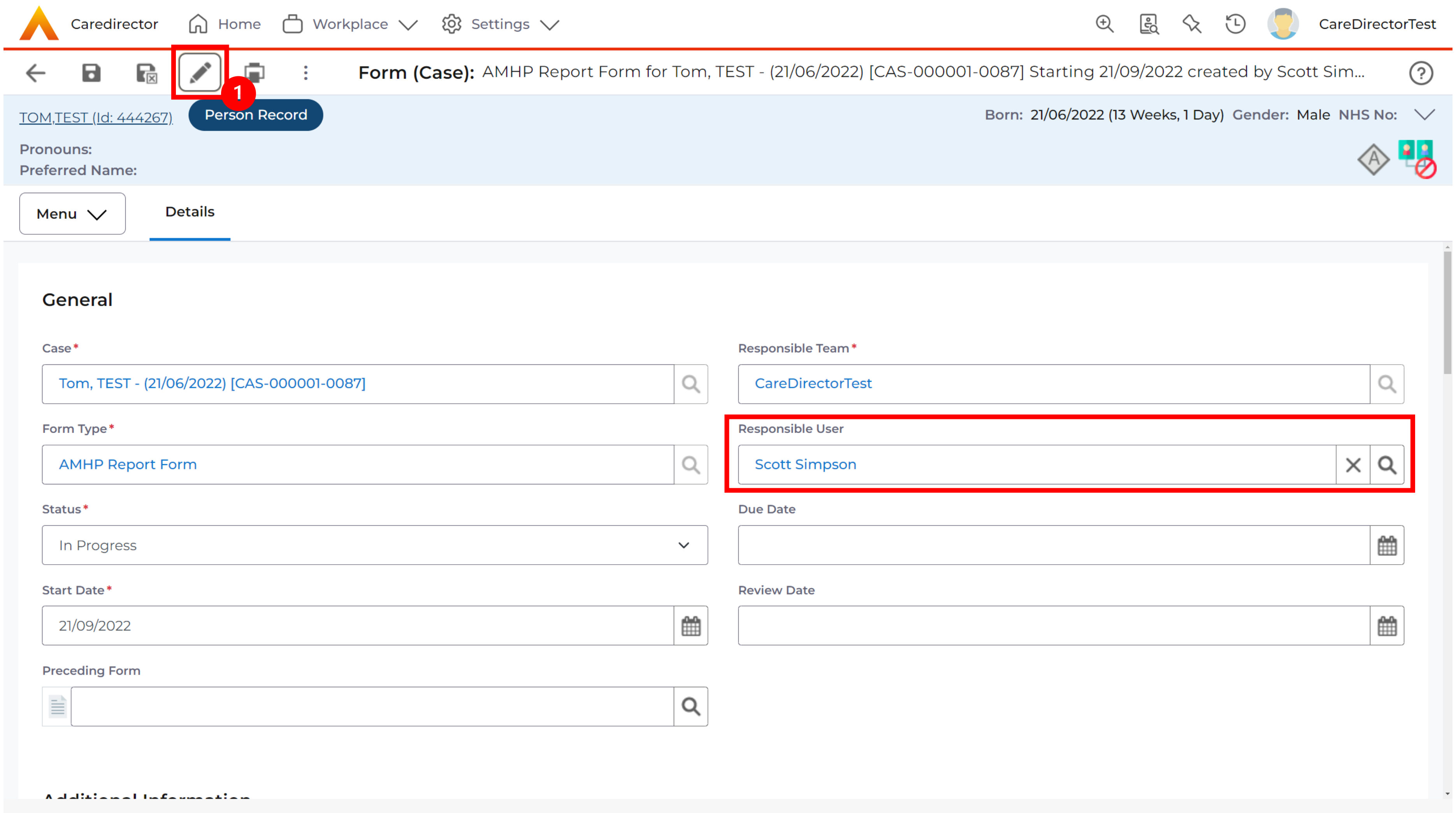
5. This will open the Form (Case) creation screen. Under **Form Type** field select the **Lookup** function and select **AMHP Report Form.** Then select **OK.** Then **Save.**



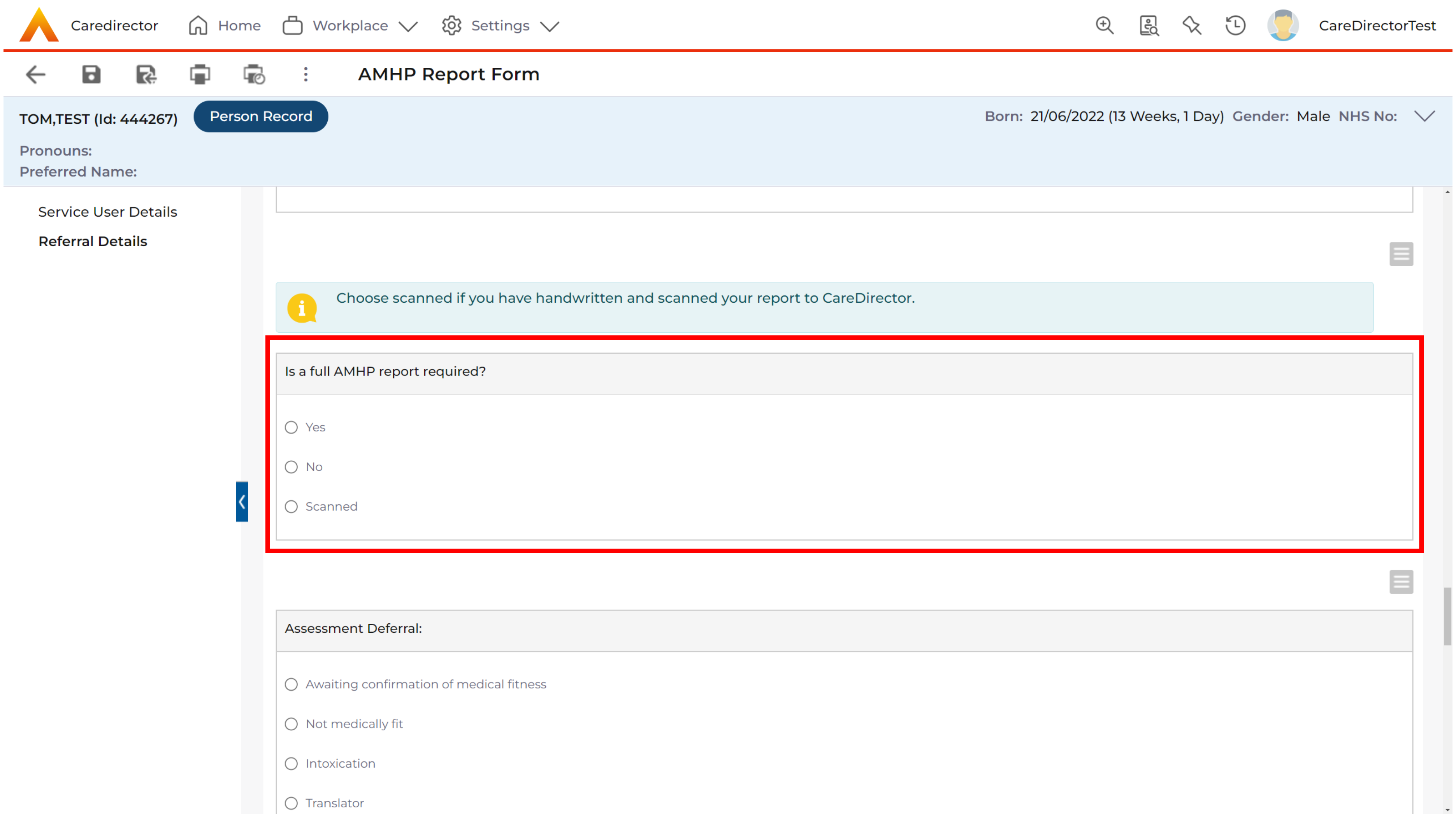
6. However, if there is one already available. Double click on the **AMHP Report Form** to open.



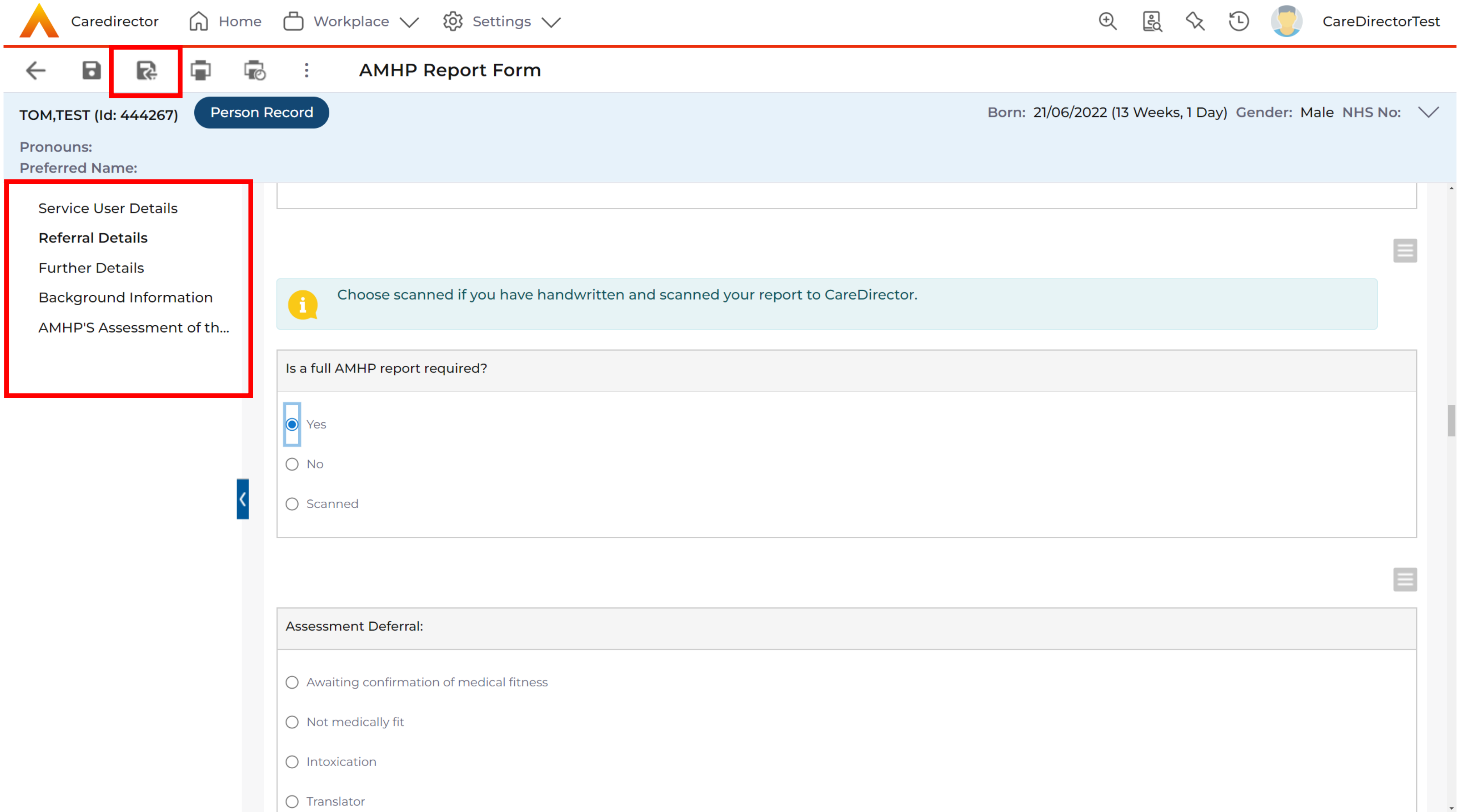
7. Once the Form is open, ensure you are named as **Responsible User.** Then open the form by selecting the pencil **Edit** icon on the toolbar.



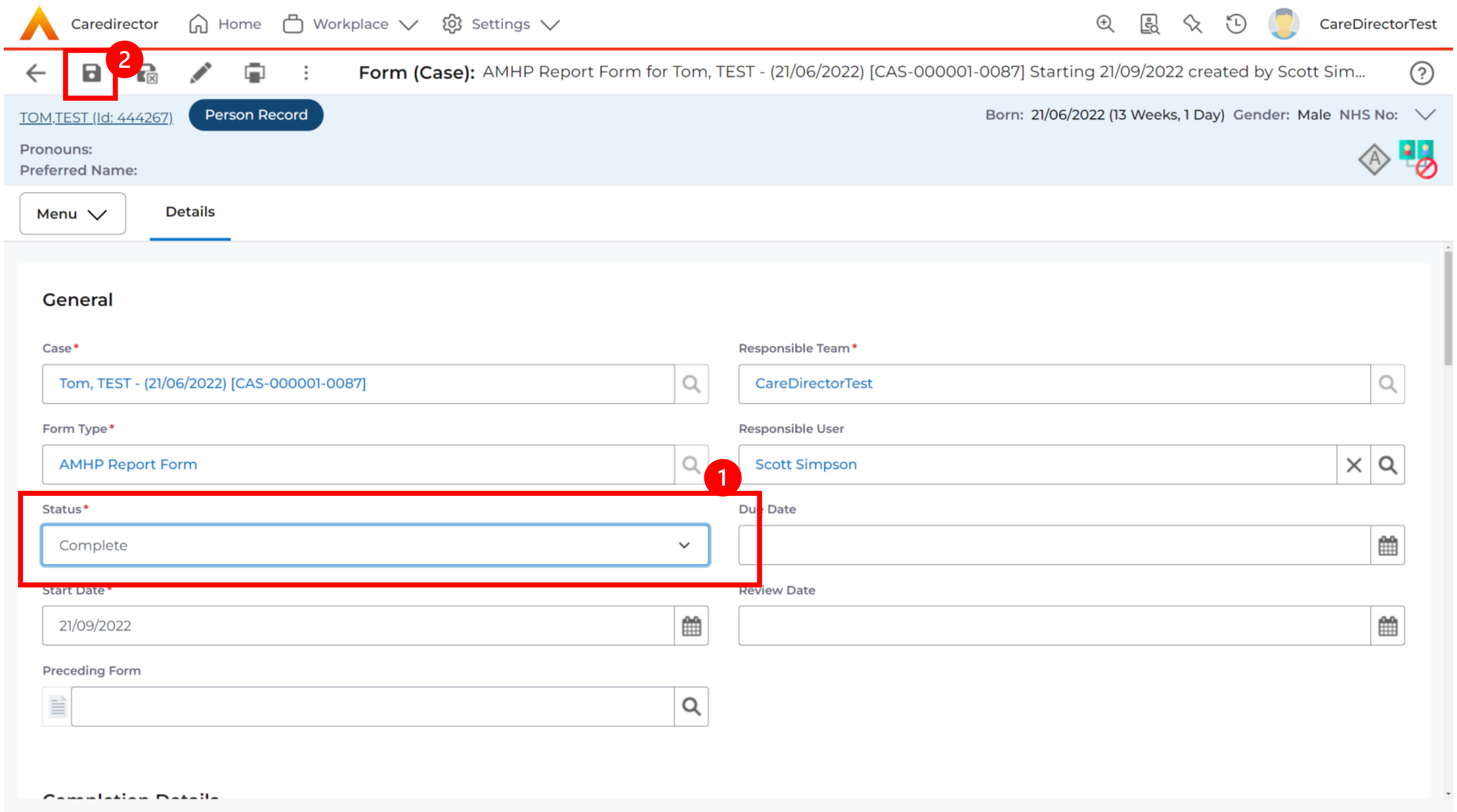
8. On the left-hand list, these are the sections of the form. Under **Referral Details** scroll down the main text until you reach **"Is a Full AMHP report required?"** If you select **Yes** new sections in the form will be displayed.



