

New Referrals Checklist

Service User Name :

Date :

Name of the Coordinator :

- Match** the care worker and accept the **new referral** by email with the start date and call time **within 30 minutes**
- Get the latest support plan from the social service.
- Call the client to Introduce and check their needs match with the support plan.
- If the client needs not met, call / Email the social service
- Complete a service user profile, Service order, and personalized task list for each call
- For Medication admin, update the GP and Pharmacy contact details in the Mobizio
- Book Hannah for an assessment through set-more.
- Define the client health conditions and needs to the booked care worker
- Call the client and share the care worker's profile.
- Drop the home folder including a copy of the social services care plan along with a personalised task list and required PPE on or prior to starting the service
- If Key Safe is in place, share the number with the care worker and update the Mobizio dashboard.
- Intervene the service user risk and add in the risk band category
- Monitor the live view to check if the care worker attends the call on time.
- After the first call, take the feedback from the service user and care worker to action.