Adults Quick Guide

Lincolnshire Sensory Service
Adult LSS Triage

This guide is only for Lincolnshire Sensory Service (LSS) workers involved in recording an **Adult LSS Triage** step in Mosaic.

All people referred to LSS with a non-profound sensory impairment will need to progress to the **Adult LSS Triage** step, following completion of the **Adult Contact (Lincolnshire Sensory Service)** step (LSS Contact).

Referrals for profound sensory impairments usually progress straight to **Adult LSS Needs Assessment** following the LSS Contact but can be triaged where needed.

The Triage step is designed to gather further information in order to determine what support is required e.g. LSS Needs Assessment or referral to WB Wellbeing.

Recording the Adult LSS Triage step

In **Full** or **Narrow workview** access your **Individual** or the **Team workview** (depending on where the Triage step has been assigned)

To start an Adult LSS Triage step assigned to the Team:

- Access the **Team workview** by clicking the **Show team workview** icon

Please note: When you are in **Team workview**, the icon will change to the **Show individual workview** icon

- If needed, close the **Team summary** and open **Current work** by clicking **Current work** at the bottom of the screen

- Access the **Incoming work** folder

- Click the **person's name** to access their record (**Person summary** screen) – this will allow you to check for warnings and other useful information before contacting the person

- Click the **Incoming work** icon within **Current work** on the **Person summary** screen

- Click **Start work** from the menu

- Click the **'Yes'** button on the popup window

The **Adult LSS Triage** will open in a separate window

Please note: The **Adult LSS Triage** step will be assigned to you once you click the **Save** icon – this will then be in your **Incomplete work** folder until finished.

To start an Adult LSS Triage step assigned to yourself:

- In **Full** or **Narrow workview** access your **Incoming work** folder in **Current work**

- Click the **person's name** to access their record (**Person summary** screen) – this will allow you to check for warnings and other useful information before contacting the person

- Click the **Incoming work** icon within **Current work** on the **Person summary** screen

- Click **Start work** from the menu

The **Adult LSS Triage** will open in a separate window

Tips for completing the form

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.

Information will prepopulate into the fields marked with the **blue cog** ⚙. If any information is missing or incorrect, it can be added/edited by:

- Clicking the **Show subject summary** icon 👤 to minimise the contact 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 contact window and then clicking the **Refresh current form** icon 🔄 to update the information in these fields

Important notes when using 'Find' buttons:

o The **Manual Input** tab should only be used as a last resort.

o 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. Refer to the **Creating a Person** user guide for full details.

o If a worker or organisation is missing from Mosaic, or their details are incorrect, you should request they are created / updated using the appropriate Mosaic request form.

o Any person/people you are finding to add to the form should also be added / ended as a 'Personal relationship' on the person's record via **Person details > Personal relationships** in the sidebar menu. Refer to the **Personal Relationships** user guide for further information.

> This guide will only cover the fields where we can specify an answer for LSS.
>
> All other fields should be completed as comprehensively as possible based on the information gathered during triage.
>
> Remember mandatory fields will be highlighted in red and cannot be missed.
>
> Review all sections and tick the 'Section completed' checkbox in all relevant sections.

Section 1. Referrer Details

Prepopulates with information recorded in the LSS Contact – this information cannot be edited

Use the **Find** button to record **Emergency Contact Details** - Tick the **'Next of Kin'** and **'Key Holder'** checkboxes if appropriate

Section 2. Person Details

Remember, information will prepopulate into the fields marked with the **blue cog** 🔵. If any information is missing or incorrect, it can be added/edited using the **Show subject summary** 👤 and **Refresh current form** 🔄 icons.

Some information prepopulates from the LSS Contact but can be amended where required using the dropdown menus, e.g. 'Preferred format of communication'

If you select **'Other'** for the **'Preferred format of communication'** you'll be asked to provide details

Person lives alone? = Select the appropriate radio button. If **'No'** is selected **'Other People in Household'** section displays:

Click the **Find** button to perform a search - From the **Find person results** pop up, click on the name hyperlink to select the person.

The **Other People in Household** popup window displays. The **yellow cog** 🟡 fields can be edited if required but for best practice these should be treated as **blue cogs** 🔵 and the information should be updated on the person's record.

Click the **Add** button to add the person and search for someone else or the **Add and close** button to close the popup window.

