

Adults Quick Guide

Adult Conversation Record Process

When a contact is received to request **Adult Care** (social work) involvement an **Adult Conversation Summary - CSC** is completed by the Serco Care and Wellbeing Hub (CSC). This step can either be created directly from the **Start** menu or recorded as a next action from an **Adult Contact (New Case)**.

Where continued support is required a next action of **Adult Conversation Record** is assigned to the relevant area team.

The Community Hospital and Transfer of Care teams will also receive the **Adult Conversation Record** for new cases transferring from Reablement.

The **Adult Conversation Record** is the first workflow step in the initial conversation process and is to be used to record any contact made with the person, their family, their representative, the referrer etc. It allows any further information gathered to be recorded and helps you to decide and log what actions have been and are to be taken.

Where someone requires a follow up of the initial conversation, before a decision is made as to whether the case requires progressing further, an **Adult Conversation – Follow Up** step should be assigned to the relevant **Lincs Conversation inbox** e.g. Adult Care Boston – Inbox (Lincs Conversation).

The **Adult Conversation – Follow Up** is a next action from the **Adult Conversation Record** and can be scheduled for up to 2 weeks in the future, depending on when the person requires the follow up contact to take place.

As the Adult Care teams all work differently around the county it is important to note the **Adult Conversation Record / Adult Conversation Record – Follow Up** will likely be started by a dedicated (duty or triage) worker for that team.

The step could then be reassigned to another worker to complete a face to face conversation where needed, and then reassigned to another worker again if it is decided a full assessment is required.

Or the dedicated worker may keep the case and be allocated the **Adult Conversation Record / Adult Conversation Record – Follow Up** for the whole of this process depending on individual team structure and how that team has decided to manage new referrals.



If the dedicated worker is unable to complete the **Adult Conversation Record / Adult Conversation Record – Follow Up** on the day it was started, they can reassign the unfinished step to the relevant Lincs Conversation inbox. This will allow further conversations and information gathering to continue until a decision is made and where appropriate the case is ready to be progressed.

If the case needs allocating to another worker the dedicated worker can reassign the **Adult Conversation Record / Adult Conversation Record – Follow Up** to the relevant CCO/SW inbox for allocation by the team manager, or directly to a named worker if appropriate. This process will also vary depending on local arrangements.

See [Reassigning the Unfinished Step to the Inbox / Worker](#) for further details


Starting / Resuming a Workflow step

To start / resume a 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 / Resume work** from the menu


The step will open in a separate window



Tips for Completing a Workflow Step

Clicking on the **Show guidance** icon  will give you assistance relevant to the associated question.

Click the **Section completed** checkbox at the end of each section to put a tick in the sections menu on the left. This will not lock the section down nor save the section. We recommend ticking 'Section completed' for the relevant sections as there is an option to select 'completed sections only' when printing the form.

Click the **Save** icon  throughout your recording in the forms. 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 with a **blue cog**  are prepopulated from the person's record. 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 (user guides on updating the person's details can be found on the **Mosaic Hub**)
- Maximise the workflow step window and then click the **Refresh current form** icon  to pull the information into the workflow step

Next actions

Next actions are mandatory in all forms so at least one next action must be added before the step can be finished.


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)
- **Assign to** = Select/Find as appropriate - Not required for NFA actions
- **Reason** = Select as appropriate from dropdown menu (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


For cases progressing beyond the initial conversation stage it is important to recognise workers are likely to be assigned an unfinished **Adult Conversation Record / Follow up** rather than an **Adult My Assessment** when allocated the case – this will appear in the allocated worker's **Incomplete work** folder.


Before finishing a step you should use the appropriate toolbar icons.

See the **Requests and Notifications** table to see details of the requests and notifications available from the **Requests** icon 

There are optional forms and letters you may need to complete. These templates are accessed via the **Forms and letters** icon .

For example, if the case is closing following the initial conversation you should complete the **Conversation Record Closure Letter**. You can request Business Support print and sent this out for you using the **Adult Admin output request** notification (available from the **Requests** icon .

Any external documents, e.g. letters, should be attached to the workflow step using the **View documents** icon .

The **Finish** icon  is to be used once the form is complete, and no further input is required. If you have sent any requests you will not be able to 'finish' until these requests have been completed. Refer to the **Working with Workflow Steps and Forms** user guide for further guidance on completing a workflow step.

