

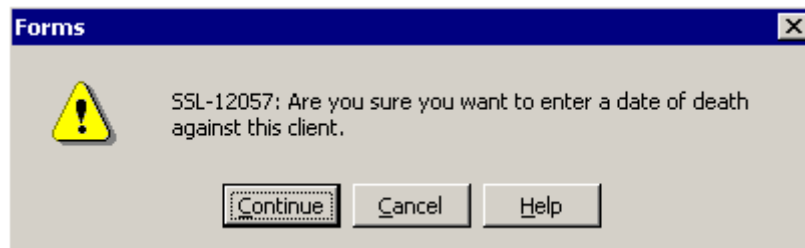
CRIB SHEET - CLOSING A CASE DUE TO DEATH OF CLIENT

Where a case is closing due to the death of the client it is essential that all relevant areas of the client record are closed correctly to ensure that the case is closed correctly.

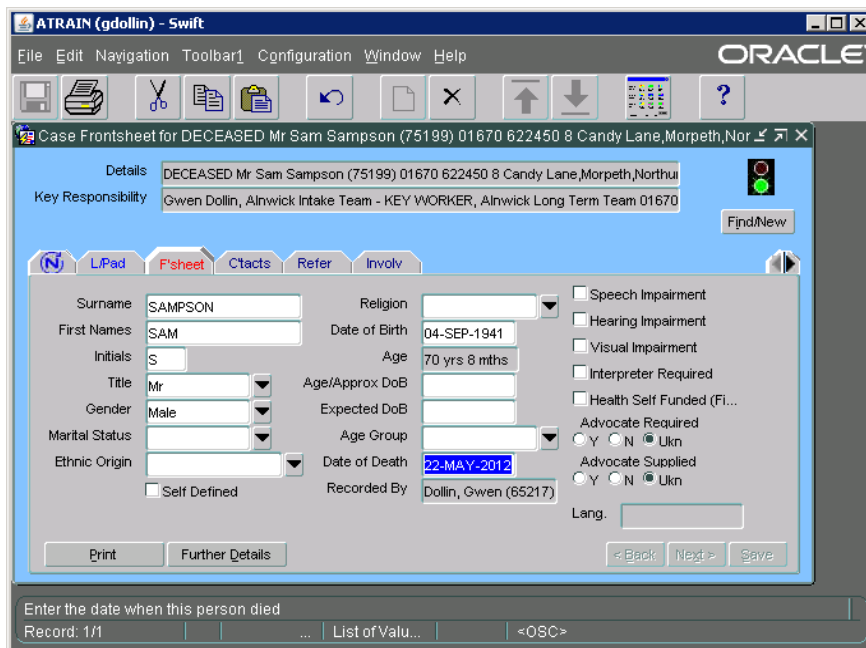
It is important to check to see if there is a current Safeguarding Referral and, any Draft CSP1's before the case is closed and you may need a discussion with the Team Manager before proceeding with closing the case.

Recording Death of Client

- Click on **F'sheet** (Frontsheet).
- Click in the Date of Death field and enter the date the client died.
- Click on **Save**. The following message will appear:



- Click on **Continue**.
The following screen will be displayed:



The name of the person who entered the date of death is entered in the Recorded By field. The word "DECEASED" now displays before the name in the header details.

- Any Costed Packages of Care (CPC) will be automatically closed off on the date of death. If there are any services that should have been ended before the date of death then CPC will need to be amended to reflect this.
- A Death Notification workflow job will be automatically sent to the Key Worker.
- Frontsheet now displays that the client is deceased.
- You **must** close off all other details in Swift:
 - Referral
 - Hazards
 - Category (e.g. Employment Status)
 - Paper File Location
 - Draft CSP1's against Assessments or Reviews (if appropriate)
 - Future Reviews
 - Current Safeguarding Cases (if appropriate)
 - Registrations
 - Blue Badge
 - Legal Status
 - Involvements (must be ended lasted)

Ending the Referral

- Click on **Refer** (Referrals).
- Click in Closed Date field and enter the date.
- Enter 'Died' in the Close Reason field.
- Click on **Save**.

