Adults Quick Guide

Wellbeing Service Hub Team

The Wellbeing workflow always starts with a workflow step called **WB Wellbeing Screening**.

The **WB Wellbeing Screening** step is recorded by any worker who wants to screen to see if a person is eligible for the Wellbeing Service.

This can be completed by the Wellbeing Service Hub Team workers for referrals received directly. It can also be completed by other (external) workers, such as LCC Adult Care practitioners and CSC.

It is available from the **Start** sidebar menu for Wellbeing Service Hub Team workers, or is selected as a next action from a workflow step for external workers.

To start a case

For direct referrals

You will need to complete a person search using the **'Find person'** button in Full workview or the **People > Find person** option from the main header menu (top of the screen) when in Narrow or Closed workview.

If the person is found you should enter the record by clicking their name from the search results.

If the person is not found you must complete at least 3 searches using different search criteria and then create the person using the **'Add new'** button. Refer to the **Creating a Person** guide for full details.

For referrals from other workers

The **WB Initial Risk Assessment and Triage** step will appear as **Incoming work** for the Wellbeing Service Hub Team, or as **Incoming work** for the Wellbeing Service Hub Team worker if the case has been allocated by the Senior Officer.

From the team's/your **Incoming work** folder click the **person's name** to access the record – this will allow you to check for warnings and other useful information before contacting the person

Updating a Person's Details

Throughout a person's involvement with the Wellbeing Service their personal details should be reviewed and updated – this can be completed by any worker at any stage of the process.

You will be prompted to review and update some details within the Wellbeing workflow steps – fields with a **blue cog** symbol display within section 1 of each workflow step. These fields can be updated as per the guidance in [General tips for completing workflow steps](#)

Some of the other details you should always review and record/update are:

- **Employment Status** – recorded via **Person details > Employment status** in the extended sidebar menu – refer to the **Employment Status** user guide for full details

- **Current Communication Needs** – recorded to comply with the Accessible Information Standard. Recorded via **Current communication needs** on the Person summary screen – refer to the **Current Communication Needs** user guide for full details

- **Health Conditions** – recorded via **Health > Conditions / Disabilities** in the sidebar menu – refer to the **Health Conditions** user guide for full details

- **Notes** – recorded to display warning messages or general information on the Person summary screen. recorded via **Person details > Notes** in the extended sidebar menu – refer to the **Notes** user guide for full details

- **Personal and Professional Relationships** – recorded via **Person details > GP / Organisational relationships / Personal relationships / Worker relationships** in the extended sidebar menu – refer to the relevant user guides in the **Relationships** section of the User Guides page for full details

General tips for completing workflow steps

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

Clicking the **Section completed** checkbox at the end of each section puts 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 forms.

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.

Fields marked with the **yellow cog** symbol will prepopulate but can be edited within the form where required. For best practice, wherever possible, these should be treated as a **blue cog**

Fields with a **blue cog** are prepopulated from the person's record and cannot be edited within the form. To correct information or add missing information:

- Click the **Show subject summary** icon to minimise the workflow step window
- Edit the information on the **Person summary** screen (refer to the relevant user guides on the **Mosaic Hub** to assist you in updating information)
- Maximise the workflow step window and then click the **Refresh current form** icon to update the prepopulated information.

Next actions section

The **Next actions** section is always the last section of a form and is where next actions are recorded. At least one next action must be recorded before a workflow step can be finished.

Next actions are how we show what will happen next and who will do it.

You will be prompted to add certain actions based on the answers to the questions within the form.

To record a next action:

- Click the **Add** button
- Select the relevant action from the **'Select action'** dropdown menu
- Tick the **'Send Immediately?'** checkbox where necessary (only available for certain actions)
- Where necessary check and amend the scheduled date (only available for certain actions)
- Assign to = Select/Find as appropriate - Not required for NFA (no further action) actions
- Reason = select an appropriate reason (only available for certain 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

Toolbar Icons

Before finishing your workflow step you should always consider whether you need to use any of the other toolbar icons at the top of the screen.

The toolbar icons vary depending on which step you are in – you will only see some icons in certain steps.

For example the **Requests** icon  is only available if there are requests or notifications you can send so you will not see this in the WB Wellbeing Screening step.