This guide will only cover some significant fields within each step.

Recording the Adult Conversation Record

The **Adult Conversation Record** workflow step contains two forms –

- **Adult Conversation Record** – this form can be printed and provided to the person / their representative where required.
- **Adult Record of Information Gathering** – this form is used to capture all conversations and reporting data. This form should not be printed and provided to the person / their representative.

Adult Conversation Record

This form contains four sections – remember it can be printed and send to the person / their representative where needed.

Section 1. Person Details

This section is used to capture the person's details.

Section 2. Summary of Conversations and Agreed Outcomes

This section is used to summarise the conversations (recorded in the **Adult Record of Information Gathering** form) and record the outcome(s) of the initial conversation process.

Section 3. Completion Details

You should only select **Yes** to the question **Conversation Record to be abandoned / cancelled?** if the reason is listed in the dropdown menu.

You must also complete **Section 4. Conversation Record Cancellation Details** within the **Adult Record of Information Gathering** form.

Section 4. Next actions

For details of the next actions available from the **Adult Conversation Record** please see the [Next Actions](#) table.

Record of Information Gathering

This form contains four sections – remember it should not be printed and provided to the person / their representative where required.

Section 1. Record of Information Gathering

This section is used to capture all conversations which take place as part of the information gathering process.

If you answer '**Yes**' to the **Pause Function** question some additional mandatory fields will appear.


The **Insert Section** button should be used to repeat this section if the conversation needs to be paused multiple times.

Once more than one section has been added the two additional buttons display:

- **Move Section Up** – can be used to rearrange the order of the pause entries so they are in chronological (date and time) order
- **Delete Section** – can be used to remove a section that is not needed (be careful not to delete a section where information has been recorded and needs to be retained)

For each 'pause' you must send the **Adult Request to authorise the pausing of conversation record** request to your manager.

Record of Conversation – 1

- Use the **date and time picker** icon  to select the **Date and time**. Click the '**Now**' button to record current date and time, but remember you should be selecting the data and time of the event not the date and time of you recording it.
- Record the **Name(s) of person(s) contacted** within the textbox
- Select the **Method of contact** e.g. telephone, letter etc
- Record the **Details of conversation** and **Agreed actions from conversation** within the textboxes

- The **Worker recording activity** field will default in with your information but can be updated if required. This highlights who has gathered the information if there are multiple workers dealing with the case.

Like in the pausing section, the **Insert Section** button should be used to repeat this section to allow multiple entries to be added – a new entry should be added to log each telephone call, ward visit, letter etc separately

Section 2. Carers Details

This section is used to capture information about the person's role as a carer and / or details of the person's carer.

Section 3. Adult Conversation Record - CSC

This section contains non-editable information recorded by the Serco Care and Wellbeing Hub (CSC) in the **Adult Conversation Record – CSC** (where recorded).

Section 4. Conversation Record Cancellation Details

This section should only be completed if you are cancelling / abandoning the step and have recorded the details in **Section 3. Completion Details** of the **Adult Conversation Record** form.

It is used to 'turn off' mandatory fields within the form if they cannot be completed due to the step being abandoned / cancelled.

Recording the Adult Conversation Record – Follow Up

This form contains six sections – sections one to four can be printed and provided to the person / their representative where required.

Section 1. Person Details

This section is used to capture the person's details.

Section 2. Record of Information Gathering

This section contains non-editable information recorded in the **Record of Information Gathering** form within the **Adult Conversation Record** step.

Section 3. Record of Information Gathering – Follow Up

This section allows for further conversations that take place during the follow up period to be logged.

Refer to [Section 1. Record of Information Gathering](#) above for details on how to record a conversation.

Section 4. Summary of Conversations and Agreed Outcomes

This section is used to summarise the conversations recorded in **Section 3** and record the outcome(s) of the initial conversation process.

Section 5. Completion Details

This section is used to capture details of any signposting or referrals made.

Section 6. Next actions

For details of the next actions available from the **Adult Conversation Record – Follow Up** please see the [Next Actions](#) table.

Next Actions

The table below list all next actions available from the **Adult Conversation Record** and **Adult Conversation Record – Follow Up** steps – indicating which step the action is available from, when to use the action and who to assign it to.

