Adults Quick Guide

Adult Carer Assessment

The **Adult Carer Assessment** is used to identify a carer's support needs and their eligibility. This assessment tool is used by the CSC Carers Service and the Carers First Team.

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

Recording the Adult Carer Assessment

The form is split into 9 different sections. Each section should be completed with relevant information.

Details of the last completed assessment will prepopulate (pull forward) into your current assessment. It is particularly important to review and update the information to ensure it reflects the carer's current situation.

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 assessment.

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.

> Due to a known system 'glitch', it is recommended that if you have had an assessment form open for more than an hour, you:
>
> - exit the workflow step using the **Close Cross** icon ❌
> - click into another section within the person record, as this will refresh the screen
> - return to the **Person summary** screen
> - click the **Incomplete work** icon 📝 for the assessment within **Current work** and then click **Resume work** in the mini menu to continue recording the assessment

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

The **Primary Support Reason** and **Primary Support Reason Sub-Category** are mandatory fields. You will see a red warning message if these fields are blank.

The **Primary Support Reason** must be added or updated in the **Person summary** screen by clicking on **Person details>Service user groups** in the extended sidebar menu.

For a carer the following options should be selected:

- The Group = **A - Social Support**
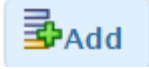- The Sub-Group = **Support to carer**

For further guidance, please refer to the **Service User Groups** user guide.

GP details - a red warning message will display if -

- there is no named GP or GP Surgery recorded on the person's record
- the named GP and GP Surgery already recorded do not match
- the GP Surgery has previously been recorded as not known, or the person has been recorded as not registered with a GP Practice.

Please refer to the **GP Details** user guide for guidance on how to record/update the GP or surgery if needed.

In **Section 2. Assessment Details** you have the ability to record the reason an assessment is paused. To do this, click the ![Add] button, select the 'Reason' from the dropdown menu, record the 'Date paused' and then click the **Add and Close** button

Once the assessment restarts click the **Edit** icon ![edit icon] to record the 'Date restarted' and then click the **Save Changes** button.

The **Edit** icon ![edit icon] can also be used to edit/amend a reason for pausing e.g. incorrect reason selected or wrong date recorded

The **Delete** icon ![delete icon] can be used to remove a reason for pausing the assessment if it has been added in error e.g. assessment does not need to be paused.

In **Section 5. Carer's Assessment** for any domains you answer 'Yes' to the question 'Are there support needs in this area?' you will find these pull through to address in the plan and are also summarised within section 6 of the assessment.

In **Section 8. Completion Details** the first question is: *'Assessment to be abandoned / cancelled?'.* You should **only** select *'Yes'* if the reason is listed in the dropdown menu.
If *'yes'* is selected, two additional mandatory questions will display: *'If yes, please provide a reason' and 'Date assessment cancelled'.*

You must record the mandatory *'Date Completed'* unless you have selected *'yes'* to the *'Assessment to be abandoned / cancelled?'* question.

Section 9. Actions Taken

Next actions are mandatory in all forms. At least one next action must be added before the **Adult Carer Assessment** 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
- 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 Support Plan	To be used if the carer is eligible for support and new services are required or current services are to continue	Self using the **Assign to Me** button
Adult Carer Emergency Response Plan	To be used if the carer requires a plan to be set up for emergency situations.	Self using the **Assign to Me** 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 Carers First Team using the Pass to team dropdown menu

Action	When to use	Who to assign to
Adult Contact to be Recorded on Cared for's Record (NFA)	If you have identified that the person the carer supports requires an assessment by Adult Care. You must contact the CSC by telephone. Record a note using the 'Note' box to state what action you have taken	This is a terminating (no further action) action, so does not need to be assigned
Adult Safeguarding Concern	Used by CSC Carers Service if safeguarding concerns have been identified. **Please note** - Carers First should contact the CSC by telephone if Safeguarding concerns have been identified.	Self using the **Assign to Me** button You should tick **'Send Immediately?'** when adding this action
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
Adult Telecare Referral	If a referral for LCC commissioned Telecare services is needed.	Self using the **Assign to Me** button You can tick **'Send Immediately?'** when adding this action
Adult End Services Request	To be used if the carer is no longer eligible for personal budget services but the case is remaining open **Important:**: You will need to make sure you have 'unticked' the relevant 'Service Type' checkbox(es) in the **Adult Carer's Support Plans Costing** form for any personal budget services you are ending (only available in the plan or review).	Self using the **Assign to Me** button You can tick **'Send Immediately?'** when adding this action.

Action	When to use	Who to assign to
Adult Information and Advice Provided (NFA)	If the outcome of the assessment includes providing information and advice	This is a terminating (no further action) action, so does not need to be assigned
Adult No Further Action Required	If no further action is required following the assessment, and a full case closure is not to be completed because there are services in place or other workers or teams are still working with the case 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 assessment is completed with no services needed, the carer does not already have services, or current services and involvement from all involved teams are to close	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 your assessment 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 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 review information and authorise	Optional authorisation to be used as and where required	Your manager using the 'Pass to Worker > Find button'
(N) Adult Carers admin output request	Used to request a finished version of the assessment is generated and posted 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
(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 Notification to CSC Carers Team	Used by Carers First workers to notify the CSC Carers Service that a Carers Emergency Action Plan needs to be created. You should use the note text field 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 assessment. The assessment cannot be finished if there are any incomplete mandatory fields 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 your assessment and no further input can be made.

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

The **Actions Taken** section of your assessment 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.