Adults Quick Guide

Adult Carer Triage

Following completion of the **Adult Contact (Carer)** the workflow for all carer's will progress to the **Adult Carer Triage** step.

This step can also be added as a next action from the **Carers Emergency Response Plan** where required.

The triage step is designed to gather further information in order to determine what support is required e.g. an assessment or information and advice.

To start the **Adult Carer Triage** 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 **Adult Carer Triage** will open in a separate window

Recording Adult Carer Triage

The form is split into 4 different sections. Each section should be completed with relevant information.

Some information will pull through from the contact but it can be edited where required.

General Tips for completing the form

Clicking on the **Show guidance** icon will give you additional information to assist in answering 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 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 the document.

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.

In **Section 1. Carer Details** Information will prepopulate into the fields marked with the symbol. If some information is missing or incorrect, it can be added or edited by:

- clicking the **Show subject summary** icon to minimise the workflow step window
- editing the information on the **Person summary** screen (user guides on updating the person's details can be found on the **Mosaic Hub**)
- maximising the workflow step window and clicking the **Refresh current form** icon to update the information in these fields

In **Section 2. Summary of Discussion** the bold text at the top of this section can be included or excluded from a PDF output of the triage step as required. To exclude it ensure you have ticked the 'Tick to remove the above text from the PDF document' checkbox.

In the subsection **Reason for the Contact** the text pulls through from the contact but can be edited if required.

Date summary of discussion started should be completed using the **date picker** icon

Complete the text boxes in the subsection **Health and Wellbeing Summary** as appropriate. Use the **Show guidance** icon for prompts to help you answer these fields.

To record details of **'Reported Health Conditions'** click the Add button and complete as appropriate.

Click the **Add** button to record an additional health condition, or click the **Add and Close** button if only recording one health condition or once all health conditions are recorded.

Once health conditions have been recorded the following icons are displayed:

Edit – to edit/amend a health condition e.g. for spelling corrections

Delete – to delete/remove a health condition e.g. when added incorrectly

Move this row up – to rearrange the order of the health conditions (only displays if more than one health condition is recorded)

If you answer 'Yes' to the question 'Has the carer had a Carer's Assessment within the last year?' you will be required to record the date.

Complete the text boxes as appropriate in the subsection **Outcome of Discussion**

If you say 'No' to the question 'Carer's Assessment required?' you must record why it is not required. If you say 'Yes' you need to indicate who will be undertaking out the assessment.

Select the relevant checkbox(es) in the **Additional Outcomes** subsection

Section 4. Actions Taken

Next actions are mandatory in all forms. At least one next action must be added before the **Adult Carer Triage** can be finished.

Depending on your answers to certain questions, you will be prompted to add certain actions. A red message will display stating which actions are still needed.

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 (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

Action	When to use	Who to assign to
Adult Carer Assessment	Used for new cases where triage determines an assessment is required. A reason must be recorded when adding this action.	Self using the **Assign to Me** button Or another worker using the Pass to worker > Find button Or Carers First Team using the Pass to team dropdown menu
Adult Bring Forward Scheduled Carer Review	Used for open cases where triage determines a review needs to be completed 'early'.	Another worker using the Pass to worker > Find button Or Carers First Team using the Pass to team dropdown menu
Adult Notification for Carers First	Used to notify Carers First that universal services are needed or that the carer needs to be added to the mailing list for carers leaflets.	Self using the **Assign to Me** button Or another worker using the Pass to worker > Find button Or Carers First Team using the Pass to team dropdown menu
Adult Complete/Update Carer Emergency Response Plan	If the carer requires a new emergency response plan creating or an existing plan needs updating.	Self using the **Assign to Me** button Or another worker using the Pass to worker > Find button Or Carers First Team using the Pass to team dropdown menu
Adult Information and Advice (NFA)	If information and advice is provided during/following the triage.	This is a terminating (no further action) action, so does not need to be assigned
Adult Referral to Other Agency	If the case needs to be referred to an external agency (one that does not use Mosaic)	Self using the **Assign to Me** button

Action	When to use	Who to assign to
Adult No Further Action Required	If no further action is required following the triage, but a full case closure is not needed e.g. because the case is open to safeguarding, remains open for review etc.	This is a terminating (no further action) action, so does not need to be assigned
Adult Proposed Case Closure	If a full case closure is required, i.e. the triage is not progressing further and the case is not open to any other teams.	Self using the **Assign to Me** button
Adult Case Closure Already Started (NFA)	If a full case closure is required and is already underway. To add this action, you must be able to see an **Adult Proposed Case Closure** or **Adult Case Closure in Progress** step within **Current work** on the **Person summary** screen	This is a terminating (no further action) action, so does not need to be assigned

Toolbar Icons

Before finishing the triage step you should always consider whether you need to use any of the toolbar icons at the top of the screen.

You should use the **View documents** icon (0) to attach relevant supporting documents created outside of Mosaic.

Optional forms and letter templates are available via the **Forms and letters** icon.

You must consider if you need to send a request or notification using the **Requests** icon.

Request (R) / Notification (N)	When to use	Who to assign to
(R) Adult Please action	This request appears in most workflow steps and can be used as and where required	Another worker or team as appropriate using the 'Pass to Worker/Team > Find button'
(N) Adult Carers admin output request	Used to request admin generate a finished version of the form and post it out to the carer/their representative. You should use the note box to record specific instructions	Another worker using the 'Pass to Worker > Find button' Or Carers First using the 'Pass to Team' dropdown menu
(N) Adult Notification to CSC Carers Team	Used by Carers First workers to notify the CSC Carers Service that a Carers Emergency Response Plan needs to be created. You should use the note box to give specific details.	Adult Carers Service - Inbox using the 'Pass to Worker' dropdown menu
(N) Adult EDT Alert	To be used to alert the Approved Mental Health Professionals (AMHP) service to a case where there could be issues out of hours. The **EDT Alert** optional form should be completed if you are sending this notification	Approved Mental Health Professionals (AMHP) using the 'Pass to Team' dropdown menu

Clicking the **Finish** icon ✅ will finish and complete your step. The triage step cannot be finished if there are any incomplete mandatory questions or if there are any requests which need completing.

If the **Finish** icon is clicked while there are outstanding mandatory sections, a system message will display explaining the form cannot be finished as "mandatory items" are outstanding.

Once the **Finish** icon can be clicked, it will lock down the form and no further input can be made.

You will find your finished form in the **Documents** section. Only finished versions of the **Adult Carer Triage** should be shared. A PDF version of your finished triage step should be generated from the **Documents** section.

The **Actions Taken** section of the form will automatically appear on the output unless the 'Output Options' are amended before printing. This section should not be included on any outputs for the carer or their representative.

For further guidance, please refer to the **Printing Documents** user guide.