

## Children's Services Quick Guide

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### Recording Case Notes on an Individual or Group

Case Notes can be added to record information on an individual person or multiple people at once through a group. Both routes offer the same fields and functionality.

You can also notify other workers that a Case Note has been recorded by sending them a Case Note Alert. Case Notes must be finished for the Alert to send.

Case Notes will be available for editing for 24 hours after you first save them. If you leave the case note unfinished, it will time out meaning you cannot edit it further. Timed out Case Notes should be finished as soon as possible.

When you finish a Case Note it will be locked down so no further edits can be made. A finished Case Note can be appended, where relevant, to add additional information.

**Case Notes can be recorded on an Individual or on a group (Family or Carer). If you need to add the same note to multiple related people, recording on the Group is the quickest, most efficient way to do this.**

### For an Individual's Case Note


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#### To Record a Case Note

From the **Person summary** screen of the child or young person's record, click **Case notes**

To add a new case note, click the **Add** button on the bottom right of the Case notes summary page.

The page has the following fields to complete:

- **Title** – Add a concise and descriptive title
- **Type of note** – Select from the drop down to pick the most appropriate
- **Date** - Defaults in - If necessary, can be amended using the calendar icon 
- **Time** - Defaults in - If necessary, can be amended manually
- **Significant Event (will be included in Chronologies)** - This checkbox should only be ticked when the contents of a Case Note is considered particularly significant.

Ticking this box will add the Case Note to the Chronology and make the case note appear bold.

- **Note** – Enter the information in relation to the case note. The note box of the Case Note has various editing and formatting options available, similar to those found in a Microsoft Word document.


## Adding Alert Recipients

An Alert can be used to let a worker know a case note has been added to the child or young person's record for their attention.

There are no automatic alerts/notifications within Mosaic. If you believe another worker or multiple workers need to be sent an Alert about a Case Note you are recording, you must add the Alert Recipient(s) when recording, editing or appending a Case Note.

Alerts can only be sent to Workers in Mosaic – you cannot send an Alert to a Team.

From the **Add case note** screen, scroll to the bottom of the screen:

- Click **Add alert recipients for this case note?**
- The screen will refresh and you will need to scroll to the bottom of the screen.
- Click **Add recipient**
- Use the **Find workers** screen to enter the worker details and click **Find**
- Results display, click on the required **Worker's Name**
- Repeat this process to add additional recipients as necessary.
- Alert Recipients can be removed by selecting the **Delete** icon  against the recipient's name. Alert Recipients can be removed before the Case Note is finished and the worker will never receive an alert - i.e. while still recording or editing the Case Note.


The alert will only be sent once the Case Note is finished. If a Case Note is appended and the original alert recipient is still listed they will receive two alerts – one for the original Case Note and one for the Appended Note. Alert Recipients can also be amended when appending a Case Note – i.e. additional recipients can be added and original recipients can be removed if necessary.

## To Save and Finish the Case Note

To save and/or finish recording a Case Note, you have the following options using the buttons at the bottom of the screen.

- **Save and continue** - Saves your work and allows you to continue making changes.

- **Save and close** - Saves your work and closes the Add Case Note page. You can resume the case note to edit it for 24 hours after the point of saving. If you do not finish within the 24 hours, the case note will time out and will no longer be able to edit. Any alerts added will not be sent until the case note is finished.


**Please Note:** A timed out Case Note must be finished and will display with the **Timed Out** icon . A timed out Case Note will remain in your 'Unfinished Case Notes' on your Homepage and any Alert Recipients added will not receive the Alert.

- **Finish** - Saves and Finishes the case note. You will not be able to edit the case note any further but you can append to it. Any Alert Recipients added will receive an alert once finished.
- **Cancel** - Closes the Add Case note page without saving any changes.

## Copying Case Notes

Only finished Case Notes can be copied.

You can copy a Case Note from one record to another person's record, if they have been added as a Personal Relationship for that individual. The copy function should only be used when it is appropriate to do so. Case Notes should not be copied to the records of personal relationships just because the system allows you to do so.

From the **Case Notes** screen, click the **Copy** icon 

Related people (those recorded as personal relationships) who are available to copy to are displayed automatically.

You can also click **Show unrelated coinhabitant** to display any people who live at the same address as the child/young person but are not listed as a personal relationship i.e. those living in the same house.

To copy:

- Tick **Select** checkbox against the person/people to copy to
- Click **Copy**

**Please note:** Case Notes copy across as unfinished notes.

You must access the record the case note was copied to and finish the note – this allows for edits to be made to ensure the information is correct for that record i.e. unnecessary information removed and additional information recorded.


## Editing an Unfinished Case Note

Once a Case Note has been Saved and Closed it can be edited until 24 hours after the first time it was saved. This is when the Case Note will Time Out. Only unfinished Case Notes which have not timed out can be edited.

