



# Hospital Discharge Process Service Provisions

## V1.0

<b>Document</b>	Hospital Discharge Process Service Provisions
<b>Purpose</b>	To inform both P&AT and CSO's how the new hospital discharge process works
<b>Version</b>	V1.0
<b>Owner</b>	ICT Business Transformation Team / Adults System Support
<b>Last Updated</b>	19/02/2024

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## Information about this document

This guide assists all practitioners, community support officers, administrators, and personalisation and assessment team members who facilitate and support hospital discharges. It incorporates the discharge-to-assess model but also addresses pathway 1 situations where the person cannot immediately return home, including the reason why.

<u>Field</u>	<u>Information</u>	<u>Description</u>
P1	Pathway 1	Discharge home – usual place of residence or temporary accommodation
P2	Pathway 2	Discharge to a community bedded setting for further MDT assessments to take place
P3	Pathway 3	Discharge to a care home placement

The changes will enable Adult Social Care to gather enhanced information about the discharge pathway used for each person, the types of short stay required, and the duration of each person's stay. This data will become part of the statutory Better Care Funds report, inform data-driven local decisions, and assist Commissioners in ensuring adequate resources are available when needed.

## Form

### Name of Form: Financial Assessment Referral – Short Stay

The form has had a new option added to the Service Details section, Bed Type Required. Practitioners must select the appropriate discharge type to enable the correct service provision to be recorded.

A typical process for this form will be:

- a. The practitioner will attach this form to the client in Caredirector. They will then assign themselves as the **Responsible User**. Set the **Status** as **In Progress**.  
Please note: If you are attaching this form for another practitioner to complete, please set the allocated responsible user as whom you are assigning it for.
- b. The practitioner will fill in the **Financial Assessment Referral – Short Stay** form.
- c. The practitioner will then set the form from **In Progress** to **Complete** and **Save**.
- d. This then sends an activity task to the managers' dashboard so the practitioner manager will sign it off and change the **Status** from **Complete** to **Closed** filling in the **Signed off by** section that appears when changing

**Status.**

- e. Once the SP has been signed off, two activities will appear. One on the **Team** dashboard so they add the **Service Provision** and another on the **P&AT** dashboard.

The document includes information about the charging rules and FA rule types and how to record these on CareDirector.. Please read all information but only follow the guidance that is relevant to your role.

There are new service element 2s that are attached to both **Adult Residential Care** and **Nursing Care service element 1s**. To the table below will help you to understand each discharge option and what charging, and payment guidelines are behind them.

Please note FA Rule Types are only applicable to those with a charge. There are three rule types to each charging SE2, these will be based on age – 18-24, 25-64, 65+.

<b>Service Element 2</b>	<b>Charging Rules</b>	<b>FA Rule Type</b>
P1 Short Stay Fracture Bed	Charge Client, Pay Home (respite)	Residential Fixed Rate (depending on age, choose 18-24, 25-64, 65+).
P1 Short Stay Housing	Charge Client, Pay Home (respite)	Residential Fixed Rate (depending on age, choose 18-24, 25-64, 65+).
P1 Short Stay Carer Breakdown	Charge Client, Pay Home (respite)	Residential Fixed Rate (depending on age, choose 18-24, 25-64, 65+).
P1 Short Stay Other	Charge Client, Pay Home (respite)	Residential Fixed Rate (depending on age, choose 18-24, 25-64, 65+).
P1 Short Stay Dovecote (PDSA)	No Charge, No Payment to home	No Charge so no FA
P1 Short Stay WICU Bed	No Charge, No Payment to home	No Charge so no FA
P1 Interim Awaiting Care	Charge NRS Rate, Payment to Home	
P2 D2A Block Booked Beds	No Charge, No Payment to home	No Charge so no FA
P2 D2A Spot Purchase Beds	No Charge, Payment to home	No Charge so no FA
P2 D2A Dovecote	No Charge, No Payment	No Charge so no FA
P3 Short Stay	Charge Client, Payment to Home	Residential Fixed Rate (depending on age, choose 18-24, 25-64, 65+).

Alongside this, there are 6 finance client categories that can go against each service element 2. These are:

Please note: You would choose which one applies to your client. If a different client category is needed, then a new pathway would need to be set up against the provider by the Adult System Support Team.

<b>Finance Client Category</b>
Dementia (Do not use for interim/ D2A placements)
Older People Dementia
Older People
Physical Disability
Older People Physical Disability
Under 65

This information is linked to the **Service Request** Section of a new service provision.

Service Request

Service Element 1\*

Finance Client Category

Special Scheme

An example of how this would look - picking different options from the above list

<b>Field</b>	<b>Information</b>
Service Element 1	Adult Residential Care
Service Element 2	P1 Short Stay Other
Special Scheme	(Leave Blank)
Finance Client Category	Dementia
GL Code	(Leave Blank – this will be added automatically after)
Rate Unit	Per Week Pro Rata

For P&AT, the charging for this example will look like:

<b>Field</b>	<b>Information</b>
Client	Tom Test
Age	25
Charging Rule	Charge Client, Pay Home
FA Rule Type	Residential Fixed Rate 25-64

## Service Provision

1. This is how you complete a service provision linked to this new hospital discharge.
2. From the selected person record, go to **Services > Create New Record**

The screenshot shows the Caredirector interface for a person record. The 'Services' tab is selected, and the 'Service Provisions' section is expanded. A table of service provisions is displayed below.

<input type="checkbox"/>	<u>Id</u>	<u>Status</u>	<u>Planned St...</u>	<u>Planned End...</u>	<u>Actual Star...</u>	<u>Actual End D...</u>	<u>Service Element 1</u>	<u>Service El...</u>
<input type="checkbox"/>	229954	Authorised		22/02/2023	20/02/2023		Adult Residential Care	Respite fi

3. **General** will already have the correct information. Leave the **Status** as **Draft**.

### General

Person\*

Responsible Team\*

Id

Responsible User\*

Status\*

#### 4. Service Request:

Please note: If you need to know which SE2 are chargeable please reference the section in [Information about this Document](#)

##### Service Request

<p>Service Element 1*</p> <input type="text" value="Adult Residential Care"/>	<p>Service Element 2*</p> <input type="text" value="P1 Short Stay Pot Bed"/>
<p>Special Scheme</p> <input type="text"/>	<p>Finance Client Category</p> <input type="text" value="Dementia"/>
<p>GL Code</p> <input type="text"/>	<p>Rate Unit*</p> <input type="text" value="Per Week Pro Rata"/>

<u>Field</u>	<u>Information</u>
<b>Service Element 1</b>	<b>Adult Residential Care or Nursing Care</b>
<b>Service Element 2</b>	<p>Choose one of the options:</p> <ul style="list-style-type: none"> <li>- <b>P1 Short Stay Fracture Bed</b></li> <li>- <b>P1 Short Stay Housing</b></li> <li>- <b>P1 Short Stay Carer Breakdown</b></li> <li>- <b>P1 Short Stay Other</b></li> <li>- <b>P1 Short Stay Dovecote (PDSA)</b></li> <li>- <b>P1 Short Stay WICU Bed</b></li> <li>- <b>P2 D2A Block Booked Beds</b></li> <li>- <b>P2 D2A Spot Purchase Beds</b></li> <li>- <b>P2 D2A Dovecote</b></li> <li>- <b>P3 Short Stay</b></li> </ul>
<b>Special Scheme</b>	Leave Blank
<b>Finance Client Category</b>	<p>Choose one of the options: (Please note: The P2 D2A Spot Purchase beds do not require a finance client category – the rest require it).</p> <ul style="list-style-type: none"> <li>- <b>Dementia</b> (Do not use for interim/ D2A placements)</li> <li>- <b>Older People Dementia</b></li> <li>- <b>Older People</b></li> <li>- <b>Physical Disability</b></li> <li>- <b>Older People Physical Disability</b></li> <li>- <b>Under 65</b></li> </ul> <p>Leave blank if it is a respite placement this will be automatically entered by the system once a service provided has been chosen.</p>
<b>GL Code</b>	Leave blank (this will automatically be created once saved).
<b>Rate Unit</b>	<b>Per Week Pro Rata</b>