You can amend the answer re whether the person is a **'Risk to lone worker'** - if you say **'Yes'** you'll be asked to provide details and whether a **'Joint visit required?'**

You should also add a 'Warning' note to the person's record as prompted in the **Show guidance** icon ❓. Refer to the **Notes** user guide for details on how to add a note to the person's record.

Section 3. Health Details

This section prepopulates with information recorded in the LSS Contact, but can be updated as required.

GP details - a red warning message will display if:

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

For best practice the **GP Surgery** should be recorded as an **Organisational relationship**, even if a named GP is already recorded on the person's record. Refer to the **GP Details** user guide for guidance on how to record/update the named GP or GP surgery if needed.

Consultant Details pull through from the LSS Contact, if not recorded in the contact use the **Find** button to record them. The **Insert Section** button can be used to add multiple **Consultant Details** if needed – remember to record the 'Area of specialism' for each consultant.

Section 5. Accommodation

If you select '**Other'** for any of the fields you'll be asked to provide details.

You'll also be asked to provide further details to other questions e.g. if you say '**Yes'** the person has pets.

Section 6. Employment, Leisure and Activities of Daily Living

If you select '**Other'** for any of the fields you'll be asked to provide details

You'll also be asked to provide further details to other questions e.g. if you say '**Yes'** the person was previously in the Armed Forces, or if you say **'No'** the person cannot take part in leisure activities.

Section 7. Completion Details

Fields marked with the **yellow cog** 🌼 will prepopulate with the worker who started the triage step but can be edited within the form where required i.e. can be overtype if a different worker completed the triage step.

The date prepopulates as the date the triage was started. This should be amended to the date the triage was finished using the **date picker** icon 📅

Section 8. Next actions

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

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 = Find/Select as appropriate - Not required for NFA (no further action) actions

- Reason = Select as appropriate (only available for certain actions)

- Note = record any necessary information – recommended when assigning a next action to another 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 LSS Needs Assessment	Used for all cases where triage determines an assessment is required	**Lincolnshire Sensory Service** using the Pass to team dropdown menu
Adult LSS Light Touch Assessment	Used where it is identified during triage that only a light touch assessment is needed	**Lincolnshire Sensory Service** using the Pass to team dropdown menu Or, self using the **Assign to me** button Or, other worker using the Pass to worker > Find button
Adult Carer Contact to be Recorded on Carer's Record (NFA)	If the person's carer requires a carers assessment You must also go to the **carer's record** and record **Adult Contact (Carer)** to refer to the Carers Team. Refer to the **Carers Referral** user guide for further information	This is a terminating (no further action) action, so does not need to be assigned
Adult Carer Conversation	If the person has caring responsibilities and has requested assessment or information and advice from the Carers Service. Reason = Adult Carer	**Adult Carers Service Inbox** using the Pass to worker dropdown menu
Adult LSS Case Monitoring	For cases progressing into LSS following triage. Check **Current work** to ensure this has not already been added – only one LSS Case Monitoring should be open on the record Tick **'Send Immediately'** to send before finishing the triage step	**Lincolnshire Sensory Service** using the Pass to team dropdown menu. Or, self using the **Assign to me** button Or, other worker using the Pass to worker > Find button

Action	When to use	Who to assign to
Adult Referral to Wellbeing (assign to self)	If the person requires screening for the Wellbeing Service	Self using the **Assign to Me** button
Adult No Further Action Required	If no further action is required following the triage, but a full case closure cannot be completed or is not needed e.g. because the case is open to LCC or LPFT Adult Care.	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 LCC or LPFT. **Important:** See **Adult Case Closure (Full Case Closures)** for more information	Self using the **Assign to Me** button Or, other worker using the 'Pass to worker > Find' 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 **Adult Proposed Case Closure** or **Adult Case Closure in Progress** 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.

The **Forms and letters** icon contains a copy of the **Adult Sensory Loss Service Consent Form.** This form can be completed within the step and/or generated as a PDF and printed:

- Click the **Forms and letters** icon

- Click the **Adult Sensory Loss Service Consent Form** hyperlink

The form will open as a separate tab within the step window

- If needed, complete the form and then use the **Output current document** icon 📄 to generate a PDF version of the consent form which can then be printed to obtain a signature. Refer to the **Printing Documents** user guide for further information.

The **View documents** icon 📎 (0) is used to upload external documents to the triage step i.e. a signed Consent form. Refer to the **Uploading Documents** user guide for further information.

