Adults Quick Guide

Private Court of Protection Deputyship Applications

This guide covers the process practitioners and business support should follow for private applications for Court of Protection Deputyship (CoP).

Applications are considered 'private' when the applicant is a friend, family member or solicitor.

Where Lincolnshire County Council (LCC) is to apply to the Court of Protection, practitioners should follow the process for authority applications. Please refer to the **Referring to The CoP and Appointeeship Team** user guide for further details.

Private applications must be monitored. The monitoring should be recorded within the **Adult Monitoring of CoP Application** workflow step – this is only available as a next action from the **Adult CoP Private Applicant**.

Practitioner - Recording the Adult CoP Private Applicant

To open the **Adult CoP Private Applicant** step:

- From within the person's record, click **Start > New…** in the sidebar menu

- Click on the **Adult CoP Private Applicant** hyperlink

The **Adult CoP Private Applicant** will open in a separate window

The form is split into 3 sections – all sections must be completed in full

General 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.

In **Section 1** information will prepopulate into the fields marked with the **blue cog** ⚙ symbol. If some information is missing or incorrect, it can be added or edited by:

- clicking the **Show subject summary** icon 👤 to minimise the workflow step 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 workflow step window and clicking the **Refresh current form** icon 🔃 to update the information in these fields

There must be a Key Team listed at all times during the CoP application process.

Before ticking the **Please tick to confirm correct Key Team has been recorded** checkbox in **Section 1**, check in **Professional and organisational relationships** on the **Person summary** screen if you are unsure whether the correct Key Team has been recorded.

Once ticked a box will display under the checkbox to show the time, date and your details as the worker confirming the correct Key Team has been recorded.

In **Section 1** use the **Find** button to complete the **Representative's Details**. Without this information, Business Support cannot monitor the application.

You can use the **View documents** icon 📎 (0) to attach relevant supporting documents created outside of Mosaic.

Section 3. Next actions

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

To record a next action:

- Click the **Add** button

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

- Assign to = Select/Find as appropriate - Not required for NFA actions

- Note = Record any necessary information – recommended when assigning a next action to another team/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

Next Action	When to use	Who to assign to
Adult Monitoring of CoP Application	If the request is to progress	The relevant Business Support (Adult Admin) Team (based on where the person lives) using the Pass to team dropdown menu
Adult CoP Private Application No Longer Required (NFA)	If the private application is no longer required as the representative no longer wishes to, or is no longer able to apply for Deputyship	This is a terminating (no further action) action, so does not need to be assigned

Once the appropriate next action has been recorded click the **Finish** icon ✅

Business Support - Adult Monitoring of CoP Application

The receiving Business Support team should assign the **Adult Monitoring of CoP Application** step to the Business Support worker who is responsible for monitoring private applications to CoP. If you are not sure who this is, speak to your Business Support Team Leader.

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

- Open the **Current work > Incoming work** folder

- Click the **Incoming work** icon 📥 next to the **Adult Monitoring of CoP Application**

- Click **Update assignment**

- Pass to worker = Click the **Find** button and search for the Business Support worker

- Click the **OK** button

Recording the Adult Monitoring of CoP Application

To start the **Adult Monitoring of CoP Application**, from within the person's record:

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

- Click **Start work** from the menu

The **Adult Monitoring of CoP Application** will open in a separate window

The form is split into 4 sections – all sections must be completed in full

General 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.

In **Section 1** information will prepopulate into the fields marked with the **blue cog** symbol. If some information is missing or incorrect, it can be added or edited by:

- clicking the **Show subject summary** icon to minimise the workflow step 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 workflow step window and clicking the **Refresh current form** icon to update the information in these fields

The **Representative Details** in **Section 1** will pull through from the **Adult CoP Private Applicant** step. If their contact details (e.g. address, telephone number or email address) change you should update the representative's record and then click the **Refresh current form** icon to update these details within the form.

Use the **Add** button to record **Events** in **Section 2**

Within the popup window that opens, click the **Add** button to add one entry and then add another, or click the **Add and close** button if only recording one entry or when all entries have been recorded. The **Close** button will close the popup without adding an entry.

When entries have been recorded the following icons are displayed:

Edit – to edit/amend an entry

Delete – to delete/remove an entry

Move this row up – to rearrange the order of the entries added (only displays if more than one entry is recorded)

A new entry should be added to the **Events** table every time you contact anyone in relation to this application.

Practitioners and finance colleagues can also add to the **Events** table if they have done something related to the application.

Requests and Notifications

Requests and notifications should be used to send messages to yourself and other teams and workers.

To send a request or notification:

- Click the **Requests** icon
- Select the appropriate **request / notification** using the radio button
- Add a Note in the text box if required
- Pass to worker / Pass to team = Search or select the appropriate worker or team

The request / notification will be sent when you next click the **Save** icon

- Click the **OK** button to return to the main workflow step

Please note: If you have already sent a request or notification you will need to click **Send request** once you have clicked the **Requests** icon to see the list of requests and notifications available

Request (R) / Notification (N)	When to use	Who to assign to
(N) Adult Follow-up reminder	To remind yourself of future actions required, e.g. contact representative in 2 weeks' time	Self using the Pass to worker > Find button
(N) Adult Inform Practitioner of outcome	To inform the referring practitioner if the application was successful or not	Referring practitioner using the Pass to worker > Find button
(N) Adult OPG 100 search required	To inform LCC Finance Team that an OPG 100 search is required	**Adult Care Finance** using the Pass to team dropdown menu
(R) Adult Please action	This request appears in most workflow steps and can be used as and where required	Another worker or team as appropriate using Find button
(R) Adult Please review information and authorise	To request authorisation	Practitioner / manager / finance colleague as necessary using the Pass to worker > Find button
(N) Adult Practitioner involvement required	To request involvement from a practitioner or finance colleague	Practitioner / finance colleague as necessary using the Pass to worker > Find button Or Pass to team > Find button to assign to the relevant team

Section 4. Next actions

Next actions are mandatory in all forms. At least one next action must be added before the **Adult Monitoring of CoP Application** 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 = Select/Find as appropriate - Not required for NFA actions

- Note = Record any necessary information – recommended when assigning a next action to another team/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

Next Action	When to use	Who to assign to
Adult Financial Assessment Referral	If the application is successful and a financial assessment is required. Can be **'Send Immediately?'**	Referring practitioner using Pass to worker > Find button Or Key Team using Pass to team dropdown menu
Adult CoP Private Applicant	If a new application is being submitted for a different family member, friend or solicitor	Referring practitioner using Pass to worker > Find button Or Key Team using Pass to team dropdown menu

Next Action	When to use	Who to assign to
Adult Local Authority CoP Application Made (NFA)	If the application is not going ahead and LCC is applying for Deputyship	This is a terminating (no further action) action, so does not need to be assigned
Adult No Further Action Required	If the application is to cease and no new application is to be made but the case remains open to other teams/services	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, e.g. the application is to cease and no new application is to be made and the case is not open to other teams/services. Please check **Case Closures - Full, Team and Involvement** user guide for full details of when to select this next action	Self using the Assign to Me button Or the referring practitioner 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

Once the appropriate next action(s) has been recorded and all sent requests have been completed, click the **Finish** icon ✅