**Dates:**

Dates

Planned Start Date	Planned End Date
<input type="text" value="19/02/2024"/>	<input type="text"/>
Actual Start Date	Actual End Date
<input type="text"/>	<input type="text"/>
Start Reason*	
<input type="text" value="Admitted from Hospital"/>	

<u>Field</u>	<u>Information</u>
<b>Planned Start Date</b>	For placements that charge a client contribution please enter in the planned start date only. CSO's please enter the same start date that the practitioner inputs onto the form and is the date they are expecting/ that has been agreed for the SU to go into the care home. (Actual start date will be inputted by P&A Team once they are satisfied that a client contribution can be charged, and the care home can receive a fee payment).
<b>Planned End Date</b>	For any temporary placement (Respite, Interim, etc) a planned end date is always required so as not to overpay the Care Home. Once the placement is reviewed and an extension activity is sent to the P&A Team confirming the approved extension date, the P&A team would change the planned end date accordingly.
<b>Actual Start Date</b>	The actual start date will need to be entered in by either the P&AT or CSO. Please see below in () which ones are done by which. <ul style="list-style-type: none"> <li>- <b>P1 Short Stay Fracture Bed</b> (P&amp;AT)</li> <li>- <b>P1 Short Stay Housing</b> (P&amp;AT)</li> <li>- <b>P1 Short Stay Carer Breakdown</b> (P&amp;AT)</li> <li>- <b>P1 Short Stay Other</b> (P&amp;AT)</li> <li>- <b>P1 Short Stay Dovecote (PDSA)</b> (CSO)</li> <li>- <b>P1 Short Stay WICU Bed</b> (CSO)</li> <li>- <b>P2 D2A Block Booked Beds</b> (CSO)</li> <li>- <b>P2 D2A Spot Purchase Beds</b> (CSO)</li> <li>- <b>P2 D2A Dovecote</b> (CSO)</li> <li>- <b>P3 Short Stay</b> (P&amp;AT)</li> </ul>
<b>Actual End Date</b>	The CSO would add an actual end date once the placement has ended.
<b>Start Reason</b>	<b>Admitted from Hospital</b>

## 5. Commissioning:

### Commissioning

<p>Purchasing Team</p> <input type="text" value="Adults Connecting Care Team East"/>	<p>Frequency in Weeks *</p> <input type="text" value="1"/>
<p>Service Provided</p> <input type="text" value="West Ridings Nursing Home * \ Adult Residential Care \ P1 Sh..."/>	<p>Provider/Carer</p> <input type="text" value="West Ridings Nursing Home *"/>

<u>Field</u>	<u>Information</u>
<b>Purchasing Team</b>	Enter in who made the request.
<b>Frequency in Weeks</b>	1
<b>Service Provided</b>	Select the lookup function and select Search. This will search within an extensive list of providers that will help what you have chosen in Service Element 1 and Service Element 2. If your chosen provider that has agreed upon is not in this list, then contact Adult System Support to set up the required pathway for the provider

6. **Authorisation Detail** is something you cannot fill out yet. Leave blank.

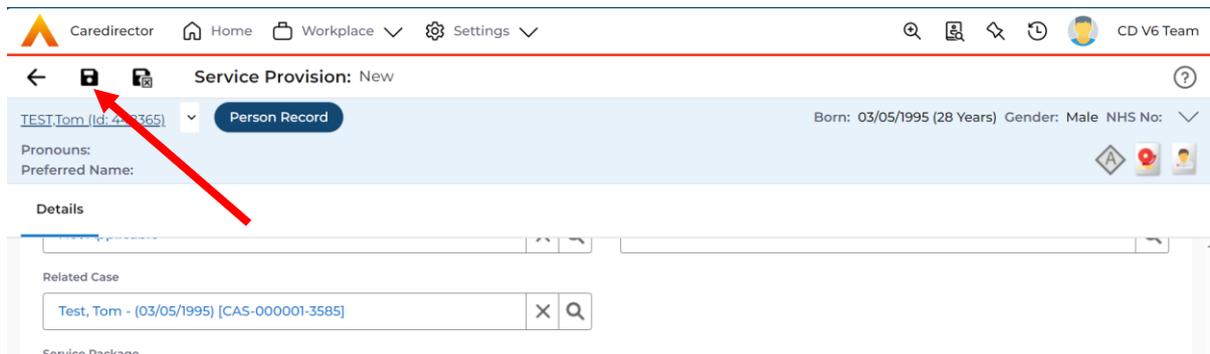
## 7. Related Information:

### Related Information

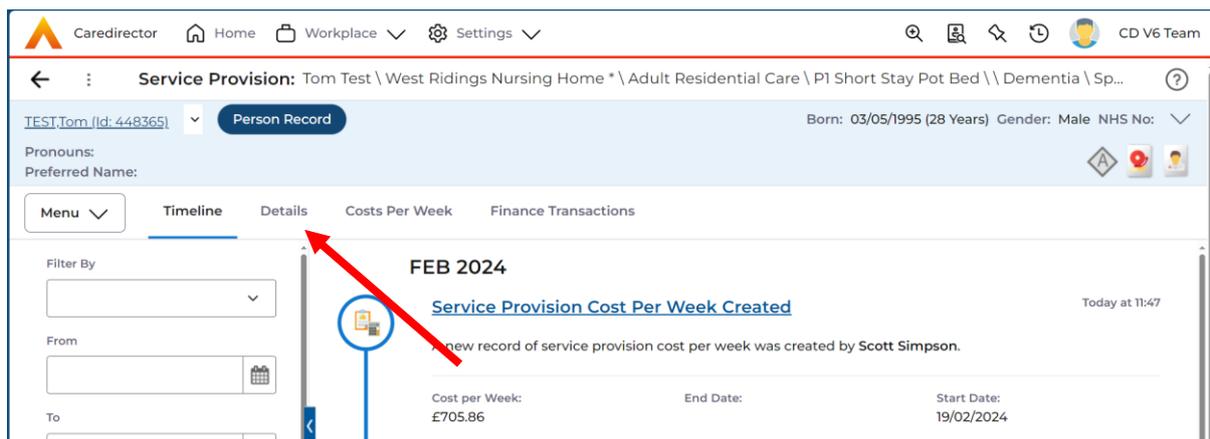
<p>Placement Room Type *</p> <input type="text" value="Not Applicable"/>	<p>Related Assessment</p> <input type="text"/>
<p>Related Case</p> <input type="text" value="Test, Tom - (03/05/1995) [CAS-000001-3585]"/>	
<p>Service Package</p> <input type="text"/>	

<u>Field</u>	<u>Information</u>
<b>Placement Room Type</b>	<b>Not Applicable</b>
<b>Related Case</b>	If there is a case within Caredirector linking with this Service Provision, you can link it here. Select lookup and search for the relevant case. This makes it easier to get onto the Case.
<b>Service Package</b>	If they have one available, please select it.
<b>Related Assessment</b>	This is going to choose from a list of forms that the person has been linked to. Attach it if it is available and relevant.

8. When finished, select **Save**.



9. This will show you the **timeline** section of the **Service Provision**. For now, you can leave this until you have the **Actual Start Date**. Once you have the actual start date to enter or it is already inputted into the service provision. Click back onto **Details**.



10. Go back to the **Status** and change it to **Ready for Authorisation** from **Draft**.  
Then select **Save**.

The screenshot displays the Caredirector interface for a 'Person Record'. The top navigation bar includes 'Caredirector', 'Home', 'Workplace', and 'Settings'. The breadcrumb trail is 'Service Provision: Tom Test \ West Ridings Nursing Home \* \ Adult Residential Care \ P1 Short Stay ...'. The record is for 'TEST, Tom (Id: 448365)', born 03/05/1995, male, with NHS No. The 'Details' tab is active, showing the 'General' section. The 'Person' field is 'Tom Test', 'Responsible Team' is 'CD V6 Team', 'Id' is '230049', and 'Responsible User' is 'Scott Simpson'. The 'Status' dropdown menu is currently set to 'Ready for Authorisation'. A red arrow points to the 'Save' icon in the top navigation bar, and another red arrow points to the 'Status' dropdown menu.

