

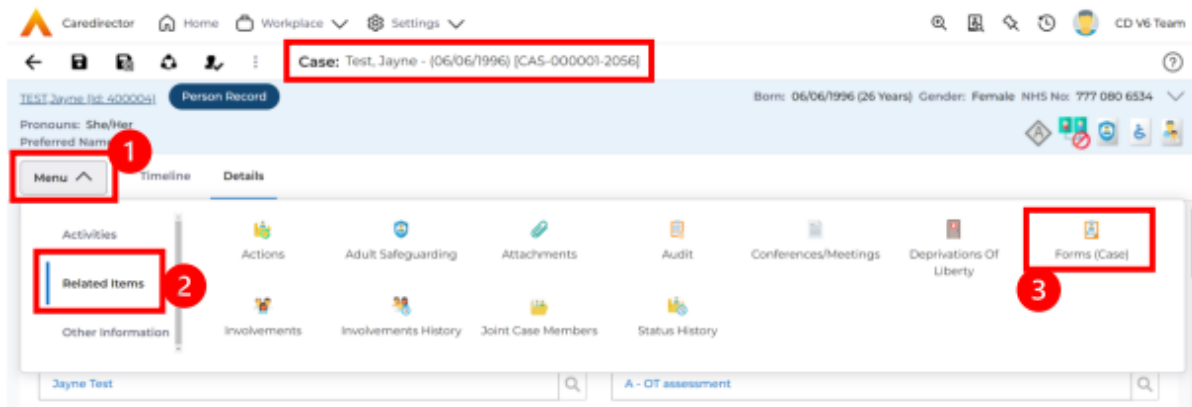


Deputy & Estates Team Referral V1.0

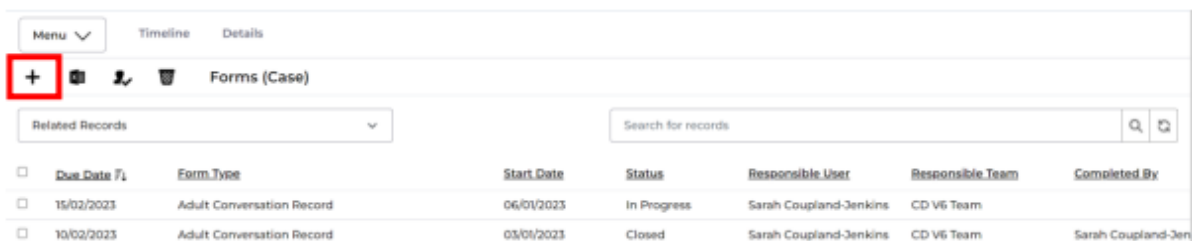
Document	Deputy & Estates Referral
Purpose	Step by step process of how to make a referral to the Deputy & Estates Team
Version	V1.0
Owner	ICT Transformation Team
Last Updated	4/4/2023

How to find the Deputy & Estates Referral form

1. The form is used to make a referral to the Deputy & Estates Team to request their involvement with a person's affairs.
2. Locate the relevant **Case Record > Menu > Related Items > Forms (Case)**.



3. Once selected, it shows a list view of all available **Forms** for this **Case**. To create a new form, select **create new record** from the toolbar.



4. Under **Form Type** select **Deputy and Estates Team Referral Form**. Then click **Save**.

The screenshot shows the 'Form (Case): New' creation form. The 'Form Type' dropdown is highlighted with a red box and contains 'Deputy and Estates Team Referral Form'. The 'Status' dropdown is set to 'In Progress'. Other fields include Case, Responsible Team, Responsible User, Date, Start Date, and Review Date.

