# Adults Quick Guide

# OT Lead Practitioners (LPs)

This guide is intended for Lead Practitioners (LPs) within the OT service and covers the main tasks the LPs are required to complete in Mosaic:

- [Using and managing the Team workview including team inboxes](#)
- [Screening and allocating a case](#)
- [Authorising and checking workflow steps](#)

It also covers some useful hints and tips around supervising others and finding information:

- [How to interrogate and oversee a practitioner's Current work folders](#)
- [Short cuts and top tips for finding information](#)
- [Re-opening workflow steps – rules and tips](#)

## Using and managing the Team workview including team inboxes

We recommend accessing the **Team workview** from the **Full workview –** click the **Show full workview** icon ▣. To access the **Team workview** click the **Show team workview** icon ⠿ (This icon changes when you have accessed the Team workview – click again to return to your Individual workview)

> Mosaic will retain your selection as to which section of the **Full workview** screen is open when you sign into the system – you will see this in the narrow part of the **Narrow workview** screen. For example, if you were in the **Team workview** with the **Current work** section open and then sign out, the **Current work** section, within the **Team workview**, will be open when you next sign in.
>
> Mosaic will also retain any organisation settings applied i.e. if you rearrange the team's **Current work** by 'Date' it will remain arranged by 'Date' until you change the setting.

The **Team workview** contains details of the **Adult OT Management team**.

From this screen you can drill down to view the workload (work currently assigned) to each OT LP/OT manager, the OT Duty Team and the members of that team including team inboxes.

By drilling down to the OT Duty Team you can also drill down to each OT Team and the members of those teams including team inboxes.

## Team summary

The **Team summary** can be closed or reopened by clicking on the Team summary heading.

The **Team summary** displays as a table. The number displayed in brackets next to **Team summary** denotes the total number of rows in the table.

The **top row** of the table displays the **allocations** and **workload** for the **team**.

The **subsequent rows** display the **allocations** and **workloads** for **each member** of the team, any **team inboxes** and any **sub-teams** (e.g. the OT teams when you are still at management level).



The information displayed within the **Team summary** tells us how many **Allocations** each worker has (cases with an open worker relationship) and the **Workload** assigned to each worker, team inbox and the team – how many pieces of **Incomplete work** (dark grey), **Incoming work** (grey) and **Future work** (light grey).

Clicking on a **worker/inbox name** will show the **Individual workview** for that worker/inbox.

From here you can then view their **Allocations** section and their **Current work** section to see the cases and work that is assigned to them.

Clicking on a **team name** will drill down and show the Team summary for that team, so to access the Team workview for the OT Team you manage you will have to click the relevant **team name** within the Team summary section (after you have first clicked and drilled down to the **Adult OT Duty Team**).

You can then drill down to the workers and team inboxes you manage by clicking a **worker/inbox name** to show the **Individual workview** for that worker/inbox.
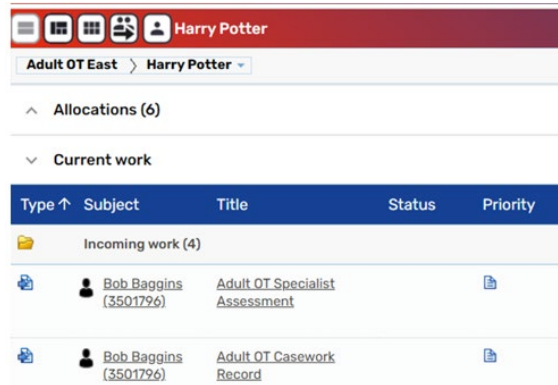


Clicking the **OT Team** name within the **Team Name** button at the top of the screen (above Team summary) will refresh the screen back to the Team workview for the OT Team, if you have drilled down to view the caseload for a worker or team inbox
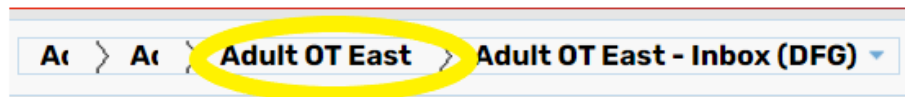


Clicking the beginning of the **Team Name** button will refresh the screen back to the **Adult OT Management** team's Team workview, if you have drilled down to view another OT LP/manager, an OT team, team inbox or an individual within that team.
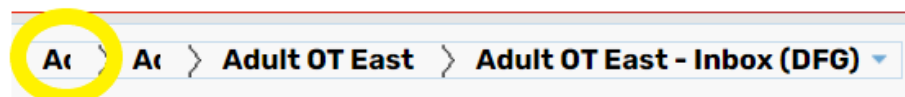


**Note**: You may only see the first few letters of **Adult OT Management** but the whole name will display when you hover over it.