## Service Provision – P1 Interim Awaiting Care

When a P1 Interim Awaiting Care needs to be put on, you need to do a few extra steps first.

### First Step

1. The first step is to put the P1 Interim Awaiting Care service provision on.
2. From the selected person record, go to **Services > Create New Record**

The screenshot shows the Caredirector interface for a person record. At the top, there are navigation tabs: Home, Workplace, Settings, and a user profile for CD V6 Team. Below this, the person's name 'Person: Tom Test' is displayed with a 'Person Record' button. A dropdown menu shows 'TEST, Tom (Id: 448365)'. To the right, personal details are shown: 'Born: 03/05/1995 (28 Years) Gender: Male NHS No:'. Below this is a 'Menu' dropdown and several tabs: Timeline, Summary, Profile, Cases, Services, Document View, and All Activities. The 'Services' tab is selected and highlighted with a red arrow. Below the tabs is a 'Service Provisions' section with a '+' icon for adding a new record, also highlighted with a red arrow. A search bar for records is present. Below the search bar is a table of service provisions.

<input type="checkbox"/>	Id	Status	Planned St...	Planned End...	Actual Star...	Actual End D...	Service Element 1	Service El...
<input type="checkbox"/>	229954	Authorised		22/02/2023	20/02/2023		Adult Residential Care	Respite fi

3. **General** will already have the correct information. Leave the **Status** as **Draft**.

#### General

Person \*

Tom Test

Responsible Team \*

CD V6 Team

Id

230045

Responsible User \*

Scott Simpson

Status \*

Draft

#### 4. Service Request:

**Service Request**

Service Element 1*	Service Element 2*
<input type="text" value="Adult Residential Care"/>	<input type="text" value="P1 Interim Awaiting Care"/>
Special Scheme	Finance Client Category
<input type="text"/>	<input type="text"/>
GL Code	Rate Unit*
<input type="text"/>	<input type="text" value="Per Week Pro Rata"/>

<b><u>Field</u></b>	<b><u>Information</u></b>
<b>Service Element 1</b>	<b>Adult Residential Care</b>
<b>Service Element 2</b>	<b>P1 Interim Awaiting Care</b>
<b>Special Scheme</b>	Leave Blank
<b>Finance Client Category</b>	Choose one of the options: <ul style="list-style-type: none"> <li>- <b>Older People Dementia</b></li> <li>- <b>Older People</b></li> <li>- <b>Physical Disability</b></li> <li>- <b>Older People Physical Disability</b></li> <li>- <b>Under 65</b></li> </ul>
<b>GL Code</b>	Leave blank (this will automatically be created once saved).
<b>Rate Unit</b>	<b>Per Week Pro Rata</b>

## 5. Dates:

### Dates

Planned Start Date	Planned End Date
<input type="text" value="19/02/2024"/>	<input type="text"/>
Actual Start Date	Actual End Date
<input type="text"/>	<input type="text"/>
Start Reason *	
<input type="text" value="Change in type of care"/>	<input type="text"/>

<b><u>Field</u></b>	<b><u>Information</u></b>
<b>Planned Start Date</b>	This does not start payments. This when they plan to start this service provision.
<b>Planned End Date</b>	Leave Blank
<b>Actual Start Date</b>	This does start payments. Enter this information in when you know the date, they are going to start the service. If you do not know this, leave blank and fill in Planned Start Date.
<b>Actual End Date</b>	Leave Blank. This will be needed when ending the service provision to stop payments
<b>Start Reason</b>	Choose option. The most common one is <b>Change in Type of Care.</b>

## 6. Commissioning:

### Commissioning

<p>Purchasing Team</p> <input type="text" value="Hospital Team Wakefield (Pinderfields)"/>	<p>Frequency in Weeks *</p> <input type="text" value="1"/>
<p>Service Provided</p> <input type="text" value="VICARAGE COURT (Formerly The Old Vicarage)* \ Adult Resid..."/>	<p>Provider/Carer</p> <input type="text" value="VICARAGE COURT (Formerly The Old Vicarage)*"/>

Rate Required \*

<u>Field</u>	<u>Information</u>
<b>Purchasing Team</b>	Enter in who made the request.
<b>Frequency in Weeks</b>	1
<b>Service Provided</b>	Select the lookup function and select Search. This will search within an extensive list of providers that will help what you have chosen in Service Element 1 and Service Element 2. If your chosen provider that has agreed upon is not in this list, then contact Adult System Support to set up the required pathway for the provider

7. **Authorisation Detail** is something you cannot fill out yet. Leave blank.

## 8. Related Information:

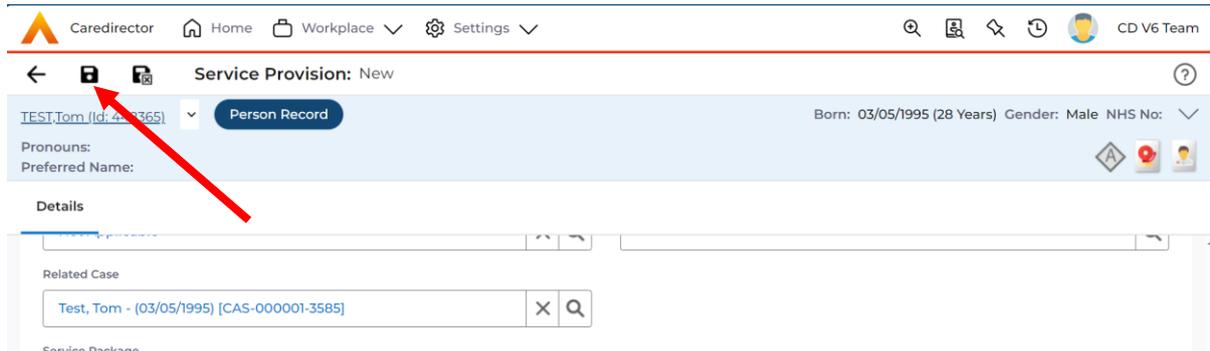
### Related Information

<p>Placement Room Type *</p> <input type="text" value="Not Applicable"/>	<p>Related Assessment</p> <input type="text"/>
<p>Related Case</p> <input type="text" value="Test, Tom - (03/05/1995) [CAS-000001-3585]"/>	
<p>Service Package</p> <input type="text"/>	

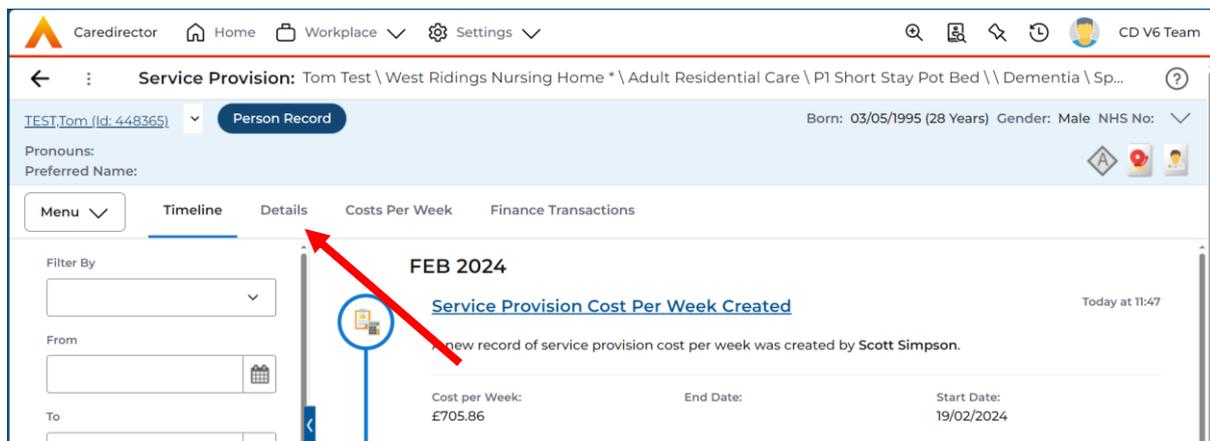
<u>Field</u>	<u>Information</u>
<b>Placement Room Type</b>	<b>Not Applicable</b>
<b>Related Case</b>	If there is a case within Caredirector linking with this Service Provision, you can link it here. Select lookup and search for the relevant case. This makes it easier to get onto the Case.
<b>Service Package</b>	If they have one available, please select it.
<b>Related Assessment</b>	This is going to choose from a list of forms that the person has been linked to. Attach it if it is available and relevant.