How to complete the form

1. Once saved, a pencil (edit) icon will appear on the toolbar. Select it.

The screenshot shows the top navigation bar of the system. The breadcrumb trail reads: **Form (Case): Deputy and Estates Team Referral Form for Test, Jayne - (06/06/1996) [CAS-000001-2056] Starti...**. Below this, the user profile for **TEST, Jayne (Id: 400004)** is displayed, including a **Person Record** button, birth date (06/06/1996), gender (Female), and NHS number (777 080 6534). A toolbar contains several icons, with a red box highlighting the pencil icon. Below the toolbar, a **Menu** dropdown and a **Details** tab are visible. The main content area shows the **General** section with the following fields:

Case*	Test, Jayne - (06/06/1996) [CAS-000001-2056]	Responsible Team*	Adults Connecting Care Team East
Form Type*	Deputy and Estates Team Referral Form	Responsible User	Sarah Coupland-Jenkins

2. This will open the form for you to complete.

The screenshot shows the **Deputy and Estates Team Referral Form** interface. The breadcrumb trail is **Deputy and Estates Team Referral Form**. The user profile for **TEST, Jayne (Id: 400004)** is shown at the top. A sidebar on the left lists navigation options: **Person Details**, **Living Arrangements**, **Property Ownership**, **Legal**, **Assets**, **Debts**, and **Referrer information**. The main content area is titled **Person Details** and contains the following sections:

Client Details - Adults

First Name	Jayne	Last Name	Test	Address	20, Lakeside Park, Normanton, WF6 1WN
Date of Birth	06/06/1996	NHS Number	777 080 6534	ID	400004

Current marital status

Marital Status	Married
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Does the service user have mental capacity to manage their financial affairs?

Yes No

Has the Service User given consent

Has the person consented to the referral to the Deputy & Estates Team?

Yes
 No

3. The form displays a list of all the person's current **Relationships**. If you wish to add a new **Relationship**, you can click on **New**. This will allow you to add a new **Relationship** to the person's record (see separate guide).

Person's current relationships

New	
Related Person	Related Relationship
Jack Test	Carer
Test Tester	Independent Advocate
Courtney Test	Cousin
Sarah Test	Mother

4. All sections of the form are **mandatory**. Answering Yes to some questions will open up new questions. For example:

Is there an occupational or private pension?

If 'not known', please try and find out whether the service user has worked in the past and what jobs they may have held.

- Yes
 No
 Not known

If 'Yes', please complete the pension details below if known and also provide paperwork if possible.

New					
Name and address of company	Reference / Member Number (if applicable)	Amount (£) *	Gross or Net	Frequency	
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	

- Any of the **tables** for Assets, Pensions, Debts etc can have new rows added. Click on **New** to add a new row.

Assets ▼ ☰

Bank accounts / savings ☰

Please complete below to the best of your ability with the information known to you at the present time.

+ New

Bank name	Account Number (must be 8 digits)	Sort Code (must be 6 digits)	Name(s) on account	Capital	
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	🗑
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	🗑
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	🗑

- Please note the instructions at the end of the form. This is a reminder of what **additional information** is required. This can be added to CareDirector as **Attachments**.

Referrer information ▼ ☰

i Prior to changing the status of this form to Complete please:

- Check GP details are correct.
- Set up relationships with up-to-date details of family members.

Documentation required:

- Mental Capacity Assessment, written signature required by DWP on the back page.
- Any other useful paperwork such as bank statements, private pension statements, utility bills, funeral plans, copy Wills etc.

[Read Less](#)

- When finished, select **Save and Return to Previous Page** from the toolbar.

←
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📄
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⋮
Deputy and Estates Team Referral Form

TEST, Jayne (Id: 400004) Person Record
Born: 06/06/1996 (26 Years) Gender: Female NHS No: 777 080 6534 ▼

Pronouns: She/Her

Preferred Name: Jayne

8. Change the **status** of the form to **Complete**. Then **Save**.

Form (Case): Deputy and Estates Team Referral Form for Test, Jayne - (06/06/1996) [CAS-000001-2056] Starti...