9. Fill out the relevant sections within this form and when completed select **Save and Return to Previous page.**



10. This will return to the **Details** tab of the **Form (Case)** where the **Status** can now be changed to **Complete**. When changed, select **Save.**



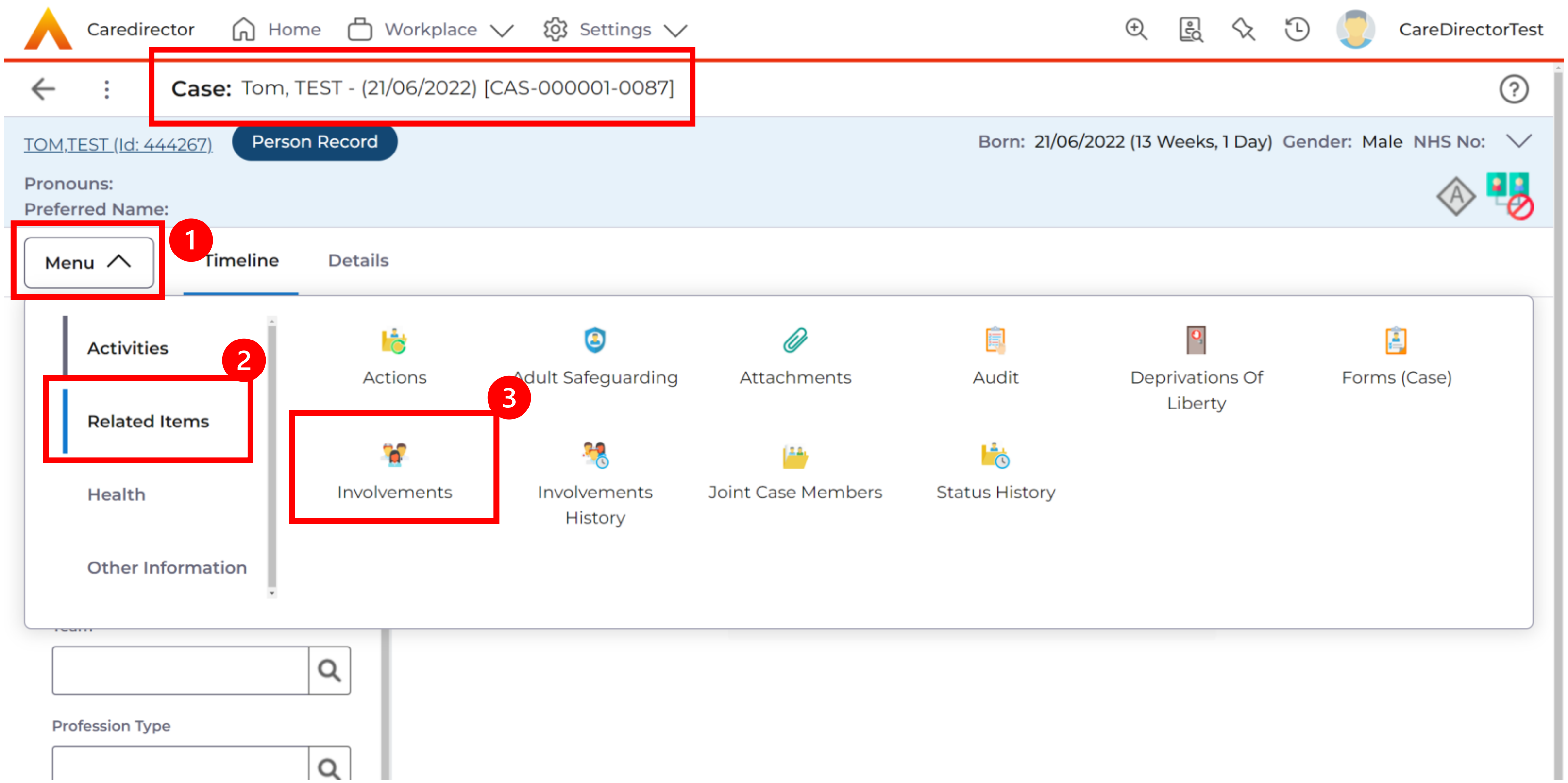
11. The form will automatically close (there is no need for Manager sign-off). The Case can now be fully closed.

Appendix 4 - How to close a Case (Close and Log as Enquiry)

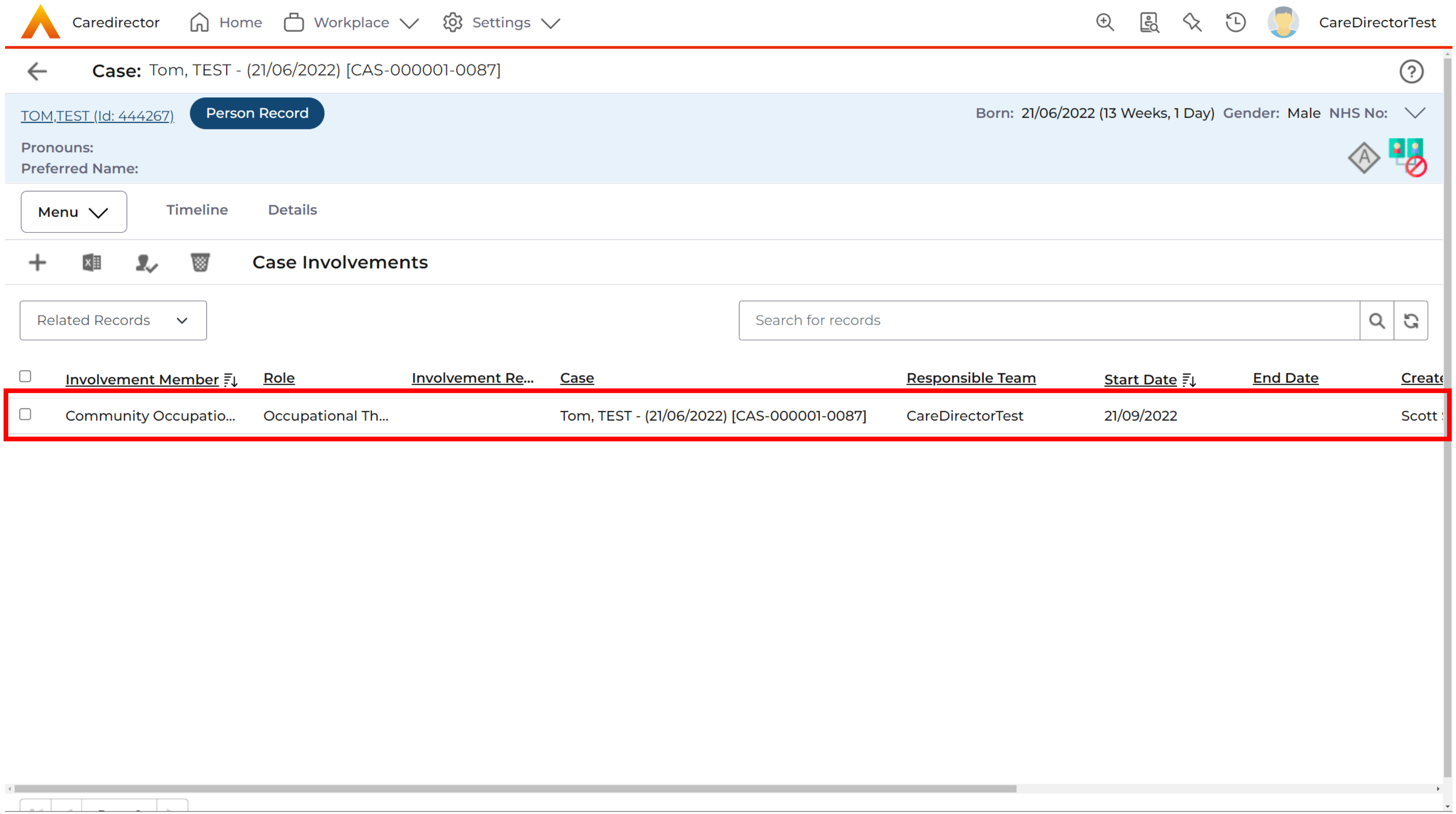
Appendix 4.1 - Ending Involvements

1. Before a Case can be closed, any ongoing work associated with the **Case** must be ended.

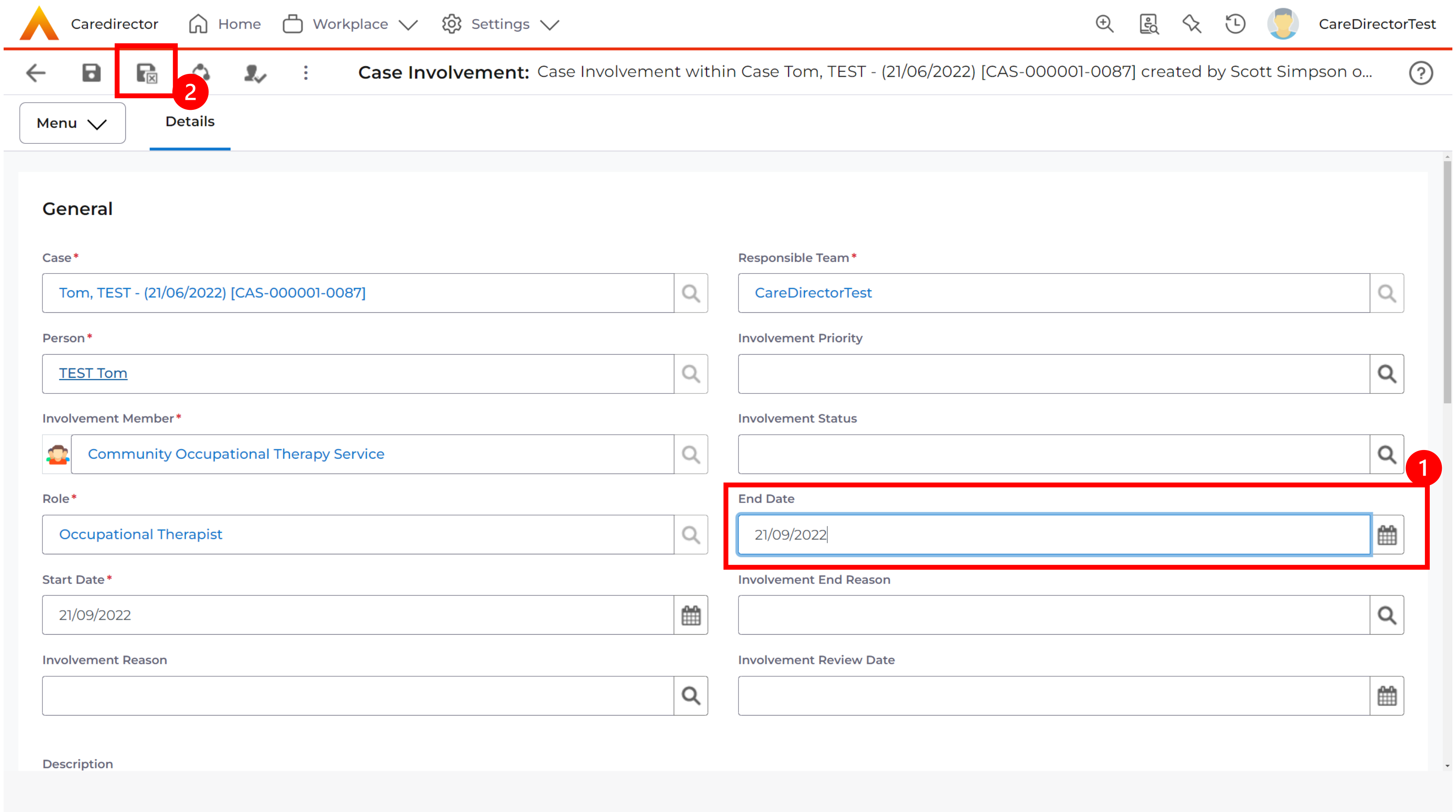
2. From the **Menu** dropdown list on a **Case Record**, select **Related Items** and then **Involvements.**



