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# Section 8: Care (Education) and Treatment Review – provider checklist

**Getting ready for a Care (Education) and Treatment Review (C(E)TR)**

Your reference: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Checklist for \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date of C(E)TR \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

How long since the last C(E)TR? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

The care co-ordinator is \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Contact details \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

The C(E)TR responsible commissioner/ chair\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Contact details \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Other key contacts: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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|  | **Ongoing** | **Completed by** | **Date completed** |
|  | To help the person understands what their C(E)TR is about and how it can help them you should support the person to use the [booklets about the review](https://www.england.nhs.uk/coronavirus/publication/letter-responding-to-covid-19-mental-health-learning-disabilities-and-autism/). They are available with and without symbols. One provides information, the other is a planner which provides forms for consent, preparation, on the day and afterwards.  The person should be offered staff support, advocacy and/or family support if appropriate to help them plan for their C(E)TR.  Staff are aware of the C(E)TR policy, code and toolkit and understand their roles in supporting the person receiving the review. |  |  |

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|  | **At least two weeks before the C(E)TR** |  |  |
|  | Support the person around consent and awareness of C(E)TR and ensure family/advocacy involvement if appropriate – to give people, families and advocates time to make arrangements to attend the review.  Raise any issues with the C(E)TR chair promptly. The signed [C(E)TR consent form](https://www.england.nhs.uk/coronavirus/publication/letter-responding-to-covid-19-mental-health-learning-disabilities-and-autism/) is copied and sent to the C(E)TR chair and care co-ordinator. If the person lacks capacity and does not have a legal appointee, a best interests assessment process must be followed and documented. |  |  |
|  | Ensure practical arrangements for the day have been made and details sent to the C(E)TR chair and others, for example, a suitable room or two rooms to enable the C(E)TR panel to meet with more than one person at a time. Confirm the most appropriate way to meet with the person to enable them the opportunity to be involved, along with any regulations the panel needs to know about getting into the building. |  |  |
|  | **The week before the C(E)TR** |  |  |
|  | Get the documents that the C(E)TR panel may ask to see ready. It is best to do this before the day of the C(E)TR. |  |  |
|  | If the person has had a C(E)TR before, you should review what happened last time with the person and what progress has been made on any recommendations and actions. Support the person to prepare what they would like to say and any questions they have for the panel. |  |  |
|  | Support the person to prepare for their C(E)TR. There is a document for this in the person’s [C(E)TR planning booklet](https://www.england.nhs.uk/coronavirus/publication/letter-responding-to-covid-19-mental-health-learning-disabilities-and-autism/), which should be completed in the person’s own words where possible. If the person has communication difficulties, other methods should be used to ensure their views are captured. If the person wishes, involve family carers and/or advocacy in helping to complete the profile. The person should bring this document to their meeting if they are happy to do so**.** |  |  |
|  | **On the day of the C(E)TR:** |  |  |
|  | Support the person to take part in the way they feel most comfortable, for example, meeting members of the panel privately, choosing to have a family carer, staff member or advocate present, or choosing to meet panel members on their own. The person should be given time to meet the panel in a way which suits them best. Your role should support reasonable adjustments being met, ensure the C(E)TR is a person-centred process – it is vital that the person’s wishes are respected, and the person is happy with the way it is carried out. |  |  |
|  | The C(E)TR panel members should respect how the person chooses to take part. The person and family if appropriate must be given the right amount of time to take part. |  |  |
|  | Staff should be able to share their views with the panel in confidence and respect is shown for their views. |  |  |
|  | **Within a week of the C(E)TR:** |  |  |
|  | Staff reflect on the C(E)TR with the person and with other staff as needed.  Any queries or concerns are recorded and flagged up with the C(E)TR chair. |  |  |
|  | The person is supported to fill in the feedback form in their planner booklet by someone they choose if they wish. Copies are sent to the C(E)TR chair and care co-ordinator. A copy of this form can also be used by other people who were involved in the review process. |  |  |
|  | The C(E)TR report should be received within two weeks by post. If not, ask the C(E)TR chair for a copy which can be circulated to everyone who took part, including family carer/advocate if relevant. Share the information with the person receiving the review in a way that meets their needs. |  |  |
|  | **Action** | **By** | **Date** |
|  | Support the person to understand the report and write the C(E)TR actions in their own words in their C(E)TR planner booklet. |  |  |
|  | A staff meeting is held to share the C(E)TR actions including timeline for completion and who this action is designated to. This should be discussed with the care coordinator who is responsible for embedding the recommendations within the care plans. |  |  |
|  | These actions are carried forward into any care meetings for regular review. |  |  |
|  | **Within two months of the C(E)TR:** |  |  |
|  | A staff meeting is held to record progress of C(E)TR actions and any further action needed to complete by the due date.  Key things to do:   1. Discuss progress since the C(E)TR with the person, their advocate and family carer if involved. 2. Follow up with relevant people to ensure key actions have begun and any barriers are identified. 3. Identify who is responsible in the staff team for making sure follow-up is carried out and updates reported back to the C(E)TR chair. 4. The recommendations and any concerns raised from C(E)TRs should be collated by the provider organisation so that any themes can be reviewed, and learning can be understood to improve the care and treatment for all people using their services. 5. Ensure that the appropriate teams are made aware of C(E)TR outcomes for organisational learning to occur. |  |  |