9. When finished, select **Save**.

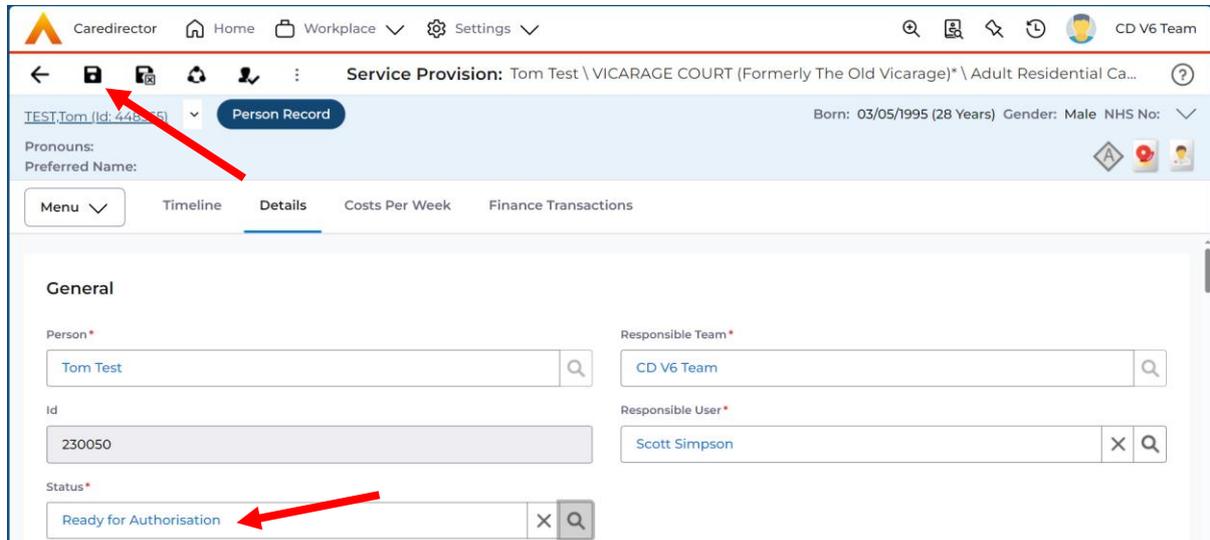
CAREDIRECTOR HOSPITAL DISCHARGE PROCESS SERVICE PROVISIONS



10. This will show you the **timeline** section of the **Service Provision**. For now, you can leave this until you have the **Actual Start Date**. Once you have the actual start date to enter or it is already inputted into the service provision. Click back onto **Details**.



11. Go back to the **Status** and change it to **Ready for Authorisation** from **Draft**. Then select **Save**.

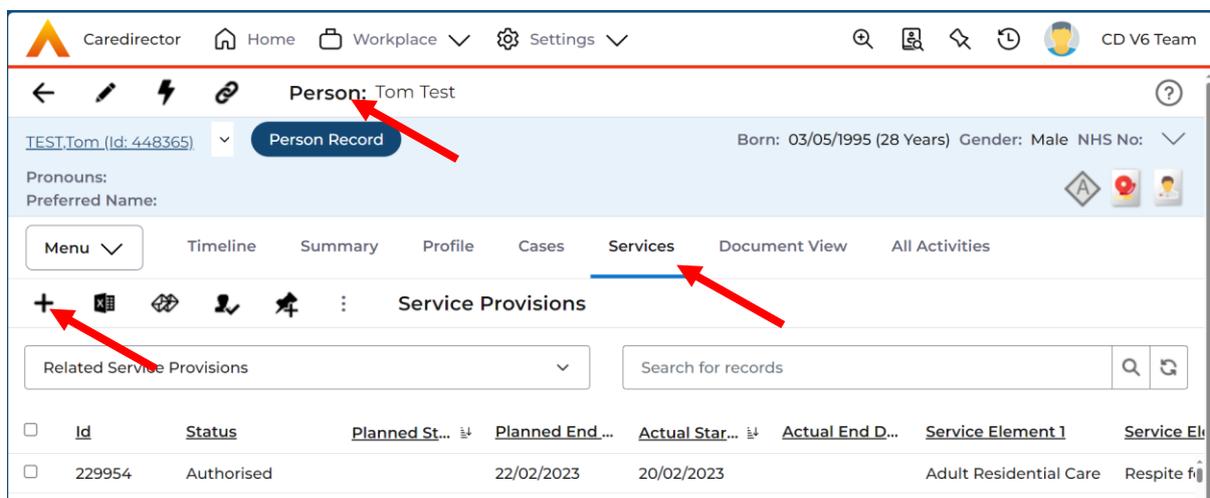


12. This must be authorised so payments can be made.

## Second Step – Home Care

After the P1 Interim Awaiting Care service provision has been created, you now need to create two other service provisions that will be linked to a dummy service provider. This will only be needed until the correct provider for Home Care and Home Care Travel Time can be found. Once that happens, you need to end these two before adding the new one.

1. From the selected person record, go to **Services > Create New Record**



2. **General** will already have the correct information. Leave the **Status** as **Draft**.

**General**

Person*	Responsible Team*
<input type="text" value="Tom Test"/>	<input type="text" value="CD V6 Team"/>
Id	Responsible User*
<input type="text" value="230045"/>	<input type="text" value="Scott Simpson"/>
Status*	
<input type="text" value="Draft"/>	



3. **Service Request:**

**Service Request**

Service Element 1*	Service Element 2*
<input type="text" value="SDS - Managed Account"/>	<input type="text" value="Home Care"/>
Special Scheme	Finance Client Category
<input type="text"/>	<input type="text"/>
GL Code	Rate Unit*
<input type="text"/>	<input type="text" value="Per 1 Hour \ Hours (Whole) \ Hours (Part)"/>

<u>Field</u>	<u>Information</u>
<b>Service Element 1</b>	<b>SDS – Managed Account</b>
<b>Service Element 2</b>	<b>Home Care</b>
<b>Special Scheme</b>	Leave Blank
<b>Finance Client Category</b>	Leave Blank
<b>GL Code</b>	Leave blank (this will automatically be created once saved).
<b>Rate Unit</b>	<b>Per 1 Hour \ Hours (Whole) \ Hours (Part)</b>

**4. Dates:**

**Please note: The start date will need to match the P1 Interim Awaiting Care service provision start date. In the future, this will also match the Financial Assessment.**

Dates

Planned Start Date	<input type="text" value="19/02/2024"/>	Planned End Date	<input type="text"/>
Actual Start Date	<input type="text" value="19/02/2024"/>	Actual End Date	<input type="text"/>
Start Reason*	<input type="text" value="New Placement"/>		

<b><u>Field</u></b>	<b><u>Information</u></b>
<b>Planned Start Date</b>	This does not start payments. This when they plan to start this service provision.
<b>Planned End Date</b>	Leave Blank
<b>Actual Start Date</b>	This does start payments. Enter this information in when you know the date, they are going to start the service. If you do not know this, leave blank and fill in Planned Start Date.
<b>Actual End Date</b>	Leave Blank. This will be needed when ending the service provision to stop payments
<b>Start Reason</b>	<b>New Placement.</b>

**5. Commissioning:**

Please note: This is a dummy service provided, it must be Interim Bed Awaiting a Package of Care at Home until a provider is found.