# Team inboxes

Each of the OT Teams (excluding Adult OT Duty) have the following team inboxes set up to 'file' work in.

Remember these team inboxes are displayed in the Team summary (you may have to hover over them to see the full name) and can be accessed by clicking on the **inbox name**

1. **Inbox (CCO)** – this inbox should contain incoming (not yet started) OT Specialist Assessments and OT Casework Records for cases awaiting allocation to a CCO.

   The note column should state the original refer date, the persons location i.e. town and a brief summary of what the person needs

   Urgent cases will have a note stating 'Priority Allocation' – if you do not agree it is urgent you can remove/update the note and then reassign the case back to the inbox.

   This inbox may also contain incomplete (started but not yet finished) OT Casework Records for cases where further information has been received after the duty process is complete but before the case is allocated to a CCO

2. **Inbox (DFG)** – this inbox should contain incomplete (started but not finished) OT Casework Records and incomplete (started but not finished) OT Goals and Action Plans for cases awaiting a DFG

3. **Inbox (Moving and Handling)** – this inbox should contain future Moving and Handling Reviews

4. **Inbox (OT)** – this inbox should contain incoming OT Specialist Assessments and OT Casework Records for cases awaiting allocation to an OT.

   The note column should state the original refer date, the persons location i.e. town and a brief summary of what the person needs

   Urgent cases will have a note stating 'Priority Allocation' – if you do not agree it is urgent you can remove/update the note and then reassign the case back to the inbox.

This inbox may also contain incomplete (started but not yet finished) OT Casework Records for cases where further information has been received after the duty process is complete but before the case is allocated to an OT

**Adult OT Duty** Team has three inboxes (one for each area):

1. **Inbox (Duty Follow Up)** – this inbox should contain incomplete (started but not yet finished) OT Conversation Records for cases awaiting a follow up call on duty, or cases where the duty process has started but is not yet complete.

   The date column should indicate the date the follow up call is required and the notes column should highlight why follow up is required and when, plus the original referral date.

## Current work for the Team

The **Current work** section is found underneath the **Team summary**.

If needed, click on the **Current work** section to open it and display the work assigned to the team.



The **Current work** section is split into folders – you will only see a folder if there is at least one piece of work in that folder.

The following folders may display in the team's **Current work** section:

- **OT Duty Team** only - **Incoming work** = Workflow steps assigned but not yet started. Primarily the following:
  - OT Conversation Records – (majority of work will be this) for cases awaiting duty involvement

- Additional Information Received – for cases already open to an OT or CCO but where additional information has been received. Duty will reassign these to you if the allocated worker is not available
- DFG Outcome – for cases where the OT or CCO who requested the DFG is no longer available. Duty will reassign these to you if the worker who requested the DFG is not available

- **Incoming requests** = Contains requests and notifications.
  The requests and notifications will primarily be:
  - **OT Duty Team -** From the District Council – for cases where the OT or CCO who requested the DFG is no longer available. Duty will reassign these to you if the worker who requested the DFG is not available
  - **All OT Teams -** From Business Support – for case closures. Outstanding work will need to be finished (if incomplete) or cancelled (if not yet started) and the Organisational relationship (Team Involvement) will need to be ended.

- **OT Duty Team** only **- Future work** = Workflow steps assigned and due to start in the future.
  This will only be:
  - Moving and Handling Reviews – for cases where the worker has not assigned them directly to the team's Moving and Handling inbox. Duty will 'file' (reassign) them into the relevant OT team's Moving and Handling inbox.

**Please note: Alerts** and **Incomplete work** are not available to be assigned to the team so these folders will never be visible in the Team workview

The default display for the **Current work** section is to be organised by **Type** (type of work/task).

Clicking on a **Yellow folder** icon 📁 expands the view to show the contents of the folder.

Work in each folder is displayed by default in ascending order by date.

You can change how you are viewing the information within **Current work** by clicking on the headings for each column.

New folders will display which are organised by the criteria of that column. For example, by **Date** (ascending order) - the column selected shows a white triangle denoting ascending or descending order. Click Date again to switch between ascending and descending order.

