

## Adults Quick Guide

---

### Organisational Relationships

Details of any organisations currently involved with the person will be displayed in the bottom half of the **Professional and organisational relationships** section on the **Person summary** screen.

Not all organisations involved in the person's case will be added as an organisational relationship. However, you will have full visibility of current organisation involvements by viewing **Current work** on the **Person summary** screen.

All organisations listed in **Professional and organisational relationships** and **Current work** are hyperlinks to that organisation's record.

To view further details of all open and any historic (ended) organisational relationships, either

- Click **Person details > Organisational relationships** in the extended sidebar menu

Or

- Click the **Change** hyperlink against 'Organisational' within **Professional and organisational relationships**

**Note:** The 'Change' hyperlink will only be visible if at least one organisational relationship is already recorded.

The **Organisation relationships** screen displays:

If no organisation relationships have been recorded, this screen will be blank.

Ended relationships will have a date recorded in the 'To Date' column.

## Adding an Organisational Relationship

---

To add a new organisational relationship, either

- Click **Person details > Organisational relationships** in the extended sidebar menu

Or

- Click the **Change** hyperlink against 'Organisational' within **Professional and organisational relationships**

**Note:** The 'Change' hyperlink will only be visible if at least one organisational relationship is already recorded.

The **Organisation relationships** screen displays

- Click the **Add** button

The **Add organisation relationships** screen displays

- Click the **Find** button to perform a search.

See the **Searching for A Person, Worker or Organisation** and **Searching for Teams or Organisations – Hints and Tips** user guides for full guidance on performing a search

**Note:** If an organisation is unknown in Mosaic (no search results are found) please contact the Mosaic Service Desk using the **Mosaic - Create / Change Organisation** form on FreshService, for the organisation to be created.

From the search results click on the **organisation name** hyperlink to pull the selected organisation through.

Complete the fields as follows:

- **Organisation** = defaults in based on organisation selected from search results
- **Relationship Type** = Select from dropdown menu as appropriate
- **From** = Defaults in – if required this can be amended using **date picker** icon 

- **To** = Ignore – use to end an organisation relationship only
- **End Reason** (where applicable) = Ignore – use to end an organisation relationship only
- Click the **Save** button
- Click the **OK** button to return to the **Person summary** screen

## Editing and Ending an Organisational Relationship

---

A person's organisational relationships should be reviewed during all case activity.

The organisational relationship should be ended as soon as your team is no longer involved in the case.

**Important note** - Editing organisational relationships should only be undertaken when a recording error has been made e.g. incorrect from/to dates recorded, incorrect relationship type selected, or incorrect organisation name selected.

To edit or end an organisational relationship, either

- Click **Person details > Organisational relationships** in the extended sidebar menu

Or

- Click the **Change** hyperlink against 'Organisational' within **Professional and organisational relationships**

The **Organisation relationships** screen displays.

Details for all current and historic (ended) organisation relationships will be listed:

- Click **Edit Pencil** icon  against the organisation relationship you need to end/edit

The **Amend organisation relationship** screen displays

Edit or update the fields as appropriate.

- **To** = Enter using **date picker** icon  if ending the relationship

When ending some organisation relationships a mandatory **End Reason** field will display. Select an appropriate value from dropdown menu.

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

Ended organisation relationship details will display on the person's **Person summary** screen until midnight of the end date. Thereafter, the details will become historic and will only be visible in the **Organisation relationships** screen.

## Key Team (Adult Care) and Involved Teams

---

An organisational relationship of **Key Team (Adult Care)** must be recorded on all cases open to a Social Care (LCC or LPFT) or Occupational Therapy team.

The key team is usually the team responsible for the person's primary care needs.

There should only ever be one team open with the organisational relationship of **Key Team (Adult Care)** at the same time.

Any additional teams involved with the person must be recorded as an organisational relationship of **Involved Team**

The key team recorded should either be an Adult Care (area) team e.g. Adult Care Boston, an LPFT Mental Health Social Care team or a Learning Disabilities team, it should never be a Review team.

An acute Hospital team or Community Hospital and Transfer of Care team should be recorded as key team if they are the only Adult Care team involved. Key team responsibility must always be transferred to the relevant Adult Care (area) or LPFT Mental Health Social Care team if ongoing long term support services are to be provided.

An Occupational Therapy team must only be recorded as key team if there is no key team involvement already open on the person's record or the person's primary care needs are occupational therapy.

Where a person is in transition and may have involvement and services from Children's and Adults' teams, the Adult Care involvement should be reflected by recording the relationship type of **Key Team (Adult Care)**.

Teams such as Adult Safeguarding, Wellbeing, Reablement, Lincolnshire Sensory Service etc should never be recorded as the key team but should always have an open organisational relationship of **Involved Team** while they are working with the person.

### **Key Team (Adult Care) Joint Working**

---

The Corporate Performance Team (Adult Care) will record a relationship type of **Key Team (Adult Care) Joint Working** on a person's record in exceptional circumstances. For example, where a case is joint-worked and services are jointly funded by a Learning Disability team and an LPFT Mental Health Social Care team.

To allow both teams to reflect their involvement in the case, the team with primary assessment, care planning and review responsibility or which funds the majority of the costs of the person's care package are recorded as **Key Team (Adult Care)**. The team with secondary responsibility or which funds the minority of the costs will be recorded as **Key Team (Adult Care) Joint Working**.