3. Open the relevant entry by double clicking an open space. This will open the involvement.



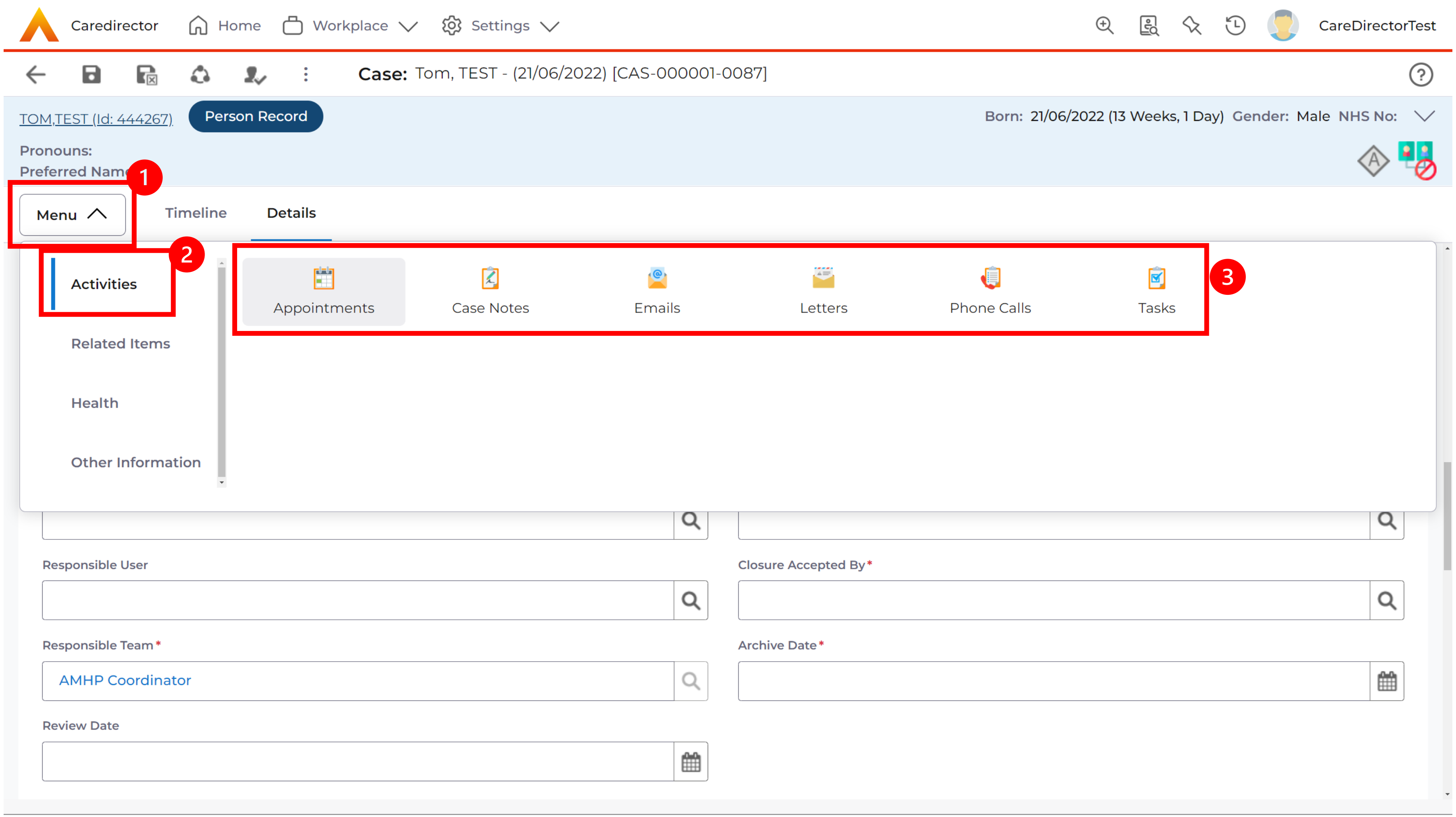
4. Enter today's date in the **End Date** field. Then select **Save and Return to Previous Page** and repeat the process until all **Involvements** are ended.



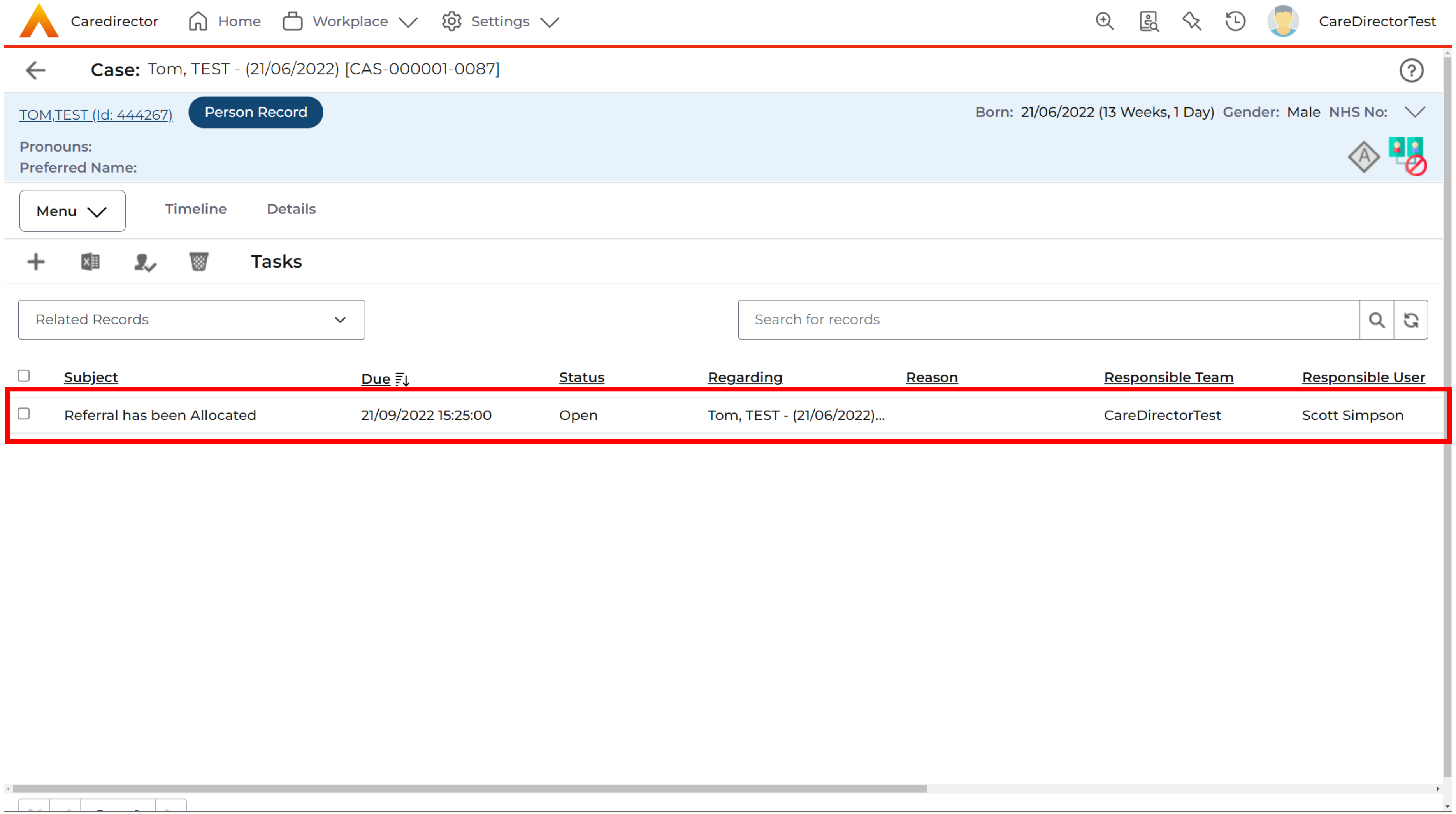
5. If the Case cannot be closed, there will be ongoing work associated with the Case.

Appendix 4.2 - Close an Open Activity

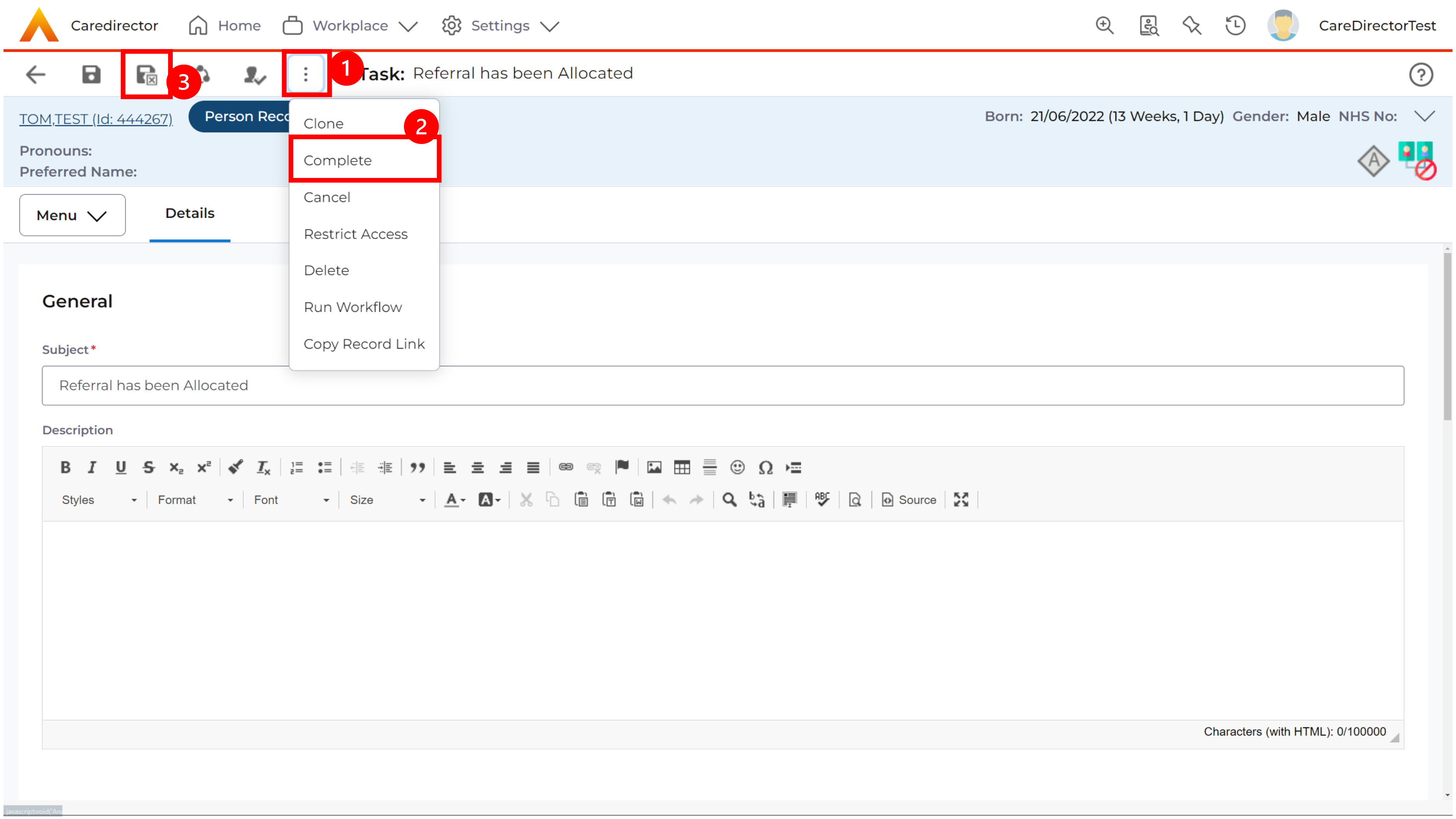
1. Select **Menu** within the **Case Record.** Then select **Activities** and open the relevant location of an activity.



2. Open the relevant location of an activity has been opened. Select the **Activity** that needs to be closed from the options.