The following screen will be displayed:

The screenshot shows the 'Refer' tab in the ATRAIN (gdollin) - Swift software. The window title is 'ATRAIN (gdollin) - Swift' and the Oracle logo is visible in the top right. The main content area displays 'Case Frontsheet for DECEASED Mr Sam Sampson (75199) 01670 622450 8 Candy Lane, Morpeth, North'. Below this, there are tabs for 'L/Pad', 'F'sheet', 'C'tacts', 'Refer', and 'Involv'. The 'Refer' tab is active, showing a 'Contact & Referral Dates' table with one entry: '22-DEC-2011 22-DEC-2011'. To the right of the table are various fields for 'Contact Reason', 'Date/Time Refer.', 'Client Category', 'Team Resp.', 'Priority', 'Eligibility Status', 'Outc. Date/Time', 'Close Date/Time', 'Refer. Status', 'Reason', 'Worker', 'Respond By', 'Outcome', and 'Notes'. The 'Close Date/Time' is set to '22-MAY-2012 13:56' and the 'Close Reason' is 'Died'. At the bottom of the window, there is a status bar with the text 'The reason for the contact' and 'Record: 1/1'.

Ending Hazards

- Click on **F'sheet** (Frontsheet).
- Click on **Further Details**.
- Click on **Hazs.** (Hazards).
- Enter the date of death in the End Date field for each hazard.
- Click on **Save**.

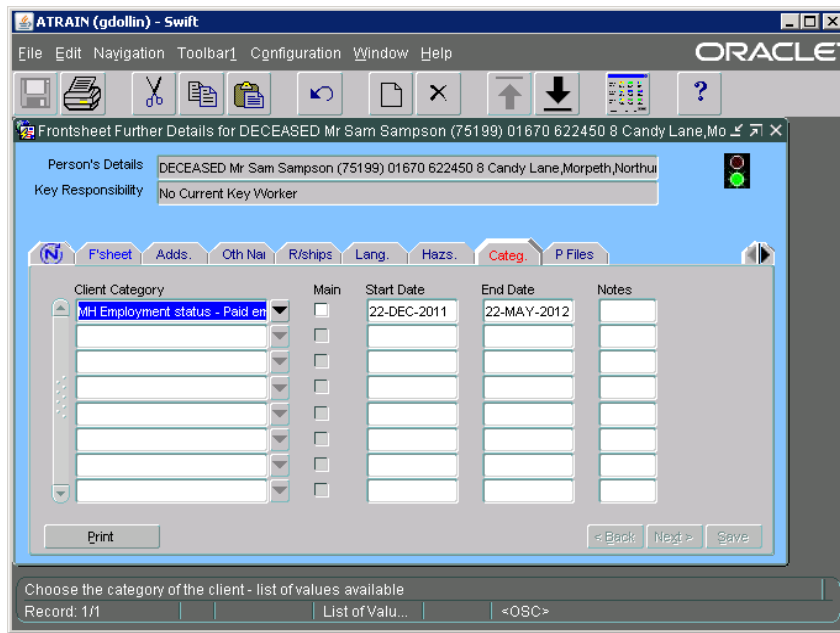
The following screen will be displayed:

Ending Category

Where the client has an employment status or any other category recorded in Category screen then these should be ended when the client dies.

- Click on **Categ.** (Category).
- Enter the date of death in the End Date field.

The following screen will be displayed:

