Mosaic

Lincolnshire COUNTY COUNCIL Working for a better future

Children's Services Guide

Sensory Education Support Team

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Introduction

This guide follows the worksteps that Teachers will complete as part of their Sensory Education Support work with young people and children.

Requests for support can either be submitted directly to the team from schools, parents and professionals or via an Internal Contact from another Mosaic User.

CS SEST Sensory Education Support Request – authorised and actioned by Manager

The **Sensory Education Support Request** would be the first workstep accessed by the team when support has been requested for a young person. This workstep will be generated as a Next action from the **Childrens Services Contact** which would be completed when a request has been submitted directly to the team. If the referral has been submitted by another Mosaic user this workstep will be generated as a Next action from the **Internal Contact**.

The **Sensory Education Support Request** can be accessed from the Team workview. It needs to be screened by a manager who will add the Next actions to allocate the case.

The **SEST Sensory Education Support Request C0465** is completed as follows:

- **Section 1 – Child / Young Person's Details**. Information will prepopulate into this section from the Person summary and Internal Contact or Childrens Services Contact.

- **Section 2 – Request Details.** This information will map through from the Internal Contact or Childrens Services Contact. However, if this workstep has been added as a Next action to the Childrens Services Contact less information will map through and additional information may need entering.

- **Section 3 – Manager's Comments**. This section is completed by a Manager. This will be done in response to a **CS Manager: Please review and authorise** request, or when the **SEST Sensory Education Support Request** workstep has been sent to the team from another Mosaic user. After reviewing the information in Sections 1 and 2, the Manager will click on Section 3 to either accept or decline the request. Use the **Select outcome** dropdown menu to record your decision. **Manager's Comments** can be used to record any notes or direction for the worker. Tick **Manager's e-signature** to sign off the workstep.

- **Section 4 – Next actions**. This section is used by a Manager to allocate or decline a case. Click on **Add**, select **CS SEST Assessment** to allocate the case and use the **Find** button to add the worker. If the request has been declined, select **CS SEST Activity Completed (NFA)** and record a **Reason**.

If the request has been sent from another Mosaic user, the manager at this point has the option of clicking on the requests icon to send a Notification informing the user of the outcome. If required, click on the requests icon and tick **CS Notification of request outcome** use the **Find** button to find the worker. The **Note** field can be used to record further information regarding the request outcome.

The manager must then **Finish** the workstep. This will then allocate the SEST Assessment to the worker, or end the team's involvement if the Request has been declined.

CS SEST Assessment – completed by SEST Worker

The **SEST Assessment** is completed outside of Mosaic. Once finished it can be uploaded and attached to this workstep by clicking on the view documents icon. Click on **Attach a document**. Use **Choose file** to locate and select the SEST Assessment.

The file should be saved under **File As** using the name convention **Service Prefix – name of documents – completed by (workers initials) and date completed backwards**, for example CS SEST Assessment, completed by XY 2020.07.05

Select the **Main Category** of **CS Sensory Education Support** and **Sub Category** of **Casework incl Assessments**. Any additional supporting documents can be attached in the same way using the different options within the Sub Category menu to file them.

Please Note: Any documents attached to worksteps automatically save into the Documents section within the side bar of the Person Summary screen. They will not need uploading again into this section.

The **SEST Assessment Overview C0877** is completed as follows:

- **Section 1 – Assessment Summary**. The child's details will default in from what has been recorded within the Person summary screen.
  - **Assessments completed** – tick and date the option that reflects the assessment type. Information recorded in this section can map forward into the **CS SEST Casework** step to be used as a reference.
  - **Brief Outline of Findings** – enter a brief summary of the assessment.

  - **Assessment shared with** – tick an option and record the date the assessment was distributed.
  - **SEST Worker's Details** default in automatically when the workstep is opened and can be updated if incorrect.
  - The mandatory questions **Is SEST Support continuing** and **Is the Contact Record Section required** must be answered.
  - **Date/time when the first contact was made after allocation** should be entered.
  - Tick the **Completed by** box to add your electronic signature to the record.

