

**Pre-approval Process for Potential Providers.**

The approval process will take 12 -14 weeks but is dependent on your commitment, available training dates and timely return of all documentation. Training, and some elements of the assessment are online so you will need access to a device (tablet or laptop) and be able to use Microsoft Teams and email proficiently or be prepared to develop these skills.

**Stage 1 - Initial inquiry and 1<sup>st</sup> visit to your home.**

Procedure and Visits	Forms and Actions
<p><b>Your initial inquiry</b> - details taken and passed on to the Shared Lives Manager.</p> <p>The Shared Lives manager will contact you in two weeks, to enquire as to whether you wish to continue with the application process.</p> <p>If you wish to proceed, the Shared Lives manager and your allocated Shared Lives Worker will arrange to jointly visit you at your home.</p>	<p>Initial enquiry form completed.</p> <p>Information pack sent to you with supporting letter, information pack and Shared Lives brochure.</p>
<p><b>1<sup>st</sup> home visit</b> - Discussion regarding your expectations, what the scheme's expectations are of you and the approval process, including training. Basic visual check of your home and dialogue regarding the capacity of your home.</p>	<p>Record of Pre-assessment meeting completed by the Shared Lives worker.</p> <p>Application form and written details of the approval process left with you/emailed to you.</p>

**Stage 2 -Application Form**

Procedure and Visits	Forms and Actions
<p>On receipt of your application form, the Shared Lives worker checks that your knowledge, skills, and the requirements of the scheme are compatible.</p>	<p>Record of contact completed with actions taken and outcome completed by the Shared Lives worker.</p>

<p>The Shared Lives worker checks that your application is sufficient for the approval process to proceed.</p> <p>Shared Lives worker will feedback to you on what is required for the process to proceed if any gaps in your application are identified. If the gaps in the application are unable to be rectified the scheme cannot proceed with your application and this is clearly explained to you.</p> <p>If the application can proceed, the Shared Lives worker contacts you to arrange a 2<sup>nd</sup> home visit and confirm that references will be requested.</p> <p>If the application is for a transition placement, the Shared Lives worker checks with the allocated social work team that they are aware of your application to the scheme, and that there is an agreed budget for the Shared Lives placement.</p>	<p>Application is scanned/saved into your electronic file.</p> <p>Shared Lives Worker checks each reference on their return and contacts the referee if more information is required.</p>
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### **Stage 3- Assessment Process**

<b>Procedure and Visits</b>	<b>Forms and Actions</b>
<b>2<sup>nd</sup> Home Visit</b>	
<p>A quick recap of the process including Panel, if required, and the Shared Lives worker will answer any questions you have.</p>	
<p>The 'Care Certificate Proposal' – Shared Lives information sheet is shared with you which outlines the 12-week Care Certificate training program -</p> <p><b>1-day</b> fast track training, office based at County Hall Worcester.</p> <p>One-week - Monday to Friday, Microsoft Team's online Care Certificate Training. These include distance learning, such as Microsoft SWAY information packages with quizzes and case studies. During this week, on</p>	<p>A copy Care Certificate programme given to you and training agreement signed.</p> <p>Agreement that the Shared Lives worker will email Fast Track training dates to you and book with learning and development the dates selected. Learning and development will send confirmation email.</p>

the Friday afternoon, First Aid awareness is completed [this is office based at County Hall].

To complete the Care Certificate, the Shared Lives Team need to sign off competencies, which require you to show practical examples of competencies. This can be achieved by shadowing in a care setting, visiting an existing Shared Lives provider or supporting an Individual who requires support in your home etc. [Observation booklet]

Towards the end of the Care Certificate training program, a professional discussion between you and a qualified assessor will take place to review work completed, this will usually take around 45 minutes.

For an equivalency to be undertaken instead of completing the full care certificate, there needs to be evidence of prior learning, either in the form of relevant certificates, a CPD log or evidence of online learning. This needs to be less than 3 years old. As the registered service, we need to be satisfied that knowledge and experience is current. If we are satisfied that the prior learning and experience meets this threshold and can be evidenced, an equivalency can be undertaken, with any gaps in knowledge to be covered by the relevant parts of the care certificate.

**The Shared Lives worker is only able to book you onto the Teams online Care Certificate training prior to you attending panel or if you have a confirmed a panel date.**

**The care certificate is to be fully signed off within 12 weeks of panel.**

**Evidence of competencies can be signed off by Shared Lives worker throughout the approval process ahead of final sign off.**

Shared Lives worker identifies a current Shared Lives provider to link with you. They will contact the current Shared Lives provider to seek agreement and get permission to share their contact details with you.