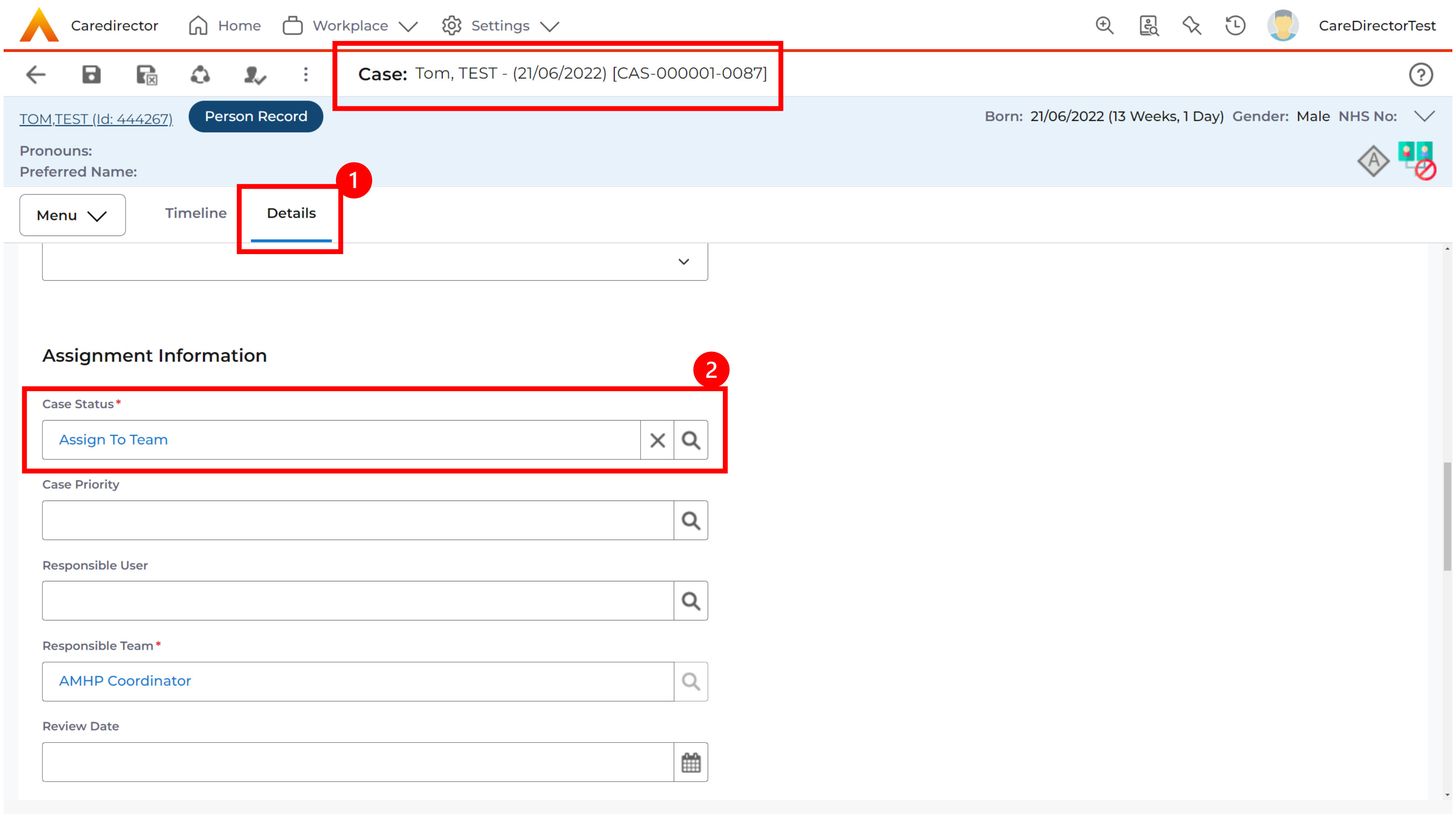


3. Located on the toolbar, select **Mark as Complete**. If it is within the three dots, select **Complete**. Then select **Save and Return to Previous Page.**

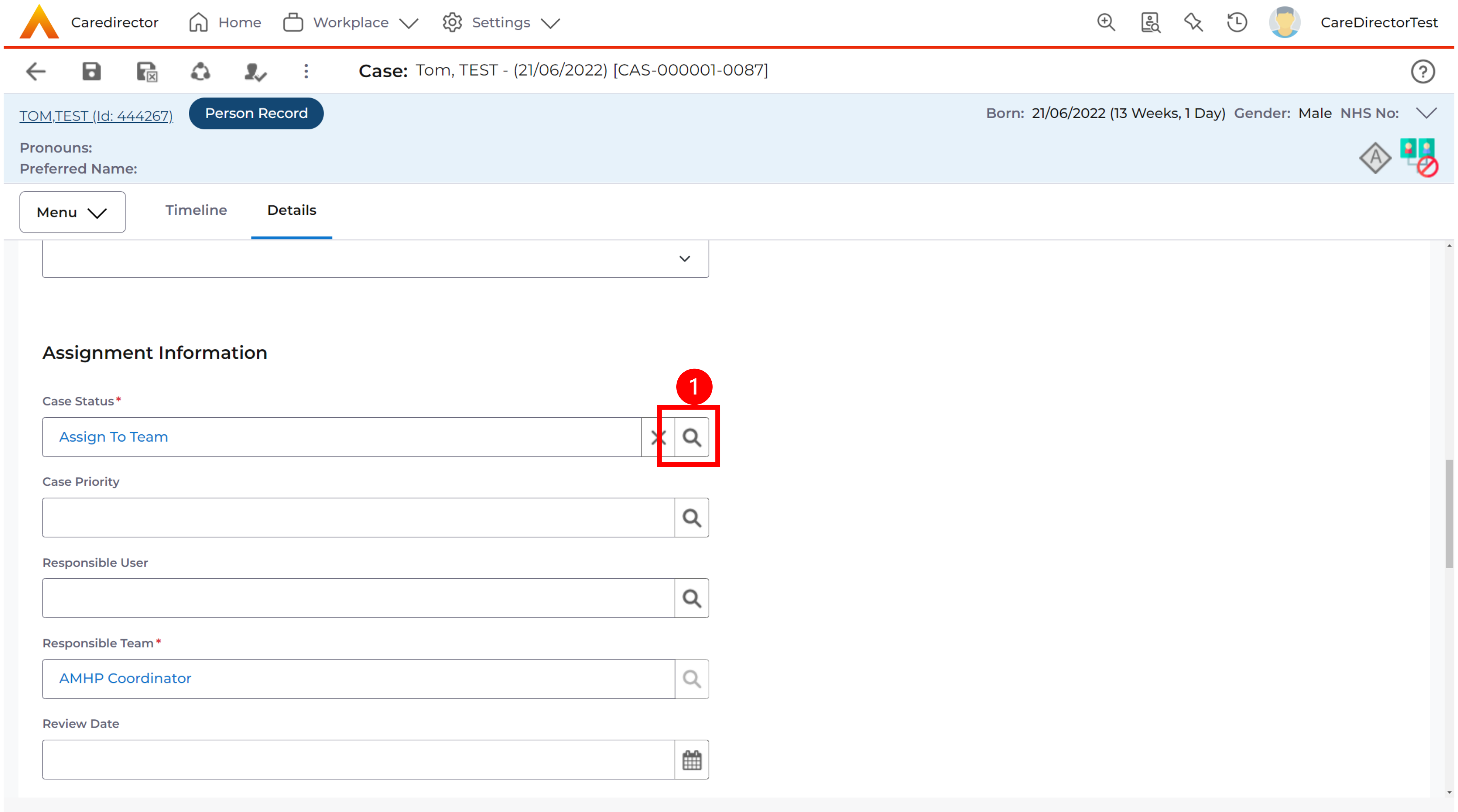


Appendix 4.3 - Close and Log as Enquiry

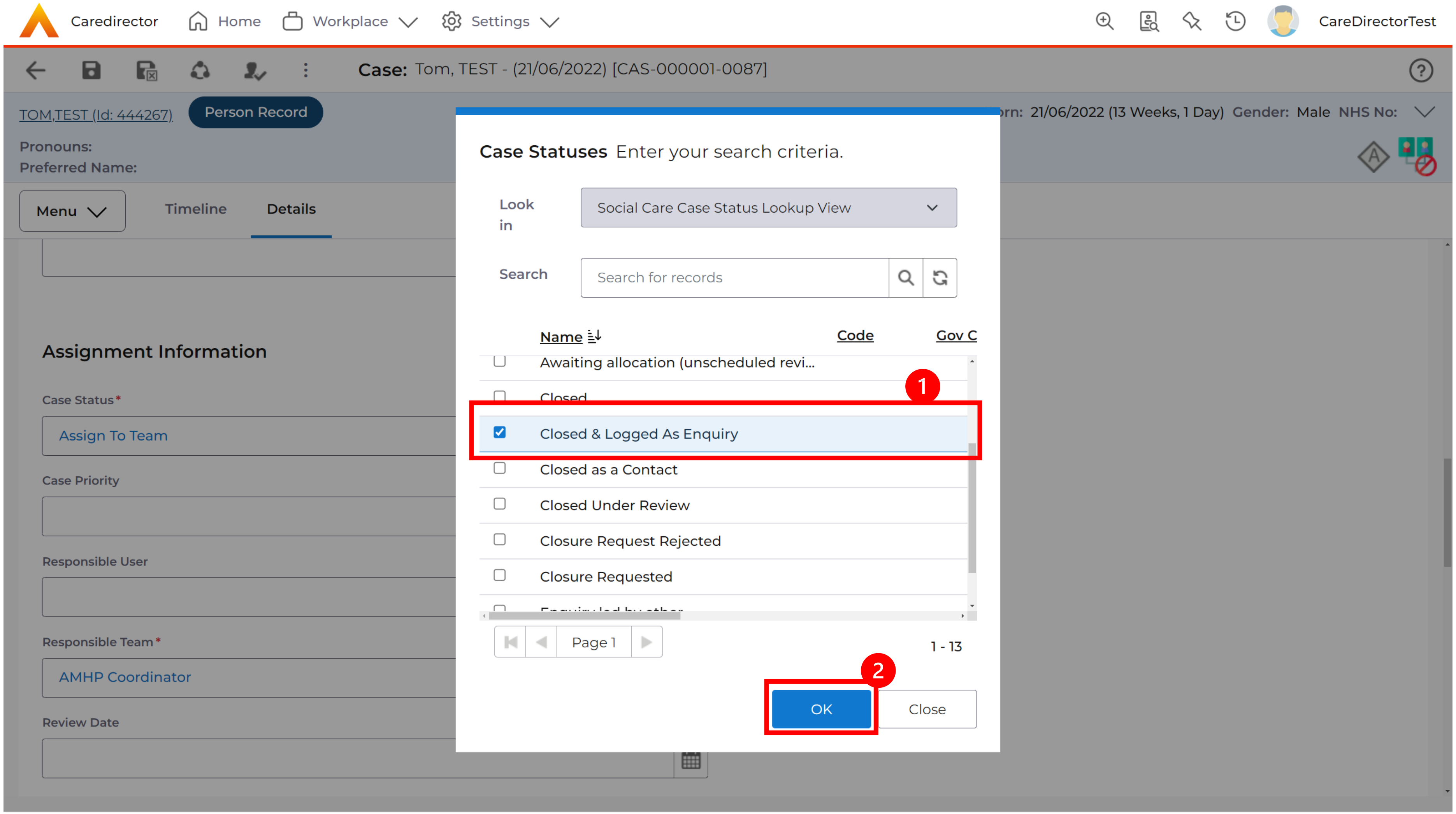
1. After all work has been completed, select the **Details** tab on the **Case Record**. Then scroll to **Assignment Information**.



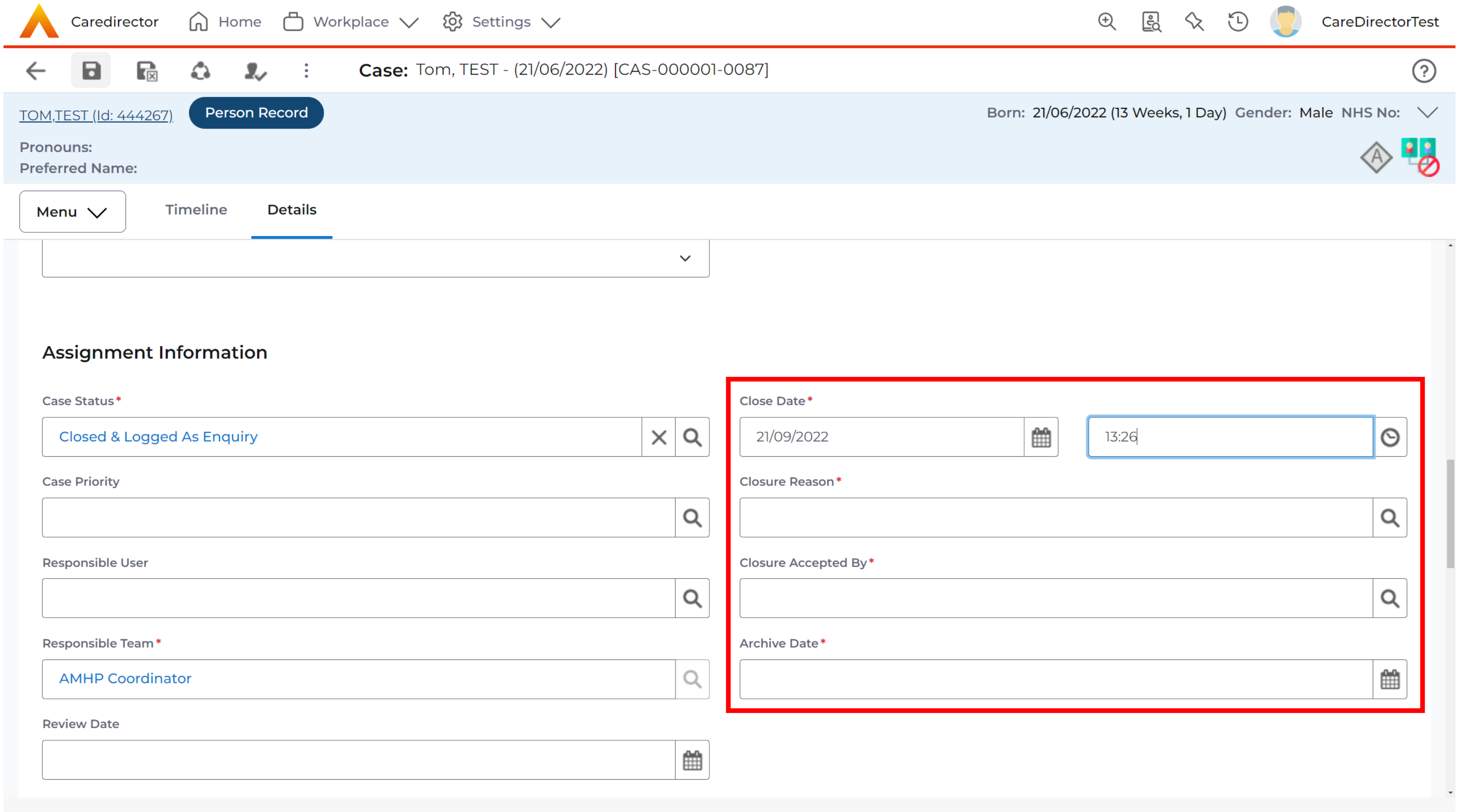
2. Select the **Lookup** function next to the **Case Status** field.