- **Section 2 – Assessment Contact Record**. Only available if the **Is the Contact Record Section required question** in Section 1 was answered **Yes.**
  This section is used to record any details of telephone calls, texts, and emails sent or received in relation to the Assessment.
  - **SEST Worker Details** – will default in but can be updated if incorrect.
  - **Record of Contacts –** click on **Add.** A **Record of Contacts** screen will appear that has additional fields to record into. Click on **Add** to record details of additional contacts or **Add and Close** once all the contacts have added.
  - **Manager's Discussion / Decision – 1** – this section is used to record details of any discussions with managers within SEST. **Insert Section** adds duplicate set of fields which can be used to record additional discussions.

- **Section 3 – Next actions.** select one or more of the following:
  - **CS SEST Casework** – used to record all your support work to the young person including meetings, emails and phone calls
  - **CS SEST Visit** – used to record all support visits to the educational setting and can be printed to share with family and other professionals
  - **CS Internal Contact** – used to refer the young person to another service within LCC that accepts Mosaic referrals. Ticking **Send Immediately** allows this workstep to be accessed upon saving whilst leaving the CS SEST Assessment workstep open for further recording to take place
  - **CS SEST Case Closure** – added to end support and close the case

All of the above actions would be assigned to the SEST Worker. Some will require further authorisation or input from a manager before they are Finished. Once the Action or Actions have been added and assigned to yourself, click on **Finish**.

CS SEST Visit – completed by SEST Worker

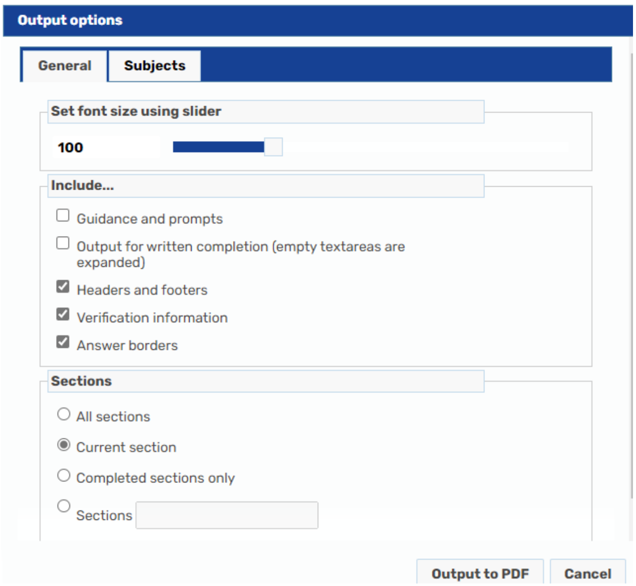
The **SEST Visit** is used to record all types of visits including support visits made to educational settings and home visits.

The **SEST Child Visit Record C0890** is completed as follows:

- **Section 1 - Details of Visit**
    - The **Childs Details** will default in from what has been recorded within the Person summary screen.
    - **Date of Visit, Location** and **Person(s) Involved** –used to record the visit
    - **Was this a double visit? –** if 'Yes' is selected, additional worker's details can be added
    - **Details of visit** – Mandatory field used to record details of any educational support visits.
    - **Voice of the child** - optional field use as appropriate.
    - **Is SEST Support continuing?** - Mandatory field tick either Yes or No, the option ticked will affect which Next Action can be added to this workstep.
    - **Visit record completed by** – Tick this box to add your electronic signature.

- **Section 2 – Next actions.** select one of the following:
    - **CS SEST Visit** – add this if support to the young person is continuing
    - **CS SEST Activity completed (NFA)** – add this if support to the young person has ended.

To print an individual Visit Information record, click back onto Section 1 and click on the output to PDF icon and the **Output Options** screen will appear.



- **Set font size using slider** – this can be used to increase the size of the text within the document.
- **Tick Verification information** – this will print off your e-signature at the bottom of Section 1.
- **Sections** – Select **Current section** to print off just Section 1

- Click on **Output to PDF**, the document will appear at the bottom left of your screen as a PDF icon, click on this to open the document. This can then either be attached to an email or printed as required for circulation.

To complete the workstep, once the Action have been added and assigned to yourself, click on **Finish.**

CS SEST Casework – completed by SEST Worker

The SEST Casework is used to record details of phone calls, emails, and texts.

