

Adults Quick Guide

Lincolnshire Sensory Service

Adult LSS Case Monitoring

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

The **Adult LSS Case Monitoring** step allows you to record any relevant ongoing activity that cannot be captured in other LSS workflow steps. For example, it can be used to keep a running record of white cane, reablement activity provided by LSS.

The **Adult LSS Case Monitoring** step should remain open until all relevant LSS activity has been completed.

It can be accessed and updated by several workers if needed.

Adult LSS Case Monitoring is available to select as a '**sent immediately**' next action from the following workflow steps:

- Adult LSS Triage
- Adult LSS Needs Assessment
- Adult LSS Support Plan

This means it can be sent before the workflow step it has been sent from is finished.

It can be assigned to self, to another worker or to the LSS team as appropriate.

A mandatory **Reason** must be recorded when selecting this next action. This is a reminder to check **Current work** on the **Person summary** screen before selecting the next action **Adult LSS Case Monitoring** as there should only be **one LSS Case Monitoring** step recorded during LSS involvement.

Recording the Adult LSS Case Monitoring step

If it is assigned to you:

If the **Adult LSS Case Monitoring** step has been assigned to you it will appear in your **Incoming work** folder.

- 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 Case Monitoring** will open in a separate window

If it is assigned to the LSS Team:

If the **Adult LSS Case Monitoring** step is assigned to the LSS Team, it will appear in the Team's **Incoming work** folder.

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

Please note: When you are in **Team workview**, the icon will change to the **Show individual workview** icon 

- If needed, close the **Team summary** and open **Current work** by clicking **Current work** at the bottom of the screen
- Access the **Incoming work** folder
- 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
- Click the **'Yes'** button on the popup window

The **Adult LSS Case Monitoring** will open in a separate window

Please note: The **Adult LSS Case Monitoring** step will be assigned to you once you start the form and click save – this step will then be in your **Incomplete work** folder until finished.

Important notes:

- Where needed, you will be able to **'Start'** or **'Resume'** any workflow steps assigned to the LSS Team or another worker within the LSS Team
- Once 'started' workflow steps can only be re-assigned to another worker, they cannot be re-assigned back to the LSS Team

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 this form.

Click the **Save** icon  throughout your recording in the form. We recommend that you save your work at least at the end of each section, but the more often the better. Once you click save, any section's mandatory fields will be highlighted in red.

Section 1. Personal 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 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 then clicking the **Refresh current form** icon  to update the information in these fields

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.

Please refer to the **GP Details** user guide for guidance on how to record/update the GP or surgery if needed.

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

Section 2. Case Monitoring Activity

This section is used to record details of case monitoring activity. It should be updated throughout the person's involvement with LSS.

To log relevant activity:

- Click the **Add** button

An 'Activity' popup window will open:

- **Date and time** = Record the date and time the activity place using the **date and time picker** icon  (The 'Now' button can be used to record the current date and time if applicable)
- **Medical status** = Record details of the person's medical status, if appropriate
- **Activity and actions required** = Record details of the activity and any actions required
- **'Worker recording activity'** = Prepopulates with your information but can be updated if required.

It is important that this is recorded accurately because this step is often updated by multiple workers during involvement from LSS.

- 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)

Section 3. Completion Details

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

Section 4. Next actions

Next actions are mandatory in all forms. At least one next action must be added before the **Adult LSS Case Monitoring** can be finished.

Important note: Remember as this step should remain open throughout the LSS involved the action should only be added once the case is closing to LSS.

To record a next action:

- Click the **Add** button
- Select the relevant action from the '**Select action**' dropdown menu
- Click the **Add and close** button

Action	When to use	Who to assign to
Adult LSS Case Monitoring Complete (NFA)	When all case monitoring activity has been recorded and LSS's involvement has ended.	This is a terminating (no further action) action, so does not need to be assigned
Adult LSS Case Monitoring No Longer Required (NFA)	When case monitoring is no longer required e.g. if a person dies, moves out of area, or no longer wants to engage with LSS.	This is a terminating (no further action) action, so does not need to be assigned

Toolbar Icons

You should always consider whether you need to use any of the toolbar icons at the top of the screen throughout your input to this step.

The **Close** icon  should be used to exit the step between logging activity entries.

The **Requests** icon  is used to send 'messages' to other workers and teams. This step contains only requests and no notifications:

- **Adult Additional assessor input required**  is an optional request used to invite other involved workers into the case monitoring step to record activity. It should be assigned to relevant worker as appropriate using the 'Pass to Worker > Find button'
- **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:

- Click the **Requests** icon 
- Select the request using the radio button
- Note = Record any relevant information or to highlight any specific instructions

- Search for a worker or team using the **Find** button
- Click the **OK** button to close the popup window
- Click the **Save** icon  to send the request/notification

Please refer to the **Requests and Notifications** user guide for further information.

The **Finish** icon  will finish and complete the LSS Case Monitoring step.

This step should only be finished when the LSS worker feels that no more information is required to be entered in to the step i.e. at the point of all LSS involvement ending.

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

End Worker Relationship

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 and time 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)

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 from the relevant LSS workflow step.

- 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)

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.

For **full case closures only** – a next action of **Adult Proposed Case Closure** should be assigned to self for completion from LSS workflow.

The **Adult Proposed Case Closure** step is also available from the **Start > New...** sidebar menu if needed as it is not expected that you start an LSS workflow step just to select the next action '**Adult Proposed Case Closure**'.

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