HCS Client Not Responding to Scheduled Visit

Policy Purpose

The Customer Care Team is responsible for locating clients who are not responding to their scheduled visit. If not found the Customer Care team is responsible for initiating a welfare check on the same day the client was notified as not being home or responding to a scheduled visit. Any calls by Community Workers to other staff members must be directed to the Customer Care Team to manage.

Scope & Applicability

This Process applies to Catholic Healthcare Community Services Customer Care team (CCT).

Contents

HCS Client Not Responding to Scheduled Visit

1. How to enter a client not responding to scheduled visit in ORCA

1.1   Create a Orca Phone interaction on Contact Record

On receipt of notification of client not responding to scheduled visit the Customer Care Team (CCT) will log a phone call interaction to document caller details

- Enter 'Missing Client' under Subject line.
- Interaction Category – Select from drop down 'Client – No response to Service'.
- Under description – enter details from Community Worker, including actions to locate the client to date
- Ask the CW to remain on site and await further directions
- Direct CW as follows
    - o   If client located during the scheduled service time, contact CCT and inform so investigation can cease, and all relevant stakeholders and documentation can be completed.
- If client not found by end of shift, to finish service by
    - o   Leaving a calling card - You were not home for scheduled visit Date/Time/CW name and number to call on their return to home.
    - o   Complete visit on Procura Mobile and provide feedback as to actions taken.
- Create a task for follow up investigation and document in the phone call actions to date, close out the phone call and follow the process below

New Phone Call

Phone Call   Administration

Subject	*	Missing Client
Interaction Category	*	Client - No response to scheduled service
Interaction Sub-category		---
Call From	*	Test Client
Call To	*	Julie Tremain
Direction		Incoming
Regarding		Test Client
Due	*	11/08/2021 8:00 AM
Duration		5 minutes
Left Voice Mail		No

Description

CW called too inform client did not respond when knocking on the door - c trying and await direction. Task created for follow up and emergency plan a

approver	owner	date approved	next review date	page
Compliance Manager	Service Delivery Operations Manager	September 2020	September 2021 September 2023	2 of 7

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HCS Client Not Responding to Scheduled Visit

1.2 Create a task in Orca

Create a Task in ORCA and Complete the following fields:

- Enter 'Missing Client' under Subject line.
- Interaction Category – Select from drop down 'Client – No response to Service'.
- Description Field – enter details of Actions taken to locate
- Due date - enter the day reported.
- Due Time – enter current time to ensure task will be picked up in the daily Missing Client dashboard for follow-up.
- Priority High
- Update task throughout investigation with actions.
- Create an incident report in Connect and identify the investigation team and Management Alert, update throughout the investigation and close off once client located – this will support analysis of trends, gaps in service and risk mitigation strategies for individuals and service wide where applicable.
- Create an ORCA Alert
    - +New Alert
    - Add Alert Category – Customer Service
    - Add Alert Type – Incident Open
    - Copy Connect Incident URL into URL field
    - Add description
    - Save and Close
- Keep CW informed of investigation and actions required.

Quick Create: Task ✕

Subject	*	Missing Client
Interaction Category	*	📠 Client - No response to scheduled se...
🔒 Interaction Sub-category		---
Regarding		📇 Test Client
Description		Add your task description and update with progress notes through until client located.
Duration		--- ⌄
Owner	*	🙎 Julie Tremain
Priority		Normal
Due	*	13/08/2021 📅 4:30 PM 🕐

Clients Not Responding to Scheduled Visit **MUST** have an interaction task entered in ORCA.

If client not found at conclusion of client **scheduled visit an INCIDENT** must be entered in Connect and assigned for follow-up by the investigation team and client record owner.

HCS Client Not Responding to Scheduled Visit

2. Investigation to be undertaken by CCT

Follow the process below until the client is located. Update the tasks as each action taken, close out task and update Incident on Connect as to findings and any actions required. This will assist should the task be reassigned to a new owner, they are aware of actions taken to date and follow up required.

2.1 Review ORCA Client Record

- Check recent interactions to see whether there are notes from a prior conversation advising the client may have cancelled the service, gone into hospital, etc.

2.2 Check Procura Schedule for changes

Has the appointment been rescheduled or cancelled and not communicated CW not notified and/or refreshed their schedule.