The SEST Contact Record C1250 is completed as follows:

- **Section 1 – SEST Summary**. Information recorded here is to meet reporting requirements for the service and to enable track of equipment used. This will map forward to future SEST casework steps to be updated. Please complete this section as fully as possible so that the information can map forward into the next workstep for reference and updating.
  - **Education Details** – Any schools will appear here if they have been added as an Organisational relationship in the Person summary. School must be selected as a relationship type for the information to appear. Click on the edit icon. Further fields appear that require information to be added.
  - **Impairment Type**– This is mandatory. Tick the option that applies and further fields, some of which are mandatory will appear that require information to be added.
  - If **Hearing** is selected, fields regarding their **Hearing Impairment**, **Communication Need** and **Type of Assessment** open. Multiple options with Communication Need and Type of Assessment can be selected and further drop downs and/or tables display. Within the tables for **Type of Assessment**, only entries inside a specific range will be able to be entered; an error message will display if outside the range.
  - If **Visual** is selected, fields such as their **Degree of Visual Impairment** and **Access Format** open.
  - If **Multi-sensory** is selected, both the fields for Hearing and Visual display.

- **Section 2 - Contact Record** – This section is used to record any details of telephone calls, texts, and emails sent or received.
  - **SEST Worker Details** – will default in from what has been recorded as the Worker Relationship in the Person summary Screen
  - **Record of Contacts –** click on **Add.** A **Record of Contacts** screen appears that has additional fields to record into. Click **Add** to record details of additional contacts or **Add and Close** once all the contacts have added.
  - **Manager's Discussion / Decision – 1** – this section is used to record

details of any discussions with managers within SEST. **Insert Section** adds duplicate set of fields which can be used to record additional discussions.
    - **Is SEST Support continuing?** – Mandatory field either tick Yes or No, the option ticked will affect which Next Action can be added to this workstep.
    - Tick the **Completed by** box to add your electronic signature to the record

- **Section 3 – Next actions** select one or more of the following:
    - **CS SEST Casework** – add this if support to the young person is continuing
    - **CS Internal Contact** – used to refer the young person to another service within LCC that accepts Mosaic referrals. Ticking **Send Immediately** allows this workstep to be accessed upon saving whilst leaving the CS SEST Casework workstep open for further recording to take place
    - **CS Teaching Assistant Visit** – used to record teaching assistant's visits. This also has the Send Immediately option
    - **CS SEST Habilitation Specialist Visit** – used to record visits completed by habilitation specialists. Also has the Send Immediately option
    - **CS SEST Case Closure** – added to end support and close the case

All of the above actions would be assigned to the SEST Worker except the Teaching Assistant Visit and the Habilitation Specialist Visit. Some will require further authorisation or input from a manager before they are Finished. Once the Action or Actions have been added and assigned to yourself, click on **Finish**.

CS SEST Case Closure – completed by SEST Worker authorised by Manager

The **SEST Case Closure workstep** is started and partially completed by the worker then sent to the manager for authorisation. Before starting the workstep the **File retention** details need to be checked and recorded.

A File retention can be added or updated from within the **Person summary** screen. In the sidebar, click on **File management > File retention**. If a **File retention** has already been recorded it will display here with a yellow heading.

When adding a File retention, the priority is given to the retention status that has the greatest value. If your File retention category has a greater value than any existing File retention recorded, then you raise the File retention period by selecting your File retention criteria from the drop-down list. However, if a greater value has already been recorded, do not overwrite it with a File retention that has a lower value. If no existing File retention has been recorded, then select an option from the drop-down values to record your own.

The two most used File retentions for your service will be **CS Children Education: Pupil in Lincolnshire** or **CS Childrens Services: Child SEND / CWD but not CP or LAC**. Once selected click on **Save** and **Start** the Case Closure.