The **Requests** icon  contains requests and/or notifications that you can send to a team or named worker.

- **Requests** require a response – you will not be able to finish the workflow step until the team/worker responds and completes the request.

- **Notifications** are purely for information – you will be able to finish the workflow step without a response.

Refer to the **Requests and Notifications** user guide for details on how to send a request or notification.

You should use the **View documents** icon to attach relevant supporting documents created outside of Mosaic. See the **Uploading Documents** user guide for full details.

Clicking the **Finish** icon will finish (lock down) your workflow step. Workflow steps cannot be finished if there are any incomplete mandatory fields or if there are any requests which need completing.

Once the **Finish** icon can be clicked no further input can be made and the next action(s) will send, appearing as new 'incoming work' to be completed.

You will find all finished forms completed within your steps in the **Documents** section (sidebar menu). Only finished versions of the forms should be shared. A PDF version of your finished form should therefore be generated from the **Documents** section. For further guidance, please refer to the **Printing Documents** user guide.

WB Wellbeing Screening

> Remember the Wellbeing Service Hub worker will only use this for referrals received directly – it is not needed for referrals made by external workers on Mosaic.

On the **Person summary** screen, select **WB Wellbeing Screening** from the **Start** sidebar menu – this will open the **WB Wellbeing Screening** step as a separate window.

Complete the form. Based on the answers recorded, in section 4 you will be advised as to whether the person is eligible for the Wellbeing Service.

Section 6. Next actions

The following next actions are available from the **WB Wellbeing Screening** step:

Action	When to use	Who to assign to
WB Case Monitoring (WB Use Only)	If the person is screened as eligible. For referrals received directly by the Wellbeing Service Hub Team only. Should be added with **WB Initial Risk Assessment and Triage (WB Use Only)**	**Wellbeing Service Hub Team** using the 'Pass to team' dropdown menu. Or, self (if the Hub worker is also going to complete the initial risk assessment) using the 'Assign to Me' button.
WB Initial Risk Assessment and Triage (WB Use Only)	If the person is screened as eligible. For referrals received directly by the Wellbeing Service Hub Team only. Should be added with **WB Case Monitoring (WB Use Only)** / **WB Case Monitoring (In-Reach Team Use Only)**	**Wellbeing Service Hub Team** using the 'Pass to team' dropdown menu. Or, self (In-Reach Team worker / if the Hub worker is also going to complete the initial risk assessment) using the 'Assign to Me' button.
WB Case Monitoring (In-Reach Team Use Only)	If the person is screened as eligible. For referrals received by the In-Reach Team only. Should be added with **WB Initial Risk Assessment and Triage (WB Use Only)** This should added instead of **WB Case Monitoring (WB Use Only)**	Self using the 'Assign to Me' button
WB Eligibility Criterial Not Met (NFA)	When the person is not eligible for the Wellbeing Service.	This is a 'no further action' (NFA) action and so does not need assigning

Action	When to use	Who to assign to
WB Information and Advice Provided (NFA)	To be used when information and advice has been provided.	This is a 'no further action' (NFA) action and so does not need assigning
WB No Further Action Required	If no further action is required, but a full case closure cannot be completed e.g. because there are LCC commissioned services in place or other workers or teams are still working with the case.	This is a 'no further action' (NFA) action and so does not need assigning
WB Initial Risk Assessment and Triage (Sent by LCC)	If the person is screened as eligible. For referrals recorded by LCC practitioners only.	**Wellbeing Service Hub Team** using the 'Pass to team' dropdown menu.
WB Initial Risk Assessment and Triage (Sent by External Provider)	If the person is screened as eligible. For referrals recorded by external agencies e.g. CSC/LFPT/Carers etc (non LCC workers with access to Mosaic) only.	**Wellbeing Service Hub Team** using the 'Pass to team' dropdown menu.

The step should be finished using the **Finish** icon by the worker completing the step.

Organisational Relationship – Add the Team

You must record the **Wellbeing Service Hub Team** as an **'Involved Team'** during screening (for direct referrals) or during completion of the **Initial Risk Assessment and Triage** step (for external referrals).