2.3 Contact Emergency and Primary Contacts

- Contact the CA / CHSP coordinator – to gain any knowledge as to client whereabouts.
- Check the Preferences Tab
  - o Are there instructions specific to the client
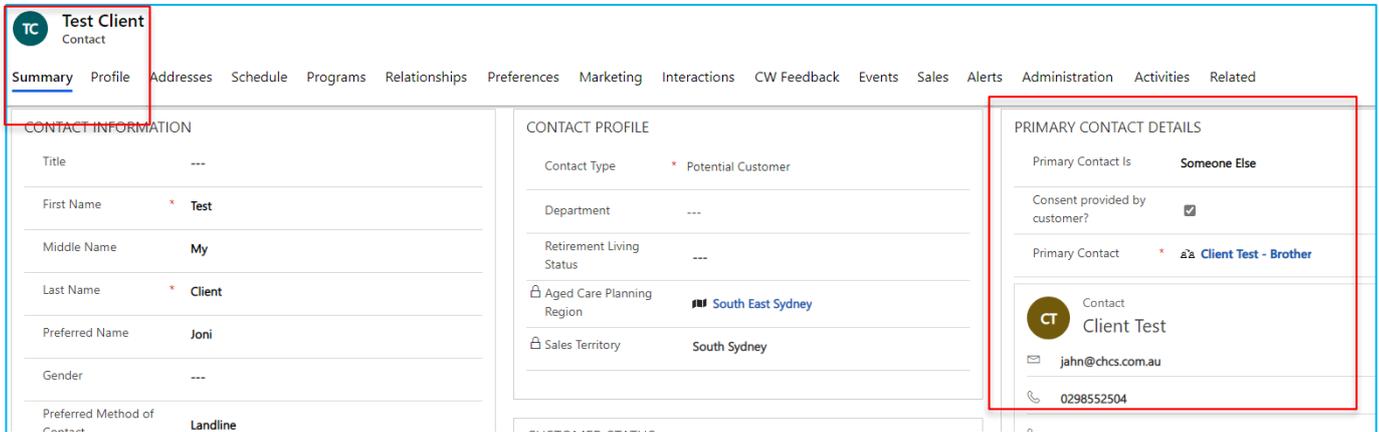 - o Contact the Emergency Plan Contact
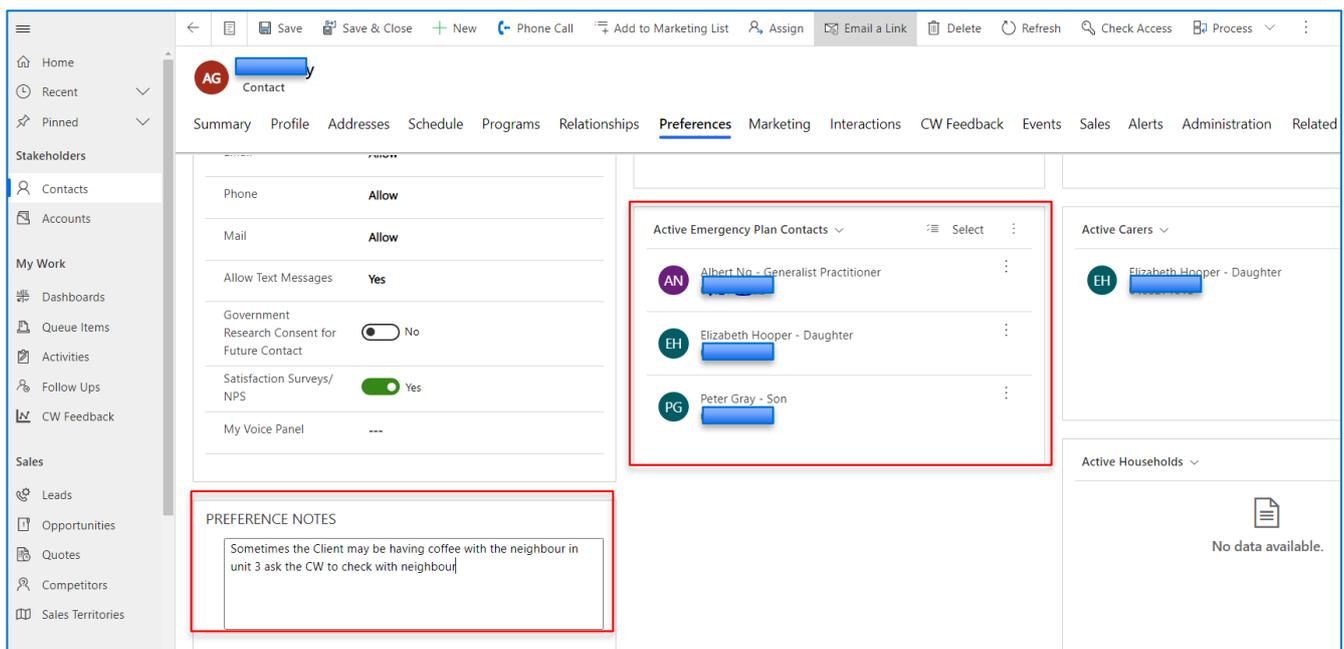
(If the client has been with CHL Prior to 1/11/2020, the Emergency plan may be located in Procura)