The **Refresh pane** icon ↻ should also be used if/when Mosaic has been sat idle to ensure the current work displayed is up to date.

Clicking on the **person's name** (Subject column) will open the **Person summary** for that person (Mosaic will automatically display as **Narrow workview**).

Clicking on the name for a piece of work in the **Title** column will open the Workflow Step Summary screen for that workflow step.

The **Priority** column displays the urgency of the task; a red flag denotes that the task is urgent. You can click the Priority column heading to sort by priority.

The **Date** column displays the date the task was sent / is scheduled for. You can click the Date column heading to sort by date.

The **Note** column displays notes added to the workflow step when assigned to the worker, team inbox or team. If the note is longer than the text visible on the screen click the text to open it in a separate popup window to view the full note.

## Work Icons

A number of **icons** are used in the team's **Current work** folders to represent different types of work.

If you hover the cursor over a **work** icon it changes to a **yellow cog** ⚙ and displays a dialogue box describing what the work is.

Left click the **yellow cog** ⚙ to see a list of actions you can take.

The list will vary according to the type of work you are looking at and which workview you are in - Full or Narrow.

For example only Incoming and Future work will have the 'Cancel work' option and 'Assignment history' is only visible when accessing the list in Full workview.

Work will have one of the following icons:

| Icon | Type of Work | List of Actions |
|---|---|---|
| | Incoming Work | Start work<br>Update assignment<br>Assignment history<br>Add to calendar<br>Cancel work |
| | Incoming Notification | Assign<br>Add to calendar |
| | Incoming Request | Resume work<br>Assign<br>Add to calendar |
| | Future Work | Start work<br>Update assignment<br>Assignment history<br>Add to calendar<br>Cancel work |

## Screening and Allocating a Case

To screen a case prior to allocation you will need to

- Access the relevant team inbox

- Access the person's record – click the **person's name** in the **Subject** column to view the **Person summary** screen.

**Please note:** Mosaic will change the display to **Narrow workview** if you were previously in Full workview – you may wish to change to **Closed workview** if you want a full screen view of the record.

- Use the **Documents** section in the sidebar menu to view the **OT Conversation Record** (completed by duty), and any other work previously completed as relevant.

- You can also use the **Workflow map** [Workflow map] and **Work history** [History] sections (accessed via the buttons located on Current work) to view work previously completed on the person's record and access the OT Conversation Record

Once you have screened the case and are ready to allocate you will need to record a worker relationship for the worker you are allocating the case to and then assign the workflow steps to them.

## Recording a Worker relationship

Within the person's record:

- Click **Person details > Worker relationships** in the sidebar menu

- Click the **Add** button

- Click the **Find** button

- Enter the worker's name and click the **Find** button

- Click the **worker's name** to pull them through to the 'Worker' field

- Select the appropriate **Relationship type** from dropdown menu

> You should select **Key Worker (Adult Care)** unless there is already a key worker – in which case you should select **Occupational Therapist** or **Occupational Therapist CCO** as appropriate

- The from date defaults in as today but can be amended if necessary

- Click the **Save** button then **OK** button

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

## Assigning work

Work can be assigned individually (one workflow step at a time) or in bulk (multiple workflow steps at once) to and from workers, teams or team inboxes.

We recommend using the **bulk assign** method when allocating a case to a worker, as you can select both the OT Specialist Assessment and OT Casework Record for a person from the team's CCO or OT inbox and assign them to a worker at the same time – any assignment notes would then appear against both workflow steps without you having to type the information twice.

The method of **individually assigning** work (one workflow step at once) can be useful for reassigning something sent in error e.g. a Moving and Handling Review assigned to the wrong team or wrong team inbox.

**Assigning Work Individually**

There are **two** ways you can assign individual workflow steps to a worker/inbox –

1. By returning to the **Team workview** (use **Full workview**) and accessing the Current work section of the relevant team or team inbox

2. From within **Current work** on the **Person summary** screen

**Assigning from Current work section in Full workview**

- In **Full workview** access the **Current work** section

If required, you can change the **Priority** of the work when assigning

To change the priority –

- Left click on the **Priority** icon - a mini menu will display
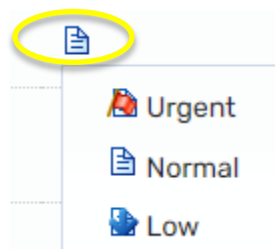


- Click on the icon to select the new priority required

To assign an individual piece of work:

- hover the cursor over the **Incoming work** icon or **Incomplete work** icon until it changes to a **yellow cog** 

- left click the **yellow cog**  to see a list of actions you can take

- Click **Update assignment**

An **Update assignment** window opens.

