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/access the person's record**

The **WB Trusted Assessment and Support Planning** step will appear as **Incoming Work** (once the case has been allocated by the Senior Officer).

From your **Incoming Work** folder click the **person's name** (Subject ID column) to access the record.

**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 Cross** toolbar 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 Documents screen by clicking the **OK** button in the bottom right.

You should review the **Person Summary** screen to look for any **Warnings** (red messages on top left) 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 the **Demographic Information** widget – 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 the Trusted Assessor should add this to the record using the **Person Details > Organisation Relationships** (extended sidebar menu)

The Trusted Assessor should also have been recorded as a Worker Relationship of 'Involved Worker' by the Senior Officer when allocating the case to them.

If this has not been recorded the Trusted Assessor should add this to the record using the **Person Details > Worker Relationships** (extended sidebar menu)

The team and worker will both display within the **Professional and Organisation Relationships** widget on the Person Summary screen.
Mosaic Mobile

Mosaic Mobile can be used to update Mosaic forms without internet access – this can be used to complete details of your assessment while visiting the person.

How to use Mosaic Mobile –

- While you still have internet access - **log into Mosaic Mobile**.
- Click the **Manage Forms** (Filing Cabinet) button.
- **Check out** the forms you require, including any optional forms by clicking on them
- **Log out** of Mosaic Mobile
- When you need to access the forms (without internet access) - **log into Mosaic Mobile**
- Click the **Edit Forms** (Pencil) button
- Click the **Edit Pencil** against the form you wish to open – you can only open one at once
- Use the **Menu** button to select the different sections of the form
- Update the form – you can only update certain fields such as text boxes, radio buttons, and dropdown menus. Others will need updating in the live system.
- **Save** any changes and **log out of Mosaic Mobile**

- Once you have internet access again - **log back into Mosaic Mobile**
- Click the **Manage Forms** (Filing Cabinet) button.
- **Check back in** the forms by clicking on them
- **Log out** of Mosaic Mobile

Important notes -

- All updates made to forms in Mosaic Mobile will show in the live system.
- Forms must be checked back in within 7 days or they will check back in blank.
- Some system functionality is not available in Mosaic Mobile, for example you cannot update fields marked with a cog, you will therefore need to review and update these details once the form is check back into the live system.
- Workflow steps must be finished in live as you cannot record Next Actions or use the Toolbar icons in Mosaic Mobile.

Please refer to the **Mosaic Mobile** guide for full details.
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 🔄 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:

- **Service User Group** (also known as a Primary Support Reason) – to be recorded if the case is only open to the Wellbeing Service. This should already be recorded if the case is open to other teams/services. Recorded via Person Details>Service User Groups in the extended sidebar menu – refer to the Service User Groups guide for full details

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

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

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

- **Personal and Professional Relationships** – recorded via Person Details> GP / Organisation Relationships / Personal Relationships / Worker Relationships in the extended sidebar menu – refer to the relevant guides in the Relationships section of the User Guides page for full details
General tips for completing workflow steps

Clicking on the Guidance Bubble 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 toolbar 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 🕒 symbol will prepopulate but can be edited within the form where required.

Information will prepopulate into the fields marked with the 🕒 symbol. If some information is missing or incorrect, it can be edited by clicking the Show subject summary toolbar icon 📊, editing the information on the Person Summary screen and maximising the workflow step window.

Once the window opens, click the Refresh toolbar icon 🔄 to refresh the prepopulated information.

Actions Taken section

The Actions Taken 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 next actions:

- Click the Add button to display the Next Actions popup window
- Select the appropriate action, assign as applicable
• Add a note if you are assigning it to another worker or team

• Amend the priority if necessary

If recording multiple actions click the Add button – this will add the action and refresh the screen so you can record the next one.

If recording just one action, or once all actions have been selected, click the Add and Close button – this will close the ‘New Actions’ popup window and display the actions 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** toolbar 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** guide for full details.

You should use the **View Documents** (paperclip) toolbar icon to attach relevant supporting documents created outside of Mosaic for example photos or plans needed for SADL. See the **Uploading Documents** guide for full details.

The **Forms and Letters** toolbar 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** toolbar 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 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 (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 (sidebar menu). For further guidance, please refer to the Printing Documents guide.

**WB Trusted Assessment and Support Planning**

From the Person Summary screen, click Start hyperlink in Current Work widget against WB Trusted Assessment and Support Planning.

The WB Trusted Assessment and Support Planning step will open as a separate window.

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

If the person is progressing to a Generic Support Officer for Support the following next action must always be selected in Section 16:

- **WB Transfer to Support Officer for Service Delivery**

This will be recorded by the Senior Officer when they sign off the step – it should be assigned to a Generic Support Officer as appropriate using the 'Find' button against 'Pass to worker'.

It will appear as WB Support Action Plan Delivery in Current Work.