From the **Case Notes** screen, click the **Edit icon**  .

The **Amend Case Note** screen displays. This screen contains a message to explain how long the Case Note is available for editing before it times out and is locked down.


All fields on the screen can be edited including removing or adding alert recipients.

Alert Recipients can be removed by selecting the **Delete icon**  next to the recipient's name.

Once you have finished editing the case note, click **Finish** to lock the case note and prevent it from becoming unfinished.

## Appending a Case Note


Once a Case Note has been **Finished** it cannot be edited. It can, however, be **Appended**.

From the **Case Notes** screen, click the **Append icon**  .

The **Append Case Note** screen displays. The Category, Title, Contact Date and original Case Note text cannot be edited.

The Significant Event (will be included in Chronologies) checkbox can be ticked or unticked. This should be ticked when the contents of a Case Note is considered particularly significant.

There is an additional Case Note text field which is mandatory and should be used to record your additional information.

Any Alert Recipients previously added will receive an additional alert – one for the original Case Note and one for the Appended Note. Alert Recipients can be removed by selecting the **Delete icon**  against the recipient's name if an additional Alert is not needed. Additional recipients can also be added if necessary.

## For Group Case Note

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### To Record a Group Case Note


From the **Family/Carer Details** screen, click on the **Case Notes** tab

To add a new case note, click the **Add** button on the bottom right of the Case Notes summary table.

The **Add case note** window will appear. This contains two tabs – **Subjects** and **Case note**.

From the **Subjects** tab, use the tick boxes on the right of the group members name's to select who you wish to record the case note against.

Click on the **Case note** tab to enter the note details. The page has the following fields to complete:

- **Title** – Add a concise and descriptive title
- **Type of note** – Select from the drop down to pick the most appropriate
- **Date and time** - Defaults in - If necessary can be amended using the date and time picker 
- **Note** – Enter the information in relation to the case note. The note box of the Case Note has various editing and formatting options available, similar to those found in a Microsoft Word document.

### Adding Alert Recipients


An Alert can be used to let a worker know a case note has been added to selected members of the group for their attention.

There are no automatic alerts/notifications within Mosaic. If you believe another worker or multiple workers need to be sent an Alert about a Case Note you are recording, you must add the Alert Recipient(s) when recording, editing or appending a Case Note.

Alerts can only be sent to Workers in Mosaic – you cannot send an Alert to a Team.

From the **Add case note** screen scroll to the bottom of the screen:


- Click **Add alert recipients for this case note?**
- The screen will refresh and you will need to scroll to the bottom of the screen.
- Click **Add recipient**
- Use the **Find Workers** screen to enter the worker details and click **Find**


- Results display, click on the required **Worker's Name**
- Repeat this process to add additional recipients as necessary.
- Alert Recipients can be removed by selecting the **Delete** icon  against the recipient's name. Alert Recipients can be removed before the Case Note is finished and the worker will never receive an alert - i.e. while still recording or editing the Case Note.

The alert will only be sent once the Case Note is finished. If a Case Note is appended and the original alert recipient is still listed they will receive two alerts – one for the original Case Note and one for the Appended Note. Alert Recipients can also be amended when appending a Case Note – i.e. additional recipients can be added and original recipients can be removed if necessary.



## To Save and Finish the Case Note

At the top of the **Add case note** windows, there are three icons:

- The  save icon can be used to **Save** the information inputted. In order to save, the mandatory fields must have information added and the subjects selected. You can resume the case note to edit it for 24 hours after the point of saving. If you do not finish within the 24 hours, the case note will time out and will no longer be able to edit. Any alerts added will not be sent until the case note is finished.


**Please Note:** A timed out Case Note must be finished and will display with the **Timed Out** icon .

A timed out Case Note will remain in your 'Unfinished Case Notes' on your Homepage and any Alert Recipients added will not receive the Alert.

- The  finish icon saves and **finishes** the case note. You will not be able to edit the case note any further but you can append to it. Any Alert Recipients added will receive an alert once finished.
- The  close icon allows you to **Cancel/Close**. A prompt will appear asking if you wish to save changes.


## Editing an Unfinished Case Note

Once a Case Note has been Saved and Closed it can be edited until 24 hours after the first time it was saved. This is when the Case Note will Time Out. Only unfinished Case Notes which have not timed out can be edited.

From the **Case Notes** tab, click the **Edit icon**  .

The **Amend Case Note** screen displays. This screen contains a message to explain how long the Case Note is available for editing before it times out and is locked down.


All fields on the screen can be edited including removing or adding alert recipients.

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Once you have finished editing the case note, click **Finish** to lock the case note and prevent it from becoming unfinished.

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From the **Case notes** screen, click the **Append icon** .

The **Append case note** screen displays. The Title, Type, Date and time and original Case Note text cannot be edited.

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