To assign the work use one of the following options:

- ○ **Team worker** = dropdown menu displays the OT LPs and managers

Click the **'show workers in sub-team'** checkbox to expand the list to include workers and team inboxes in the OT teams – note this will make the list rather large

**Important note:** If the work is assigned to a worker or team inbox rather than the team the worker/team inbox name will automatically display within the 'Team worker' field – you can use the dropdown menu to select a different worker/team inbox or use the 'Pass to worker' or 'Pass to team' option as described below

- ○ **Pass to worker** = use the **Find** button to search for the worker or team inbox you wish to assign to

- ○ **Pass to team** = use the **Find** button to search for a team you wish to assign to

> **Incomplete work** cannot be assigned to a team – once work has been started it can only be assigned to another worker or a team inbox

- You should add a **note** for the worker or team receiving the work

- Click the **OK** button to assign the work, or click the **Cancel** button to close the dialog without reassigning the work

> Work can also be assigned from the **Allocations** or **Recently viewed** sections following the same process described above

**Assigning from Current work on the Person summary screen**

> You will not be able to change the **Priority** of the work when assigning from here.

- Left click on the **Incoming work** icon or **Incomplete work** icon next to the work you want to assign to see a list of actions you can take

- Click **Update assignment**

An **Update assignment** window opens.

To assign the work use one of the following options:

- ○ **Team worker** = dropdown menu displays the LPs and managers in your Area

Click the **'show workers in sub-team'** checkbox to expand the list to include workers and team inboxes in your OT teams – note this will make the list rather large

**Important note:** If the work is assigned to a worker or team inbox rather than the team the worker/team inbox name will automatically display within the 'Team worker' field – you can use the dropdown menu to select a different worker/team inbox or use the 'Pass to worker' or 'Pass to team' option as described below

- ○ **Pass to worker** = use the **Find** button to search for the worker or team inbox you wish to assign to

- ○ **Pass to team** = use the **Find** button to search for a team you wish to assign to

- You should add a **note** for the worker or team receiving the work

- Click the **OK** button to assign the work or click the **Cancel** button to close the dialog without reassigning the work

**Bulk Assign**

- In **Full workview** access the **Current work** section

You can assign some or all of the work in the team's/team inbox's/worker's **Current work** at the same time by clicking on the **Bulk Assign** button on the **Current work** header

> This button is only visible in **Full workview** and you will have to first drill down to the team/team inbox/worker from within the **Team summary** to access their **Current work** section

The **Bulk action** window will display.

All the Current work is listed - you can filter the list using the search field.

You can select individual items by clicking the checkbox to their right or click on the checkbox in the header to select all the current work.

To assign the work use one of the following options:

○ **Team worker** = dropdown menu displays the OT LPs and managers

Click the **'show workers in sub-team'** checkbox to expand the list to include workers and team inboxes in the OT teams – note this will make the list rather large

○ **Pass to worker** = use the **Find** button to search for the worker or team inbox you wish to assign to

○ **Pass to team** = use the **Find** button to search for a team you wish to assign to

> **Incomplete work** cannot be assigned to a team – once work has been started it can only be assigned to another worker or a team inbox

Once you have selected a worker, team inbox or team, the **Preview assign** button is enabled. By clicking **Preview assign**, the selected workflow steps are displayed and can be assigned if appropriate.

• You should add a **note** for the worker, team inbox or team receiving the work.

When allocating a case add the date of allocation, date of contact, plus instructions for the worker.

- Click the **Assign** button to assign the work or click the **Cancel** button to close the dialog without reassigning the work.

## Cancelling Moving and Handling Reviews at allocation

If a Moving and Handling Review is scheduled on the person's record (showing in Current work) when you allocate the case you must also cancel this review to prevent duplicated workflow on the record.

