

## Adults Quick Guide

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### Lincolnshire Sensory Service Adult LSS Needs Assessment

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

All people referred to LSS with a profound sensory impairment will require an **Adult LSS Needs Assessment**. This is recorded as a next action directly from the **Adult Contact (Lincolnshire Sensory Service)** step (LSS Contact).

Any person with a non-profound sensory impairment will be triaged to determine whether an **Adult LSS Needs Assessment** is required.

The assessment is designed to gather further information regarding the person's needs and to determine whether a support plan is required.

The **LSS Needs Assessment** can only be assigned to the LSS team. The LSS manager will screen the assessments and assign to an appropriate LSS worker for completion.

When an **LSS Needs Assessment** or other workflow step has been assigned to you it will display in your **Current work > Incoming work** folder when working in **Full** or **Narrow workview**.

### Recording a Worker Relationship

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The worker relationship may be recorded for you by your manager when the assessment is assigned (allocated) to you.

If not, you will need to record this yourself:

From the **Person summary** screen

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

- Click the **Add** button
- **Worker** = Use the **Find** button to search for self/the relevant LSS worker
- Click the **name hyperlink** to select
- **Relationship type** = Select **Involved Worker**
- **From date** = Select 'today' or relevant start date
- 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 **Worker Relationships** user guide for further details

**Please note:** The person's details will also display in your **Allocations** folder when working in **Full** or **Narrow workview**.

## Recording the LSS Needs Assessment


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To start the assessment:


- 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 Needs Assessment** will open in a separate window

## Tips for completing the form

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

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.

### **Important notes when using 'Find' buttons:**

- The **Manual Input** tab should only be used as a last resort.
- 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 via the Mosaic Service Desk 01522 555555.
- 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 the assessment.

Mandatory fields will be highlighted in red and cannot be missed.

Please review all sections and tick the 'Section completed' checkbox in all relevant sections.

## Section 1. Person Details

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 assessment 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 assessment window and then clicking the **Refresh current form** icon  to update the information in these fields

Some information prepopulates from the LSS Triage 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 / amend 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.

You can also amend the **Emergency Contact Details** – use the **Find** button to add additional emergency contacts, use the **edit pencil** icon  to amend incorrect details and use the **delete bin** icon  to remove anyone no longer relevant

## Section 2. Health Details

**GP details** - a red warning message will display if:

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

It is important to note that 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 GP or surgery if needed.

**Consultant Details** pull through from LSS Contact or LSS Triage, but if not recorded at contact/triage use the **Find** button to record them

The '**Insert Section**' can be used to add multiple **Consultant Details** if needed – remember to record the 'Area of specialism' for each consultant

## Section 3. Sensory Need

The **person's sensory need** and the **summary** text pre-populates from the LSS Triage (if recorded) but can be changed if needed.

Questions will display according to the sensory need selected. These questions will build a picture of the person's needs

## Section 4. Accommodation

Most information is prepopulated from the LSS Triage (if recorded) but this information can be edited if required.

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 or if you say '**No**' the person does not have smoke alarms fitted and working

## **Section 5. Family, Friends & Support Networks**

If you say the person has a carer you will be asked if this is an informal or formal carer. Further questions will then display based on the answer you select from the dropdown menu.

### **Informal**

Use the **Find** button to search for the person i.e. friend or family member who acts as the person's informal carer

You will also have to use a dropdown menu to answer the question 'Do they require a Carer's Assessment or Carer Emergency Response Plan?'

### **Formal**

Use the **Find** button to search for the care agency (organisation)

### **Both informal and formal**

You'll have to use the **Find** buttons to search for the informal carer (friend or family member) and the care agency (organisation)

### **Customer as a Carer**

In this section you'll also be asked if the person is a carer for someone else – if you select 'Yes' you'll see additional fields including a question about whether the person requires a Carer's Assessment or Carer Emergency Response Plan

## **Sections 6. Employment, Leisure and Activities of Daily Living**

Information is prepopulated from the LSS Triage (if recorded) but this information can be edited if required.


## **Sections 7 – 11**

These sections contain questions to build a picture of the person's needs.

You will be asked to provide further details to some questions based on your answers e.g. if you say '**Yes**' the person uses mobility aids or equipment

In section 10 there are checkboxes which should be ticked to indicate what benefit(s) the person claims.


## Section 12. Assessment Summary

Use **date and time picker** icon  to record the date of assessment visit

**People contributing to the assessment** = Click the **Add** button and record details in the popup window.

- Use the tick box to indicate if the person was present at the assessment
- Click the **Add** button to add multiple people or the **Add and Close** button once all people have been added


## Section 13. Completion Details

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

Tick the mandatory checkbox '**Sensory Loss Consent Form**' completed?' to confirm the consent form has been completed.

