Mosaic

Lincolnshire COUNTY COUNCIL Working for a better future

Adults Quick Guide

Chronologies

A chronology is a list of significant events on a person's record.

A new chronology can be created, named, filtered, edited etc. to meet your requirements.

All saved chronologies are stored within the **Chronologies** section of a person's record.

New chronologies can be created; incomplete (unfinished) chronologies can be edited and both incomplete and finished chronologies can be viewed and printed.

Creating a New Chronology

From the **Person summary** screen of a person's record:

- Click **Chronologies** in the sidebar menu

The **Chronologies** screen displays

- Click the **New Chronology** button

The **New chronology** window opens

Naming the Chronology

- Click the **Edit Pencil** icon next to '**Unnamed chronology**'
- **Name** the chronology - it is advisable to give the chronology an informative name to help identify what information the chronology contains – e.g. "Whole record January 2021 – March 2021" or "All Hospital data" etc.
- To **Save** the name click the tick icon or to cancel click the cross icon

Filtering Options

You can choose to filter the chronology to specify what information is displayed.

This filtering can take place during the creation of a new chronology, the editing of an incomplete chronology and also when viewing and printing chronologies.

Not selecting any filter options (i.e. not entering dates, leaving all categories ticked) will ensure all information from the record is displayed.

The filter options available are:

- By Date: Enter 'From' and 'To' date using the **date picker** icon
- By Category: Select or deselect categories from the list to include or exclude certain category types.

To filter click the **Go** button or click the **Refresh** button

Event Display Options

You can alter what information will be displayed within the final chronology and how that information will display using the event display options.

- **Edit Pencil** icon (against each event) allows you to edit the Title/Description of events. You must click the tick icon to save the edit you have made or click the cross icon to cancel – exit without saving the edit(s)
- **Header Hyperlinks** allow you to sort the chronology by category and/or date by clicking on the appropriate column header hyperlinks.
- **Move Up** icon allows you to rearrange the order of events which have occurred on the same day.

- **Viewing** icon allows you to view case notes details. This icon will open the case note in a separate 'Person case notes' viewing window and the case note can also be printed from here.

- **Edit Pencil** icon (in actions column) allows you to edit the event (only visible for specific events).

- **Delete Cross** icon allows you to remove event (only visible for specific events).

- **Checkboxes** allow you to select or deselect any events by clicking the checkbox against them. Selecting an event will include it in the final chronology and deselecting an event will remove the event from the chronology.

Button Options

There are a number of buttons located to the bottom right hand side of the screen.

Amend case note inclusion button

Allows case notes to be removed (deselected) from the chronology and also allows additional case notes to be selected and added to the chronology.

This is how you can include case notes not ticked as 'significant events' when they were recorded.

To do this:

- Click the **Amend case note inclusion** button

The **Amend case note inclusion** screen displays - this screen shows case notes already included in the chronology. These can be deselected to remove them from the chronology.

Or to add additional case notes not currently included in the chronology (those that were not marked as 'significant events' at the time of recording):

- Click the **Include More…** button

The **Include More…** screen displays - this screen opens as a '**Find case notes'** search screen and should be used to find additional case notes to include in the chronology.

- Enter search criteria and then click the **Find** button.

The **Case notes** screen displays (displaying only case notes fitting the search criteria used)

- Select the additional case note(s) as required.

- Click the **Include Selected Case Notes** button.

If the case note(s) searched for did not display then click **Change Search Criteria** button instead and search again.

The **Amend case note inclusion** screen re-displays (with the additional case notes included on the screen)

Additional searches can be carried out by clicking the **Include More…** button again and following the previous instructions.

- Click the **OK** button once all necessary case notes have been selected or deselected

The **New chronology** screen re-displays – any additional selected case notes will now display and any deselected notes will have been removed.

Start From… button

Allows you to start this chronology using a previous chronology, and then add to it or edit as needed.

This button can only be used if at least one previous chronology has been saved to the record.

- Click the **Start From…** button

The **Start from existing chronology** screen displays

- Select the chronology you wish to use by clicking the radio button against it

- Click the **Use this** button

The **New Chronology** screen re-displays - the "used" chronology name will pull through along with the events which were included in that chronology.

The name and events will need editing/amending when choosing what should be included in your new chronology.

Add Event button

This allows you to add a text event to the chronology which is being created.

This text event will not appear anywhere else on the customer's record, although it will be available for any future chronologies run.

- Click the **Add Event** button

The **Add an event** screen displays - complete the fields as follows:

- Title = Enter event title text as required
- Date = Enter using the **date picker** icon
- Time = Enter time of event in the format HH:MM
- Context = defaults in
- Category = Select from dropdown menu as appropriate
- Click the **OK** button

The **New Chronology** screen re-displays with the 'text event' now included

Saving, Finishing and Exiting Chronologies

There are various different saving, finishing and exiting options when creating, editing and viewing a chronology.