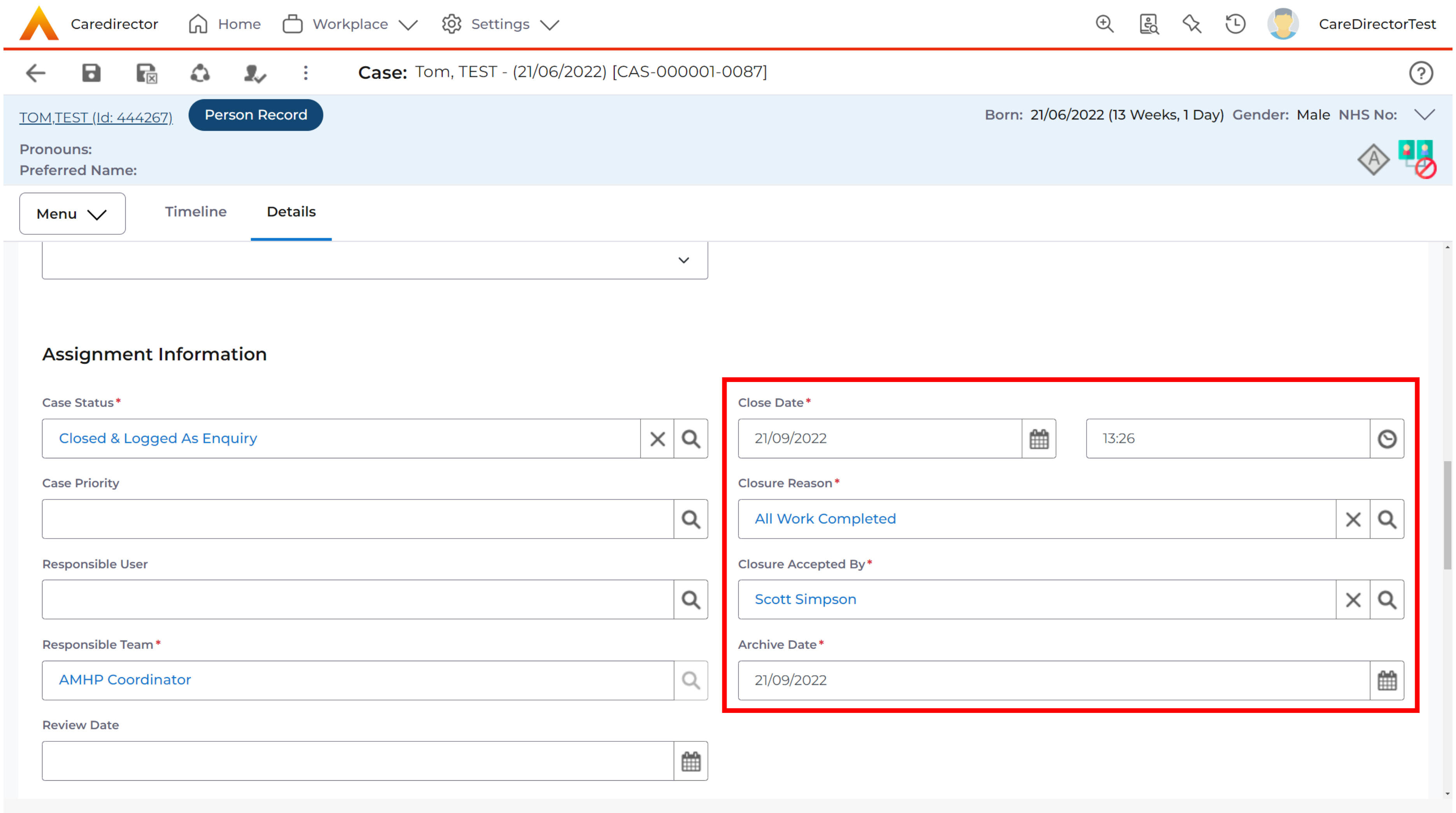
3. This will open a new window, to **Close and Log as Enquiry**. Select that option. Then select **OK.**



4. This will then show new fields on the right-hand side next to **Case Status**. Enter a **Closure Reason, Closure Accepted By** and **Archive Date.**



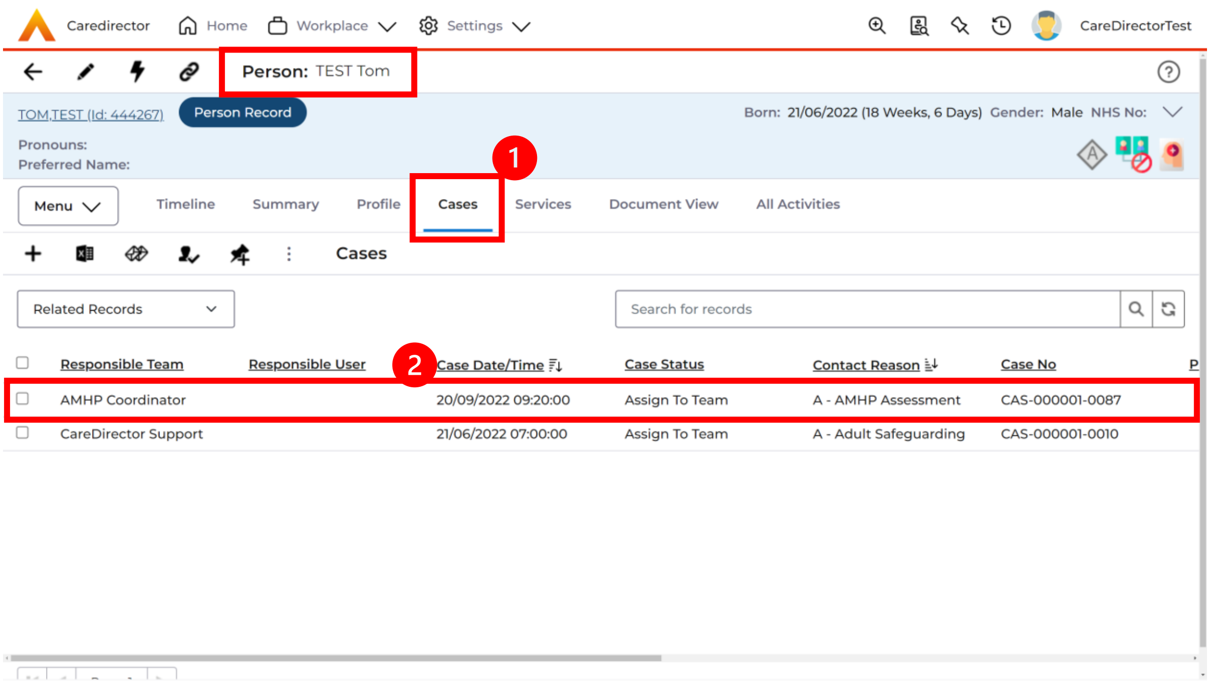
5. When finished, select **Save** and an activity will be automatically generated for the Administration Team to pick up and input any details required in the **Person Risk** section of **CareDirector**.



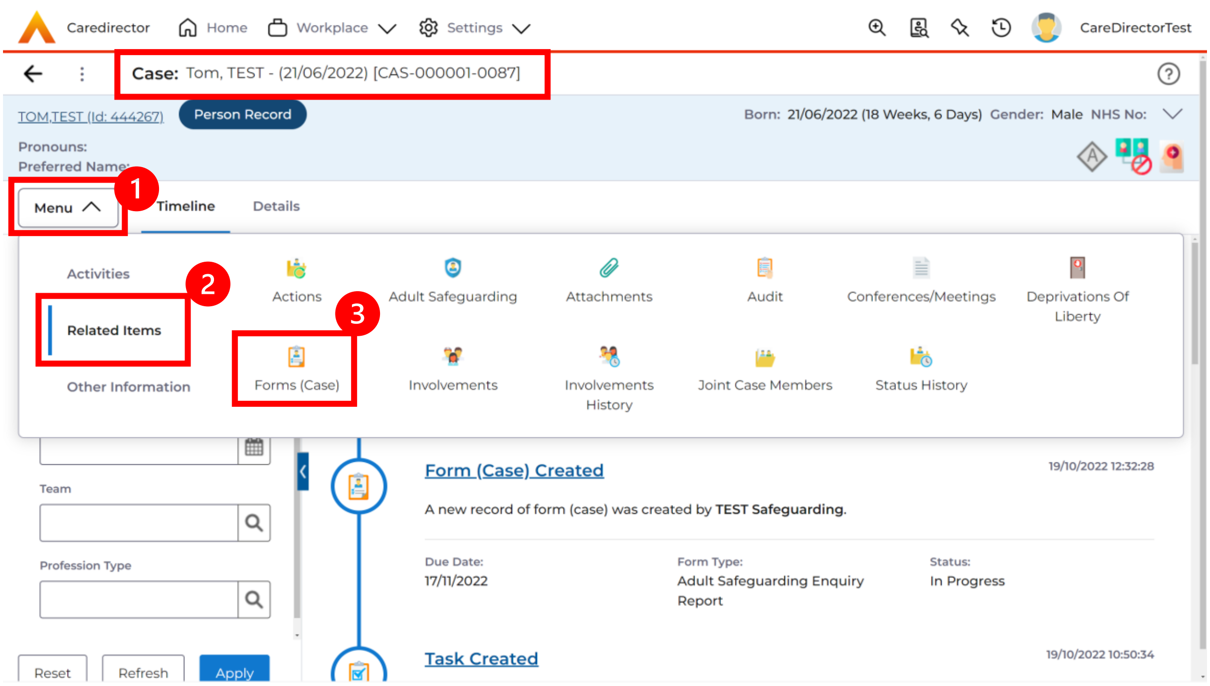
Appendix 5 – How to Transfer (Change Ownership) of a Case

Appendix 5.1 - AMHP Assessment Case Process

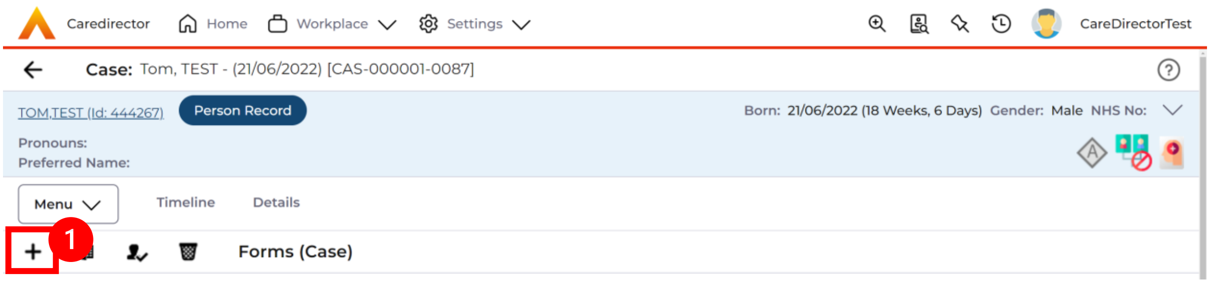
1. Locate the **AMHP Assessment Case** through the **Person Record** or through your **Dashboard** and open it.



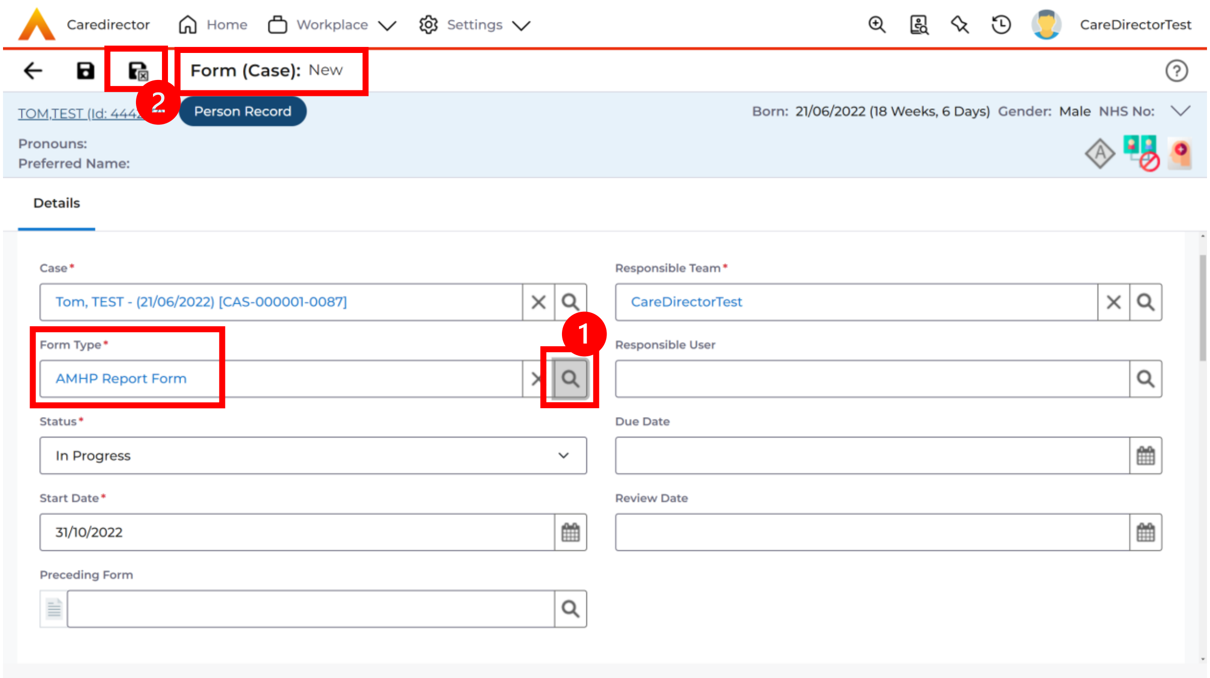
2. Once opened, we need to add the **AHMP Form.** Select **Menu**, **Related Items** and then **Form (Case)**.