To cancel the review:

Either;

- Access the **Inbox (Moving and Handling)** by clicking on the link in **Team summary**

- Find the Moving and Handling Review within the folder

- Click the **Incoming work** icon or **Future work** icon to the left of the review – this will look like a **yellow cog** when you hover over it

- Click **Cancel work** from the mini menu

Or;

- Access the workflow step summary screen for the **Moving and Handling Review** by clicking on the **workflow step name** within the inbox or within Current work on the Person summary screen

- Click **Cancel work** from the menu in the top left of the screen

Once you have clicked **Cancel work** a 'Cancel' window will open

- Select the most appropriate 'Reason' from the dropdown menu e.g. Change of Circumstances

- Add a note in the **'Note'** box to give more information

- Click the **OK** button – the workflow step will 'vanish' from the folder

## Authorising Workflow Steps (Incoming requests)

In order for a workflow step, e.g. an OT Specialist Assessment, to be authorised the worker recording that step must send you a request (usually **Adult Please review information and authorise**).

This request will display in your **Incoming requests** folder – visible in both Narrow and Full workview but using **Full workview** will ensure you see any notes attached to the request.

To authorise the workflow step and complete a request:

- Click on the **Title** of the request in your **Incoming requests** folder. The request **Title** includes the name of the request and the name of the workflow step it has been sent from.
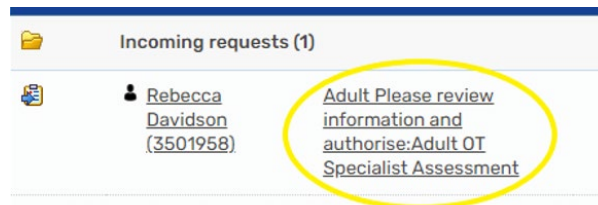


Mosaic will change to Narrow workview – change to **Closed workview** for best results.

The **Workflow Step Summary** screen will display for the workflow step the request was sent from.

This screen shows a lot of useful information – this will vary based on what has been completed within that step.

You should be able to see the following information on the step summary screen:

**Status** = should say 'incomplete' for work you are authorising

**Workflow Step Summary Screen**

**Documents** = forms completed within the workflow step (main workflow step form and any additional optional forms or letter templates)

**ID** = workflow step ID (only needed if requesting Mosaic Service Desk re-open the workflow step)

...list Assessment: Rebecca Davidson (3501958)

**Status**

✓ Incomplete

**ID**

22208636

**Previous** = last workflow step (the one this was a next action from)

**Previous**

Adult OT Conversation Record  for Rebecca Davidson

**Assignment details** = which worker the workflow step is currently assigned to (you can use the 'History' hyperlink to see details if the work has been reassigned at any point)

**Assignment details**

Assigned to: Harry Potter | History
Note: note from manager at allocation

**Progress details**

Started on: 21/10/2021 12:41
Last updated by: Harry Potter on 05/11/2021 14:05

**Progress details** = date and time the workflow step was started, worker name, date and time of when the step was last updated. For completed work you will also see completed date and time and for re-opened work the date and time it was re-opened.

**Documents**

Adult OT Specialist Assessment
Adult Prisma 7 Frailty Screening Le...
Adult OT Assessment

**Attachments** = any external documents which have been uploaded within the workflow step

**Attachments**

Letter from GP Dr Khan (01.11.2021)

**Proposed next actions**

⚙ 📄 Adult OT Action Plan

Assigned to: Harry Potter

**Proposed next actions** = actions recorded within the Actions Taken section of the form (which have not been 'Sent Immediately' – will send when the workflow step is 'Finished')

**Next actions**

⚙ 📄 📄 Adult Moving and Handling Assessment a...

Assigned to: Harry Potter

**Next actions** = actions recorded within the Actions Taken section of the form (which have been 'Sent Immediately' – sent when the workflow step was saved)

**Requests**

📄 Adult Admin output request - **SENT** | Histor...
Assigned on 05/11/2021 14:05 to Adult Admin...
Note Please post copy of assessment (excludi...
Assessment letter to Oscar at his home addre...

📄 Adult Please review information and authorise - **SENT** | History
Ass...

**Requests** = any requests or notifications which have been sent from this workflow step including details of who sent the request/notification, who they sent it to and when they sent it. You can also see which requests/notifications have been completed and which are still outstanding.

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To review and authorise the workflow step, from the **Workflow Step Summary** screen:

- Click **Resume** in the sidebar menu

The workflow step will open in a separate window - check the following before deciding whether to authorise (complete the request) or reject (return the request):

- Check that there are no sections highlighted in red with warning triangles (red highlight indicates mandatory fields not completed)

- Check the contents of the form – click into the various sections and read

- Check next actions are correct – correct type and correctly assigned

- Check that appropriate optional forms are used and match with next actions/requests and notifications where applicable

- Check any attachments where applicable

**Please note:** The content of the form can be reviewed by clicking into each section or by using the **Output current document** icon  to generate a PDF of the document and read as one continuous form. See the **Printing Documents** user guide for further guidance on generating a PDF.