The **Requests** icon 📋 is used to send 'messages' to other workers and teams. It contains both requests and notifications:

- ○ **Adult Notify Admin of confirmed sensory impairment** ℹ️ is an optional notification that can be assigned to another worker or the LSS team if required.

- ○ **Adult Please action** 📋 is an optional request that can be assigned to another worker or the LSS team if required.

How to send a request or notification:

- Click the **Requests** icon 📋

- Select the request or notification using the **radio button**

- Note = Record any relevant information or to highlight any specific instructions

- Either, search for a worker using the 'Pass to Worker > Find button' or, select a team using the 'Pass to Team' dropdown menu

- Click the **OK** button to close the popup window

- Click the **Save** icon 💾 to send the request/notification

Refer to the **Requests and Notifications** user guide for further information.

The **Finish** icon ✅ will finish and complete the triage step. It cannot be finished if there are any incomplete mandatory fields or if there are any requests which need completing. When the **Finish** icon is clicked, it will lock down your triage step and no further input can be made. This will assign (send on) the next actions (workflow items) recorded. You will find your finished triage step in the **Documents** section in the sidebar menu.

Recording a Registration

When known, a registration category must be recorded on the person's record.

From the **Person summary** screen

- Click **Registrations** in the sidebar menu

- Click the **Add** button

- **Register** = Select **Sensory Impairment Register**

- **Category** = Select as appropriate from the dropdown menu

- **From** = Use the **date picker** icon

- **Note** = Is optional and can be used to record relevant information regarding the registration

- Click the **Save** and **OK** buttons to return to the **Person summary** screen

The details will display in **Register entries** on the **Person summary** screen.

Refer to the **LSS - Registrations** user guide for further details

Recording Person Details

As soon as it is known the following information should be recorded on the person's record.

If the case is already known to LCC or LPFT some of this information should already be recorded.

However during LSS involvement this information should be checked and added if missing or updated if incorrect.

- **Current Communication Needs** – recorded to comply with the Accessible Information Standard. Recorded directly in the **Current communication needs** section on the **Person summary** screen using the **Add** button. Refer to the **Current Communication Needs** user guide for full details.

- **Health Conditions** – recorded via **Health > Conditions / Disabilities** in the sidebar menu. Any applicable health conditions should be recorded on the person's record. This information will not generate as a section on the **Person summary** screen. Refer to the **Health Conditions** user guide for full details.

- **Notes** – recorded to display warning messages or general information on the **Person summary** screen. Recorded via **Person details > Notes** in the sidebar menu. When there is a risk to lone workers a **'Warning'** note type should be recorded, once you have confirmed with your manager. Refer to the **Notes** user guide for full details.

- **Personal and Professional Relationships** – recorded via **Person details > GP / Organisational relationships / Personal relationships / Worker relationships** in the sidebar menu. Refer to the relevant user guides in the **Relationships** section of the User Guides page for full details.

- **References** – recorded via **Person details > References** in the sidebar menu. NHS number and National Insurance number should both be added to the person's record. Refer to the **References** user guide for information on how to record a reference.

- **Employment Status** – recorded via **Person details > Employment status** in the sidebar menu. Refer to the **Employment Status** guide for full details

Ending the Team Involvement (Organisational Relationship)

The LSS Organisational relationship needs to be ended on the person's record at the end of the LSS involvement i.e. when **Adult Proposed Case Closure**, **Adult Case Closure Already Started (NFA)**, **Adult No Further Action Required** or another **NFA** next action is added.

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

- Click the **Edit Pencil** icon 🖉 against the LSS team relationship

- **To** = Use **date picker** icon 📅

- **End Reason** = Select from dropdown menu

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

The LSS Team details will remain in **Professional and organisational relationships** on the **Person summary** screen until midnight of the end date. Refer to the **Organisational Relationships** user guide for further details.

Adult Case Closure (Full Case Closures)

If the person was not open to Adult Care (LCC or LPFT) prior to the LSS involvement and there are no involvements from other teams e.g. Safeguarding or DoLS the case will need to be closed using the **Adult Proposed Case Closure** step.

The **Adult Proposed Case Closure** is a next action from the **Adult LSS Triage** and is also available from the **Start > New...** sidebar menu.

> If the person has died or left the area and was previously in receipt of a direct payment service (you can find this information 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 LCC Adult Care (Area) Team.
>
> The Adult Care Team will then complete the DP Termination checklist section of the form, review the case and finish the **Proposed Case Closure** step.

For further details, refer to the **Case Closures – Full, Team or Involvement** user guide.