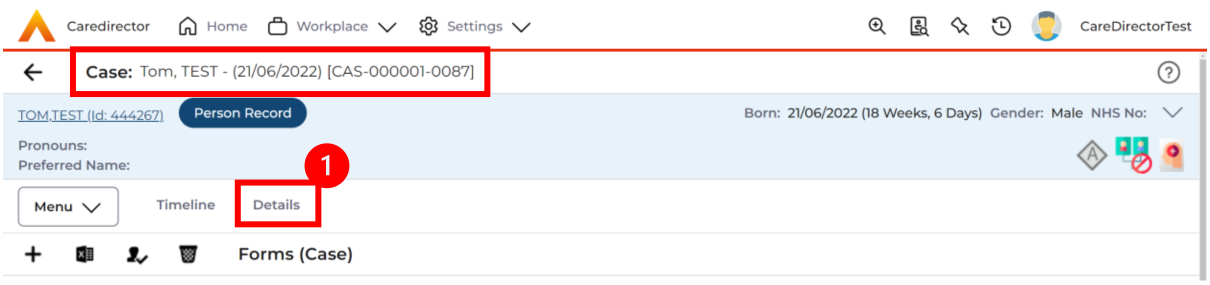
3. Select the **Create New Record** from the **toolbar**.



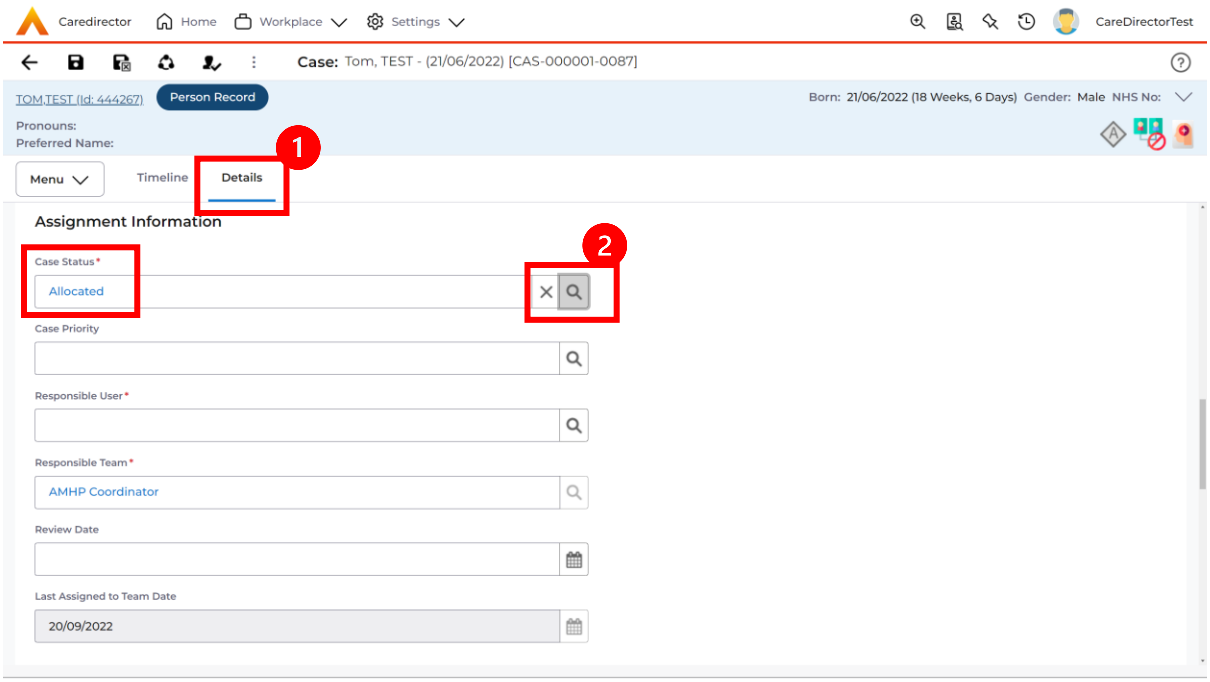
4. Under **Form Type** select **AMHP Report Form** and fill in the other mandatory fields. Once done select **Save and Return to Previous Page.**



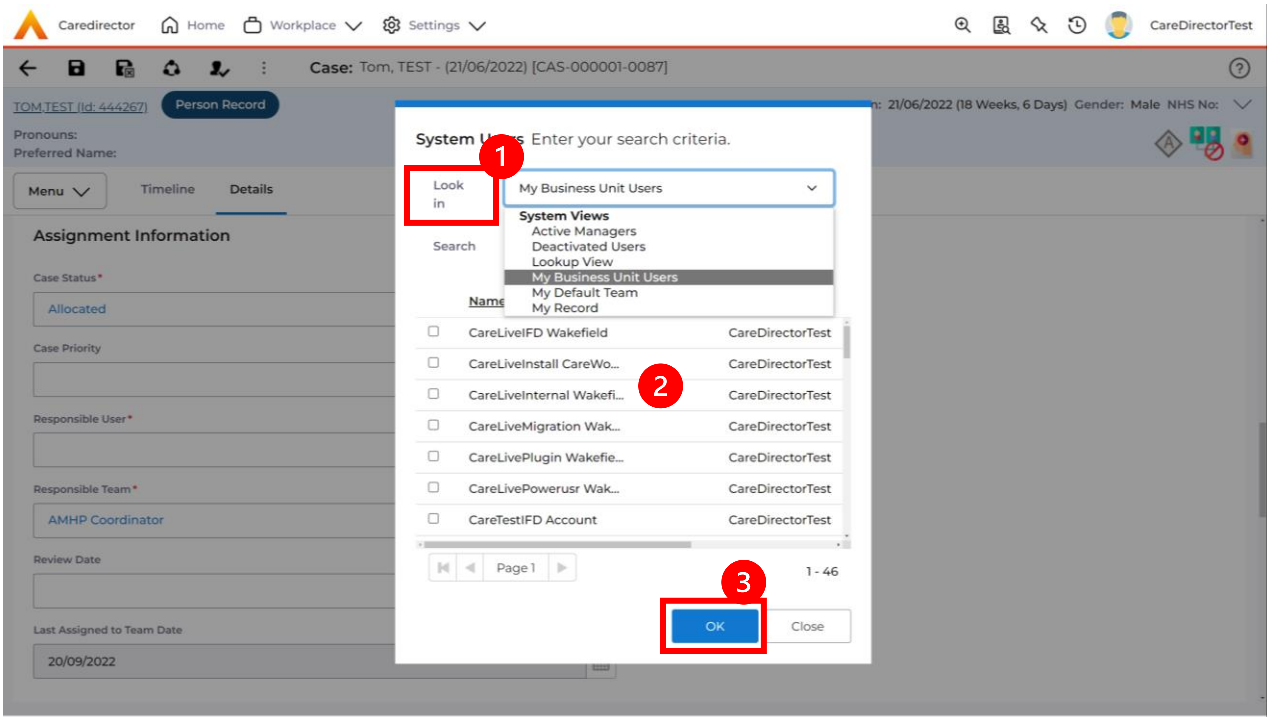
5. Once you returned to the **Case Record** select the **Details** tab. We need to now **allocate** the **Responsible User.**



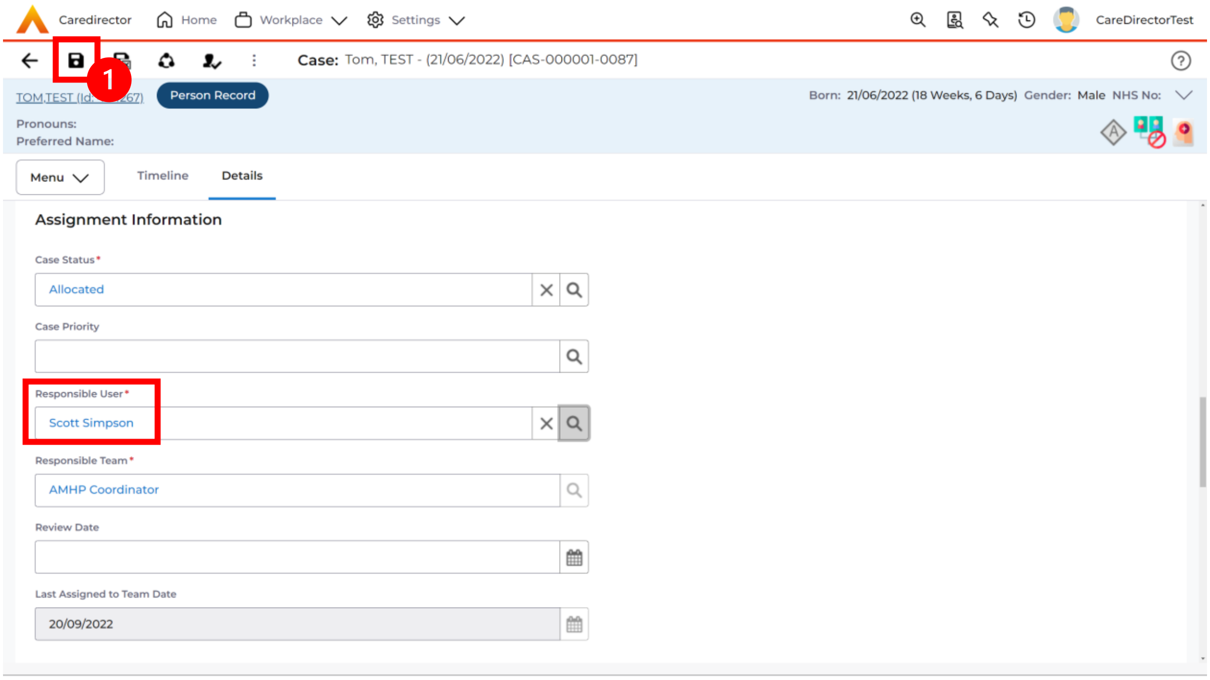
6. Scroll down to **Assignment Information** and change the **Case Status** next to **Lookup function** and change the **Status** to **Allocated.**



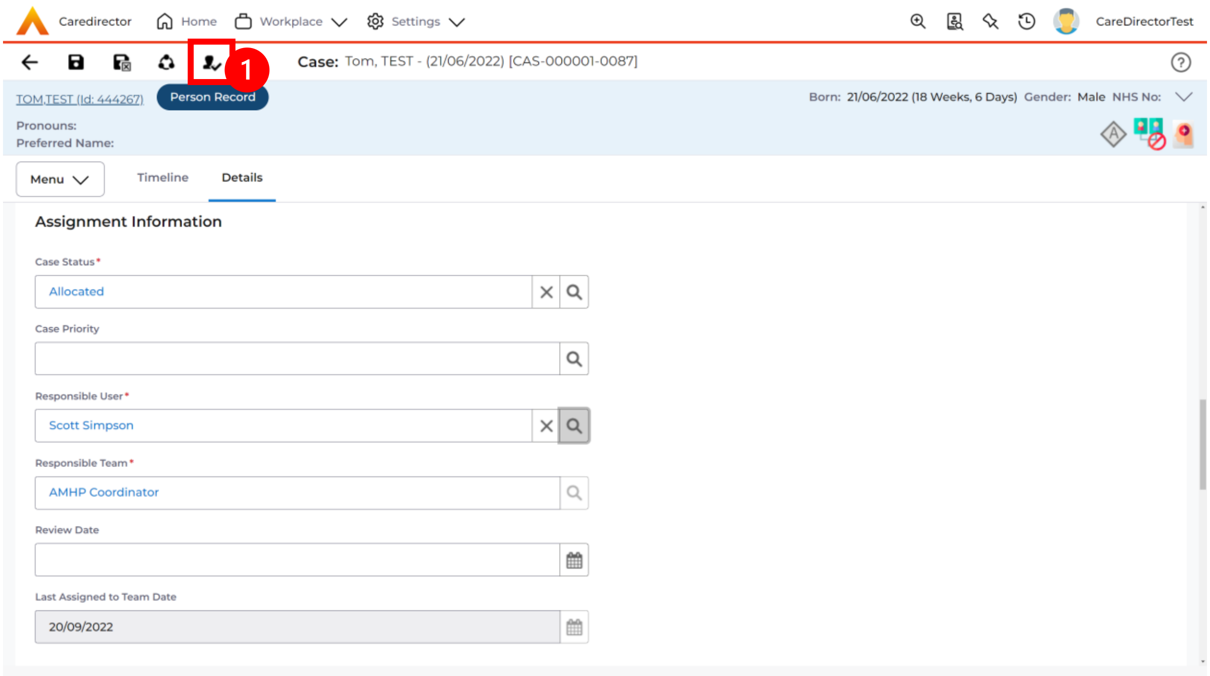
7. This will set the **Responsible User** field to mandatory for the system before it allows you to **Save**. Use the **Lookup function** and within this the **Look in** field will change who you can search for. Utilised this, changing it to **Lookup View** will search across the entire database. When selected, press **OK.**



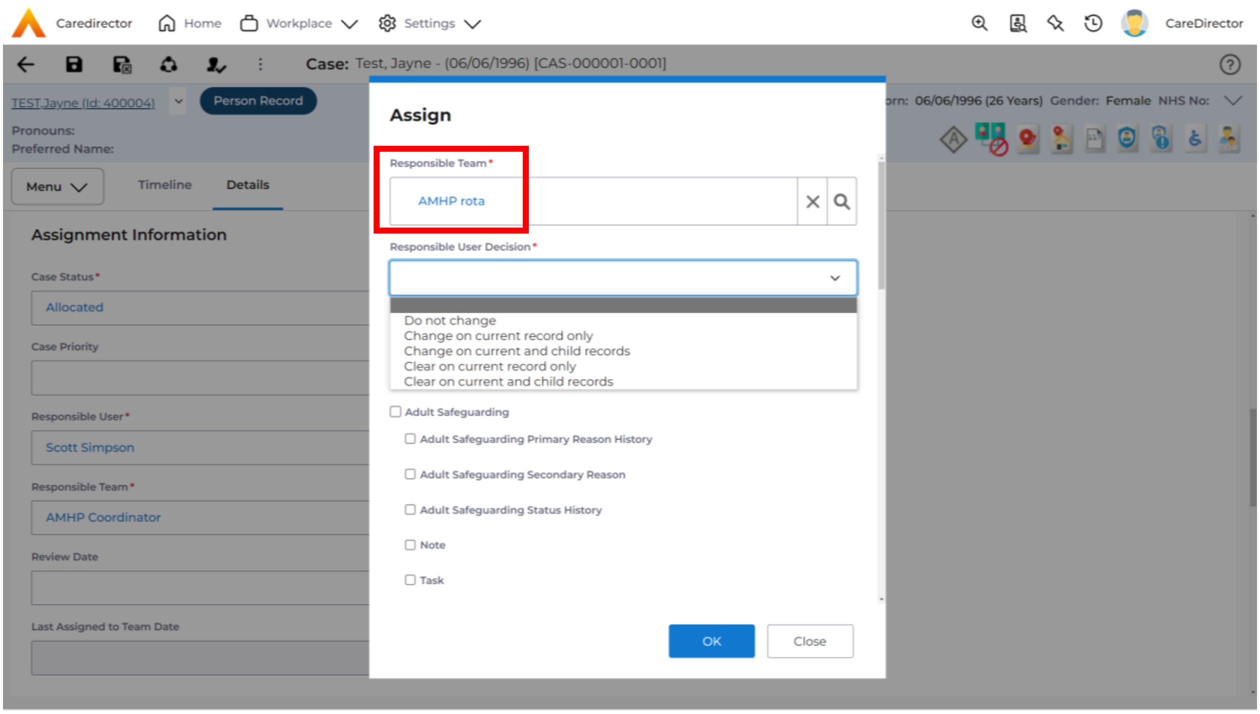
8. Once you have selected the **Responsible User** who will look at this **Case** and **AMHP Report Form**, select **Save** from the toolbar.



