Adults Quick Guide

Adult Safeguarding Process

The Adult Safeguarding workflow always starts with an **Adult Safeguarding Concern** step and ends with the **Adult End of Safeguarding Activity** step (if the case progresses beyond triage).

Details within this workflow will prepopulate (pull forward) from each workflow step to the next. You should review and update the information to reflect the person's current situation in each step.

The steps available within the Adult Safeguarding workflow are:

Workflow Step	Who uses the Step and when
Adult Safeguarding Concern	Anyone in Adult Care, including the Care and Wellbeing Hub (CSC). It is selected as a next action from most Adult Care workflow steps but can also be accessed via the Start sidebar menu. It is recorded by the worker raising/receiving the information about the concerns.
Adult Safeguarding Triage	Safeguarding Manager only. **Note:** If received outside of normal working hours, may be started by AMHP and then reassigned to Safeguarding manager for completion. It is a next action from the Concern step and is used to determine whether an Enquiry is needed or not.
Adult Safeguarding Enquiry	Safeguarding Practitioner or Safeguarding Manager where required. It is a next action from the Triage step and is used to record details of the enquiry. It remains open for the duration of safeguarding activity.

Workflow Step	Who uses the Step and when
Adult Safeguarding Protection Plan	Safeguarding Practitioner or Safeguarding Manager where required. It is a next action from the Enquiry step and can be sent immediately so it can be completed before the enquiry is finished. It is used to record details of a protection plan where appropriate.
Adult Safeguarding Protection Plan Review	Safeguarding Practitioner or Safeguarding Manager where required. It is a next action from the Protection Plan or Protection Plan Review steps and is used to review the protection plan in place.
Adult End of Safeguarding Activity	Safeguarding Practitioner or Safeguarding Manager where required. It is a next action from the Enquiry step and is used whenever the safeguarding activity is to be ended.
Adult Safeguarding Serious Case Review	Senior Managers only. It is only available from the Start sidebar menu.

Starting / Resuming a workflow step

To start a 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

To resume a step from within the person's record:

- Click the **Incomplete work** icon within **Current work** on the **Person summary** screen
- Click **Resume work** from the menu

The workflow step will open in a separate window

Tips for completing workflow steps

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

Clicking the **Section completed** checkbox at the end of each section puts 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 forms.

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.

For detailed guidance on completing a workflow step or form, including the function of buttons, icons etc refer to the **Working with Workflow Steps or Forms** user guide.

Next actions section

Next actions are mandatory in all forms. At least one must be recorded before a workflow step can be finished.

To record a next action:

- Click the **Add** button
- Select the relevant action from the **'Select action'** dropdown menu
- Always tick the **'Send Immediately?'** checkbox when available e.g. when adding a protection plan as a next action from the enquiry
- **Assign to** = Select/Find as appropriate. Not required for NFA (no further action) actions
- **Notes** = record any necessary information. Usually needed when assigning the action to another team or worker
- **Priority** = select as appropriate
- 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

The next actions available from the Safeguarding workflow steps (with the exception of the main Safeguarding steps as these have already been described above) are:

Next Action	Safeguarding steps available from	When used and who assigned to
Adult Referral to Other Agency	Concern, Triage, Enquiry, Protection Plan, Protection Plan Review, End of Activity	When referring a case to an external agency - one not on Mosaic. Assigned to self for completion.
Adult Information and Advice Provided (NFA)	Protection Plan, Protection Plan Review	When information and advice has been provided. This is a 'no further action' action and so does not need assigning
Adult DASH Risk Assessment Completed - Referred to MARAC (NFA)	Concern, Triage, Enquiry, Protection Plan, Protection Plan Review, Serious Case Review, End of Activity	When a DASH Risk Assessment has been completed and the case has been referred to MARAC This is a 'no further action' action and so does not need assigning
Adult DASH Risk Assessment Completed - Referral to MARAC Not Required (NFA)	Concern, Triage, Enquiry, Protection Plan, Protection Plan Review, Serious Case Review, End of Activity	When a DASH Risk Assessment has been completed but the case does not need to be referred to MARAC This is a 'no further action' action and so does not need assigning
WB Wellbeing Screening (assign to self)	Triage, Enquiry	When a person needs screening for the Wellbeing Service - should be sent immediately. Assigned to self for completion
Adult Telecare Referral	Enquiry	When a person needs referring for LCC commissioned Telecare equipment - should be sent immediately. Assigned to self for completion.