TEST, Jayne (0004) Person Record Born: 06/06/1996 (26 Years) Gender: Female NHS No: 777 080 6534

Pronouns: She/Her Preferred Name: Jayne

Menu Details

General

Case * Test, Jayne - (06/06/1996) [CAS-000001-2056] Responsible Team * Adults Connecting Care Team East

Form Type * Deputy and Estates Team Referral Form Responsible User Sarah Coupland-Jenkins

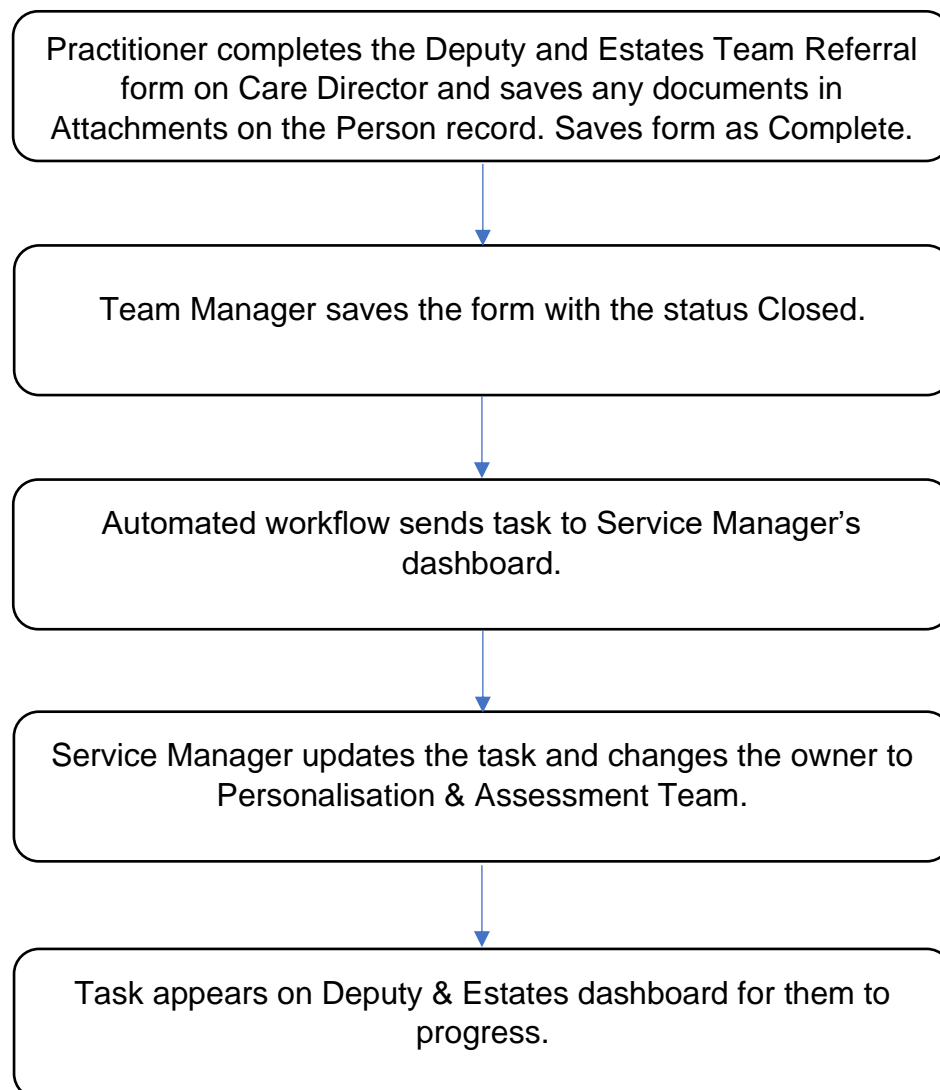
Status * Complete Due Date 04/04/2023

Start Date * 28/03/2023 Review Date

Preceding Form

The approval process

The flowchart below shows the process of how the form is approved and sent to the Deputy Estates Team for action.



Version Control

Version Number	Change	Author	By Date
1.0	Creation of document	SCJ	04/04/2023