The **SEST Sensory Ed Support Closure Record C0352** is completed as follows:

- **Section 1 – Service Closure Record**. This section is completed by the SEST Worker. Any information recorded here can be referred back to if the case was to re-open in the future.
  - **1. Reason for service involvement** – this information maps through from the Sensory Education Support Request
  - **2. Summary of interventions and child's progress** – used to record an overview of support provided and an update on the child's progress
  - **3. Reason for closure** – select as appropriate
  - **4. Further details about why the case is being closed** – used to record the case closure reasons fully
  - **5. Any outstanding issues or issues that require further actions should case re-open** – used to highlight any issues for future case workers if the case reopens in response to a yearly contact with the family or should the family request further support
  - **Final Report Sent? & Date** – select and complete as appropriate
  - **Evaluation sent to family**? – select as appropriate
  - **Closure completed by** – tick to add your electronic signature
  - **File retention details** – defaults in when it has been recorded within the Person Summary screen as outlined above

Once Section 1 has been completed by the SEST Worker the Case Closure is ready to be sent to the Manager for authorisation. Click on the mandatory request icon and tick **REQUIRED CS Manager: Please review and authorise**. Use the **Find** to add your manager and then click **OK**. Save and Close the workstep, this sends the Request to the manager.

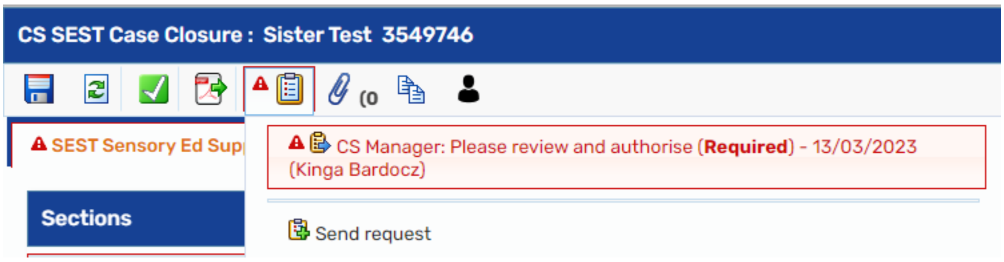
The workstep will appear within your **Current work** as shown, highlighted in yellow until your manager actioned the Request. If the manager returns the workstep to you for further information to be recorded, then it will appear within your **Current work** highlighted in red and will require attention.

Manager's actions –The manager will receive an **Incoming request** to authorise the Case Closure. Click on the incoming request icon and select **Resume work** from the dropdown menu.

The **SEST Sensory Ed Support Closure Record C0352** is screened and authorised by the manager as follows:

- **Section 1 – Service Closure Record**. This section is completed by the SEST Worker. The manager is responsible for checking this section to ensure that it has been completed correctly. File retention details should display at the bottom of this section. If they do not or are incorrect, they will need adding or updating from within the **Person summary** screen as outlined above.

  The clipboard request is used to either authorise the workstep or return it to the worker for further information to be recorded. Click on the clipboard and then click on the red line of text that displays.



  The **Sent request** screen will display. If you are satisfied with the level of information recorded, tick **Completed**. If you require the worker to record further information, tick **Returned**. If you select Returned you must complete the **Note** field to outline what actions you require the worker to complete. Click **OK.** If **Returned** has been selected, Save and close the workstep. If **Completed** has been selected, complete Sections 2 and 3.

- **Section 2 – Manager's Authorisation** – This section is completed by the Manager.
  - **Please confirm** – tick the options to reflect what you have checked. The SEST workflow has a CS SEST Casework step that may require cancelling if the worker has not added an NFA Next Action to it. The **Retention details** option is mandatory because it is the managers responsibility to ensure they have been correctly recorded
  - **Date** – confirms and records the date that the case is closed for reporting and auditing requirements
  - **Manager's comments** – complete as appropriate
  - **Closure approved by**: - tick to add your electronic signature

- **Section 3 – Next actions** - select one or more of the following:
  - **CS SEST Case Closed (NFA)** – added when all involvement has ended and no further support or yearly contact will be required
  - **CS Further monitoring required following closure** – added to schedule a yearly follow up contact with the family. The **Scheduled Date** field will pre-populate with a date 1 year in the future but can be amended if required.

Pass to worker is used to select which Virtual Worker to assign this to

Once the **Next Actions** have been selected, click on **Add and Close** then Finish the workstep.