Once you have reviewed the workflow step and are ready to authorise, or return the step:

- Click on the **Requests** icon  (this will be highlighted red denoting that there is a request to complete)

The outstanding request(s) will display in red text.
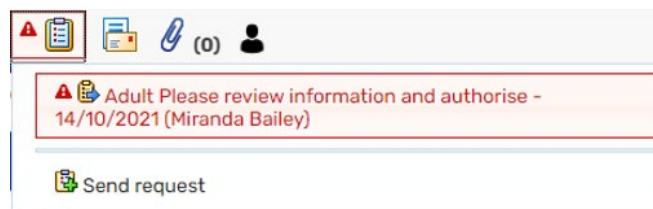


- Click on the red textbox (with your name against it) to open the outstanding request

- Click the **Completed** radio button, if you are happy to authorise the workflow step

- Then click the **OK** button

Or

- Click the **Returned** radio button, if you need to reject and return the workflow step – if you are not authorising

- You must add a note to explain why you are returning it

- Then click the **OK** button

The workflow step screen displays.

- If 'Completing' the request (authorising) – Click the **Finish** icon ✅*

Finishing the step sends the proposed next actions and saves the step as read only to prevent further amends following authorisation. The step can then be viewed via Documents, Work history or the Workflow map.

Or

- If 'Returning' the request (not authorising) – click the **Save** icon 💾 and then exit the workflow step using the **Close** icon ❌

> *When you receive the request **Required Adult Please review non-contract specials request and authorise** you should complete the request as per the process described above but should exit the step rather than finishing it.
>
> Please refer to the **Non-Contract Specials Process** user guide for further details.

## How to interrogate and oversee a practitioner's Current work folders

From the OT team's Team workview (remember you will have to drill down to access this once you access your Team workview – by clicking the **Show team workview** icon 📧), click on the **worker name** within the Team summary to drill down to their **Current work** - use **Full workview** to allow you to see all necessary details

For **all** the folders:

- Look at **Date** column for all folders – as a general rule anything with an old date is out of date

- Look at **Note** column – notes may help you understand what is in the folder and why, especially for requests and notifications. Remember if the note is longer than the visible text you can click the text to open it in a popup window to read the whole note.

- Check the type of work in all folders – there should be no old or AC workflow now



For the **Incoming work** folder (Work not yet started):

- Work should not be overly old in here e.g. why have a Moving and Handling Assessment and Plan not yet started dated for over month ago?

For the **Incoming requests** folder (Contains both requests and notifications):

- Requests 🗐 - require an answer so should be completed asap to prevent sender from being held up

- Notifications 📇 - for information and should be acknowledged/completed asap to clear from folder

For the **Incomplete work** folder (Work started but not yet finished):

- OT Casework Records for DFG cases should be moved to team's DFG inbox, unless the case is still active or particularly complex which means the worker needs to remain actively involved

- Check there are no re-opened steps still showing as 'incomplete' – re-opened steps should be finished as soon as the reason for re-opening is complete e.g. missing information added

- Check there is no old work e.g. OT Specialist Assessment started 1 month ago - OT Casework Records are the only work flow steps that should remain open for a long period of time, all other steps are usually completed quickly and so should not be hanging around in this folder

For the **Future work** folder (Work with a scheduled start date in the future):

- Moving and Handling Reviews should be moved to the team's Moving and Handling inbox unless they are due now/within the next few weeks or there is a reason for the worker to retain involvement with the case

For the **Alerts** folder (Contains alerts sent from a Case note):

- Alerts should be acknowledged once seen and the Case note read, so again there shouldn't be anything too old in here. We only suggest leaving them if a prompt is required to make a follow up call and that should usually be completed soon after the alert is received

## Short cuts and top tips for finding information

## Workflow Step Summary Screen

For information about a workflow step use the **Workflow Step Summary** screen. This screen can be accessed a number of ways.

