

## Adults Quick Guide

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### Adult Corporate Appointeeship Application

The **Adult Corporate Appointeeship Application** workflow step is used by the **Serco Court of Protection and Appointeeship Team (CoP)** to record the activity of the appointeeship process.

The **Adult Corporate Appointeeship Application** remains 'open' for the period of the appointeeship application and the CoP team worker remains the 'owner' of that piece of work until an outcome is reached.


To start the **Adult Corporate Appointeeship Application**, 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 Corporate Appointeeship Application** will open in a separate window

### Tips for completing the form

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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 form.

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.

The form is split into 6 different sections. Each section should be completed with relevant information.

The relevant dates of outgoing and incoming legal documentation, benefits applied for and dates of benefits received are recorded within the form.

In **Section 1. Personal Details** information will prepopulate into the fields marked with the **blue cog** . 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 (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

Use the **Find** button to record details of the current appointee and DWP details in **Section 2.**


### **Application Details**

**Important:** The '**Manual Input**' button should only be used as a last resort:

- If a person is not known in Mosaic they should be created. To avoid duplicate records, you should always search using at least 3 different search criteria before creating them. See the **Creating a Person** user guide for full details.
- If an organisation is not known or their details are incorrect, you should complete the relevant form via Our Intranet > Mosaic Requests to request they are created/updated.

Use the **Insert Section** button to repeat certain fields in the form e.g. in **Section 2** where the person has multiple benefits

These repeated fields can be rearranged by using the **Move Section Up** button and deleted (if added in error) by using the **Delete Section** button

Use the **date picker** icon  to record relevant dates within the various sections of the form.

## Section 6. Next actions

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

To record a next action:


- Click the **Add** button
- Select the relevant action from the '**Select action**' dropdown menu
- 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 Corporate Deputyship Application	Where a deputyship referral is needed	<b>Serco Court of Protection &amp; Appointeeship Team</b> via Pass to team dropdown menu
Adult Corporate Appointeeship Setup (NFA)	To be used if the appointeeship has been setup and no further action is required.	This is a terminating (no further action) action, so does not need to be assigned
Adult Corporate Appointeeship Review	If a Corporate Appointeeship Review requires scheduling.  The 'scheduled date' defaults in but can be amended where needed.	<b>Serco Court of Protection &amp; Appointeeship Team</b> via Pass to team dropdown menu

Action	When to use	Who to assign to
Adult No Further Action Required	If no further action is required, and a full case closure cannot 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 person does not already have services, or current services and involvement from all involved teams are to close  Please check <b>Case Closures, Full, Team and Involvement</b> user guide for full details of when to select this next action	Self using the <b>Assign to Me</b> 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 <b>Adult Proposed Case Closure</b> or <b>Adult Case Closure in Progress</b> 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 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  to attach relevant supporting documents created outside of Mosaic.

You must consider if you need to send a Request or Notification via the **Requests** icon .

<b>Request (R) / Notification (N)</b>	<b>When to use</b>	<b>Who to assign to</b>
<b>(N)</b> Adult Inform involved worker that Corporate Appointeeship set up	To notify the appointeeship has been set up	Referring practitioner using the Pass to worker > Find button
<b>(R)</b> 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 Find button

Clicking the **Finish** icon  will finish and complete the application – you should do this once the relevant next action has been recorded.