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

- Organisation = Click the **Find** button
- Search for the **'Wellbeing Service Hub Team'** – click the hyperlink to select and pull this through to the 'Organisation' field
- Relationship type = select **'Involved Team'** from the dropdown menu
- From = defaults in but can be amended if needed
- Click the **Save** button, then click the **OK** button to return to the Person summary screen.

The team will display within **Professional and organisational relationships**

Refer to the **Organisational Relationships** user guide for full details.

WB Initial Risk Assessment and Triage

To start the **WB Initial Risk Assessment and Triage** step, from within the person's record:

- Click the **Incoming work** icon within **Current work** on the **Person summary** screen
- Click **Start work** from the menu

> It is important to note if the WB Initial Risk Assessment and Triage step is still assigned to the team you will see a popup window – click '**Yes'** to continue into the step.

The **WB Initial Risk Assessment and Triage** will open in a separate window

Complete the form. Some information will pull through from the **WB Wellbeing Screening** step and will not be editable.

Section 5. Next actions

The following next actions are available from the **WB Initial Risk Assessment and Triage** step:

Action	When to use	Who to assign to
WB Transfer to Trusted Assessor for Assessment and Support Planning It will appear as **WB Trusted Assessment and Support Planning** in Current work.	If the person is progressing to a trusted assessment.	**Wellbeing Service North Team** or **Wellbeing Service South Team** as appropriate using the 'Pass to team' dropdown menu.
WB Case Monitoring	For external referrals only – where the **WB Case Monitoring** is not already showing in Current work. This action should be **'sent immediately'**	**Wellbeing Service Hub Team** using the 'Pass to team' dropdown menu. Or **Case Monitoring WB North – Inbox (Unassigned) / Case Monitoring WB South – Inbox (Unassigned)** using the 'Pass to worker' dropdown menu.
WB Triage Not Possible Or Not Required (NFA)	When triage is not currently possible or not needed.	This is a 'no further action' (NFA) action and so does not need assigning
WB Information and Advice Provided (NFA)	When information and advice has been provided. You will be prompted to add this action if you check the 'information and advice' checkboxes.	This is a 'no further action' (NFA) action and so does not need assigning
WB Involvement Ended (NFA)	When the Wellbeing Service involvement is ending but the case is remaining open to other workers/teams/services.	This is a 'no further action' (NFA) action and so does not need assigning

Action	When to use	Who to assign to
Adult Proposed Case Closure	When the Wellbeing Service involvement is ending and the case needs fully closing down as there are no other open workers/teams/services.	Self using the **'Assign to Me'** button
Adult Case Closure Already Started (NFA)	When the Wellbeing Service involvement is ending and the case needs fully closing down as there are no other open workers/teams/services but someone else has already started this process. To record this action you should be able to see **Adult Proposed Case Closure** or **Adult Case Closure in Progress** in Current work.	This is a 'no further action' (NFA) action and so does not need assigning

Remember before finishing the step you should consider the toolbar icons.

The following requests and notifications are available from the **Requests** icon :

Request (R) / Notification (N)	When to use	Who to assign to
(N) WB Unable to proceed with referral, please re-refer	To inform the referrer a referral cannot proceed.	Referring worker or team as appropriate using 'Pass to worker/Pass to team > Find button'
(R) WB Additional information required	To ask for more information from the referrer or an involved worker.	Relevant worker as appropriate using 'Pass to worker > Find button'
(R) WB Please action	As and when required – standard request found in all Wellbeing workflow steps	As appropriate using 'Pass to team' dropdown menu or 'Pass to worker > Find button'

The step should be finished using the **Finish** icon by the worker completing the step.

WB Case Monitoring

To resume the **WB Case Monitoring** step, from within the person's record:

- Click the **Incoming work** icon within **Current work** on the **Person summary** screen
- Click **Start work** from the menu

The **WB Case Monitoring** will open in a separate window

> The **WB Case Monitoring** step should remain **open** throughout a person's involvement with the Wellbeing Service.
>
> It should be completed with relevant activity (telephone calls, emails, meetings etc) by each worker.
>
> It can therefore be started by the Wellbeing Service Hub Team worker where needed and will be updated by the Trusted Assessor and/or Generic Support Officer by the Senior Officer later in the process if the case progresses.

