

Children's Services Quick Guide

Viewing and Uploading Documents


The Documents section contains documents associated with the person. These include:

- Letters and forms that are part of finished worksteps
- Any related documents that have been uploaded, such as signed plans or drawings that a child has done
- Documents that contain information that has been migrated from ICS

Documents can be viewed by selecting **Documents** from the side menu on the **Person summary** screen. The documents display in date order. For documents that have the same date, you are able to view the order in which documents were completed.

The Document store is also available from the Family Details screen. This will display all the documents that relate to the entire family group.

Any documents completed within worksteps will display in the **Forms and Letters** tab. Any Documents uploaded into the Document store, attached to worksteps or uploaded historically in ICS will display within the **Attachments** tab.

To view a document, click on its title and a read-only version will open in a new window. If the document that has been uploaded and appears in the **Attachments** tab, you will be prompted to download a copy. Clicking on the  step summary icon will open the **Workstep summary** for the workstep where the document was completed. This will allow you to view all documents associated with this step.

Within the **Forms and letters** tab, the **viewing** buttons allow you to:

- **Show more people** – Expands the list of documents to include those of the person's relatives.
- **Download selected forms and letters** – Allows you to download selected documents. To select the documents, click on the button to the right of the document under the **Download** column. If multiple forms are selected they will be in a zip file. Forms and letters are included in the zip as PDF's. You are then prompted to save the file and close the prompt window when saving is complete.
- **Create** – Allows you to create any forms or letters that are available outside of a workflow.
- **OK** – Closes the Documents screen and returns you to the Person Summary screen.

Uploading Documents

You are able to upload any documents relating to a person's record, such as a signed copy of a plan, copies of work created with a child, or a copy of an e-mail into the Document store or to a Workstep. Where possible it is recommended that a document is uploaded to a workstep so that it is attached to the work it is associated with.

To upload a document into the Documents, click **Upload** from within the **Attachments** tab within the documents store. The **Add document** screen will display.

The screenshot shows the 'Add document' form. At the top, there is a blue header with the text 'Add document'. Below the header, on the right side, there is a note: 'The fields marked with * are required'. The form is divided into two main sections. The first section is titled 'Document file' and contains a 'File*' field. This field has a 'Choose File' button and the text 'No file chosen'. The second section is titled 'Filing details' and contains three fields: 'File as*' (a text input field), 'Main Category*' (a dropdown menu showing '-- Please select --'), and 'Sub-category' (a dropdown menu showing '-- Please select --'). At the bottom of the form, there are three buttons: 'Upload', 'Upload and close', and 'Cancel'.


- **File** - Click **Choose file** to locate the document on your computer file system.
- **File as** - the file name will default in and will need renaming to follow the naming convention of (*Service prefix (i.e CS, SC, EH), Doc name, completed by [ints] on [date in reverse order e.g. 19.12.01]*)

Please note: if you change the name of the file, you must keep the file extension at the end, e.g..*doc*. If you don't keep the file extension at the end of the file name it can make the file unstable, affecting anyone trying to download it in the future.

- **Main Category** - Select a filing category that reflects the service you work within or the service for which you are uploading the document.
- **Sub-category** - Select a filing category that reflects what the document you are uploading is related to.


Click **Upload** to upload the document and return to the **Attachments** tab within the **Documents** page.

Please note: All Legal and Pre-Proceeding memos **must** be uploaded using SC Social Care as Main Category and Legal Advice or Legal Proceedings as Sub-category.

To upload a document to a workstep, click on the  icon on the top toolbar within the workstep. Select **Attach a document** and follow the steps above.

Please ensure that you only upload documents to a group workstep if the information is relevant to **ALL** members of the group. If a document is relevant to one child only, this should be uploaded to the child's record via the document store within their **Person summary** screen and **NOT** to the group step. Uploading directly into a group step saves the document to all subjects listed in the subject table at the start of the master form. This has serious data protection implications if saved incorrectly as information specific to one child would be available on their sibling's records. This also increases the risk of potential data breaches.

Editing an uploaded document

Any documents that have been uploaded directly to the Documents page can be edited. You can edit the category, sub-category and name of a document that has been uploaded by clicking its  edit icon on the **Documents** page:

Amend document filing details - Thomas Turner (3549728)

Fields marked with * are required

| | |
|------------------------|--|
| Original filing | |
| Date filed | 23/02/2023 |
| Filed by | Amy Brooke (acting as Amy Brooke) |
| Last update | |
| Date last filed | 23/02/2023 |
| Last filed by | Amy Brooke (acting as Amy Brooke) |
| Filing details | |
| File type | Docx(docx) |
| Currently filed as | SC Example document AB 2023.02.23 |
| File as* | <input type="text" value="SC Example document AB 2023.02.23"/> |
| Main category* | <input type="text" value="CS Social Care"/> |
| Sub-category | <input type="text" value="Child in Need Visits"/> |

If the attachment is on a group record, you can also amend who the document is displayed against.

Click **Save** after making changes to the **File** such as **name**, the **Main Category** or **Sub-Category**. If you want the document to be deleted, please raise a request via FreshService.

Creating forms and letters outside workflow

It is possible to create some forms and letters in Mosaic outside of the normal workflow. You can create a document for a person or group by clicking **Create** on the appropriate Documents page.

The screenshot shows the 'Forms and letters' tab in Mosaic. At the top, there are tabs for 'Forms and letters' and 'Attachments'. Below this is a header 'Documents shown for this group only'. A search bar is present with the text 'Search:'. Below the search bar is a table with columns: Document, Category, Sub-category, Type, Subjects, Date, Step status, Actions, and Download. The table contains two entries:

| Document | Category | Sub-category | Type | Subjects | Date | Step status | Actions | Download |
|--|--------------------------------|-----------------------|------|----------|---------------------|-------------|---------|--------------------------|
| SC Childrens Social Care Request C0125 | CS Social Care | Requests and Closures | FORM | | 22/02/2023 14:47:59 | Completed | | <input type="checkbox"/> |
| CS Childrens Services Contact C0925 | CS Childrens Services Contacts | CSC Contact Records | FORM | | 22/02/2023 14:33:18 | Completed | | <input type="checkbox"/> |

Below the table, it says 'Showing 1 to 2 of 2 entries'. At the bottom right, there are navigation buttons: 'First', 'Previous', '1', 'Next', 'Last'. At the bottom center, there are buttons: 'Show more people', 'Download selected forms and letters', and a red-bordered 'Create' button.

Click the name of the form or letter that you want to create from the list. The document opens and you can edit its content. You can Save or Finish the document and when you close the document, the form or letter will appear in the Documents page.

To update a saved document, click on the edit icon. The document will display and can be edited until it is finished by clicking on the finish icon.