From within the person's record:

1. For Incoming, Future and Incomplete work you can click the **name** of the step you wish to view within **Current work** on the Person summary screen
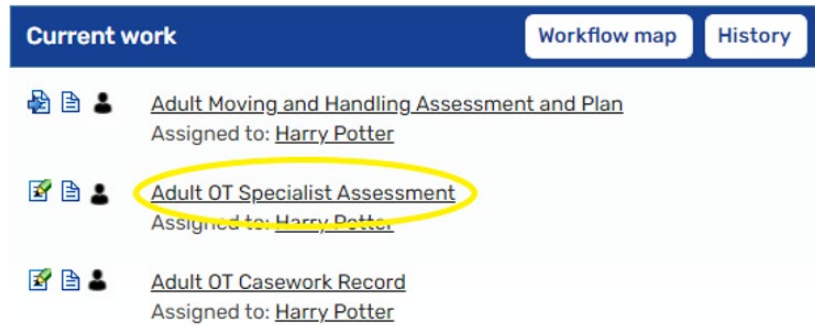


2. For Incomplete and Complete work you can click the **Step summary** icon (against the step you wish to view) within the **Actions** column in the **Documents** section



3. For all work you can click the **Summary** button (under the step you wish to view) within the **Workflow map**
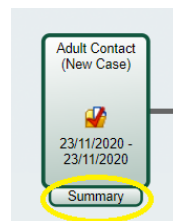


4. For all work you can also click the **workflow step name** in the **Work** column in **Work history**
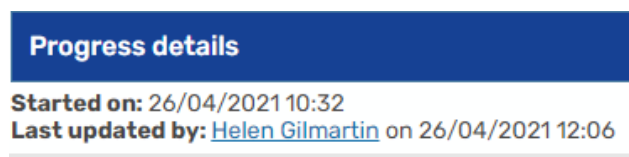
From the worker's **Current work** folders:

- For all work you can click the **workflow step name** in the **Title** column



On the **Workflow Step Summary** screen you can see lots of useful information relating to the workflow step as described previously e.g. the **Progress details** can show you when a workflow step was started and when it was last updated, along with the name of the worker who updated it.
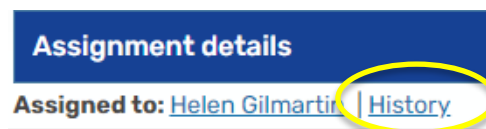


For completed work it also shows when the workflow step was finished and for re-opened work it shows when it was re-opened along with a note stating the reason. This note is added by the Mosaic Service Desk when they re-open a workflow step.

See [Workflow Step Summary Screen](#) for full details.

## Assignment details / history

Use **Assignment details / history** to view details of who assigned a workflow step where and when together with any notes that were added when the step was assigned. **Assignment details / history** can be accessed in two ways:

1. By clicking **History** within the **Assignment details** on the **Workflow Step Summary** screen

2. By clicking the **yellow cog** ⚙ next to the workflow step in the worker's **Current work** folders and then clicking **Assignment history** in the mini menu
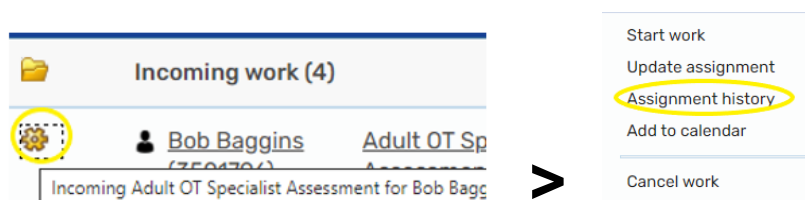


## Letters

If you are trying to find out if a **letter** has been sent to a person look in the **Documents** section. You will need to look at both the **Forms and letters** and **Attachments** tabs.

- **Forms and letters** tab = if a Mosaic letter template has been completed

- **Attachments** tab = if letter has been created outside of Mosaic and then uploaded to the record.

## Case activity

If you are trying to find **case activity** outside of the main workflow steps e.g. details of telephone calls you will need to look in the **Documents** section and **Case notes** section.

- Remember, OT activity should primarily be recorded in the **OT Casework Record** (which you'll find in the **Documents** section) but some significant information may also be found in **Case notes**. Historic OT information will also be found in Case notes rather than an OT Casework Record.

- For 'area team' social care activity (LCC and LPFT social workers and CCOs) you'll mainly need to look in **Case notes**.