**Commissioning**

<p>Purchasing Team</p> <input type="text" value="Hospital Team Wakefield (Pinderfields)"/>	<p>Frequency in Weeks *</p> <input type="text" value="1"/>
<p>Service Provided</p> <input type="text" value="Interim Bed Awaiting A Package Of Care At Home \ SDS - Ma..."/>	<p>Provider/Carer</p> <input type="text" value="Interim Bed Awaiting A Package Of Care At Home"/>

<u>Field</u>	<u>Information</u>
<b>Purchasing Team</b>	Enter in who made the request.
<b>Frequency in Weeks</b>	1
<b>Service Provided</b>	<b>Interim Bed Awaiting a Package of Care at Home</b>

6. **Authorisation Detail** is something you cannot fill out yet. Leave blank.

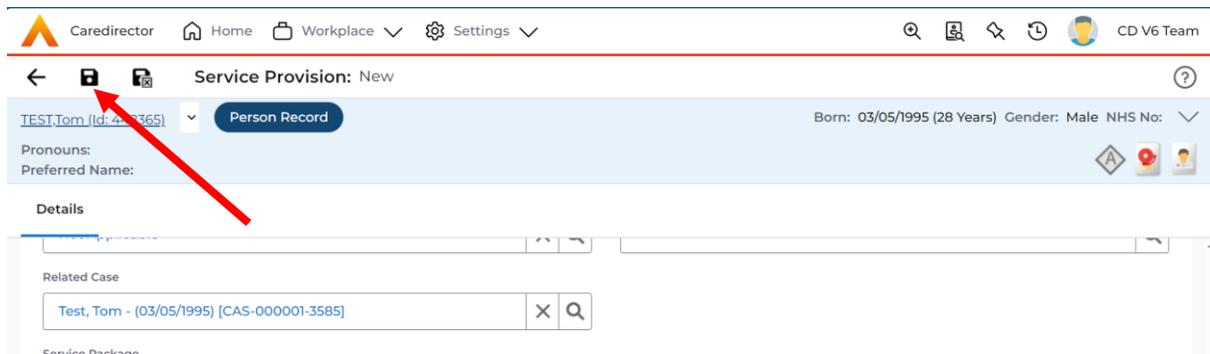
**7. Related Information:**

**Related Information**

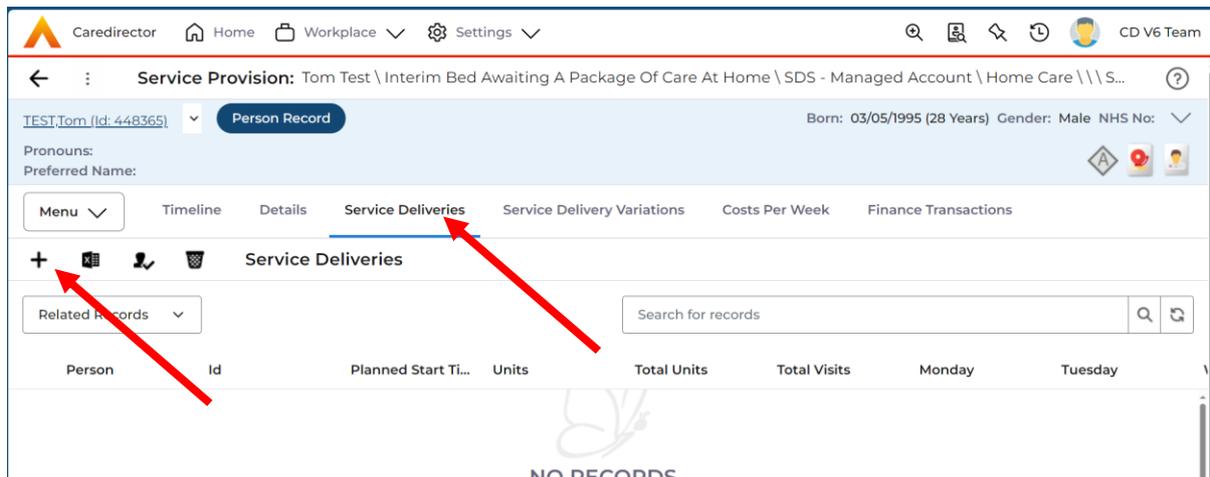
<p>Placement Room Type *</p> <input type="text" value="Not Applicable"/>	<p>Related Assessment</p> <input type="text"/>
<p>Related Case</p> <input type="text" value="Test, Tom - (03/05/1995) [CAS-000001-3585]"/>	
<p>Service Package</p> <input type="text"/>	

<u>Field</u>	<u>Information</u>
<b>Placement Room Type</b>	<b>Not Applicable</b>
<b>Related Case</b>	If there is a case within Caredirector linking with this Service Provision, you can link it here. Select lookup and search for the relevant case. This makes it easier to get onto the Case.
<b>Service Package</b>	If they have one available, please select it.
<b>Related Assessment</b>	This is going to choose from a list of forms that the person has been linked to. Attach it if it is available and relevant.

8. When finished, select **Save**.



9. Before we can change the status, we need to add in **Service Deliveries**. After pressing, **Save** go onto **Service Deliveries > Create New Record**.



10. This information is found within the Forms section of the Case. Here you will want to find their **Adult Care & Support Plan**. Here will show planned start times and days. Please complete this for as many visits as required. The process is the same for any.

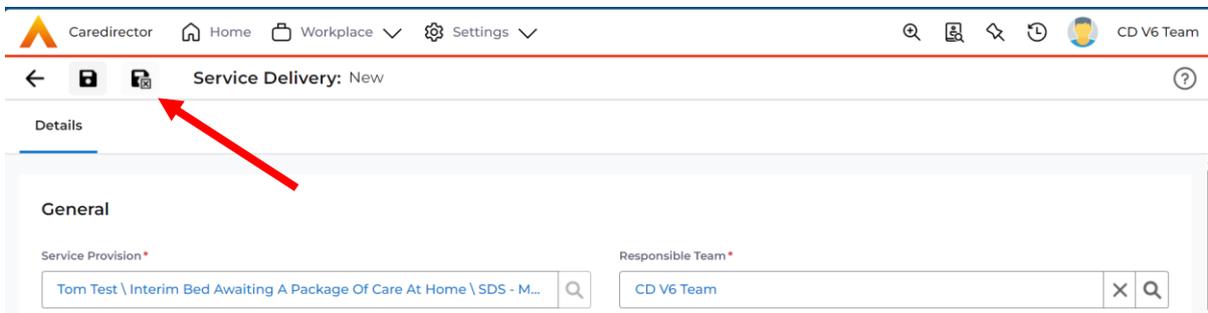
Field	Information
<b>Planned Start Time</b>	Whatever is shown in their adult care & support plan. However, you will need to create a new service delivery if there are more than one time.
<b>Units</b>	This is appointed by 1 hour. So, a Unit of 1 will be 1 hour. A unit of 0.5 is 30 minutes and so on.
<b>Number of Carers</b>	Please say how many carers will be required for that visit.
<b>Schedule applies to days</b>	Please select the relevant days that your allocated planned start time will be applicable for.