- **Save & Continue**: Saves the chronology, while staying in the **Chronology** screen, and allows you to continue to edit/update it.
- **Save & Close**: Saves the chronology and takes you back to the **Chronologies** screen. The chronology will be marked as incomplete and will still be available to be edited further.

- **Finish:** Marks the chronology as finished and takes you back to the **Chronologies** screen. The chronology will no longer be available to edit, but it can still be viewed and printed if required.

- **Cancel**: Cancels the chronology, without saving, and returns you to the **Chronologies** screen.

- **Close**: This button is only available when viewing a finished chronology. It allows you to close the chronology and return to the **Chronologies** screen.

- **Print**: This button appears only displays if you have saved the chronology, it is also available when editing an incomplete chronology and when viewing a chronology. You can print an incomplete or completed chronology.

Editing Incomplete Chronologies

If a chronology is exited without finishing it you can edit and finish it at a later date. You can only edit and finish a chronology you have created – not chronologies started by another worker.

From the **Chronologies** screen

- Click the **Edit this Chronology** icon

The **Chronology** window opens.

As with creating a new chronology, you can:

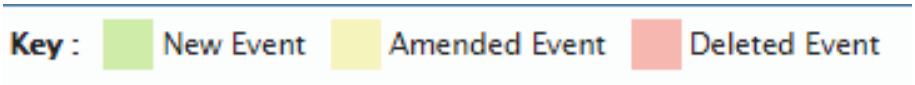
- edit the name of the chronology
- filter the chronology
- choose which information should display in the chronology
- change and choose various other settings

In addition to this you can also print an incomplete chronology before it is finished using the **Print** button.

When editing an incomplete chronology there is another additional button – **Update.**

The **Update** button allows you to refresh the chronology, updating the incomplete chronology if additional activity has occurred on the record since the chronology creation was first started.

If the **Update** button is clicked events are highlighted as per the following key.



If there has been no new activity and/or no changes to the record, the key and colour coding will not appear. This colour coding disappears once the chronology is saved and will not appear when the chronology is printed.

Viewing and Printing Chronologies

All chronologies can be viewed and printed from the **Chronologies** screen.

- To access the **Chronologies** screen click **Chronologies** in the sidebar menu

Viewing a Chronology

- Click the **View this chronology** icon

This icon is only available for finished chronologies. Incomplete chronologies can only be viewed, edited and finished if you started creating them.

The **Chronology** window opens.

A finished chronology can be filtered if required to hide certain events/information while viewing but also for printing.

There are two options available when viewing a finished chronology:

1. **Close** button: closes the **Chronology** window and re-displays the **Chronologies** screen.

2. **Print** button: allows you to print the chronology.

Before printing a chronology, you are advised to change your **Personal Settings** so the chronology will print in the agreed LCC standardised format. This is done by changing the default settings for the header and footer fields.

Once the settings have been applied Mosaic will automatically use them whenever a chronology is printed.

Applying your Personal Settings

From **Closed** or **Narrow workview:**

- Click **Tools > Personal settings** in the main header menu across the top of the screen

The **Personal Settings** screen displays - this screen is only used to set **Chronological View Print Option – default settings.**

Agreed LCC standard settings are:

- Group By = Select **None** (in Chronological Order) - this ensures the chronology will be printed in Date order.
- Chronology Header Fields (Left, Centre, Right) =
    - Left = Select **Person Name**
    - Centre = Select **Person ID**
    - Right = **Leave blank**
- Chronology Footer Fields (Left, Centre, Right) =
    - Left = Select **Printed By**
    - Centre = Select **Printed Date**
    - Right = Select **Page Number**
- Include Category checkbox = **Leave un-ticked**
- Click the **Save** button to retain these changes for all future chronologies

Printing a Chronology

A chronology can be printed once you first save the chronology. This means both an incomplete and finished chronology can be printed using the **Print** button located at the bottom of the window.

- Click the **View this chronology** icon to access a finished chronology, or click the **Edit this chronology** icon to access an incomplete chronology

The **Chronology** window opens.

If required you can filter the chronology to choose what information will print. You can filter to print less information than what is displayed in the finished chronology.

- Click the **Print** button to generate a PDF version of the chronology which can be downloaded and then printed (and/or saved if required)

The **Print Chronological View** screen displays - this screen allows the **Chronological View Print Option Settings** to be selected/changed.

This screen will default with the standard LCC settings if you have set your **Personal settings**. If no print option settings are selected the chronology will print using the default system settings when the **Print** button is clicked. Other settings can be selected for personal use but the LCC standard settings must be used if the chronology is going to be seen by any external agencies.