

Adults Quick Guide

Notes

There are a number of different note types that can be recorded on a person's record.

All notes are viewed, recorded, edited and ended in the same way. Most notes can be recorded by anyone with sufficient permissions to add a note but some are for specific teams or services.

All notes are displayed on the **Person summary** screen, but where they appear is dependent upon the type of note.

Some notes appear across the top of the page, under the heading **Warnings** (red text) and others appear at the bottom of the right column on the page, under the heading **Notes** (black text).

Within the **Warnings** and **Notes** sections, notes will display under subheadings of note type. Both sections will expand if there are multiple notes recorded. If multiple warnings are recorded you can choose to 'Show less' and make the Warnings section slightly smaller while viewing the record.

All note types should be reviewed as part of case management activity and ended as needed.

Ended notes will only display in the **Person notes history** screen (**Person details > Notes** in the extended sidebar menu or **Change** hyperlink/button against the Warnings or Notes)

Warning notes

Warning notes should always be discussed with your manager first before being recorded in Mosaic.

It is important that a Warning is removed (ended) as soon as the reason for its existence has expired. This is to ensure that information held about the person is accurate and that workers are fully informed of the person's current situation. For this reason, Warnings must be reviewed regularly, as per agreed timescales. Managers must monitor Warnings to ensure that none are overlooked.

The Key Worker is responsible for monitoring and reviewing Warnings attached to their allocated cases. The Manager is responsible for cases without an allocated worker.

The need for a Warning to remain open must be reviewed prior to closing the case. If there is a reason for the Warning to remain in place, the case should not be closed and should continue to be reviewed regularly.

Recording a Note

- From the **Person summary** screen, either click **Person details > Notes** in the extended sidebar menu or click the **Change** hyperlink/button against Warnings or Notes

Note – the 'Change' hyperlink will only be visible if a note (either a warning or note) has already been recorded.

Person notes history screen displays.

- Click the **Add** button
- **Type of Note** = Select from dropdown menu as appropriate

Note types prefixed with **A** are Adult Care notes.

Note types prefixed with **B** are both Adult Care and Children's Services notes.

Note types prefixed with **C** are Children's Services notes.

Only note types prefixed with **A** or **B** should be recorded on an Adult's record.

- **Note** = Enter appropriate text (as per note type)
- Click the **Save** button then click the **OK** button to return to the **Person summary** screen

Editing a Note

- From the **Person summary** screen, either click **Person details > Notes** in the extended sidebar menu or click **Change** hyperlink/button against Warnings or Notes

- Click the **Edit Pencil** icon 

Amend fields as required

The note text should only be amended to correct errors.

If the note needs updating due to changes it should be ended and a new note added to the record instead.

- Click the **Save** button then click the **OK** button to return to the **Person summary** screen

Ending a Note

- From the **Person summary** screen, either click **Person details > Notes** in the extended sidebar menu or click **Change** hyperlink/button against Warnings or Notes
- Click the **Red Square** (End) icon 
- **End Date** = Use the **date picker** icon 
- Click the **Save** button - ended Notes have an end date visible in the 'End date' column.
- Click the **OK** button to return to **Person summary** screen – the ended Note should no longer be visible

Important - Person Posing a Risk

If a person has been identified as posing a risk, you must record a Note identifying them as such on their record.

You must use the note category of **B: Warning** and include any relevant information in the Note text field. This information can include details obtained from sources such as the Police or Safeguarding teams.

If you are working with any clients who are known to be a PPRC (person posing a risk to Children) then you should contact the Children's Safeguarding Admin so they can record an appropriate warning.

Do not

- Record a note advising the person poses a risk on any record but their own
- Use any of the three note categories beginning **C: Person posing risk**. These are only to be used by the appropriate Children's Services teams.