CAREDIRECTOR HOSPITAL DISCHARGE PROCESS SERVICE PROVISIONS

General

Service Provision *	Responsible Team *
<input type="text" value="Tom Test \ Interim Bed Awaiting A Package Of Care At Home \ SDS - M..."/>	<input type="text" value="CD V6 Team"/>
Id	Rate Unit *
<input type="text"/>	<input type="text" value="Per 1 Hour \ Hours (Whole) \ Hours (Part)"/>
Planned Start Time *	Units *
<input type="text" value="09:00"/>	<input type="text" value="1"/>
Total Visits *	Total Units *
<input type="text"/>	<input type="text"/>

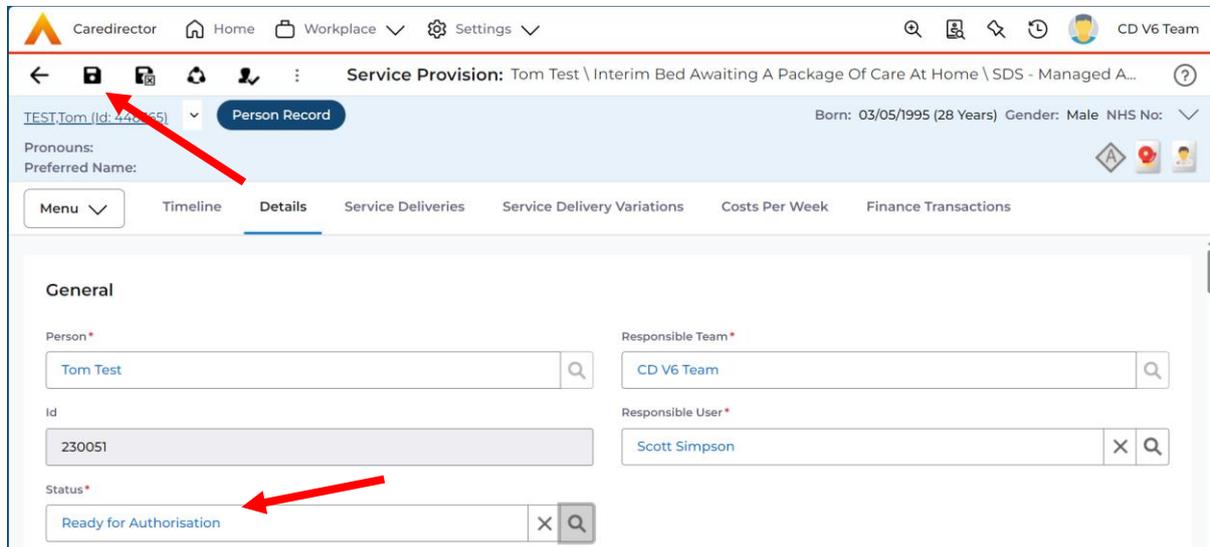
11. When finished, select **Save and Return to Previous Page**.



12. Continue to add more if the **Adult Care & Support Plan** needs it but for me, they only needed 1 hour every day at 09:00.

Person	Id	Planned Start...	Units	Total Units	Total Visits	Monday	Tuesday
<input type="checkbox"/> Tom Test	197591	09:00	1.0000	7.0000	7	Yes	Yes

13. Go back to the **Status** and change it to **Ready for Authorisation** from **Draft**. Then select **Save**.

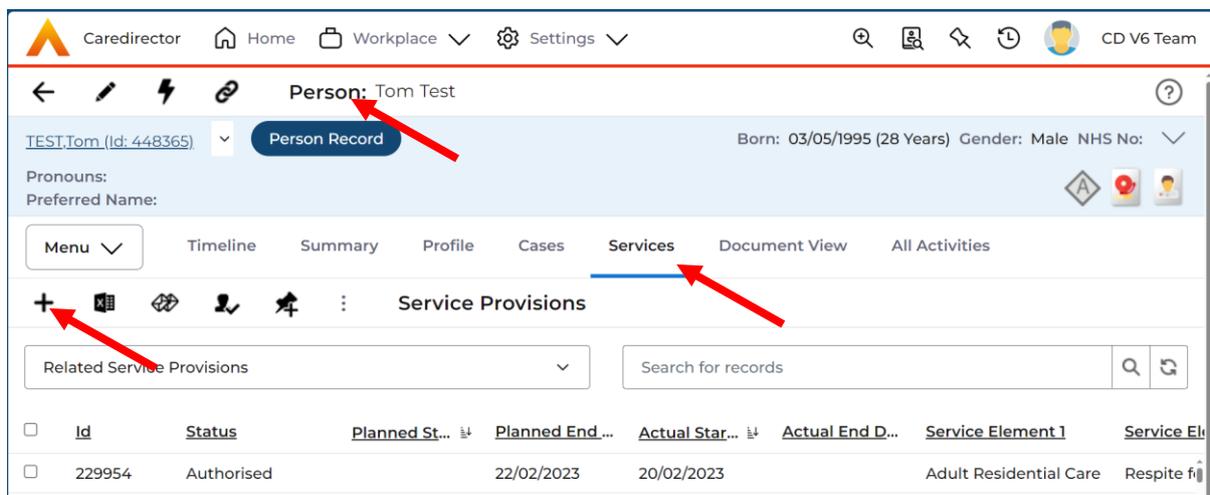


14. This requires authorisation to start payments, so long as the actual start date has been entered.

### Third Step – Home Care Travel Time

After the Home Care dummy service provision has been created, you now need to create the travel time service provision. This is also linked to a dummy service provided so once an actual service provided has been found, this will put an end date towards.

1. From the selected person record, go to **Services > Create New Record**



2. **General** will already have the correct information. Leave the **Status** as **Draft**.

**General**

Person*	Responsible Team*
<input type="text" value="Tom Test"/>	<input type="text" value="CD V6 Team"/>
Id	Responsible User*
<input type="text" value="230045"/>	<input type="text" value="Scott Simpson"/>
Status*	
<input type="text" value="Draft"/>	

3. **Service Request:**

**Service Request**

Service Element 1*	Service Element 2*
<input type="text" value="SDS - Managed Account"/>	<input type="text" value="Home Care"/>
Special Scheme	Finance Client Category
<input type="text"/>	<input type="text"/>
GL Code	Rate Unit*
<input type="text"/>	<input type="text" value="Per 1 Hour \ Hours (Whole) \ Hours (Part)"/>

<b><u>Field</u></b>	<b><u>Information</u></b>
<b>Service Element 1</b>	<b>SDS – Managed Account</b>
<b>Service Element 2</b>	<b>Home Care Travel Time</b>
<b>Special Scheme</b>	Leave Blank
<b>Finance Client Category</b>	Leave Blank
<b>GL Code</b>	Leave blank (this will automatically be created once saved).
<b>Rate Unit</b>	<b>Per Visit \ Units (Integer)</b>

**4. Dates:**

**Please note: The start date will need to match the P1 Interim Awaiting Care service provision start date. In the future, this will also match the Financial Assessment.**

Dates

Planned Start Date	<input type="text" value="19/02/2024"/>	Planned End Date	<input type="text"/>
Actual Start Date	<input type="text" value="19/02/2024"/>	Actual End Date	<input type="text"/>
Start Reason*	<input type="text" value="New Placement"/>		

<b><u>Field</u></b>	<b><u>Information</u></b>
<b>Planned Start Date</b>	This does not start payments. This when they plan to start this service provision.
<b>Planned End Date</b>	Leave Blank
<b>Actual Start Date</b>	This does start payments. Enter this information in when you know the date, they are going to start the service. If you do not know this, leave blank and fill in Planned Start Date.
<b>Actual End Date</b>	Leave Blank. This will be needed when ending the service provision to stop payments
<b>Start Reason</b>	<b>New Placement.</b>

**5. Commissioning:**

**Please note: This is a dummy service provided, it must be Interim Bed Awaiting a Package of Care at Home until a provider is found.**

Commissioning

Purchasing Team	<input type="text" value="Hospital Team Wakefield (Pinderfields)"/>	Frequency in Weeks*	<input type="text" value="1"/>
Service Provided	<input type="text" value="Interim Bed Awaiting A Package Of Care At Home \ SDS - Ma..."/>	Provider/Carer	<input type="text" value="Interim Bed Awaiting A Package Of Care At Home"/>
Rate Required*	<input type="radio"/> Yes	Cost Per Week	<input type="text" value="0.00"/>

<b><u>Field</u></b>	<b><u>Information</u></b>
<b>Purchasing Team</b>	Enter in who made the request.
<b>Frequency in Weeks</b>	<b>1</b>
<b>Service Provided</b>	<b>Interim Bed Awaiting a Package of Care at Home</b>