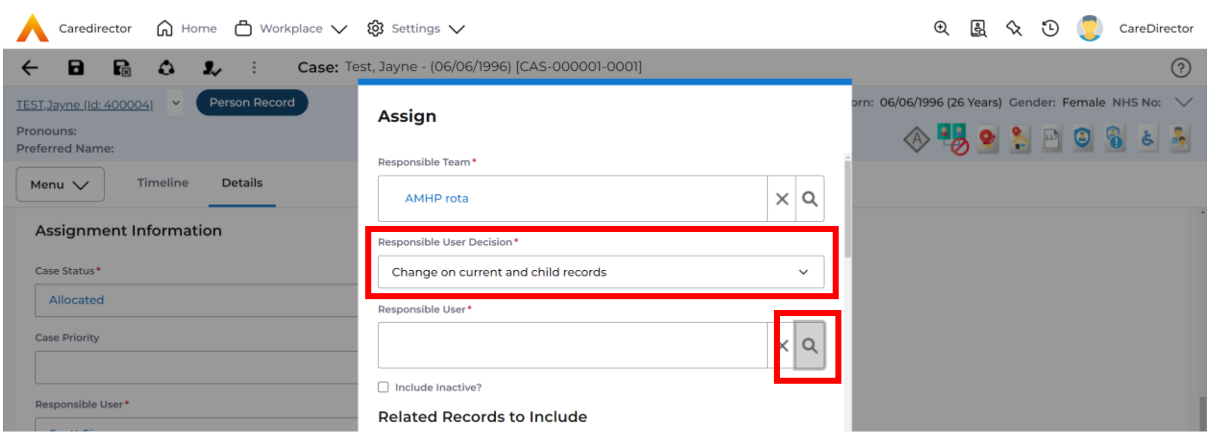
9. However, we need to change the **Responsible Team.** To do this, select the **Assign this record to another team** from the toolbar.



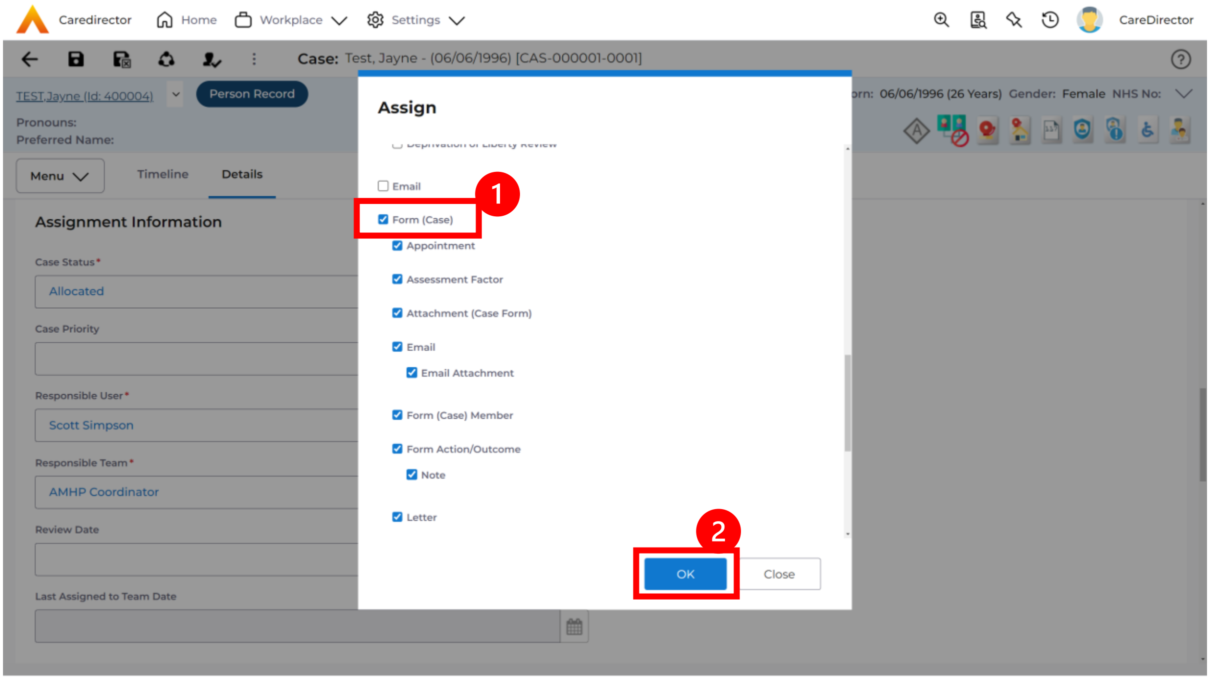
10. This will open a separate window that will ask you who the new **Responsible Team** will be and what to do about the **Responsible User**. **Responsible Team** select the **Responsible Team** that the **Responsible User** is part of.



11. Next, we need to decide what we are doing about the **Responsible User.** Even though we have already chosen the relevant worker, we still need to make sure that the **AMHP Report Form** is being allocated to that worker too. Therefore, you need to select **Change on Current and Child Records** under the **Responsible User Decision**. This will give another field using skip logic, that you need to choose that **Responsible Users** name again. This time, when you select the **Lookup function** it will show you a list of users that are part of team you selected.



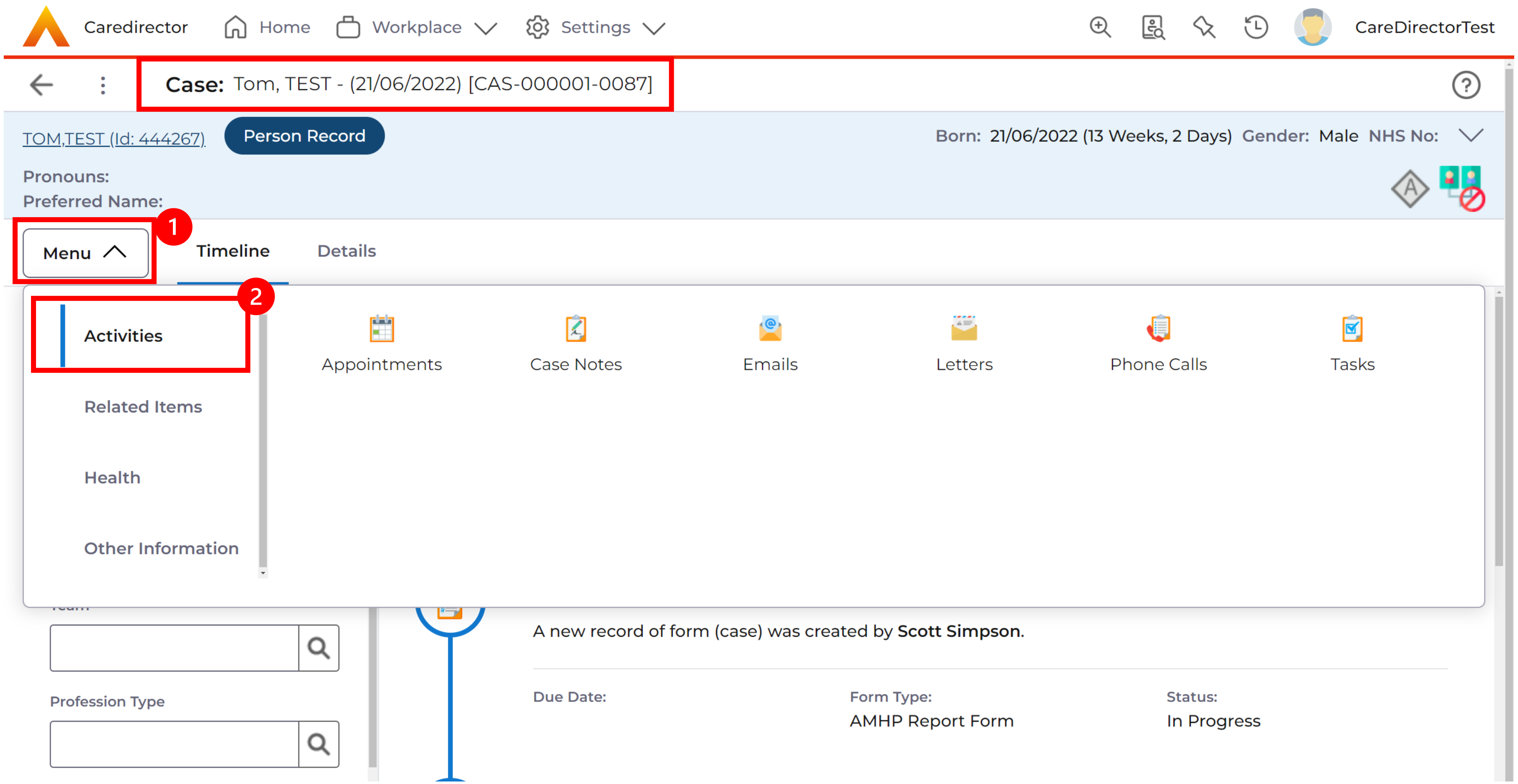
12. Before we select **OK** we need to tell the system which **CHILD** records we want it to be changed on. Due to us only adding the **AMHP Report Form** we need to scroll down on **Related Records to Include** section and select **Form (Case)** checkbox. Once you select **Form (Case)** it will select the rest automatically. Now select **OK.**



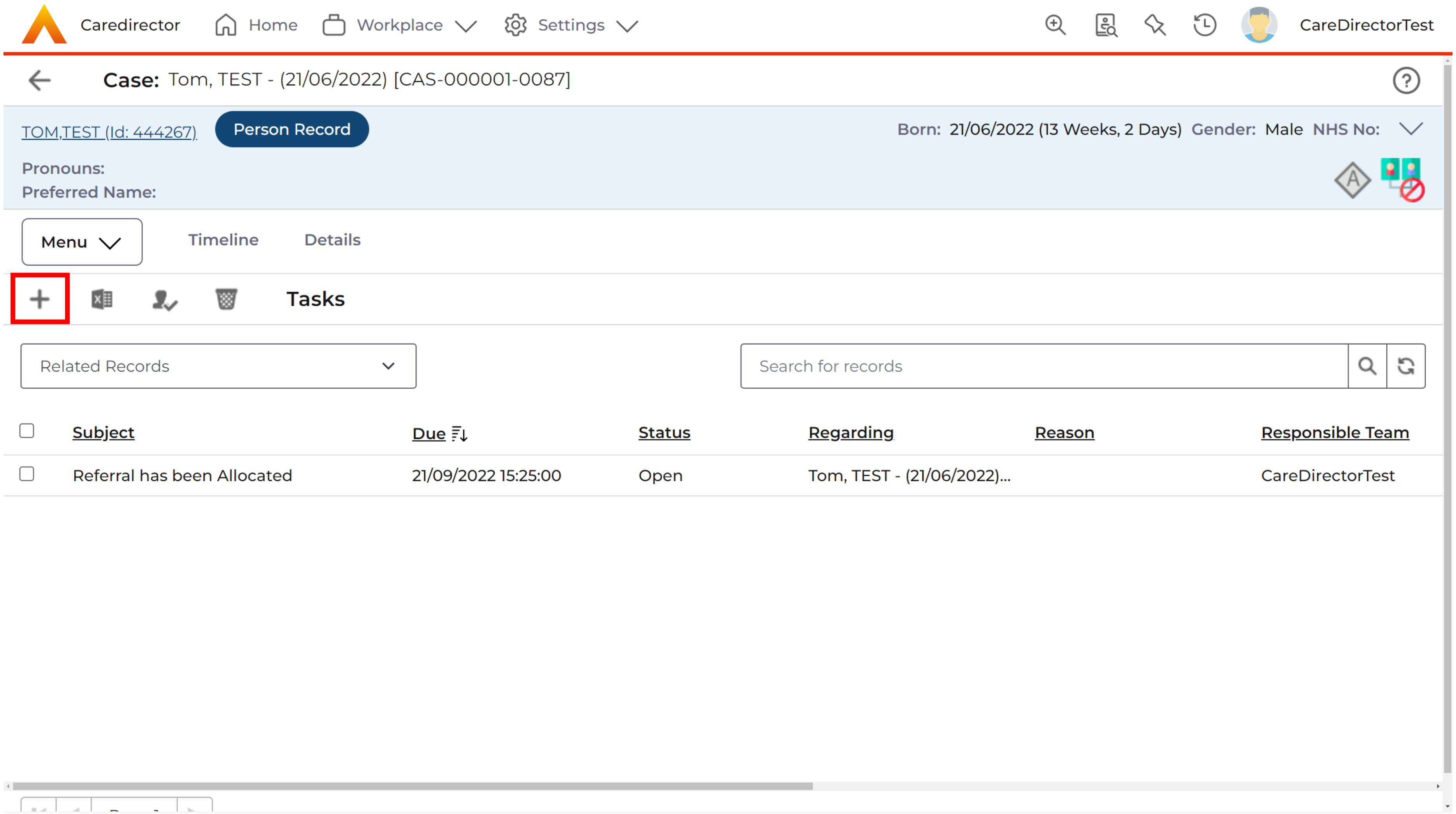
13. It will automatically **Save** but it is good practice to **Save** your work with **CareDirector** not having the automatic save feature. This will change the **Responsible Team/ User** of the **Case** to the relevant worker and change the **Responsible Team/ User** of the **AMHP Report Form** that we created earlier.