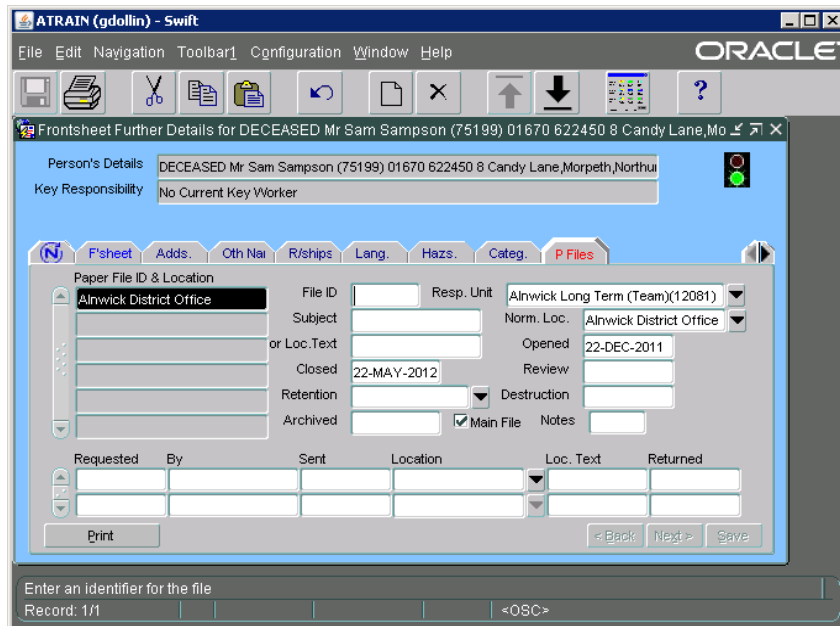


Ending Paper File Location

If the client has a paper file location recorded this will need to be ended.

- Click on **P Files** (Paper File Location).
- Enter the date of death in the Closed field on all locations.
- Click on **Save**.

The following screen will be displayed:



Draft CSP1's against the Assessment or Review

If the client has a draft CSP1 then this will need to be update before the case is closed, and may need a discussion with the Team Manager before proceeding with closing the case.

Complete one of the following actions, as appropriate:

- Finalise the CSP1.
- If the assessment was started but not completed e.g. due to death of the client, finalise the CSP1 by recording “an assessment/plan which was not completed” in the first question field on the CSP1.
- If the CSP1 was created in error, you will need to contact the Systems Support Help Line to have this removed send an email to SystemsHelpline <mailto:systemshelpline@northumbria-healthcare.nhs.uk>
- If the CSP1 is checked out, you must check this back into Swift in order to finalise it.

Note: You may need to add yourself as an involvement on the involvement screen to access the CSP1 don't forget to end your involvement on the involvement screen when you have finished.

The screenshot displays the 'Assessment Framework for: DECEASED Mr Sam Sampson (75199) 01670 622450 8 Candy Lane, Morpeth, Northumbria' in the Swift software. The interface includes a menu bar (File, Edit, Navigation, Toolbar, Configuration, Window, Help) and a toolbar with various icons. The main window shows 'Person's Details' and 'Key Responsibility' (Gwen Dollin, Training Alnwick Social Care Team - KEY WORKER, Alnwick Social Ca). Below this, there are tabs for 'L/Pad', 'Asses:', and 'Rev.'. The 'Asses:' tab is active, showing a list of assessment types with 'Client Needs Assessment' selected. The 'Assessment & End Date' section contains fields for 'Assess. Type', 'Resulting From', 'Reason/Views', 'Subject' (Sampson, Sam Mr (7519)), 'Responsibility', 'Resp. Team', 'Status', 'Answers From', and 'Authorised'. On the right, there are fields for 'Requested', 'Required By', 'Target Start' (14-MAY-2016), 'Target End' (14-MAY-2016), 'Level', 'Copy Answers', 'Status Rsn', and 'Re-Assessment'. At the bottom, there are buttons for 'Print', 'Further Details', '< Back', 'Next >', and 'Save'. A footer message reads: 'Choose the type of assessment to be undertaken - list of values available Record: 1/2 <OSC>'.

Deleting a Review

When a case is to be closed any future reviews that will no longer take place should be deleted.

Note: if the case closure is following a Care Management Review then completion of the review on Swift should be recorded as part of the review process.

