


## Adults Quick Guide

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### Case Closures – Full, Team and Involvement

There are **three** main types of closure to be aware of in Mosaic: full case closures, team closures and involvement only closures.

**You** are responsible for **ending your own worker relationship** on the record for **all** types of case closure:

- Click **Person details > Worker relationships** in the extended sidebar menu or click the **Change** hyperlink next to 'Professional' within **Professional and organisational relationships**
- Click the **edit pencil** icon  against the relationship
- Record 'To date' and 'End Reason'
- Click the **Save** button and then the **OK** button

A **full** case closure is **not needed** when a person:

- is open to any other team in Mosaic (such as DoLS or Safeguarding) and needs to remain open to them (check **Current work** and **Professional and organisational relationships** – note DoLS will not have workflow steps open within **Current work** but will show as an open '**Organisational relationship**')
- has open services which do not need ending – you should not propose a case closure to end just one / some of the person's services
- for certain self-funded cases e.g. where LCC have arranged those services for the person. A note type of '**Self Funder**' should display on the **Person summary** for these cases
- for some health pathways. A note type of '**Fully Funded via Continuing Health Care**' could display on the **Person summary** for these cases

- there are ongoing financial issues or debt. A note type of '**Outstanding Financial Issues**' should display on the Person summary for these cases

## Involvement Only Closure

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Involvement only closures are where the case is only closing to you but will remain open to your team, e.g. the case is to remain open on a review cycle as there are ongoing services in place.

You will need to ensure the workflow continues as appropriate for example, by adding a review as a next action and assigning to the relevant worker/team.

You will need to end your **Worker relationship** as described above

If you are the **Key Worker (Adult Care)** and there are outstanding financial workflows or there is outstanding debt associated with the case, you must not end your **Worker relationship** until the workflow has ended/issues have been resolved.

A note type of '**Outstanding Financial Issues**' should already be recorded or be added to the record

## Team Closures


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Team closures are required where the case cannot be fully closed but your own and your team's involvement has ended, e.g. you have completed an assessment, the person does not wish to have any further involvement or does not want services, but another team such as the Safeguarding or DoLS team are involved with the person.

You will need to end the workflow with the most relevant next action, i.e. No Further Action Required.

As well as ending your **Worker relationship**, you will also need to make sure that you end your team's relationship:

- Click **Person details > Organisational relationships** in the extended sidebar menu or click the **Change** hyperlink next to 'Organisational' within **Professional and organisational relationships**

- Click the **edit pencil** icon  against the relationship
- Record 'To' date and 'End Reason'
- Click the **Save** button and then the **OK** button

If there are outstanding financial workflows or there is outstanding debt associated with the case, the **Organisational relationship** for the **Key Team (Adult Care)** must not be ended until the workflow has ended/issues have been resolved.

A note type of '**Outstanding Financial Issues**' should already be recorded or be added to the record

## Full Case Closures

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If a full case closure is required, it is initiated by recording an **Adult Proposed Case Closure** workflow step with a next action of **Adult Case Closure in Progress**.

**Important note:** The **Adult Case Closure in Progress** step will always be completed by LCC Business Support (Adult Admin) except for cases only open to LPFT, Safeguarding and Carers Service/Carers First teams where it will be completed by these teams.

The **Adult Proposed Case Closure** is **only** required for **Full Case Closures**. It is available as a next action from most workflow steps but is also available from the **Start > New...** sidebar menu

If there are outstanding financial issues or there is outstanding debt associated with the case, the **Adult Proposed Case Closure** should not be recorded until the workflow has ended/issues have been resolved.

As well as ending your **Worker relationship** as described above you will need to complete or cancel any outstanding workflow steps you have assigned to you before the case closure process can be completed by Business Support.

If the work has been carried out e.g. an assessment has taken place, the outstanding workflow step should be completed rather than cancelled.

You cannot cancel any work which has been started; this work will need to be completed (finished), though for certain workflow steps you can cancel/abandon it from within the step where appropriate.

You will also need to ensure that all your case notes are finished.

If you have not completed/cancelled workflow and finished your case notes, you will receive an **Adult Case closure in progress** notification from Business Support to remind you to do so.

If the full case closure is required due to death, the worker notified of the death is responsible for recording the date of death via **Person details > Date of death** in the sidebar menu.

## Full Case Closure Not Required

If you have recorded the next action **Adult Proposed Case Closure** and then realised a full case closure is not required you can cancel the proposed case closure from your **Current work > Incoming work** folder (if you have not started it and have sufficient permissions to cancel work).

If you have started the proposed case closure you must request the proposed case closure step is deleted.

Once the proposed case closure is cancelled or deleted you must consider whether the previous workflow step needs re-opening to choose a different next action e.g. is a review required?

To delete and/or re-open workflow you will need to complete the **Change Person Record/Workflow** form through Our Intranet > Mosaic Requests

Non LCC colleagues should contact the Mosaic Helpdesk on 01522 555555.


## Recording the Adult Proposed Case Closure – Full Case Closures Only

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The **Adult Proposed Case Closure** consists of four sections. All sections should be completed with the necessary details.

### Tips for completing the form


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.

Click the **Save** toolbar icon  throughout your recording in the form. We recommend 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.

**Section 1. Proposed Case Closure** is where you will record the reason for case closure.


For someone with Direct Payment services in place, including where the person has died, the **Direct Payment Suspension and Termination Checklist** (Section 2) **must** be completed. This must then be authorised by the Key Team manager, using the **Adult Authorise DP Termination/Suspension** request, before the Direct Payments Team will stop payments.

If you are not the Key Worker, or member of the Key Team you must send the **Adult Case closure action required** request to the Key Worker or Key Team's manager to ask them to complete the checklist.

There is an optional letter template, **Adult Case Closure Letter**, available from the **Forms and letters** icon . This letter is not mandatory but can be used as required.

There is a checkbox within **Section 1** of the **Adult Proposed Case Closure** which you can tick if you would like to request Business Support send out this letter for you.

This letter will not pull through into the **Adult Case Closure in Progress** so the letter must be finalised before the **Adult Proposed Case Closure** is finished. The letter is also available within the **Adult Case Closure in Progress** step so if you have forgotten to complete it you can ask Business Support to invite you into the **Adult Case Closure in Progress** step to complete it within that step.

There are two optional requests available from the **Requests** icon  which may be needed while proposing a case closure:

- **Adult Please review information and authorise**

This request should be used if you need to confirm the case closure with your manager, or are proposing a closure and want the relevant Key Team/Key Worker to complete the **Direct Payment Suspension and Termination Checklist**.

- **Adult Authorise DP Termination/Suspension**

This request should be sent to the Key Team manager following completion of the Direct Payment Suspension and Termination Checklist section to confirm the Direct Payment service can be ended.

## **Section 4. Actions Taken**

The next actions available are:

- **Adult Case Closure in Progress –**

To be used if a full case closure is required.

This next action should be assigned to the relevant area Business Support (Adult Admin) team based on where the person lives.

For hospital cases this action should only be assigned to the hospital Business Support (Adult Admin) team if there has been no Area Team involvement.

For OT cases this action should only be assigned to the OT Business Support (Adult Admin OT) team if there has been no social care team (Area/Hospital/Community Hospital) involvement

- **Adult Case Closure Not Required (NFA) –**

To be used if a full case closure is not required.

This next action does not require assigning to anyone as it is a NFA (no further action)

The Business Support team will manage the rest of the full closure – informing other parties of the closure where required, cancelling outstanding work and ending/closing the rest of the record.