Adults Quick Guide

Lincolnshire Sensory Service
Adult Contact (Lincolnshire Sensory Service)

This guide is only for Lincolnshire Sensory Service (LSS) workers involved in recording contacts for the Lincolnshire Sensory Service in Mosaic.

All people referred directly to LSS are to be recorded in Mosaic, including referrals from health professionals and Lincolnshire County Council (LCC). LCC practitioners will refer to LSS by telephone.

LSS workers start the LSS workflow in Mosaic with an **Adult Contact (Lincolnshire Sensory Service)**. It is important that the contact is always recorded in a timely manner.

Access the Person's Record / Create the Person

In **Closed** or **Narrow workview**, you must first search for the person.

- Click **People** > **Find person** in the main menu at top of screen

Please note: To avoid duplicate records, you should always search using at least 3 different search criteria. If the person does not exist in Mosaic, you must create them. Refer to the **Creating a Person** user guide for full details.

If the person already exists in Mosaic, click the **person's name** within the search results screen to enter their record.

The **Person summary** screen will display.

Recording an Adult Contact (Lincolnshire Sensory Service)

From the **Person summary** screen:

- Click / Hover over **Start** in the sidebar menu

- Select **Adult Contact (Lincolnshire Sensory Service)**

The **Adult Contact (Lincolnshire Sensory Service)** 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.

- 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.

- 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 provided by the referrer.
>
> 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. Details of Person Making the Contact

Use the **Find** button to record details of the person, worker or organisation making the contact

Use the **date and time picker** icon to record the 'Date and time of contact'. You can either click the **Now** button (for current date and time) or select the appropriate date and time

Section 2. Person Details

The person's details should be reviewed throughout LSS involvement and should be recorded when missing and updated as needed.

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.

Either, add the person's email address (if missing). Or, tick the checkbox to confirm if the person does not have or does not wish to give their email address.

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

If you say **'Yes'** the person is a **'Risk to lone worker'** 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

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.

Use the **Find** button to record **Consultant Details**. 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 4. Light Touch Assessment and Support Plan/Drop in Referral

As per the bold text at the top of this section, information relating to 'Light Touch Assessment and Support Plan' will only appear if **'LSS Drop-in Referral'** or **'LSS Light Touch Referral'** has been recorded as the **'Source of Contact'** in **Section 1.**

For the **Outcomes Identified at Start of Referral / Outcomes Achieved at Close of Referral** tick all relevant checkboxes - a 'Details' textbox will display so you can record information for each identified / achieved outcome.

Section 5. Consent

As per the bold text at the top of this section, information relating to consent will appear only if a response has been recorded against the **'Source of contact'** question in **Section 1.**

The information displayed will vary based on whether the contact was made by the person (self) or someone else.

Section 6. Completion Details

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

If the 'Date' field is highlighted in red use the **date and time picker** icon to click the **Now** button to update the date and time

If a light touch assessment has not been completed you will see a mandatory question asking whether a further assessment is required.

If you answer **'Yes'** you will then be asked to answer another mandatory question to confirm whether the contact is for a profound sensory impairment or not.

If you answer **'No'** you will be prompted to add a triage step as a next action and if you answer 'Yes' you'll have to answer whether triage is required or not. Based on your response you'll either be prompted to add a triage step or assessment as a next action.

Section 7. Next actions

Next actions are mandatory in all forms. At least one next action must be added before the **Adult Contact (Lincolnshire Sensory Service)** can be finished.

To record a next action:

- Click the **Add** button

- Select the relevant action from the **'Select action'** dropdown menu

- Assign to = Find/Select as appropriate - Not required for NFA (no further action) 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 Triage	Used for non-profound sensory impairments when triage is necessary to determine if an LSS Needs Assessment is required. Can also be used for profound sensory impairments where it is felt triage is necessary	Self using the **Assign to me** button Or, other worker using the Pass to worker > Find button. Or, **Lincolnshire Sensory Service** using the Pass to team dropdown menu
Adult LSS Needs Assessment	Used for profound sensory impairments when triage is not required.	**Lincolnshire Sensory Service** using the Pass to team dropdown menu
Adult LSS Light Touch Assessment and Support Plan Completed (NFA)	If no further involvement from LSS is required e.g. if the LSS Contact has been recorded as a follow up at a drop in clinic. **Important:** If LSS are the only involved team a full case closure will be required and you will also need to record a next action of **Adult Proposed Case Closure**. See **Adult Case Closure (Full Case Closures)** for more information.	This is a terminating (no further action) action, so does not need to be assigned
Adult Referral to Wellbeing (assign to self)	If the person requires screening for the Wellbeing Service	Self using the **Assign to Me** button

Action	When to use	Who to assign to
Adult No Further Action Required	If no further action is required following the contact, 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 contact 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
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 your contact you should always consider whether you need to use any of the other toolbar icons at the top of the screen.

The **View documents** icon 📎 (0) is used to upload (attach) external documents to the contact. Refer to the **Uploading Documents** user guide for further information.

The **Output current document** icon 📤 is used to generate a PDF version of the contact which can then be printed if required. Refer to the **Printing Documents** user guide for further information.

The **Finish** icon ✅ will finish and complete your contact. The contact 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 contact and no further input can be made. This will assign (send on) the next actions (workflow items) recorded. You will find your finished contact in the **Documents** section in the sidebar menu.

Recording the Team Involvement (Organisational Relationship)

Recording the Lincolnshire Sensory Service as an 'Involved Team' is required for all cases referred to Lincolnshire Sensory Service.

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

- Click the **Add** button

- **Organisation** = Click the **Find** button and search for **Lincolnshire Sensory Service**

- Click the **name hyperlink** (Lincolnshire Sensory Service) to select

- **Relationship Type** = Select **Involved Team** from the dropdown menu

- **From** = Defaults in as today but can be amended if required

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

The details will display in **Professional and organisational relationships** on the **Person summary** screen.

Refer to the **Organisational Relationships** user guide for further details

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 date** = Use **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 Contact (Lincolnshire Sensory Service)** 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