

Adults Quick Guide

Referring to the Court of Protection & Appointeeship Team

This guide is for use when making a referral to the **Serco Court of Protection and Appointeeship Team**.

The **Adult Corporate Appointeeship/CoP Deputyship Referral** step is used for both **Corporate Property and Financial Affairs Deputyship Referrals** and **Corporate Appointee Referrals**.

You can choose the one you need by selecting the appropriate radio button within section 2 of the form.

To refer a case:

- Click **Start > New...** in the sidebar menu
- Click on the **Adult Corporate Appointeeship/CoP Deputyship Referral** hyperlink

The **Adult Corporate Appointeeship/CoP Deputyship Referral** will open in a separate window

Recording the Adult Corporate Appointeeship/CoP Deputyship Referral

The **Adult Corporate Appointeeship/CoP Deputyship Referral** consists of 11 sections.

Sections 1 to 10 should be completed by the practitioner making the referral.

In **Section 2. Reason for Referral** you must specify the '**Type of Referral**' – whether a **Corporate Property and Financial Affairs Deputyship Referral** or **Corporate Appointee Referral** is required.

Section 11. Actions Taken should be completed by the **Serco Court of Protection and Appointeeship Team** when they accept or reject the referral. Any actions recorded by the referring practitioner will be checked and, where necessary, amended.

General Tips for completing the form

Clicking on the **Show guidance** icon  will give you additional information to assist in answering the associated question.

Click the **Section completed** checkbox at the end of each section to put a tick in the sections menu on the left. This will show you which sections you have completed and if you have missed anything, but will not lock the section down nor save the section or form. There is also an option to select 'completed section only' when printing the form.

Click the **Save** icon  throughout your recording in the form. It is recommended that you save your work at least at the end of each section, but the more often the better. Once you click save, any mandatory fields will be highlighted in red.

In **Section 1. Personal Details** information will prepopulate into the fields marked with the **blue cog**  symbol. If some information is missing or incorrect, it can be added or edited by:

- clicking the **Show subject summary** icon  to minimise the workflow step window
- editing the information on the **Person summary** screen (guides on updating the person's details can be found on the **Mosaic Hub**)
- maximising the workflow step window and clicking the **Refresh current form** icon  to update the information in these fields

If someone has a **current appointee** and/or has made **Enduring or Lasting Power of Attorney** (you answer 'yes' to those questions) you should use the **Find** button to perform a search for them so their details display in appropriate fields within **Section 2. Reason for Referral**

You should also use the **Find** button to record details of **Involved Individuals** in **Section 3**, anyone contacted in exploring who could act of the person's behalf in **Section 4** and the **Medical Contact Details** in **Section 5**.

Important: The '**Manual Input**' button should only be used as a last resort:

- If a person is not known in Mosaic they should be created. To avoid duplicate records, you should always search using at least 3 different search criteria before creating them. See the **Creating a Person** user guide for full details.
- If a worker is not known in Mosaic you must complete the relevant form via Our Intranet > Mosaic Requests to request they are created.

Use the **Insert Section** button to repeat certain fields in the form e.g. where multiple people need listing as having **Enduring or Lasting Power of Attorney** in **Section 2** and where the person has multiple **bank accounts** in **Section 8**.

These repeated fields can be rearranged by using the **Move Section Up** button and deleted (if added in error) by using the **Delete Section** button

Use the **Add** button to record details of **Debts and Money Owed** in **Section 7** and details of **Income and Expenditure** within the various tables in **Section 9**.

Within the popup window that opens, click the **Add** button to add one entry and then add another, or click the **Add and close** button if only recording one entry or when all entries have been recorded. The **Close** button will close the popup without adding an entry.

When entries have been recorded the following icons are displayed:

 **Edit** – to edit/amend an entry

 **Delete** – to delete/remove an entry

 **Move this row up** – to rearrange the order of the entries added (only displays if more than one entry is recorded)

You should use the **View documents** icon  to attach relevant supporting documents created outside of Mosaic.

There is a mandatory request '**Required Adult Please review information and authorise**' which must be sent to the **Serco Court of Protection and Appointeeship Team**.

It used to request authorisation of the **Adult Corporate Appointeeship/CoP Deputyship Referral** and acts as a form of screening.

The **Serco Court of Protection and Appointeeship Team** will complete the request if they are accepting the referral and return the request if there is insufficient information or the referral is not appropriate.

It is important to note that even if you no longer need to refer the case to the **Serco Court of Protection and Appointeeship Team** you will still have to send them the request – use the notes box to state that the referral is not needed and why.

To send the request:

- Click the **Requests** icon 
- Select the **Required Adult Please review information and authorise** request
- select **Serco Court of Protection & Appointeeship Team** from the 'Pass to team' dropdown menu
- Add a note if necessary – remember you must do this if the referral is no longer necessary
- Click the **OK** button

Click the **Close** icon  to close the referral and allow it to be screened and the request to be completed.

The **Serco Court of Protection and Appointeeship Team** will record the next action in **Section 11. Next actions** once they have completed the request.

Section 11. Next actions

Next actions are mandatory in all forms. At least one next action must be added before the **Adult Corporate Appointeeship / CoP Deputyship Referral** can be finished.

To record a next action:

- Click the **Add** button
- Select the relevant action from the **Select action** dropdown menu
- Assign to = Select/Find as appropriate - Not required for NFA actions
- Note = Record any necessary information – recommended when assigning a next action to another team/worker
- Priority = Select radio button as appropriate – use the **Note** field to explain why you have changed the Priority from Normal if you change it
- Click the **Add** button if more than one next action is required or click the **Add and close** button if only adding one next action or once all actions are added

Next Action	When to use	Who to assign to
Adult Corporate Appointeeship Application	To submit an accepted appointeeship referral	Serco Court of Protection & Appointeeship Team via Pass to team dropdown menu
Adult Corporate Appointeeship Not Appropriate, Bring Forward Scheduled Review	If the appointeeship referral is not needed or not appropriate	Referring practitioner using the Pass to worker > Find button
Adult Corporate Deputyship Application	To submit an accepted deputyship referral	Serco Court of Protection & Appointeeship Team via Pass to team dropdown menu

Next Action	When to use	Who to assign to
Adult Corporate Deputyship Not Appropriate, Bring Forward Scheduled Review	If the deputyship referral is not needed or not appropriate	Referring practitioner using the Pass to worker > Find button
Adult No Further Action Required	If no further action is required following the referral, and a full case closure cannot be completed because there are services in place or other workers or teams are still working with the case etc.	This is a terminating (no further action) action, so does not need to be assigned
Adult Proposed Case Closure	If a full case closure is required, i.e. the person does not already have services, or current services and involvement from all involved teams are to close Please check Case Closures, Full, Team and Involvement user guide for full details of when to select this next action	Self using the Assign to Me button
Adult Case Closure Already Started (NFA)	If a full case closure is required and is already underway. To add this action, you must be able to see Adult Proposed Case Closure or Adult Case Closure in Progress within Current work on the Person summary screen	This is a terminating (no further action) action, so does not need to be assigned

The **Serco Court of Protection and Appointeeship Team** will finish the step by clicking the **Finish** icon  once they have completed the request and recorded the appropriate next action.