Adults Quick Guide

Protection of Property Process

The Protection of Property process consists of an **Adult Protection of Property** step, various **Protection of Property** forms and, for LPFT only an **Adult Protection of Property Returned Property** step.

This guide covers the following:

- Starting and Recording the **Adult Protection of Property** step

- Protection of Property Optional Forms (for electronic completion)

- Starting and Recording the **Adult Protection of Property Returned Property** step – **LPFT only**

> The Protection of Property forms can be completed in Mosaic (electronically) or handwritten and uploaded to the **Protection of Property** step.
>
> Forms for handwritten completion are available in the forms library or on the Adult Care Procedures, Practice Guidance and Tools.

Starting the Protection of Property step

The **Adult Protection of Property** step is available from the **Start > New...** sidebar menu or as a next action from various Adult Care workflow steps.

If recorded as a next action, 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

Or if selecting from the **Start > New …** sidebar menu:

- Click **Start > New …** in the sidebar menu

- Click **Adult Protection of Property** hyperlink

The **Adult Protection of Property** will open in a separate window.

Recording the Protection of Property step

General 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 or 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.

Section 1. Initial Considerations

You should read this section before starting the Protection of Property process.

Section 2. Personal Details

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 (user 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

If the address of the property being protected is different from the person's current address, record this within the textbox provided and use the **Save** icon 💾 before opening any of the **Protection of Property** forms available via the **Forms and letters** icon 📇.

Section 3. Protection of Property Checklist

Use the **date picker** icon 📅 to record the 'Date Protection of Property began'.

Record the 'Reason for Protection of Property being undertaken' within the textbox

As you complete each stage of the Protection of Property process, use the **dropdown** menus to state whether the related form has been completed electronically or handwritten, or if the form is not applicable.

Handwritten forms

If you complete a **Protection of Property** form by hand, you will need to confirm that a copy has been uploaded to the step.

- Click the **View documents** icon 📎 (0)

- Click **Attach a document**

- Click the **Choose File** button and locate the document on your computer

- If needed amend the **File as** field

- **Main Category** = select **AC Legal**

- **Sub-category** = select **Protection of Property**

- Click the **Add** button and then click the **OK** button – you should see the number in brackets by the **View documents** icon 📎 (1) increase

Repeat this process for each handwritten form and refer to the **Uploading Documents** user guide for further instructions if needed.

Forms completed electronically (in Mosaic)

The **Protection of Property** forms are available in the **Forms and letters** icon ![icon]. If you complete the **Protection of Property** forms electronically (within Mosaic) you will need to be aware of the following:

The person's name and the Protection of Property address will populate from the section 2 of the main **Protection of Property** form. Remember, if the address of the property being protected is different from the person's current address, you should record this within the textbox in section 2 and save the main form (click the **Save** icon ![icon]) before opening any of the **Protection of Property** forms.

Throughout the forms, you will need to indicate if the supporting person is a Mosaic user (i.e. if they have a current Mosaic account).

If they are a Mosaic user, send them the **Adult Please action** request (available in the **Requests** icon ![icon]) then click the **Save** icon ![icon] and exit the step using the **Close** icon ![icon]

The supporting person can then resume the step and tick the supporting person's **verification checkbox** within the relevant form(s).

If the supporting person does not have a current Mosaic account, use the **Manual Input** button to record their details within the form(s). The person will need to complete the **Witness Statement** by hand and you should then upload it to the step using the **View documents** icon ![icon] (as described above)

The **Protection of Property** forms available in the **Forms and letters** icon ![icon] are:
- Adult PoP Consent
- Adult PoP Inventory
- Adult PoP Risk Assessment
- Adult PoP Securing Property Checklist
- Adult PoP Witness Statement

For full details on completing these forms please refer to the **Protection of Property Optional Forms** section within this user guide.

Section 3. Protection of Property Checklist continued

Record whether 'Estates Referral Guidelines for Local Authorities and Hospitals referred to' by selecting the appropriate radio button

LPFT colleagues should state if the step is being completed before the property has been returned to the person. This question is not available to LCC colleagues, who should always return property before the step is completed.

Activity and conversations related to protecting the property can be recorded in the **Record of Events** table e.g. depositing money at the bank or informing the police that the property is empty.