Next Action	**Safeguarding steps available from**	**When used and who assigned to**
Adult Safeguarding Protection Plan Completed (NFA)	Protection Plan, Protection Plan Review	When a protection plan is complete. This is a 'no further action' action and so does not need assigning
Adult Serious Case Review Completed (NFA)	Serious Case Review	When a serious case review is complete. This is a 'no further action' action and so does not need assigning
Adult No Further Action Required	Concern, Triage, End of Activity	If no further action is required, but a full case closure cannot be completed because there are services in place or other workers or teams are still working with the case. This is a 'no further action' action and so does not need assigning
Adult Proposed Case Closure	End of Activity	If a full case closure is required, i.e. the person does not have services and involvement from all involved teams is to close. Assigned to self for completion
Adult Case Closure Already Started (NFA)	End of Activity	If a full case closure is required and is already underway - To add this action, you must be able to see a closure step within the **Current work** on the **Person summary** screen. This is a 'no further action' action and so does not need assigning

Toolbar Icons

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

For example, you may need to complete one or more of the optional forms or letter templates available via the **Forms and letters** icon.

The form and letter templates that are available vary depending on which step you are in. Some templates are available in multiple steps and some are only available in certain steps.

You may need to send a request or notification using the **Requests** icon

Requests (R) / Notifications (N)	Steps available in	When to use and where to assign to
(R) Adult Please review information and authorise	Concern, Triage, Enquiry, End of Activity	Optional authorisation to be used where required. It should always be used when you feel the case is ready to close to safeguarding e.g. when you are recording the next action Adult End Safeguarding Activity Assigned to Safeguarding Manager
(R) Adult Please action	All	Standard request found in all steps. To be used as and when required and so can be assigned as appropriate
(R) Adult Section 42: Action required	Triage, Enquiry, Protection Plan, Protection Plan Review	To be used to request more information/some action from the key worker, an involved worker or the key team. Assigned to key/involved worker or key team as appropriate
(R) Adult Please convene Safeguarding meeting / send invitations	Triage, Enquiry	To be used to ask the Safeguarding and Review team convene a Best Interest or Strategy Meeting. Assigned to Adult Safeguarding – Meeting inbox
(R) Adult Safeguarding meeting cancellation	Triage, Enquiry	To be used to ask the Safeguarding and Review team cancel a Best Interest or Strategy Meeting. Assigned to Adult Safeguarding – Meeting inbox

Requests (R) / Notifications (N)	Steps available in	When to use and where to assign to
(R) Adult Safeguarding meeting re-arrangement	Triage, Enquiry	To be used to ask the Safeguarding and Review team re-arrange a Best Interest or Strategy Meeting. Assigned to Adult Safeguarding – Meeting inbox
(N) Adult Inform Manager	End of Activity	To be used to notify the manager where appropriate e.g. if risks are high and unresolved, if complex situation, if media are involved, criminal activity and for serious case reviews. Assigned to relevant manager
(N) Adult EDT Alert	Concern, Triage, Enquiry	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. Assigned to Approved Mental Health Professionals (AMHP)
(R) Adult Chair to approve meeting minutes	Serious Case Review	To be used to ask the meeting chair to approve the meeting minutes. Assigned to chair

Clicking the **Finish** icon ✅ will finish and complete your workflow step.

The step 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 step and no further input can be made.

You will find all finished forms completed within the workflow steps stored in the **Documents** section. Only finished versions of the forms should be shared. A PDF version of your finished form should therefore only be generated from the **Documents** section.

The **Next actions** section of your step 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 person or their representative.