The **Adult Sensory Loss Consent Form** is a separate form located within the **Adult LSS Triage**. If the form was already completed within the Triage step you do not need to complete another form unless an update is needed.

A signed copy of the consent form should be uploaded using the **View documents** icon 

- Click **View documents** icon 
- Click '**Attach a document**'

- Click the **Choose file** button and search for the document on your computer
- **File As** = Updated to give an informative title e.g. *Signed Sensory Loss Consent Form (date signed)*
- **Main Category** = Select **AC Lincolnshire Sensory Service**
- Sub-category\* = **Assessment**
- Click the **Add** button

A popup message displays to confirm upload complete (click the **OK** button to close it) and the number in brackets next to the **View documents** icon will change to "1".

Refer to the **Uploading Documents** user guide for further information.

## Section 14. Actions Taken

Next actions are mandatory in all forms. At least one next action must be added before the **Adult LSS Needs Assessment** 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 Support Plan	If the person requires a support plan.	Self using the <b>Assign to Me</b> button Or, other worker using the Pass to worker > Find button  Or, <b>Lincolnshire Sensory Service</b> using the Pass to team dropdown menu
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 <b>carer's record</b> and record <b>Adult Contact (Carer)</b> to refer to the Carers Team.  Refer to the <b>Making a Carers Referral</b> 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	<b>Adult Carers Service Inbox</b> using the Pass to worker dropdown menu
Adult LSS Case Monitoring	For cases where the LSS Case Monitoring has not already been added i.e. those that have not been triaged  Check <b>Current work</b> to ensure this has not already been added – only one LSS Case Monitoring should be open on the record	<b>Lincolnshire Sensory Service</b> using the Pass to team dropdown menu.  Or, self using the <b>Assign to me</b> 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 <b>Assign to Me</b> button
Adult LSS Risk Notification to Key Team	If the person is already known to an LCC or LPFT Adult Care Team and the assessment has highlighted significant risk(s) which require further involvement from Adult Care.  Use the ' <b>Note</b> ' box to summarise details and indicate urgency.	Relevant LCC or LPFT Adult Care team using the Pass to team dropdown menu
Adult No Further Action Required	If no further action is required following the assessment, 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 assessment is not progressing to a plan and the case is not open to LCC or LPFT.  <b>Important:</b> See <a href="#">Adult Case Closure (Full Case Closures)</a> for more information	Self using the <b>Assign to Me</b> 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 <b>Adult Proposed Case Closure</b> or <b>Adult Case Closure</b> within <b>Current work</b> on the <b>Person summary</b> screen	This is a terminating (no further action) action, so does not need to be assigned



## Toolbar Icons

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


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

- **Adult Additional assessor input required**  is an optional request that can be assigned to another worker in the team if a joint assessment has been completed. It is used to invite the second worker to record their details within the same assessment form.
- **Adult Admin output request**  is an optional notification. It is usually assigned to the LSS Team via the 'Pass to Team' dropdown menu. It is to be actioned by the Spa admin workers and is used to request that a finished version of the assessment is printed and posted to the person. It can also be assigned to a named worker if required.
- **Adult Notify Admin of confirmed sensory impairment**  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 **Output current document** icon  is used to generate a PDF version of the assessment 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 assessment. The assessment 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 assessment and no further input can be made. This will assign (send on) the next actions (workflow items) recorded. You will find your finished assessment in the **Documents** section in the sidebar menu.

## Recording a Registration

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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

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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 your Worker Relationship

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If your involvement with the case has ended i.e. you are assigning the next step to another worker or the case is closing - when **Adult Proposed Case Closure, Adult Case Closure Already Started (NFA)** or **Adult No Further Action Required** is added you will need to end your worker relationship on the person's record.

- Click **Person details > Worker relationships** in the sidebar menu
- Click the **Edit Pencil** icon  by your worker name/ the involved LSS worker
- To = Use **date picker** icon 
- **End Reason** = Select relevant reason from dropdown menu
- Click the **Save** button then click **OK** button to return to the **Person summary** screen



The worker will disappear from **Professional and organisational relationships** straight away and the LSS worker's allocation will also disappear.

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

## Ending the Team Involvement (Organisational Relationship)

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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 and time 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)**

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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 Needs Assessment** 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, please refer to the **Case Closures – Full, Team or Involvement** user guide