Other next actions available from the WB Trusted Assessment and Support Planning step are as follows:
• **WB Referral to SADL** – To be used when a referral for simple aids for daily living (equipment) is required. The optional form **WB SADL Referral** (available via *Forms and Letters* toolbar icon) must be completed before adding this action. This action can be 'sent immediately' and should be assigned to the **Wellbeing SADL Service**

• **WB Referral to Housing (NFA)** – To be used when a referral to Housing has been made outside of Mosaic. This is a 'no further action' action and so does not need assigning

• **WB LF&R Contact to be Recorded (NFA)** – To be used when a referral to Lincolnshire Fire and Rescue is needed. This should be carried out externally to Mosaic. This is a 'no further action' action and so does not need assigning

• **WB Referral to Carers Team (NFA)** – To be used 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' action and so does not need assigning

• **WB Referral to Neighbourhood MDT (NFA)** – To be used when a referral to the Neighbourhood MDT is made outside of Mosaic. This is a 'no further action' action and so does not need assigning

• **Adult DASH Risk Assessment Completed – Referred to MARAC (NFA)** – To be used when a DASH Risk Assessment has been completed and the case has been referred to MARAC. This is a 'no further action' action and so does not need assigning

• **Adult DASH Risk Assessment Completed – Referral to MARAC Not Required (NFA)** – To be used 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' action and so does not need assigning
- **WB Involvement Ended (NFA)** – To be used when the Wellbeing Service involvement is ending but the case is remaining open to other workers/teams/services. This is a 'no further action' action and so does not need assigning.

- **Adult Proposed Case Closure** – To be used when the Wellbeing Service involvement is ending and the case needs fulling closing down as there are no other open workers/teams/services. This should be assigned to self using the 'Assign to Me' button.

- **Adult Case Closure Already Started (NFA)** – To be used 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 Current Work. This is a 'no further action' action and so does not need assigning.

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

- **REQUIRED WB Transfer to Senior Officer to review information and add additional next actions** – Mandatory request to be used to allow the Senior Officer to sign off the work and record/update necessary next actions. To be assigned to **Wellbeing Service Management Team** using the 'Pass to Team' dropdown menu.

- **WB Please action** - Request found in all workflow steps. To be used as and when required and so can be assigned as appropriate.

- **WB Additional information required** – Request to be used to ask for more information from an involved worker. To be assigned to relevant worker as appropriate using the 'Find' button against 'Pass to Worker'.
It is important to remember to use the relevant optional forms available via the Forms and Letters toolbar 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 toolbar icon.

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

**WB Case Monitoring**

From the Person Summary screen, click Start/Resume hyperlink in Current Work widget against WB Case Monitoring - this will open the WB Case Monitoring step as 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 sometime be started by the Wellbeing Service Hub Team worker prior to the Trusted Assessor's involvement and will say 'Resume' rather than 'Start' against it (it will be Incomplete Work, not Incoming Work).

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

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)

At the bottom of section 2 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.

The relevant next action must also be recorded at the end of Wellbeing Service activity. The step should be finished using the **Finish** toolbar icon once the relevant action is recorded.

The following actions are available:

- **WB Case Monitoring Complete (NFA)** – To be used when all case monitoring activity has been recorded and the Wellbeing involvement has ended. This is a 'no further action' action and so does not need assigning

- **WB Case Monitoring No Longer Required (NFA)** – To be used when case monitoring is no longer required e.g. for cases not progressing beyond the Initial Risk Assessment. This is a 'no further action' action and so does not need assigning

The following request is available from the **Requests** toolbar icon:

- **WB Please action** - Request found in all workflow steps. To be used as and when required and so can be assigned as appropriate

- **WB Hub please send relevant correspondence** – Notification to be used 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. To be assigned to the Wellbeing Service Hub Team using the 'Pass to Team' dropdown menu
End Worker Relationship and Organisation Relationship (where required)

Once the Trusted Assessor’s activity has ended the Worker Relationship must be ended.

- Click **Person Details > Worker Relationships** (extended sidebar menu)

- Click **Edit Pencil** icon by the **Trusted Assessor**

- To = record relevant 'end' date

- End Reason = select relevant reason from dropdown menu

- Click **Save** button then click **OK** button to return to the Person Summary screen – the worker will disappear from the **Professional and Organisation Relationships** widget straight away and the Trusted Assessor's 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 > Organisation Relationships** (extended sidebar menu)

- Click **Edit Pencil** icon by the **Wellbeing Service North/South Team**

- To = record relevant 'end' date

- End Reason = select relevant reason from dropdown menu

- Click **Save** button then click **OK** button to return to the Person Summary screen - the team will display within the **Professional and Organisation Relationships** widget until midnight of the end 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 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** 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 the Current Work widget on the Person Summary screen.

**Referring to Carers Services**

If you identify the need to refer the customer 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 the Current Work widget 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** 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 the Care Packages Provided widget on the Person Summary screen), you will need to send the Request **'Adult Please review information and authorise'** to the relevant LCC Adult Care (Area) Team. The Adult Care Team will then complete the DP Termination checklist (optional form), review the case closure and finish the Proposed Case Closure step.

Please refer to the **Case Closures** guide (under the heading Case Activity – Workflow Steps and Forms) for full guidance on case closures.