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

Worker and Organisational Relationships

While a case is open to the Safeguarding Team, the team should be recorded as an **Organisational relationship** of **'Involved Team'**. This can be added by the Safeguarding Manager or the Safeguarding Practitioner, once it has been decided an enquiry is necessary.

Once the case has been allocated to them, the Safeguarding Practitioner should also be recorded as a **Worker relationship** of **'Safeguarding Officer'**. This can be added by the Safeguarding Manager or the Safeguarding Practitioner.

The team and worker will then both display within **Professional and organisational relationships** on the **Person summary** screen.

The Organisational and Worker relationships should both be ended once the End of Safeguarding Activity, and where appropriate Proposed Case Closure, step is complete. Again this can be carried out by the Safeguarding Manager or the Safeguarding Practitioner.

See the **Worker Relationships** and **Organisational Relationships** user guides for further details on adding and ending the relationships.

End of Safeguarding Activity and Full Case Closures

All Safeguarding cases, which progress beyond triage, should end with the **Adult End of Safeguarding Activity** step.

Sometimes there will also be the need to propose a full case closure i.e. the record needs to be closed because the person has died, left the area or does not have any social care needs and is not open to any other team or service.

Refer to the **Case Closures – Full, Team and Involvement** user guide for further details on when to propose a full case closure.

For full case closures only –

The next action **Adult Proposed Case Closure** should be assigned to self for completion from the **Adult End of Safeguarding Activity** step.

From the **Adult Proposed Case Closure** step a next action of **Adult Case Closure in Progress** should then be assigned to the relevant Adult Admin (Business Support Team, based on where the person lives).

> If the person has died or left the area and was previously in receipt of a Direct Payment Service (you can see this within Care packages provided on the Person summary screen), you will need to send the **'Adult Please review information and authorise'** request to the relevant Adult Care Team (key team).
>
> The Adult Care Team will then complete the Direct Payment Suspension and Termination Checklist section, review the case and finish the Proposed Case Closure step.

Making a Referral to Adult Social Care or Occupational Therapy

Sometimes it will be necessary to refer a person to Adult Social Care or Occupational Therapy (OT) for assistance.

In these scenarios you will need to record an **Adult Contact** from the **Start** sidebar menu.

Adult Social Care -

- If the person is not already open to Adult Social Care you should record an **Adult Contact (New Case)** and assign a next action of **Adult Conversation Record** to the relevant Adult Care Team, based on where the person lives

- If the case is open to an Adult Care Team you should record an **Adult Contact (Open Case)** and assign a next action of **Adult Bring Forward Scheduled Review** to the relevant Adult Care Team, based on where the person lives

OT –

- If the case is not already open to OT you should record an **Adult Contact (New Case)** and assign a next action of **Adult OT Conversation Record** to the relevant OT team, based on where the person lives

- If the case is already open to an OT Team, but not a worker, you should record an **Adult Contact (Open Case)** and assign a next action of **Adult OT Conversation Record** to the relevant OT team, based on where the person lives

For cases already open to named workers –

- If the case is already open to any other workers and you need to share important case information with them there is no need to make another referral to that service. Instead, you should record a **Case note** and send an **alert** to the relevant workers.

See the **Recording a Case Note and Sending an Alert** user guide for further details on recording a case note and sending an alert.

Making a Referral to the Carers Service

If you are working with a person who is a carer and you feel they need a carer's assessment you will need to record a **Contact** from the **Start** sidebar menu on their record.

Or, if you are working with a person and feel their carer needs a carer's assessment you will need to record a **Contact** from the **Start** sidebar menu on the carer's record.

In either scenario, if they are **not** already open to the Carers Service, record an **Adult Contact (Carer)** and assign a next action of **Adult Carer Conversation** to the **Adult Carers Service Inbox**.

Or if they are already open to the Carers Service, record an **Adult Contact (Additional Information)** and assign a next action of **Adult Additional Information Received** to the **Adult Carers Service Inbox** (Pass to worker > Find button) or **Carers First team** (Pass to team dropdown menu) as applicable.

For further guidance, refer to the **Making a Carers Referral** user guide.