

Adults Quick Guide

Service User Groups (Primary Support Reason)

To fulfil statutory reporting requirements, it is necessary to record a Primary Support Reason (PSR) for all people open to Adult Care.

In Mosaic, Primary Support Reasons are recorded in the **Service User Groups** (SUGs) section accessed via **Person details**.

A person's Service User Group should be determined and recorded at the earliest available opportunity. This could be done at the initial point of contact but no later than the point of assessment.

The SUG should be reviewed and updated (as required) during subsequent review or case management activity to ensure the appropriate values are recorded.

There can only be **one primary** Service User Group recorded for each person

Before purchasing any services a valid SUG must be recorded. If there is no SUG recorded no purchase can be made.

Viewing Service User Groups

If no SUGs have been recorded on the person's record there will be no **Service user groups** section on the **Person summary** screen.

Any current Service User Groups will display in this section.

To view all SUGs (current and historic):

- Click on the **Change** button on this section (if there is a **Service user groups** section on the **Person summary** screen)

Or,

- Click **Person details > Service user groups** in the extended sidebar menu to access the **Service users groups** screen.

All SUGs will be listed in the Service user groups table at the bottom of the screen.

The primary SUG will be at the top of the list against the word 'Primary'.

Historic SUGs will have an 'End Date' recorded.

Adding, Amending and Ending a Service User Group

A person's SUG details may need to be recorded or updated following assessment or review or at any point during case management activity.

To access the **Service users groups** screen, either

- Click on the **Change** button in the **Service user groups** section (if there is already a SUG on the record)

Or,

- Click **Person details > Service user groups** in the extended sidebar menu

To add a SUG

From the **Service user groups** screen, complete the following:

- **Start Date** = Defaults in. If required, this can be amended using the **date picker** icon 
- **Group** = Select from the dropdown as appropriate

Only values prefixed with '**A**' should be used on an **Adults** record

- **Sub-Group** = Select from the dropdown as appropriate.

The values will vary according to the 'Group' selected

The value of '**A - PSR Not Yet Established**' is only intended for use by the Care and Wellbeing Hub (CSC) and Business Support/Admin teams, when a contact has been recorded and a person's SUG has not yet been established.

- Click the **Add** button (top half of the screen)

The SUG will display in the **Service user groups** table in the lower half of the screen.

If this is the first SUG to be recorded click the **Save** button to return to the **Person summary** screen.

If you click the **Save** button and have missed the **Add** button in the top half of the screen you will see a message highlighting this to you.

Click the **OK** button to exit the Service user groups screen without adding the new SUG.

Or

Click the **Cancel** button to return to the Service user groups screen to add the new SUG.

Remember the SUG has not been added until it is visible in the **Service user groups** table at the bottom of the screen.

If the person already has a primary SUG and you are adding a new one, the new SUG should be added and the previous SUG should then be ended.

Once the old SUG is ended, the new SUG should be marked as the 'Primary' SUG.

To end the old SUG

- Click on the **Red Square (End)** icon 

The **End service user group** screen displays.

- **End Date** = Enter date using the **date picker** icon 
- Click the **Save** button

To make the new **SUG Primary**

- Click on the **Green Arrow** icon 

This will move the SUG up to the top of the table – against the word 'Primary'

- Click the **Save** button to return to the **Person summary** screen

The **Primary** Service User Group will display in the **Service user groups** section on the **Person summary** screen.

Ended SUGs will no longer be visible in the **Service user groups** section, they will only display within the **Service user groups** screen as historic, ended SUGs.