**6. Authorisation Detail** is something you cannot fill out yet. Leave blank.

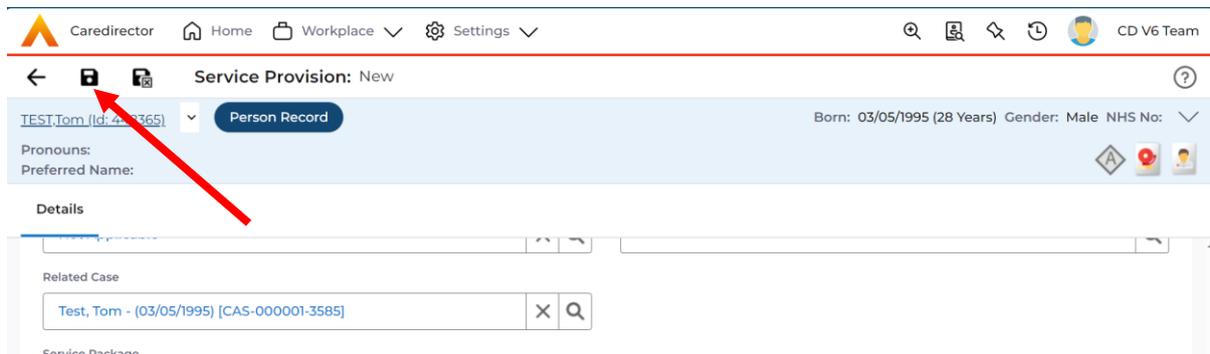
## 7. Related Information:

### Related Information

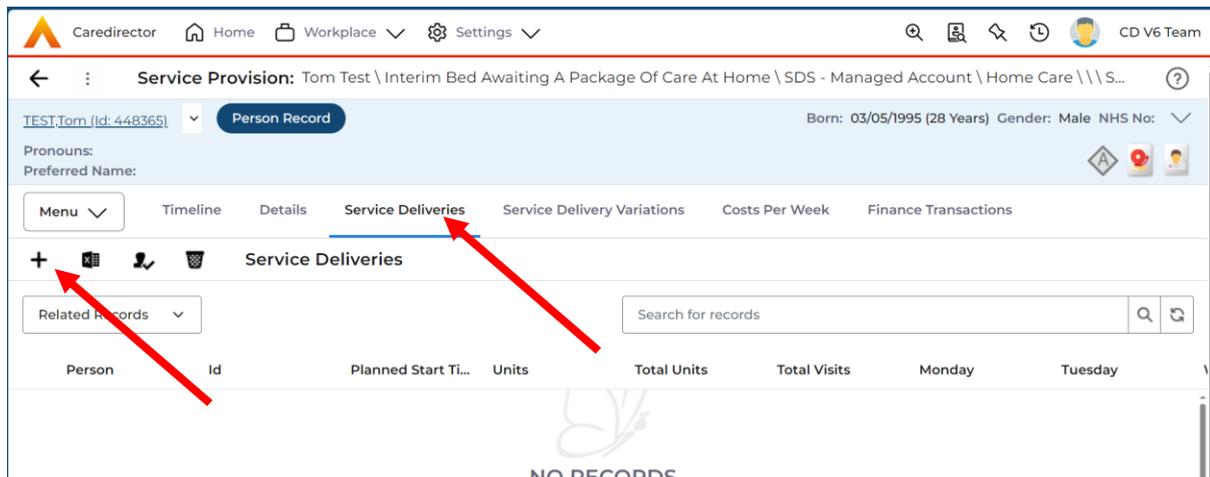
<p>Placement Room Type*</p> <input type="text" value="Not Applicable"/>	<p>Related Assessment</p> <input type="text"/>
<p>Related Case</p> <input type="text" value="Test, Tom - (03/05/1995) [CAS-000001-3585]"/>	
<p>Service Package</p> <input type="text"/>	

<b><u>Field</u></b>	<b><u>Information</u></b>
<p><b>Placement Room Type</b></p>	<p><b>Not Applicable</b></p>
<p><b>Related Case</b></p>	<p>If there is a case within Caredirector linking with this Service Provision, you can link it here. Select lookup and search for the relevant case. This makes it easier to get onto the Case.</p>
<p><b>Service Package</b></p>	<p>If they have one available, please select it.</p>
<p><b>Related Assessment</b></p>	<p>This is going to choose from a list of forms that the person has been linked to. Attach it if it is available and relevant.</p>

8. When finished, select **Save**.



9. Before we can change the status, we need to add in **Service Deliveries**. After pressing, **Save** go onto **Service Deliveries > Create New Record**.



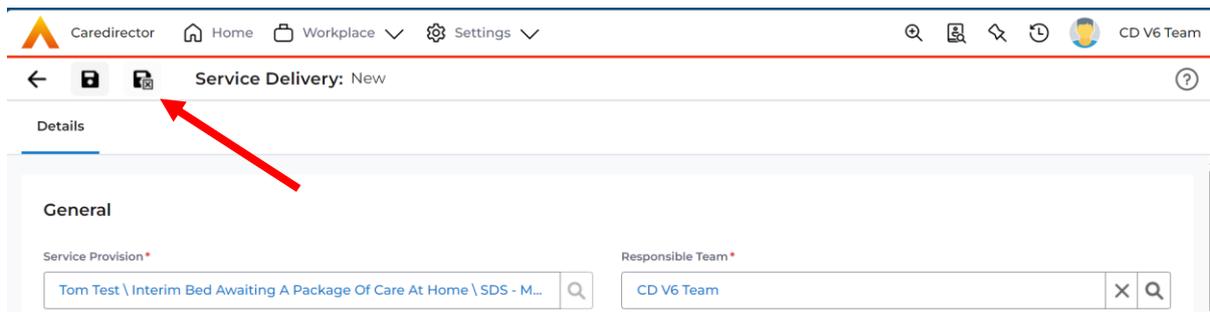
10. This information is a match up with the earlier step, Home Care visits. You can approach these two ways; you can go ahead and match the number of entries you put in for the Home Care section. Where it will 1 unit and match the same days that you did at that time. Alternatively, you can block it into one. This requires a bit of maths – if you did a visit everyday (Mon-Sun) one entry being at 09:30 and another entry at 15:00 then you can select all 7 days below and, in the unit, you will put 2. Because you did it twice of those sets of visits. Obviously, if you have 3 entries, where two are the same days but on only has two days instead, then you can either work that out through your units or you can put them as separate. The choice is yours, if you did understand the earlier paragraph, please feel free to match all entries that you have put in before putting in the correct planned start time and units being.

Field	Information
<b>Planned Start Time</b>	Whatever is shown in their adult care & support plan. However, you will need to create a new service delivery if there are more than one time.
<b>Units</b>	1 (if you are doing the multiple block method this will change depending on the number of visits are the same)
<b>Number of Carers</b>	Please say how many carers will be needed for that visit.
<b>Schedule applies to days</b>	Please select the relevant days that your allocated planned start time will be applicable for.