  But for information recorded at by LCC Area Team 'duty' look at the Conversation Record forms within the **Documents** section
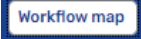
  For information recorded by LPFT manager/duty look at the Adult LPFT Social Care Initial Conversation Record form within the **Documents** section

- Acute hospital activity is primarily recorded in the **Hospital Discharge Request** (and previously in the **Hospital Case Monitoring**) step (which you'll find in the **Documents** section) but some significant information may also be found in **Case notes**.

- Community hospital activity is primarily recorded in the **Community Transfer of Care Case Monitoring** step (which you'll find in the **Documents** section), but some significant information may also be found in **Case notes**.

- For safeguarding activity you'll need to look at the **Safeguarding Enquiry** within the **Documents** section but some significant information may also be found in **Case notes**.

Many of our external partner agencies such as Wellbeing and the Lincolnshire Sensory Service also have their own 'monitoring' workflow steps so we would always recommend looking at both the **Case notes** and **Documents** section when trying to find activity recorded by any team.

## Documents, Work history and Workflow map

As well as the **Document** section (in the sidebar menu), you should also utilise **Work history** History and the **Workflow map** Workflow map . Both are accessed via the buttons located on **Current work** on the **Person summary** screen.

These 3 screens contain similar information but it does vary slightly so it depends on what you are looking for as to which is the best screen to find it:

- The **Documents** section allows you to see all forms and letter templates completed as part of a workflow step. It also shows any external documents which have been uploaded and attached to the record. The **Work history** and the **Workflow map** screens will not provide this information.

- The **Work history** and the **Workflow map** screens will show all work – Incoming, Incomplete, Complete and Future work. Whereas the **Documents** section will only show Incomplete and Completed work – it won't show you any work not yet started.

- The **Workflow map** screen is useful for a visual of the workflow but remember a new workflow (map) is generated every time work is started from the **Start > New …** sidebar menu so you may have to click the **View workflows** icon (top left within the Workflow map screen) to access the workflow you want to view.

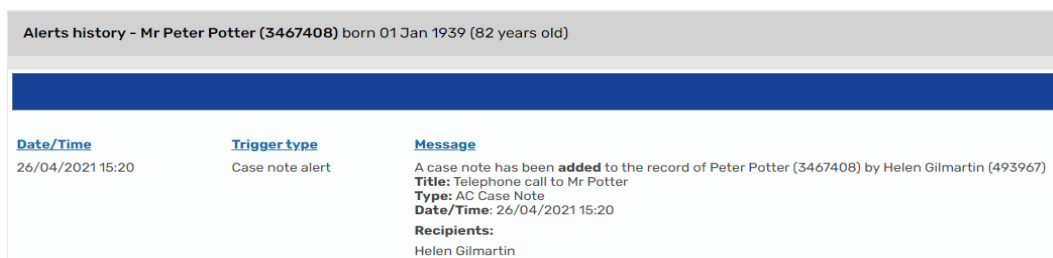We always recommend using this icon to check for other workflows.

The **Key** icon 🔑 will also clarify what the different colours mean on the map if needed.

- The **Work history** screen is the only screen you will see the **workflow step ID** (in the **ID** column) which is needed if requesting steps are re-opened or deleted.

- The **Work history** screen is also the only screen you can see if workflow steps have been **re-opened** and not yet re-finished –'re-opened' will show in the **End Date** column

## Alerts history

Another useful area of a person's record to be aware of is **Alerts history** – this is located in the sidebar menu.

The screen shows any **Case notes** that have been added (recorded) or appended where an alert has been sent.



The screen gives the title, type and date and time of the Case note, and lists the recipients who have been sent an alert.

It is useful to check this screen if trying to confirm a worker has sent / has been sent an alert about a particular Case note:

- If the Case note is listed the alert has been sent to any workers listed as 'recipients'.

- If the Case note is not listed it has either not yet been finished (alerts are only sent from finished Case notes), or the worker recording the Case note has forgotten to add the recipients and so no alerts have been sent.

# Re-opening workflow steps – rules and tips

When you receive an authorisation request (via Freshservice) to re-open work you need to consider the following:

- Check reason for re-opening – is it valid and necessary?

- Check which workflow step is being requested to be re-opened e.g. why is a worker requesting an OT Specialist Assessment from last year is re-opened when there is a new assessment which was completed last week?

- Check and make sure the worker will be available to update the work and re-finish it. Work should ideally by re-finished within 24/48 hours of being re-opened (re-opened work will show in worker's Incomplete work and will be visible in Current work on the Person summary screen – it will 'vanish' once re-finished)