1 SET UP

- Arrange handover with referrals team member, including referral aims, history and case status (INA/Settled/Interim)
- Read all available information on iinsight including Case Consultation, Case Proposal, Contact Info
- Contact case manager/commissioner to introduce yourself and plan an initial meeting to talk about the referral.
- Contact network members, as directed by case manager (use contact sheet)

2 INITIAL MEETING

- Arrange initial meetings with case manager and with client/family, as directed by case manager
- Gather information as per Assessment Recording Form template
- Plan dates and times for sessions, including any joint work with other professionals
- Plan date and time for assessment review meeting/MDT meeting
- Complete risk assessment using information from meetings on medical and behavioural risks

3 ASSESSMENT Session 1 - 4

- Use Assessment Recording Form template to continue to gather information and record assessment activities/responses per session.
- Review referral aims/goals and develop treatment aims/goals
- Add case notes to iinsight using ML template but Main Themes are recorded in the Recording Form
- Complete Assessment Report template and send to Case Reviewer for approval.
- Send Assessment Report to case manager/commissioner
- Discuss report and recommendations at Review meeting/MDT with Case Manager
- Agree on treatment goals and plan for treatment sessions

4 Therapy Sessions Sessions 5 - 12

- Case notes on template, on time, on iinsight, including weekly review of progress against aims
- Admin hours provided for case notes, admin, liaison with CM and other professionals
- Any concerns uploaded to MyConcern. Support from Clinical Team and 2 monthly Case Reviews
- Log hours on iinsight
- At session 8, decide whether to recommend further work based on potential for further progress and suitablilty to meet needs. Use Case Reviewer and supervision to support decision making
- If recommending continuation, agree with case manager and send bullet points of aims to the relevant member of the referrals team who will put Case Proposal together for Case Manager

5 Continuing Therapy

- Write Review Report using template for end of contract
- Wait for new sign request/contract to be sent – sign and return.
- Wait for case to be opened on insight, check the plan with referrals team member. Review risk assessment and capacity to consent arrangements.
- Once new contract confirmed and on iinsight, continue therapy sessions as agreed in the plan as per Section 4 above, including new Risk Assessment

6 ENDING THERAPY

- Agree with client (if appropriate), case manager/commissioner and network what progress towards therapeutic goals has been made.
- Plan for post therapy network - are there ways the remaining team can learn from your support? Make recommendations for good practice
- Plan for final session with client.
- Complete ending report, send to case manager/commissioner.
- End note on insight, ensure all billing complete.