Section 1. Personal Details

Remember - Fields with the **blue cog** are prepopulated. As per the guidance in General tips for completing workflow steps, they are updated using the **Show subject summary** and **Refresh current form** icons – you do not have to exit the workflow step to record this information.

Section 2. Case Monitoring Activity

Activity should be logged in section 2 using the **Add** button.

An Activity popup window will open and you will have to record the following:-

- Date/Time
- Activity and actions required

- Worker recording activity – default in with your name

If recording multiple lines of activity click the **Add** button – this will add the activity and refresh the screen so you can record the next line.

If recording just one line of activity or once all activity has been recorded, click the **Add and close** button – this will close the popup window and display the activity table.

Once activity has been recorded the following icons are displayed:

Edit – to edit/amend a line of activity

Delete – to delete/remove a line of activity

Move this row up – to rearrange the order of the activity logged (only displays if more than one activity is recorded)

Section 3. Completion Details

At the bottom of this section there is a mandatory field **'Reason for Wellbeing involvement ending'.** This must only be recorded by the worker involved with the case at the point of the Wellbeing Service activity ending – this will be the Wellbeing Service Hub Team worker if the case is not progressing beyond the Initial Risk Assessment.

Section 4. Next actions

The relevant next action must also be recorded at the end of Wellbeing Service activity.

The following next actions are available:

Action	When to use	Who to assign to
WB Case Monitoring Complete (NFA)	Once all case monitoring activity has been recorded and the Wellbeing involvement has ended.	This is a 'no further action' (NFA) action and so does not need assigning

Action	When to use	Who to assign to
WB Case Monitoring No Longer Required (NFA)	If case monitoring is no longer required e.g. for cases not progressing beyond the Initial Risk Assessment.	This is a 'no further action' (NFA) action and so does not need assigning
Adult Proposed Case Closure	When the Wellbeing Service involvement is ending and the case needs fulling closing down as there are no other open workers/teams/services.	Self using the **'Assign to Me'** button
Adult Case Closure Already Started (NFA)	When the Wellbeing Service involvement is ending and the case needs fulling closing down as there are no other open workers/teams/services but someone else has already started this process. To record this action you should be able to see **Adult Proposed Case Closure** or **Adult Case Closure in Progress** in Current work.	This is a 'no further action' (NFA) action and so does not need assigning

Remember before finishing the step you should consider the toolbar icons.

The following requests and notifications are available from the **Requests** icon :

Request (R) / Notification (N)	When to use	Who to assign to
(N) WB Hub please send relevant correspondence	To request the Wellbeing Service Hub Team workers send out correspondence. This is therefore unlikely to be used by the Wellbeing Service Hub Team workers.	**Wellbeing Service Hub Team** using the 'Pass to team' dropdown menu

Request (R) / Notification (N)	When to use	Who to assign to
(R) WB Please action	As and when required – standard request found in all Wellbeing workflow steps	As appropriate using 'Pass to team' dropdown menu or 'Pass to worker > Find button'

The step should be finished using the **Finish** icon by the worker completing the step.

> Remember the **WB Case Monitoring** step should remain **open** throughout a person's involvement with the Wellbeing Service.
>
> It should therefore not be finished, and instead, be reassigned to the relevant **WB Case Monitoring North / South – Inbox (Unassigned)** if the case is progressing to a trusted assessment.

To reassign the WB Case Monitoring to the WB Case Monitoring North / South – Inbox (Unassigned):

Either:

- In Full or Narrow workview access your **Incomplete work** folder
- Click the **Incomplete work** icon to the left of the **WB Case Monitoring** – this will look like a **yellow cog** when you hover over it
- Click **Update assignment** from the mini menu
- Click the **Find** button for 'Pass for worker' - type **WB Case** in the 'First Name' field, click the **Find** button and then select the correct inbox (North or South) from the list.
- Add a note in the **'Note'** box if needed
- Click the **OK** button – the WB Case Monitoring will then move from your Incomplete work folder to the inbox's Incomplete work folder

Or:

- In Closed or Narrow workview, from the **Current work** section on the **Person summary** screen click the **Incomplete work** icon next to the **WB Case Monitoring**
- Click **Update assignment** from the mini menu
- Click the **Find** button for 'Pass for worker' - type **WB Case** in the 'First Name' field, click the **Find** button and then select the correct inbox (North or South) from the list.
- Add a note in the **'Note'** box if needed
- Click the **OK** button – the WB Case Monitoring will then move from your Incomplete work folder to the inbox's Incomplete work folder

Update Organisational Relationships

Once the Wellbeing Service Hub Team activity has ended the **Organisational relationship** must be ended.