Click the '**Send Immediately**' checkbox for all relevant next actions recorded to allow workflow to progress before this step is finished.

Next Action	Which Step	When to use	Who to assign to
Adult My Assessment: Area Team	Both	For new / historic Area or LD cases only If it is decided a full assessment is required.	Self using the Assign to Me button

Next Action	Which Step	When to use	Who to assign to
Adult My Assessment: Non-Area Team	Both	For new / historic Prison or Community Hospital and Transfer of Care Cases only If it is decided a full assessment is required.	Self using the Assign to Me button
Adult Conversation Record – Follow Up	Conversation Record	For cases where agreed outcomes have been identified in the initial Conversation Record. The scheduled date defaults in as 2 weeks but can be amended as appropriate	Relevant Lincs Conversation inbox or named worker using the Pass to worker > Find button
Adult Internal Contact (assign to self)	Both	If the person requires assistance from Occupational Therapy (OT).	Self using the Assign to Me button
Adult Bring Forward Scheduled Review	Conversation Record	For open cases only (where the Conversation Record has been used in error) If it is decided a scheduled review needs to be started early. The reason for review should be recorded in the 'Notes' box	Self using the Assign to Me button
Adult Referral to Wellbeing (assign to self)	Both	If the person requires screening for the Wellbeing Service.	Self using the Assign to Me button
Adult Safeguarding Concern	Both	If safeguarding concerns have been identified	Self using the Assign to Me button

Next Action	Which Step	When to use	Who to assign to
Adult Carer or Additional Information Contact to be Recorded on Carer's Record (NFA)	Conversation Record	If the person's carer requires a carers assessment. Important: When selecting this action, you must go to the carer's record and record an Adult Contact (Carers) to refer to the Carers Team.	This is a terminating (no further action) action, so does not need to be assigned.
Adult Immediate Emergency Services Request	Both	If the person requires urgent services and there is no time to complete an assessment first. A mandatory 'Reason' must be recorded when selecting this action.	Self using the Assign to Me button
Adult Referral to Reablement (assign to self)	Both	If the person requires a referral to home based reablement service (Libertas)	Self using the Assign to Me button
Adult Referred to ILT (NFA)	Both	If the person has been referred to ILT	This is a terminating (no further action) action, so does not need to be assigned
Adult Referral to Extra Care Housing (assign to self)	Conversation Record	If the person requires a referral for Extra Care Housing. Refer to the Referring to Extra Care Housing user guide for further details.	Self using the Assign to Me button
Adult Referral to LPFT Mental Health Social Care (assign to self)	Both	If the person needs transferring to LPFT for Mental Health Social Care intervention.	Self using the Assign to Me button

Next Action	Which Step	When to use	Who to assign to
Adult Referral for Joint Involvement	Both	If the person needs joint involvement from LCC Adult Care and LPFT for Mental Health Social Care intervention. Refer to the Joint Working user guides for further details.	Team you are referring to using the Pass to team dropdown menu
Adult Referral to LSS (NFA)	Both	If the person has been referred to the Lincolnshire Sensory Service	This is a terminating (no further action) action, so does not need to be assigned
Adult Information and Advice Provided (NFA)	Both	If the person has been provided with information and advice.	This is a terminating (no further action) action, so does not need to be assigned
Adult Referral to Other Agency	Both	If the person needs to be referred to an external agency (one not using Mosaic)	Self using the Assign to Me button
Adult My Transition Assessment	Conversation Record	When it is decided an assessment is required on a case transitioning from Children's to Adult's services.	Self using the Assign to Me button Or Intake Team using Pass to team dropdown menu
Adult Appropriate Adult Referral to TAAS (NFA)	Conversation Record	If the contact was from the police asking for an Appropriate Adult. You need to contact the Call Handling Team at TAAS by telephone to make the referral – 0333 2424999.	This is a terminating (no further action) action, so does not need to be assigned.