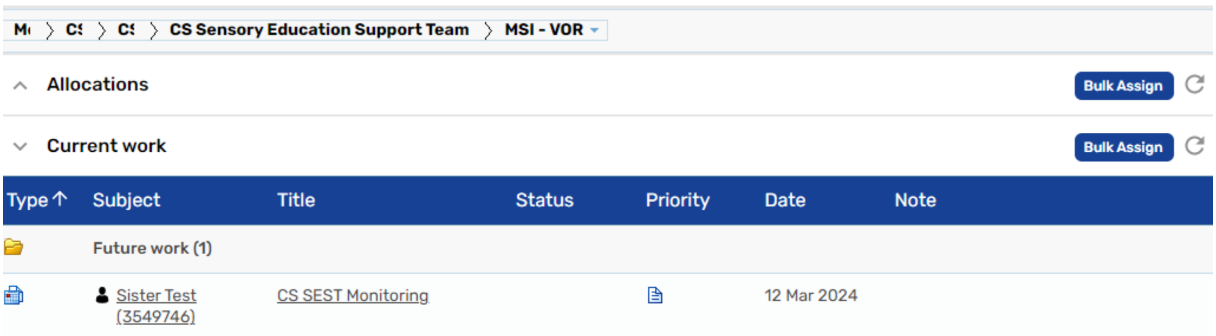
CS SEST Monitoring – reassigned by Manager completed by SEST Worker

The **SEST Monitoring** workstep is used to record the yearly contacts with the family to discuss the young person's progress. If the family raise concerns and request support, a Next action of **Sensory Education Support Request** can be added from the monitoring to access the **SEST Assessment**.

All SEST Monitoring worksteps will be allocated to a Virtual Worker initially. These will need to be reassigned by a manager to a SEST Worker. Click on team workview icon and the Virtual Workers display at the top of the team workview list.

Click on the relevant Virtual Worker hyperlink to access the **Current work** list.

The work will appear in **Incoming work** and **Future work** folders. Clicking on the folder will expand the list of work.



The work can be reallocated by clicking on the future work icon. From the drop down menu select **Update assignment**. When the Update assignment screen opens the **Team worker** drop down menu can be used to select the worker you wish to allocate this workstep to. Click **OK** and the screen will refresh. The workstep will now be allocated. Repeat the this process to allocate any additional **SEST Monitoring** steps.

The SEST Worker can then **Start** the workstep to record details of the yearly contact.

The **SEST Monitoring Record C1251** is completed as follows:

- **Section 1 – Monitoring Record**. The **Childs Details** will default in from what has been recorded within the Person summary screen. **SEST workers details** default in when the workstep is opened and can be updated if incorrect.
  - **Visit / Contact Record – 1** – this section is used to record the details and type of contact. This has an **Insert Section** button. Clicking this will add Visit / Record of Contact – 2 and so on to allow additional contacts to be recorded. The recommended amount of contacts per form is 12.
  - **Manager's Discussion / Decision – 1** – can be used to record any discussions with or guidance given by managers. Clicking Insert Section will repeat the fields to allow additional records to be added.
  - **Completed by** – tick to add your electronic signature to the record

- **Section 2 – Next actions** - select one of the following:
  - **CS SEST Monitoring** – added to schedule a yearly follow up contact to the family. The **Scheduled Date** field will pre-populate with a date 1 year in the future but can be amended if required. **Pass to worker** is used to select which Virtual Worker to assign this to
  - **CS SEST Initiate New Referral** – added and assigned to the worker. This will add a **Sensory Education Support Request** workstep for the SEST Worker to record the reasons why support needs to be given to the child. This should be assigned to yourself
  - **CS No Further Action** – added when no further yearly contacts are needed

Once the **Next actions** have been added, click **Add and Close** then Finish.

CS SEST Sensory Education Support Request – completed by SEST Worker

The **Sensory Education Support Request** can be completed by a SEST Worker as a Next action from the **SEST Monitoring** workstep when it has been identified that further support is required.

The **SEST Sensory Education Support Request C0465** is completed as previously outlined.

The SEST Worker should complete Section 1 & 2 in as much detail as they can.

Once Section 2 has been completed the workstep needs sending to a Manager for authorisation. Click on the requests icon and tick **CS Manager: Please review and authorise** then use the **Find** button to add the manager. Click **OK** then **Save and Close** the workstep, the Request will now have been sent to the Manager.

The authorising manager will review information recorded within this section and use this to decide whether or not the young person is eligible for support.