<p>Discussion with you will take place about Shared Lives Provider networking. It is important to develop a full understanding of the role of a Shared Lives provider and establish peer support. To achieve this, the Shared Lives Worker will organise contact between you and an experienced provider. This may also help with completing any competences.</p>	
<p>Approval Paperwork explained and discussed, and left with you to complete unless you would prefer that it is emailed to you-</p> <ul style="list-style-type: none"> <li>• Community Network Map</li> <li>• Day in the life [one each if joint application]</li> <li>• Personal profile [one each if joint application]</li>   <li>• Applicant's health declaration MRF1 form- left to complete.</li> <li>• Mortgage or landlord approval form with supporting letter if required.</li> </ul>	<p>If agreed, Shared Lives worker to email to you - Community Network Map, Day in the life, Personal profile, Mortgage, or landlord agreement forms with supporting letter if required and MRF1 Form. Please return in a secure email.</p>
<p>The Disclosure Barring service [DBS] process to be explained by Shared Lives worker. Agree for link to be emailed to you to complete. Shared Lives worker will explain what ID will need to be seen by them at the next home visit, so DBS application can be completed and sent off.</p> <p>If you have a live DBS - your Shared Lives worker will request a form from the DBS team, and they will pass it on to you to complete. This provides the scheme with a code to access your current DBS.</p>	<p>The email link sent to you will look like this- Dear Please follow this link to complete the DBS form <a href="https://disclosure.capitarvs.co.uk/worcestershire/">https://disclosure.capitarvs.co.uk/worcestershire/</a></p> <p>To access the form, click in the orange box on "start application". The organisational reference is WCC201. Do not enter a password, it is not needed. Then click enter.</p> <p>You should then be able to work your way through the application.</p> <p>If you have any questions, please do not hesitate to contact your allocated worker.</p>

	If required a live DBS form[s] is requested from DBS team and passed on to you.
Date agreed for next home visit with brief explanation given to you by the Shared Lives Worker	Record of Home 2 <sup>nd</sup> visit recorded in your assessment form.  Any competencies observed during visit are recorded in your individual observation book, if applicable.

<b>3<sup>rd</sup> Home visit</b>	
Shared Lives worker will collect and review any paperwork completed. Any actions required will be discussed and agreed.	Following receipt of MRF1 health form[s], Shared Lives worker will review it and pass it on to Maitland Medical OH Admin Team if required..  Completed forms saved / scanned into your electronic file.
Environment Home Risk Assessment explained and completed by Shared Lives worker – actions agreed e.g., Gas Safe certificate, Car Insurance, fire blanket etc. [Public Liability insurance not needed until placement is found but <b>must be in place</b> before placement goes ahead].	Home risk assessment typed up saved into your electronic file
Fire Evacuation Plan – Written details and map of escape routes discussed, and Shared Lives worker will request you complete these for your home. [Supporting paperwork left to aid completion].	Request email examples if preferred.
DBS ID checks completed by Shared Lives worker.	
You will be asked to produce a family brochure. Your Shared Lives worker will discuss and share an example with you	Email- example if preferred.
Panel date agreed.	Panel date plan shared with Registered Manager.

<p>Care certificate 5-day training dates shared, and dates of attendance agreed.</p> <p>If applicable, Shared Lives worker to collect evidence of prior learning from you, to be shared with the Learning and Development team.</p> <p>Shared Lives worker will discuss the plan for the completion of competency observations.</p> <p>Shared Lives worker will request an update on networking with a current Shared Lives Provider, they will support/ offer guidance if this has not taken place.</p>	<p>Shared Lives worker books agreed dates with Learning and Development [Care Certificate 5-day online training and First aid awareness]. Dates and invite sent by Learning and Development team.</p> <p>Review of equivalency with Shared Lives Worker, what gaps need to be completed with training are identified and dates agreed with learning and development.</p> <p>Plan and arrangement agreed for competency observations to be completed.</p>
<p>Date agreed for next home visit with brief explanation from Shared Lives worker about what it will include.</p>	<p>Record of 3rd home visit in your assessment</p> <p>Any competences observed during visit are recorded in your individual Observation Book, if applicable.</p> <p>Information received transferred into your assessment form.</p>

<p><b>4<sup>th</sup> Home visit</b></p>	
<p>Shared Lives worker will collect and review any paperwork completed and review the process so far. Any actions discussed and agreed. They will also answer any questions you may have.</p>	
<p>A discussion and review of networking with current Shared Lives provider[s].</p>	<p>Shared Lives worker will record the details, experience, and outcome of networking with</p>

	current Shared Lives carer[s] in your assessment form.
Any outstanding forms, actions for Home Risk Assessment, training and competency observations reviewed and actions agreed.  Review Assessment Form – Shared Lives worker will ask questions to fill in any gaps that have not been covered in the process so far.	
Introduction presentation completed with you.	Introduction checklist completed. Copies of Handbook and Medication policy given to you, and receipt of delivery completed. Banding tools shared with you. Shared Lives Plus leaflet left.
	Record of 4 <sup>th</sup> home visit recorded in your assessment.  Any competencies observed during the visit recorded in your observation book, if applicable.  Information received transferred into your assessment.

<b>5<sup>th</sup> Home visit</b>	
Your assessment is shared with you to add your comments, date, and sign. There is also a signing section to agree to ongoing training.  The assessment should be sent to the Shared Lives manager for their comments no later than two weeks before the agreed panel date.	Invite to panel is sent to you.  Plan agreed to complete any outstanding observations.

**This outlines the general process for approval of Shared Lives provider[s], although there will be occasions when the assessor [Shared Lives worker] may identify the need for additional input or may have concerns and identify gaps in the application process. Should this happen the Shared Lives worker will act promptly and discuss any issues with the Shared Lives manager to agree actions.**

**Any concerns need to be acted upon quickly, as they can delay or terminate the approval process.**

**Any concerns or difficulties will be shared with you to ensure appropriate action.**

Helpful tips to ensure that you are prepared to join the online Care Certificate sessions.

- Once you are booked onto the Care Certificate download the Teams App on the device you will be using.
- Use your email address to set up – this will set up a calendar for you.
- You will receive several invites to join the Care Certificate sessions via your email.
- Accept every invite – once accepted, these sessions will automatically appear in your calendar.
- To join the sessions, you then click on the relevant session, on the relevant day.