Next Action	Which Step	When to use	Who to assign to
Adult Start Care Programme Approach Review	Conversation Record	To be used then the person needs the Care Programme Approach Review starting.	Self using the Assign to Me button Or appropriate team using Pass to team dropdown menu
Direct Payments Referral to Penderels	Both	If a referral to Penderels Trust is required.	Self using the Assign to Me button
Adult Telecare Referral (TEPAC Pilot only)	Both	If a referral to the TEPAC pilot is required. Important: Must not be used to refer to Telecare.	Self using the Assign to Me button
Adult No Further Action Required	Conversation Record	If no further action is required, but a full case closure cannot be completed or is not needed This action cannot be added with any other actions.	This is a terminating (no further action) action, so does not need to be assigned.
Adult Proposed Case Closure	Both	When it is decided the case does not need to open/remain open and a full case closure is required. Refer to the Case Closures – Full, Team and Involvement guide for further information	Self using the Assign to Me button
Adult Case Closure Already Started (NFA)	Both	When a full case closure is required but it is already underway. To add this action, you must be able to see Adult Proposed Case Closure or Adult Case Closure in Progress within Current work on the Person summary screen	This is a terminating (no further action) action, so does not need to be assigned.

Next Action	Which Step	When to use	Who to assign to
Adult Conversation Record – Follow up Complete (NFA)	Follow Up	If no further action is required, but a full case closure cannot be completed or is not needed This action cannot be added with any other actions.	This is a terminating (no further action) action, so does not need to be assigned.

Requests and Notifications

The table below lists all requests and notification available from the **Adult Conversation Record** and **Adult Conversation Record – Follow Up** steps – indicating which step the request / notification is available from, when to use it and who to assign it to.

Request (R) / Notification (N)	Which Step	When to use	Who to assign to
(R) Adult Request to authorise the pausing of conversation record	Conversation Record	When pausing the conversation record. This must be sent each time the conversation is paused.	Your manager using the Pass to worker > Find button
(N) Adult Notification of activity	Conversation Record	Can be sent to notify a worker or team of the activity taken during this stage	Another worker or team using the Pass to worker/team > Find button
(N) Adult Notification to Brokerage: Reablement transfer no longer required	Conversation Record	To notify Brokerage that a transfer from reablement to a brokered package of care is no longer required.	Hosp/Reable/EDT – Admin inbox using Pass to worker dropdown menu



Request (R) / Notification (N)	Which Step	When to use	Who to assign to
(N) Adult Admin Output Request	Both	To be used to request Business Support generate a finished version of the document and/or letter and post it out to the person/their representative. You should use the note textbox to give specific details e.g. any sections/forms that should be excluded from the printout, who to send copies to, address details if different to those recorded in Mosaic etc	Business Support (Adult Admin Team) using Pass to team dropdown menu
(R) Adult Please review information and authorise	Both	Optional authorisation to be used as required.	Your manager using the Pass to worker > Find button
(R) Adult Please action	Both	This appears in most workflow steps and can be used as and where required.	Another worker or team using the Find button

Reassigning the Unfinished Step to the Inbox / Worker

Remember, where the **Conversation Record / Conversation Record – Follow Up** cannot be completed on the date it has been started it should be reassigned to the team's **Lincs Conversation inbox** e.g. Adult Care Boston – Inbox (Lincs Conversation) to be continued by the dedicated worker the following day.

Depending on your team's structure, if the case needs allocating to another worker the dedicated worker can reassign the **Conversation Record / Conversation Record – Follow Up** to the relevant CCO/SW inbox for allocation by the team manager, or directly to a named worker if appropriate.

To reassign the unfinished **Conversation Record / Conversation Record – Follow Up** to a team inbox or another worker in your team:

- If needed, exit the step using the **Close** icon  and say 'yes' to save any changes
- From the **Current work** section on the person's record click the **Incomplete work** icon  to the left of the **Adult Conversation Record / Adult Conversation Record – Follow Up**
- Click **Update assignment** from the mini menu
- In the 'Team worker' dropdown menu select the relevant inbox or named worker

Important: The team manager and any worker helping another team (one they do not normally work for) may not see the correct workers or inboxes in the 'Team worker' dropdown, instead they may need to use the 'Find' button against 'Pass to worker' and search for the inbox/worker they are assigning the work to.

- Add a **Note** to highlight any important information
- Click the **OK** button – the **Adult Conversation Record / Adult Conversation Record – Follow Up** will then move from your **Incomplete work** folder to the inbox/other worker's **Incomplete work** folder