- You will need to contact the Systems Support Help Line to have this review removed send an email to SystemsHelpline <mailto:systemshelpline@northumbria-healthcare.nhs.uk>

The screenshot shows the ATRAIN (gdollin) - Swift software interface. The main window displays the 'Assessment Framework for: DECEASED Mr Sam Sampson (75199) 01670 622450 8 Candy Lane, Morpeth, Northumbria'. The 'Person's Details' field contains the client's name and address, and the 'Key Responsibility' field contains the reviewer's name and role. The 'Review Due Date & Type' section shows a list of reviews, with '14-DEC-16 Client Needs' selected. The 'Review Type' is set to 'Client Needs', and the 'Subject' is 'Sampson, S'. The 'Reviewer' field is empty, and the 'Due Date' is '14-DEC-2016'. The 'Status' is set to 'Planned'. The 'Notes' field is empty. The 'Upload' section has three radio buttons: 'OY', 'NI', and 'UKm'. The 'Print' and 'Further Details' buttons are visible at the bottom of the form.

Current Safeguarding

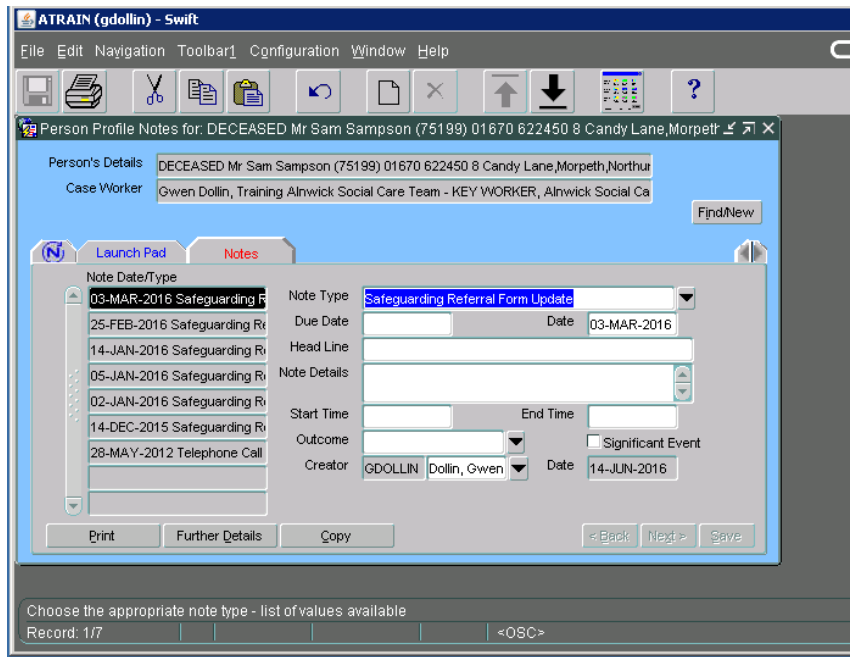
It is important to check to see if there is a current Safeguarding Referral before the case is closed and may need a discussion with the Team Manager before proceeding with closing the case.

Note: You may need to add yourself as an involvement on the involvement screen to access the Safeguarding Episode Form don't forget to end your involvement on the involvement screen when you have finished.

Complete one of the following actions, as appropriate:

- If the case is closed and there are no further safeguarding issues, then please update the episode form with the relevant closure details and ensure the Current Status has been changed to Closed to Safeguarding.
- If the Client has died then the Care Management Referral and Key Team must be left open until the Safeguarding Referral has been closed.

The following screen will be displayed:

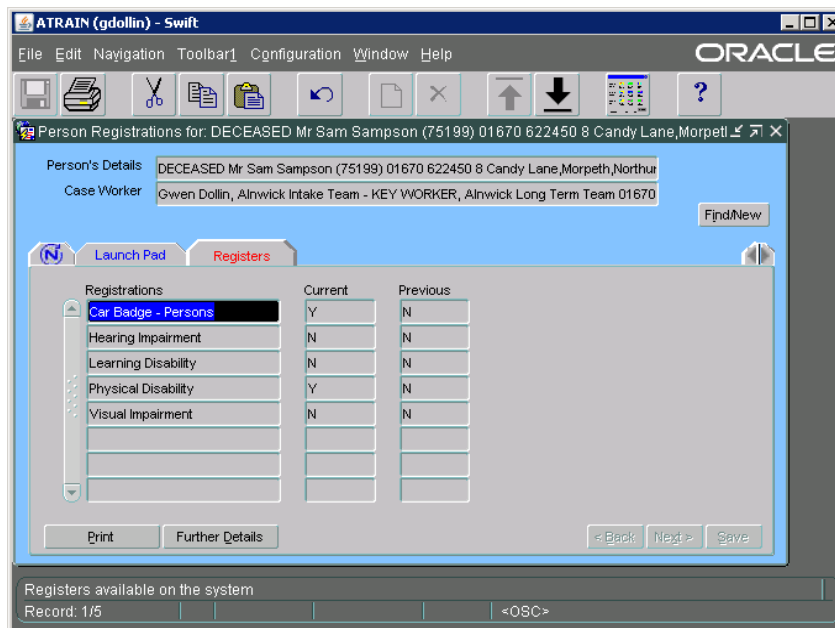


Ending a Registration




- Navigate to [Person's Registrations](#) for the client.

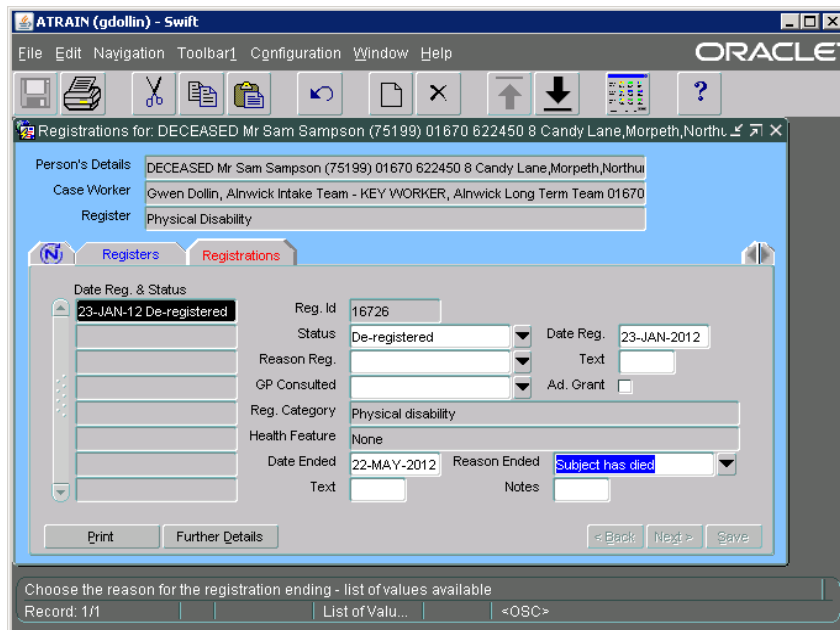
You will see a screen similar to the following screen:



- From the main registrations screen, access the registration you wish to end.
- Click on [Further Details](#).
- Change the Status field to 'De-registered'.
- Enter the date of death in the Date Ended field.
- Enter 'Subject has died' in the Reason field

- Click on .

The following screen will be displayed:



Person's Details: DECEASED Mr Sam Sampson (75199) 01670 622450 8 Candy Lane, Morpeth, North...

Case Worker: Gwen Dollin, Alnwick Intake Team - KEY WORKER, Alnwick Long Term Team 01670

Register: Physical Disability

Registers Registrations

Date Reg. & Status: 23-JAN-12 De-registered

Reg. Id: 16726

Status: De-registered

Date Reg.: 23-JAN-2012

Reason Reg.:

GP Consulted:

Ad. Grant:

Reg. Category: Physical disability

Health Feature: None

Date Ended: 22-MAY-2012

Reason Ended: Subject has died

Notes:

Print Further Details <Back Next> Save

Choose the reason for the registration ending - list of values available

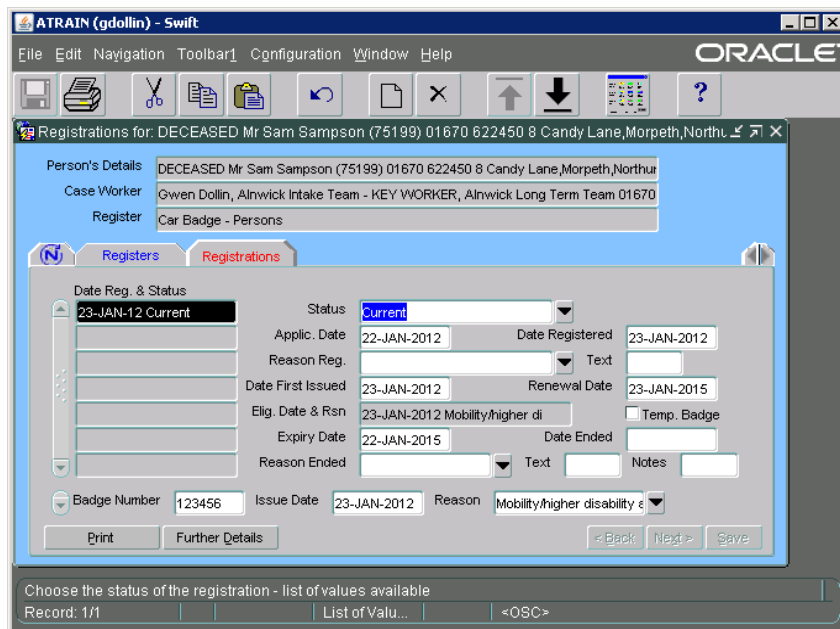
Record: 1/1 List of Valu... <OSC>

- Repeat for any other registrations (other than Blue Badge)

Ending Blue Badge

- From the main registrations screen, access the Car Badge – Persons screen.

The following screen will be displayed:



Person's Details: DECEASED Mr Sam Sampson (75199) 01670 622450 8 Candy Lane, Morpeth, North...

Case Worker: Gwen Dollin, Alnwick Intake Team - KEY WORKER, Alnwick Long Term Team 01670

Register: Car Badge - Persons

Registers Registrations

Date Reg. & Status: 23-JAN-12 Current

Status: Current

Applic. Date: 22-JAN-2012

Date Registered: 23-JAN-2012

Reason Reg.:

Date First Issued: 23-JAN-2012

Renewal Date: 23-JAN-2015

Elig. Date & Rsn: 23-JAN-2012 Mobility/higher di

Temp. Badge:

Expiry Date: 22-JAN-2015

Date Ended:

Reason Ended:

Notes:

Badge Number: 123456


Issue Date: 23-JAN-2012

Reason: Mobility/higher disability

Print Further Details <Back Next> Save

Choose the status of the registration - list of values available

Record: 1/1 List of Valu... <OSC>

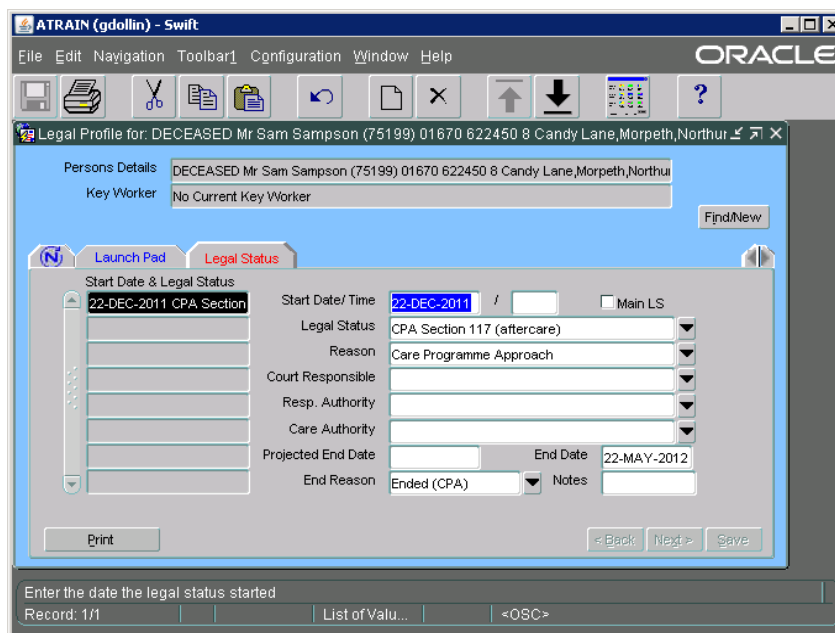
- Change the status to 'De-registered'.
- Enter the date of death in the Date Ended field.
- Enter 'Subject has died' in the Reason Ended field.
- Click on .

