Wellbeing Service – Trusted Assessors

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.

For people who are screened as eligible for the Wellbeing Service, the Wellbeing Service Hub Team worker will complete the **WB Initial Risk Assessment and Triage** step and assign the next action **WB Transfer to Trusted Assessor for Assessment and Support Planning** to the Wellbeing Service North/South Team as appropriate.

This will appear as **WB Trusted Assessment and Support Planning** and will be screened and allocated (assigned) to a Trusted Assessor by the Senior Officer.

To start a case

Once the case has been allocated by the SO, the **WB Trusted Assessment and Support Planning** step will appear in your **Incoming work** folder

If reassigned to you (this is sometimes left assigned to the team inbox) - you will also have the **WB Case Monitoring** step in your **Incomplete work**.

This step remains **open** throughout a person's involvement with the Wellbeing Service. It should be completed with relevant activity by each worker. It will therefore be started prior to your involvement.

From 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

Reviewing the record and 'referral' details

Once you have accessed the record, before booking your appointment you can review the 'referral' by clicking **Documents** in the sidebar menu and clicking the **WB Wellbeing Screening** hyperlink.

The **WB Wellbeing Screening** will open in a separate window and is the referral document. At the bottom of section 1 you will see whether you should contact the person directly or who to contact if it is not the person. The rest of the screening document will tell you who made the referral and why. This document can be closed by clicking the **Close** icon

You can also view the **WB Initial Risk Assessment and Triage** step if needed – though this information will pull through into the **WB Trusted Assessment and Support Planning** step.

Exit the **Document**s screen by clicking the **OK** button in the bottom right.

You should review the **Person summary** screen to look for any **Warnings** (red messages across top of screen) or **Notes** (bottom right).

You should look at the **Current communication needs** to see if you need to communicate with the person in a certain way.

You should also look at the person's address in **Demographic information**– using the View map hyperlink to see where the person lives and looking at the notes to see access information including a key safe number where applicable.

Worker and Organisation Relationships

The relevant **Wellbeing Service Team (North or South)** should have been recorded as an **Organisation relationship** of **'Involved Team'** by the Wellbeing Service Hub worker.

If this has not been recorded you should add this to the record using the **Person details > Organisation relationships** extended sidebar menu.

Refer to the **Organisational Relationships** user guide for full details on how to do this.

When allocating the case the SO should also have recorded a **Worker relationship** of **'Involved Worker'** for you.

If this has not been recorded you should add this to the record using the **Person details > Worker relationships** extended sidebar menu

Refer to the **Worker Relationships** user guide for full details on how to do this.

The team and worker will both display within **Professional and organisational relationships** on the **Person summary** screen.

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 all stages of the process (usually after the assessment visit).

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 **Output current document** icon  can be used at any stage, including prior to going out to assess the person, to generate a PDF of the assessment. This PDF can be saved to your computer, emailed or printed as required. Depending on your reason for generating the PDF you will need to amend the 'Output Options'. See the **Printing Documents** user guide for full details.

You should use the **View documents** icon 

to attach relevant supporting documents created outside of Mosaic for example photos or plans needed for SADL. See the **Uploading Documents** user guide for full details.

The **Forms and letters** icon should be used to open and use additional forms – you are usually prompted to use these based on the answered recorded within the main form.

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.

Clicking the **Finish** toolbar 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** toolbar 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. 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 Trusted Assessment and Support Planning

To start the **WB Trusted Assessment and Support Planning** 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 Trusted Assessment and Support Planning** will open in a separate window

Complete the form. Some information will pull through from the previous Wellbeing steps and will not be editable.

> **Important**
>
> If you have answered **'Yes'** to the question **'Are there care and support needs in this area to address in the plan?'** within sections 4 to 12, recorded information, and then changed the answer to 'No' you will see an error message within **Section 14. Support Action Plan**
>
> Refer to the guidance in the **Validation** subsection at the bottom of **Section 14. Support Action Plan** to correct this error.