Appendix 6 – Recording an Activity

1. From the selected Case select **Menu**, **Activities** and then your chosen activity.



2. Select the **Create New Record** on the toolbar of the selected task. When the information has been completed select the **Save.**



3. Ensure that you enter a **Subject** heading that enables anyone searching that activity to easily identify it from the list of activities.

4. If you do not want anyone to go into the activity and edit it, you can **Mark as Complete** located on the toolbar or change the status as **Completed.**

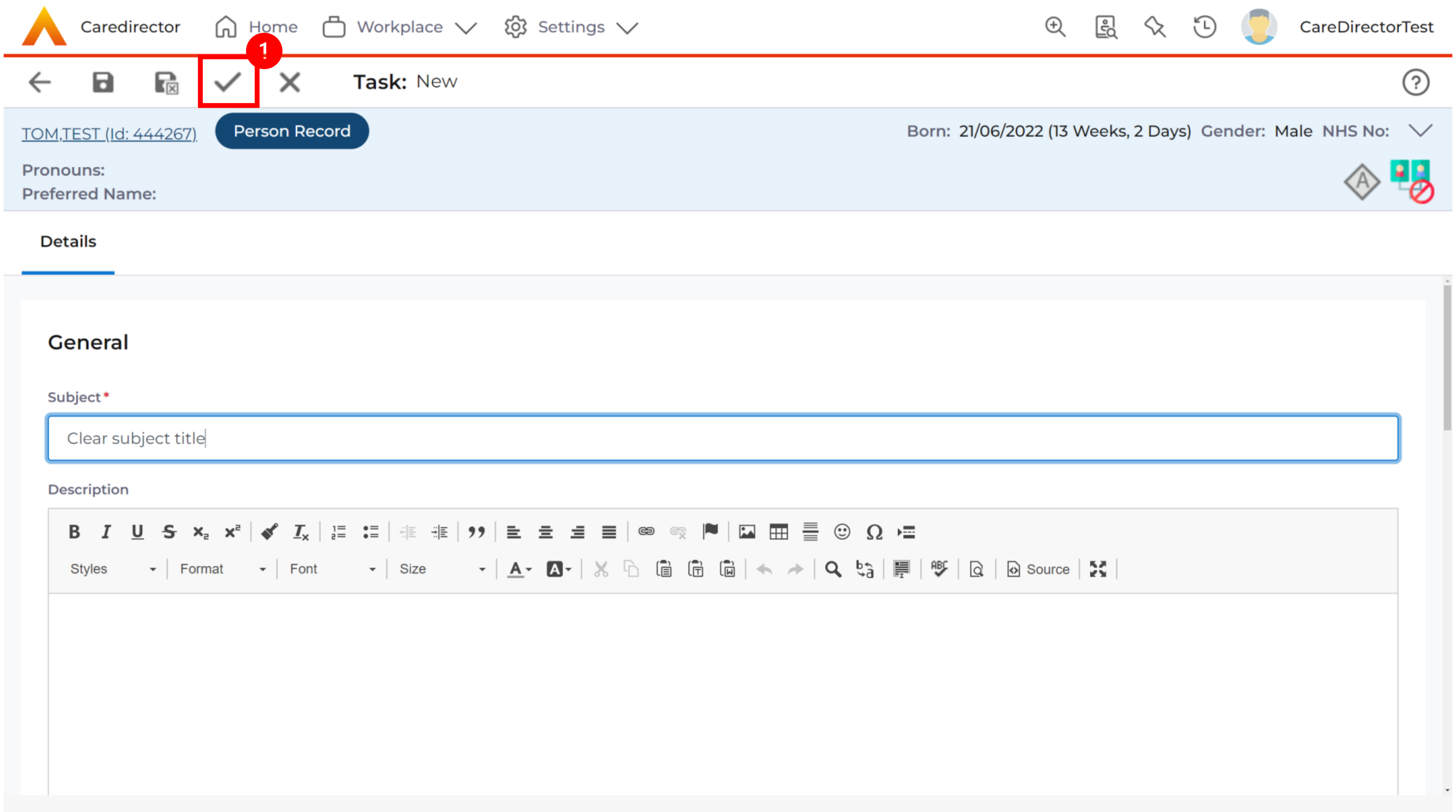
5. If you just **Save and Return to Previous Page,** it will remain open and therefore yourself or anyone else will be able to update or edit it.

6. When an activity is recorded for information only and does not require further action you should always **Mark as Complete**.

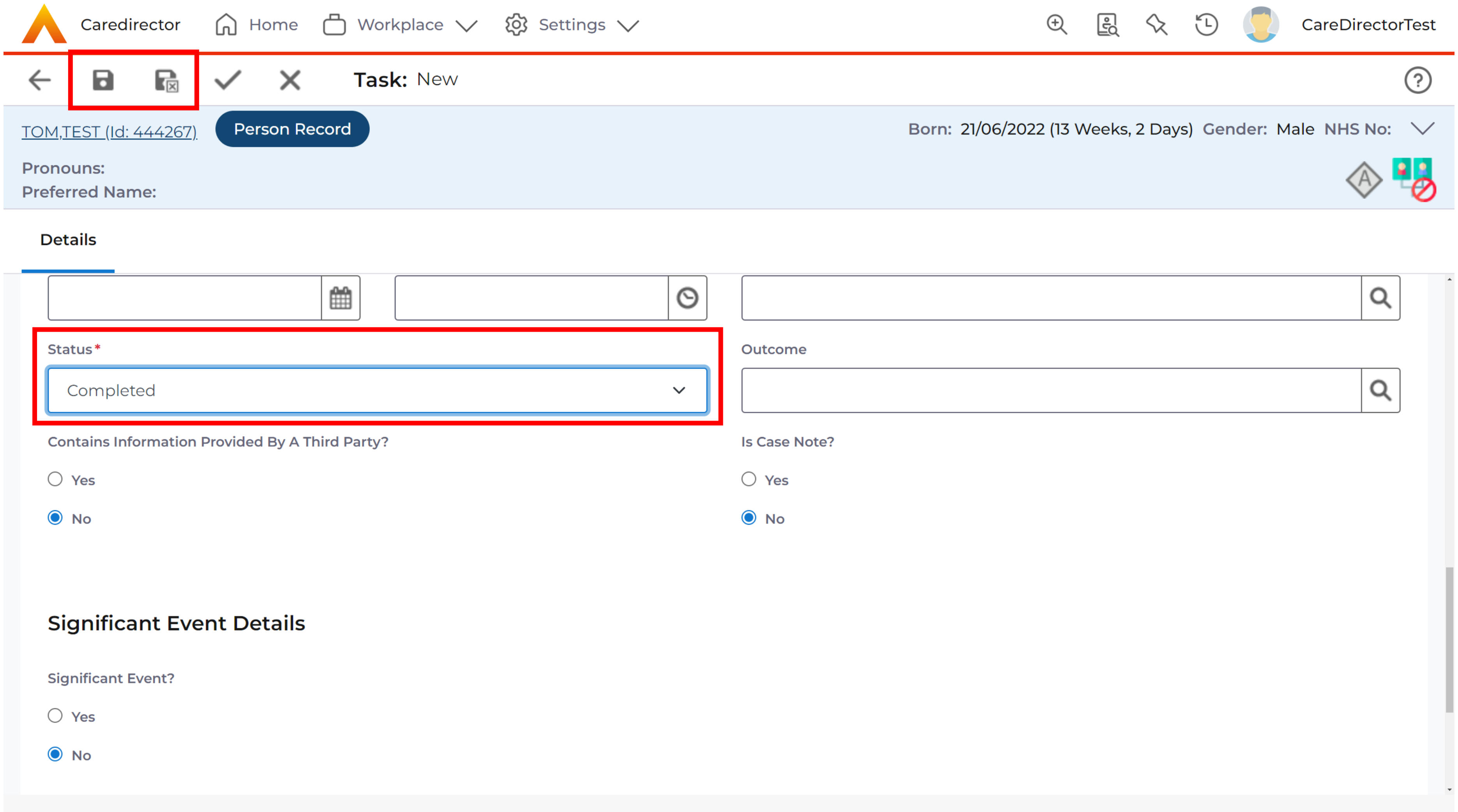
7. However, there may be times when you need someone else to do something on the system and you can alert them by interesting an activity and changing the **Responsible User** to them. This way it will appear in their list of activities on their workplace dashboard.

Appendix 6.1 – How to Mark as Complete

1. Before you save your activity after you complete it, there will be a **Mark as Complete** option available on the toolbar.

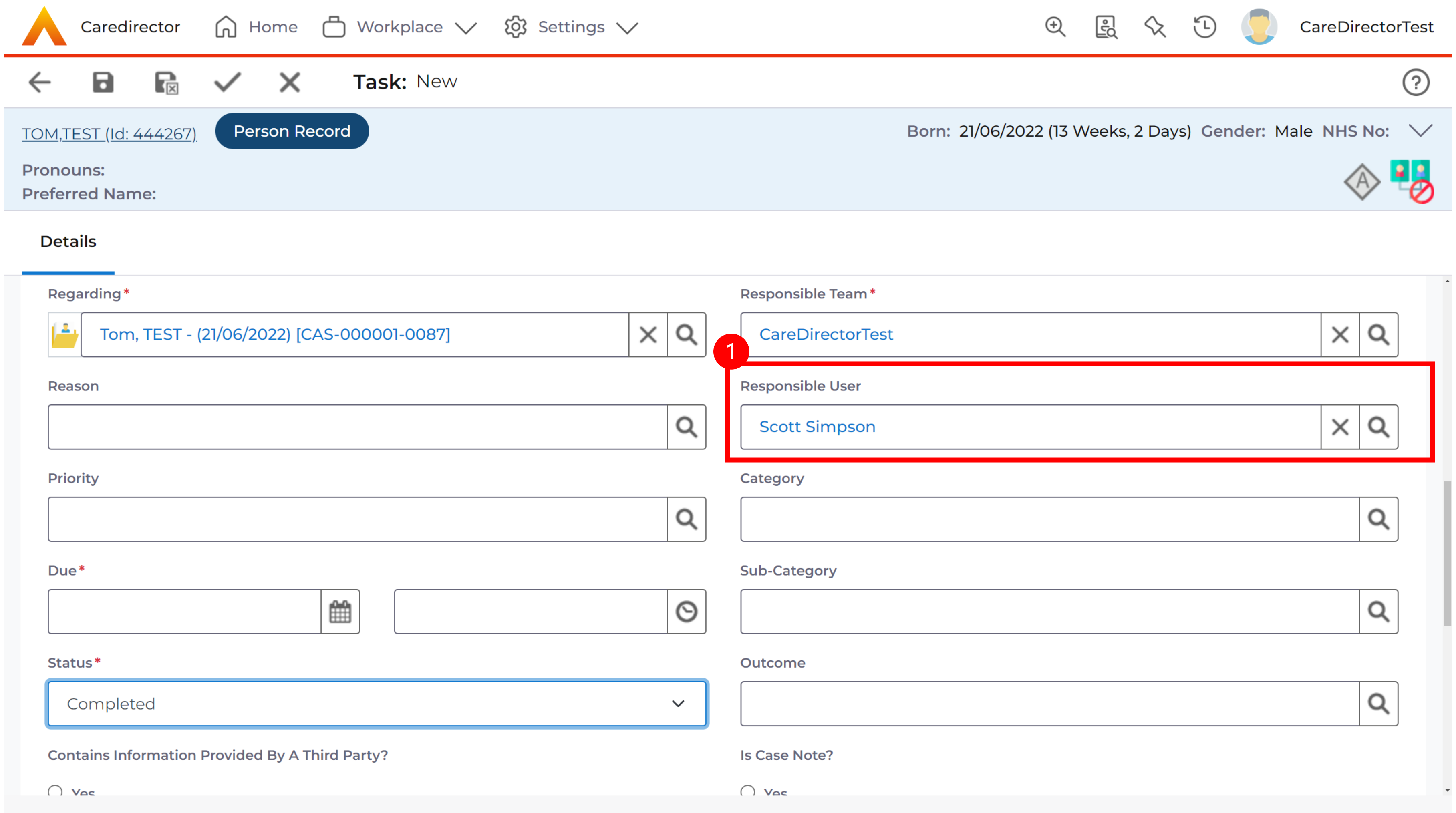


2. Alternatively, if you have saved the activity. Change the Status to **Complete.** Then **Save.**



Appendix 6.2 – How to change Responsible User on an activity

1. Under **Responsible User** use the **lookup** option next to the field to change the responsible user. Then **Save**.



Version Control

Version Number	Change	Author	By Date
V1	Initial Start	Scott Simpson	22/09/2022