Ending Legal Status



- Navigate to [Legal Profile](#) for the client.
- Click on the legal status you wish to end in the Start Date & Legal Status summary list.
- Enter the date of death in the End Date field.
- Enter Ended (CPA) in the End Reason field.
- Click on [Save](#).

The following screen will be displayed:



Legal Profile for: DECEASED Mr Sam Sampson (75199) 01670 622450 8 Candy Lane, Morpeth, Northur

Persons Details: DECEASED Mr Sam Sampson (75199) 01670 622450 8 Candy Lane, Morpeth, Northur

Key Worker: No Current Key Worker

Find/New

Launch Pad Legal Status

Start Date & Legal Status

Start Date/ Time	Legal Status	Reason	Court Responsible	Resp. Authority	Care Authority	Projected End Date	End Date	End Reason	Notes
22-DEC-2011	CPA Section 117 (aftercare)	Care Programme Approach					22-MAY-2012	Ended (CPA)	

Print < Back Next > Save

Enter the date the legal status started

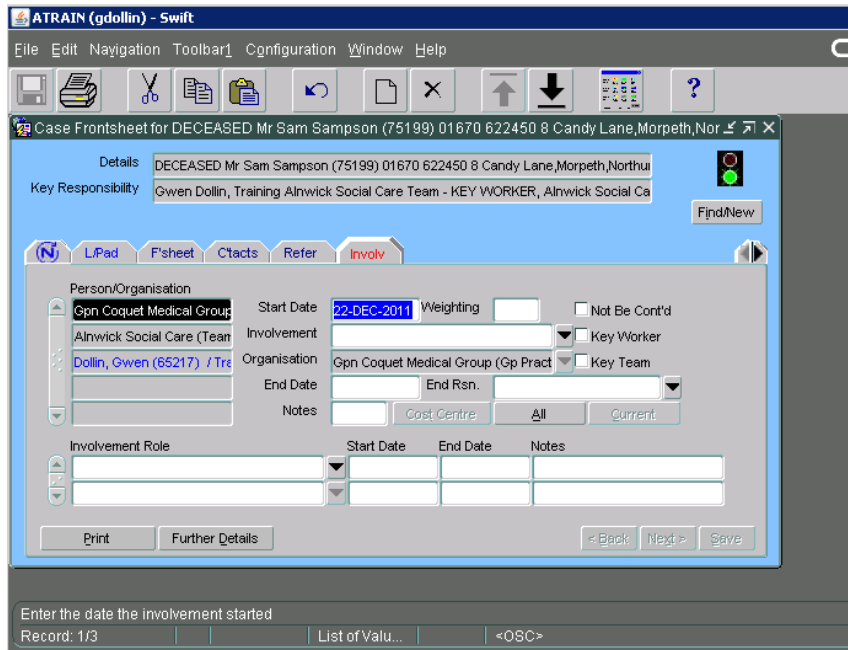
Record: 1/1 List of Valu... <OSC>


Ending Involvements

When the date of death has been recorded you must ensure that all involvements are ended.

- Click on [Involv](#) (Involvements).

The following screen will be displayed:



- Click on the first involvement that needs to be ended.
- If you are ending a key worker or key team involvement, you must remove the tick from the Key Worker/Key Team fields.
- Enter the date the involvement ended in the End Date field.
- Click on .

Note: any involvement role entered will be automatically ended.