- Click **Person details > Organisational relationships** in the extended sidebar menu
- Click the **Edit Pencil** icon by the **Wellbeing Service Hub Team**
- To = record relevant 'end' date
- End Reason = select relevant reason from dropdown menu
- Click the **Save** button

If the case is **not progressing** to a Trusted Assessment click the **OK** button to return to the Person summary screen – the team will remain in **Professional and organisational relationships** until midnight of the end (To) date.

If the case **is progressing** to a Trusted Assessment the relevant Team - **Wellbeing Service North** or **Wellbeing Service South** must be added with as 'Involved Team':

- Click the **Add** button
- Organisation = click the **Find** button

- Search for the **'Wellbeing Service North/South'** – click the hyperlink to select and pull this through to the 'Organisation' field

- Relationship Type = select **'Involved Team'** from the dropdown menu

- From = defaults in but can be amended if needed

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

The teams will display within **Professional and organisational relationships** (Wellbeing Service Hub Team will remain until midnight of the end (To) date)

Incoming Requests (Notification)

The Wellbeing Service Hub Team will receive the notification **WB Hub please send relevant correspondence** into the team's **'Incoming requests'** folder.

This is used to request correspondence is sent out – the Trusted Assessor or Generic Support Officer should add a note to explain what should be sent when they send this notification.

Please refer to the **Acknowledging Notifications** user guide for details on how to deal with a notification.

Start Sidebar Menu

The **Start > New…** sidebar menu shows the list of workflow steps available to Wellbeing workers, these are as follows:

- **Adult Proposed Case Closure** – completed to initiate a full case closure. Please see Full Case Closures section

- **WB Covid – 19 Response** - used for Covid - 19 referrals

- **WB Wellbeing Screening** – completed to record Wellbeing referrals received directly into the Wellbeing Service Hub Team

Important note: A new workflow map is created each time a workflow step is started from the Start sidebar menu. When viewing the **Workflow Map** it is therefore important to click on the **View Workflows** icon  within the Workflow Map to see all case activity.

For further guidance please refer to the **Workflow Map** user guide.

Referring to Safeguarding or Carers Services

Referring to Safeguarding

If you identify any safeguarding issues, you should discuss these with your manager or safeguarding officer. If they are in agreement, telephone the Customer Service Centre (CSC) to raise a Safeguarding Concern.

Following a Safeguarding referral to CSC you would expect to see an **Adult Safeguarding Triage** step in Current work on the Person summary screen.

Referring to Carers Services

If you identify the need to refer the person or their carer to Carers Services you should telephone the Customer Service Centre.

Following a Carers referral to CSC you would expect see an **Adult Carer Triage** step in Current work on the Person summary screen of the carer's record.

Full Case Closures

Sometimes there will be the need to propose a full case closure i.e. the record needs to be closed because the person has died, left the area or does not have any social care needs and is not open to any other team or service.

For **full case closures only** – the next action **Adult Proposed Case Closure** should be assigned to self for completion.

The **Adult Proposed Case Closure** step is also available from the **Start > New …** sidebar menu if needed – it is not expected that you start a workflow step just to select the next action 'Adult Proposed Case Closure'.

From the **Adult Proposed Case Closure** step a next action of **Adult Case Closure in Progress** should then be assigned to the relevant Adult Admin Team (LCC Business Support Team) based on where the person lives.

> If the person has died or left the area and was previously in receipt of a direct payment service (you can find this information within **Care packages provided** on the Person summary screen), you will need to send the **'Adult Please review information and authorise'** request to the relevant LCC Adult Care (Area) Team.
>
> The Adult Care Team will then complete the Direct Payments Suspension and Termination checklist section, review the case and finish the Proposed Case Closure step

Please refer to the **Case Closures – Full, Team and Involvement** user guide for full guidance.