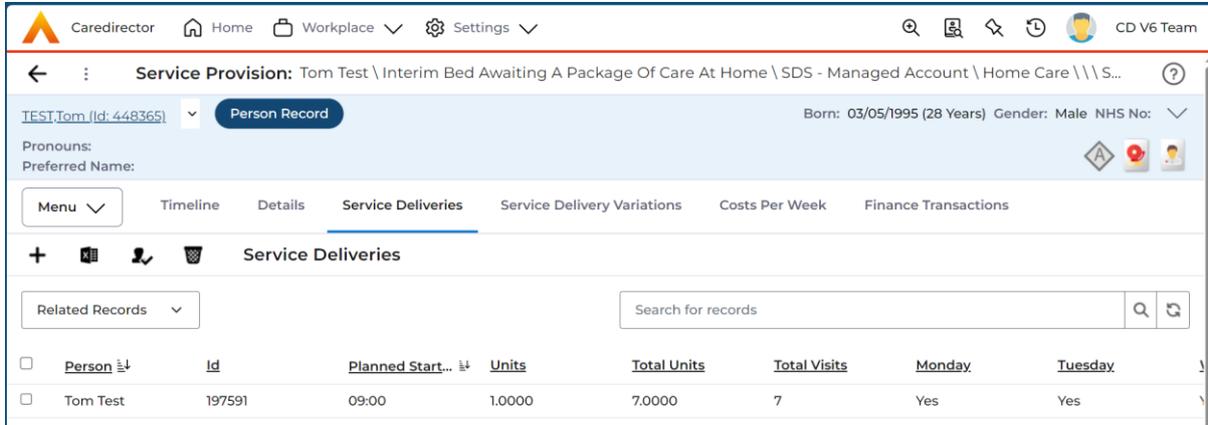
**General**

<p>Service Provision *</p> <input type="text" value="Tom Test \ Interim Bed Awaiting A Package Of Care At Home \ SDS - M..."/>	<p>Responsible Team *</p> <input type="text" value="CD V6 Team"/>
<p>Id</p> <input type="text"/>	<p>Rate Unit *</p> <input type="text" value="Per 1 Hour \ Hours (Whole) \ Hours (Part)"/>
<p>Planned Start Time *</p> <input type="text" value="09:00"/>	<p>Units *</p> <input type="text" value="1"/>
<p>Total Visits *</p> <input type="text"/>	<p>Total Units *</p> <input type="text"/>

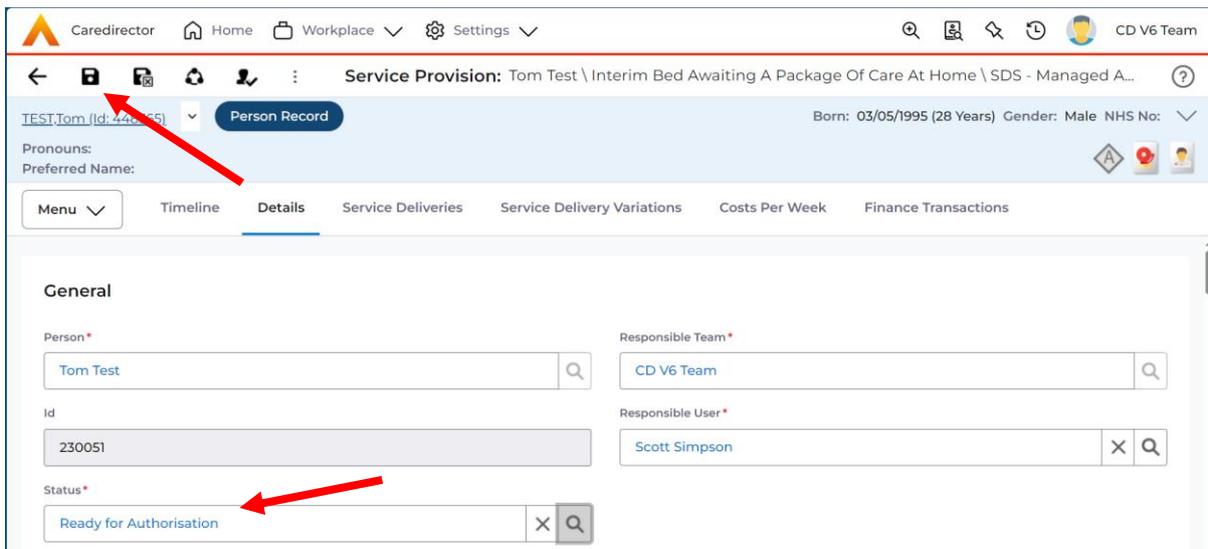
11. When finished, select **Save and Return to Previous Page**.



12. Continue to add more if you are doing more time travelling according to the Adult Care and Support plan or the earlier home care service provision.



13. Go back to the **Status** and change it to **Ready for Authorisation** from **Draft**. Then select **Save**.



14. This requires authorisation to start payments, so long as the actual start date has been entered.

### Fourth Step – Authorisation

All these need to be authorised, the Home Care, Home Care Travel Time and P1 Interim Awaiting Care as care has started from this time. Please ensure your manager/ responsible user is authorising these service provisions.

If you have struggled with any of the earlier steps, please contact **Adults System Support**.

### Fifth Step – When a service provider is known

This step is the last step, and it requires a lot of the same as before with step two and three. As with this step, once you know who is going to provide the home care and home care travel time service provision you need to recreate the service provisions under the new service provided. No longer will it be **Interim Bed Awaiting a package of care at home**.

#### Commissioning

<p>Purchasing Team</p> <input type="text" value="Hospital Team Wakefield (Pinderfields)"/>	<p>Frequency in Weeks *</p> <input type="text" value="1"/>
<p>Service Provided</p> <input type="text" value="Interim Bed Awaiting A Package Of Care At Home \ SDS - Ma..."/>	<p>Provider/Carer</p> <input type="text" value="Interim Bed Awaiting A Package Of Care At Home"/>
<p>Rate Required *</p> <input type="radio"/> Yes	<p>Cost Per Week</p> <input type="text" value="0.00"/>

P1 Interim Awaiting Care service provision should be ended the day the correct home care provider is to be charged from. So, the same end date and start date. If this service provision is not ended, then the home will continue to get paid, but the client will have left. In this instance we can use the same date as new service provision start date as P1 Interim Awaiting Package of Care has an adjusted days of -1 so it does not charge for the last day.

This is what you need to do. Go into the dummy, old, service provisions (do this for both home care, home care travel time and P1 Interim Awaiting Care) and put in an **Actual End Date** (this is the day before the new provider is going to be taking over). Please note: That the Actual End Date cannot be set in the future, so it will be more than likely the day of or the day the new provider took over in the past, as the new service provisions will have an actual start date of the same. The **End Reason** will be **Change of Provider**.

**Dates**

Planned Start Date	Planned End Date
<input type="text"/>	<input type="text"/>
Actual Start Date	Actual End Date
<input type="text" value="19/02/2024"/>	<input type="text" value="21/02/2024"/>
Start Reason*	End Reason*
<input type="text" value="New Placement"/>	<input type="text" value="Change of Provider"/>

Once both Home Care and Home Care Travel time have an end date and End Reason. You now need to recreate the home care and home care travel times in its entirety. The new provider and new **actual start date** is day after the actual end date of the dummy service provision. Adjusted days for managed account service provisions is 0 days so you get charged for the day it ends. New SP's need to start the day after.

Make sure the new service provisions of Home Care and Home Care Travel time have been authorised to issue payments.

### Sixth Step – Conclusion

There are a lot of steps within the P1 Interim Awaiting Care so to summarise here is it in chronological order.

- P1 Interim Awaiting Care service provision is created.
- Home Care with dummy provider service provision is created.
- Home Care Travel with dummy provider service provision is created.
- New provider is found.
- Home Care with dummy provider service provision is ended on the day before the new provider is taking over.
- Home Care Travel Time with dummy provider service is ended on the day before the new provider is taking over.
- Home Care with correct provider is created with the actual start date being the same as the end date of the dummy. The Financial Assessment will automatically transfer to this one the day after the end date of the dummy SP.
- Home Care Travel Time with correct provider is created with the actual start date being the same as the end of the dummy. The Financial Assessment will automatically transfer to this one the day after the end date of the dummy SP.
- P1 Interim Awaiting Care service provision should be ended the day the correct home care provider is to be charged from. So, the same end date and start date. If this service provision is not ended, then the home will continue to get paid, but the client will have left. In this instance we can use the same date as new service provision start date as P1 Interim Awaiting Package of Care has an adjusted days of -1 so it does not charge for the last day.

- You will end up with Home Care and Home Care Travel time with the correct provider as a service provision until the end date is put in place for all as the need for the package of care is no longer needed.

### Version Control

Version	Change	Author	Date
V1	INITIAL START	SS	19/02/2024
V1.1	Changes made by service	SS	29/02/2024