HCS Client Not Responding to Scheduled Visit

- Contact Primary Carer found under Summary Tab

2.3 If not located

Continue to investigate and contact the following:

- Hospitals
- GP/Specialist
- Log into MAC Login | Health (myac.gov.au) check the clients "Services in Place" tab to see if the client has gone into Residential Aged Care. If the client has gone into Residential Aged Care note in ORCA and notify the clients Care Advisor or Coordinator owner for follow up.

If at the conclusion of the service day, in the event the client is still not found, perform a welfare check with the clients local Police Station.

3. End of Day – procedure

3.1 At 4:30pm Team leader / Nominated Customer Care Officer run the missing client report on ORCA

- Select Activities -1
- Select from drop down list – Client Not Responding to Service - 2
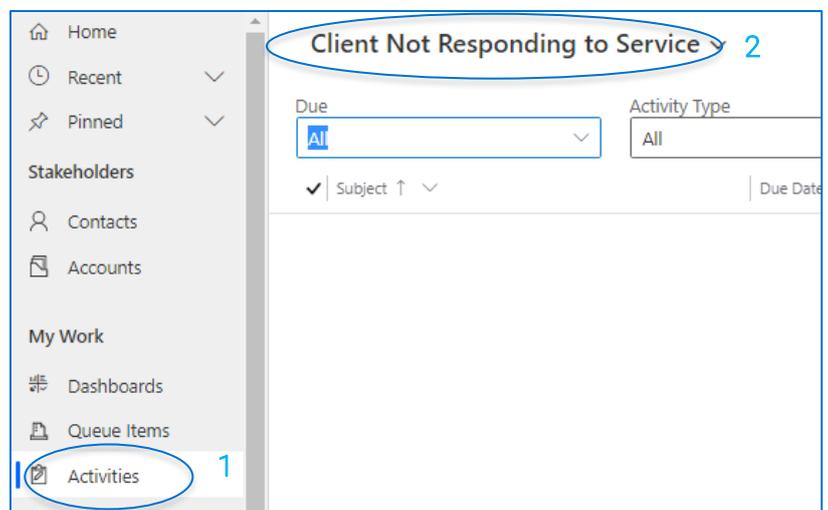
HCS Client Not Responding to Scheduled Visit

3.2 If the client has been located

- Inform all stakeholders
- Complete task and close the Missing Client interaction
- Deactivate the Alert on client record in ORCA
- Close the incident on Connect

3.3 If the Client has not been located

- Follow up Police Welfare check
- Update notes in ORCA and Incident in Connect
- Inform all stakeholders
- Hand over to Emergency and Primary Contacts
- Follow up next business day until client located.

Review History

Date of update	Outline of change	SMEs Reviewed
September 2020	Document creations	Cassie Meehan
December 2020	Document updated with change of procedure and Dashboard creation	Cassie Meehan
August 2021	Document review/update with new naming conventions, system processes, added Relate Policies & References	Aged Care Programs Mgr. - Julie Tremain

Related Policies & References

Related Policies

- CS Assessment and Reassessment
- CS Client Documentation Policy
- CS Disaster Plan – Client Management
- CS Risk Management Policy
- CS Emergency Planning Prompting Tool
- CS Risk Assessment and Task Analysis Worksheet
- CS Hazard Identification Checklist Workplace Premises
- CS Hazard Identification Checklist Ergonomics and Manual Tasks Standards
- Aged Care Quality Standards 2019

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HCS Client Not Responding to Scheduled Visit

References

- A Guide for Community Care Service Providers on how to respond when a community care client does not respond to a scheduled visit 2009
- Aged Care Act 1997
- Charter of Rights and Responsibilities for Home Community Workplace Health and Safety Act 2011
- Privacy Act 1988 (amended by the Privacy Amendment (Private Sector) Act 2000)
- A National Risk Assessment Framework for Sudden Onset Natural Disasters, 2007. COAG
- Department of Health – Important Reminder about Caring for Older People in Warmer Weather

Key words for search

<Not responding to scheduled visit, Missing client, Incident, Interaction, Connect>