Section 16. Next actions

The following next actions are available from the **WB Trusted Assessment and Support Planning** step:

Action	When to use	Who to assign to
WB Transfer to Support Officer for Service Delivery It will appear as **WB Support Action Plan Delivery** in Current work.	If the person is progressing to a Generic Support Officer for Support This will be recorded by the **Senior Officer** when they sign off the step	Appropriate Generic Support Officer using the 'Find' button against 'Pass to worker'.
WB Referral to SADL	When a referral for simple aids for daily living (equipment) is required. The optional form **WB SADL Referral** (available via **Forms and letters** icon) must be completed before adding this action.	**Wellbeing SADL Service** using the 'Pass to team' dropdown menu. This action should be **'sent immediately'**
WB Referral to Housing (NFA)	When a referral to Housing has been made outside of Mosaic.	This is a 'no further action' (NFA) action and so does not need assigning

Action	When to use	Who to assign to
WB LF&R Contact to be Recorded (NFA)	When a referral to Lincolnshire Fire and Rescue is needed. This should be carried out externally to Mosaic.	This is a 'no further action' (NFA) action and so does not need assigning
WB Referral to Carers Team (NFA)	When a referral to Carers Service is needed. You should call the Customer Service Centre to make a referral to the Carers Team if this action is recorded.	This is a 'no further action' (NFA) action and so does not need assigning
WB Referral to Neighbourhood MDT (NFA)	When a referral to the Neighbourhood MDT is made outside of Mosaic.	This is a 'no further action' (NFA) action and so does not need assigning
Adult DASH Risk Assessment Completed – Referred to MARAC (NFA)	When a DASH Risk Assessment has been completed and the case has been referred to MARAC.	This is a 'no further action' (NFA) action and so does not need assigning
Adult DASH Risk Assessment Completed – Referral to MARAC Not Required (NFA)	When a DASH Risk Assessment has been completed but the case does not need to be referred to MARAC.	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
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

Action	When to use	Who to assign to
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
(R) REQUIRED WB Transfer to Senior Officer to review information and add additional next actions	Mandatory for all cases - to allow the Senior Officer to sign off the work and record/update necessary next actions.	**Wellbeing Service Management Team** using the 'Pass to team' dropdown menu
(N) WB Hub please send relevant correspondence	To request the Wellbeing Service Hub Team workers send out correspondence. You should record what you need to be sent out using the 'Note' field.	**Wellbeing Service Hub Team** using the 'Pass to team' dropdown menu
(R) WB Additional information required	To ask for more information from an involved worker.	Relevant worker as appropriate using 'Pass to worker > Find button'

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'

It is important to remember to use the relevant optional forms available via the **Forms and letters** icon – you are usually prompted within the main form based on the answers recorded.

It is also important to note that not all forms you need are available in Mosaic – some forms are still external and will need uploading to the record using the **View documents** icon (0).

Once you have sent the mandatory request exit the step using the **Close** icon – the Senior Officer will click the **Finish** icon when they sign off the step.

WB Case Monitoring

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

- Click the **Incoming work** icon / **Incomplete work** icon within **Current work** on the **Person summary** screen

- Click **Start work / Resume 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 will therefore likely be started prior to your (the Trusted Assessor's) involvement and will show as Incomplete work, not Incoming work

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 this section 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 Trusted Assessor if the case is not progressing to a Generic Support Officer.

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
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

Action	When to use	Who to assign to
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 request is 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. You should record what you need to be sent out using the 'Note' field.	**Wellbeing Service Hub Team** using the 'Pass to team' dropdown menu
(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.

End Worker Relationship and Organisation Relationship (where required)

Once your involvement if complete and your activity has ended, your **Worker relationship** must also be ended

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

- Click the **Edit Pencil** icon by the **Trusted Assessor**
- To = record relevant 'end' date
- End Reason = select relevant reason from dropdown menu
- Click the **Save** button then click the **OK** button to return to the Person Summary screen – your worker relationship will disappear from **Professional and organisational relationships** straight away and your allocation will also disappear.

If the case is **not progressing** to a Generic Support Officer the Team - Wellbeing Service North or Wellbeing Service South – may also need ending.

- Click **Person details > Organisational relationships** in the extended sidebar menu
- Click the **Edit Pencil** icon by the **Wellbeing Service North/South Team**
- To = record relevant 'end' date
- End Reason = select relevant reason from dropdown menu
- 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** until midnight of the end (To) date.

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 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.