To record:

- Click the **Add** button

- Use the **date and time** picker icon to record the 'Date and time' of the event.

  Click the 'Now' button to record current date and time but remember you should be selecting the data and time of the event not the date and time of you recording it.

- Complete the text boxes with appropriate details.

- The **'Worker recording activity'** field will default in with your information but can be updated if required. This highlights who has recorded the information if there are multiple workers dealing with the case.

- Click the **Add** button to record an additional event, or click the **Add and close** button if only recording one event or when all events have been recorded

When events have been recorded the following icons are displayed:

 Edit – to edit/amend a line in the event table

 Delete – to delete/remove a line from the event table

 Move this row up – to rearrange the order of the events logged (only displays if more than one event is recorded)

Section 4. Completion Details

Defaults in with the name of the worker who started the step – this can be amended if needed.

Use the **date picker** icon to update the 'Date completed' field to the date the step is being finished (it defaults as the date the step is started).

Section 5. Next actions

Next actions are mandatory in all forms. At least one next action must be added before the **Adult Protection of Property** 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 (no further action) 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 Protection of Property Completed (NFA)	When all protection of property activity is completed, and the responsibility for the property has been returned to the person or their representative.	This is a terminating (no further action) action, so does not need to be assigned

Next Action	When to use	Who to assign to
Adult Protection of Property No Longer Required (NFA)	When no activity has taken place and the protection of property process is no longer necessary.	This is a terminating (no further action) action, so does not need to be assigned
Adult Protection of Property Returned Property (LPFT Mental Health Social Care Only)	**For use by LPFT only.** When the protection of property process is complete, with the exception of returning the property to the person or their representative.	Self using the **Assign to Me** button Or relevant LPFT team using 'Pass to team' dropdown menu

Toolbar Icons

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

As mentioned you may wish to complete one or more of the **Protection of Property** forms electronically (see **Protection of Property Optional Forms** for full details). You may also need to use one of the optional forms or letter templates available via the **Forms and letters** icon

Remember, you should use the **View documents** icon (0) to attach any handwritten protection of property forms (as described above)

You must also consider if you need to send a request available via the **Requests** icon .

Request	When to use	Who to assign to
Adult CoP Protection of Property storage	**For use by LCC only** When property is stored with the Court of Protection team, so the CoP worker can confirm receipt of the property	**Serco Court of Protection & Appointeeship Team** using the 'Pass to team' dropdown menu Or named CoP worker using the 'Pass to worker > Find button'

Request	When to use	Who to assign to
Adult Request for Purchase Order	**For use by LCC only** To request Business Support raise a purchase order – you must ensure all necessary details are recorded within the 'Note' field	Business Support (Adult Admin Team) using the 'Pass to team' dropdown menu
Adult Please review information and authorise	**For use by LPFT only** To request authorisation of payments.	LPFT manager using the 'Pass to worker > Find button'
Adult Please action	Can be used to invite the second person (witness) into the step to verify activity (where they are a Mosaic user)	The other worker using the 'Pass to worker > Find button'
Adult Please convene Best Interest meeting / send invitations	To be used to request the Safeguarding and Review team arrange a Best Interest Decision Making meeting and/or send out the meeting invitations The optional form **Adult Best Interest Meeting Invitation List** should be completed to provide sufficient information for admin to complete this request	**Adult Safeguarding – Meeting** using the 'Pass to worker' dropdown menu
Adult Best Interest meeting cancellation	To be used to request the Safeguarding and Review team cancel a Best Interest Decision Making meeting	**Adult Safeguarding – Meeting** using the 'Pass to worker' dropdown menu
Adult Best Interest meeting re-arrangement	To be used to request the Safeguarding and Review team re-arrange a Best Interest Decision Making meeting	**Adult Safeguarding – Meeting** using the 'Pass to worker' dropdown menu

Once the form is complete, all requests have been completed and the relevant next action added, finish the step by clicking the **Finish** icon ✅

Note the step cannot be finished if there are any incomplete mandatory fields or if there are any requests which need completing. If the **Finish** icon ✅ is clicked while there are outstanding mandatory sections, a system message will display explaining the form cannot be finished as "mandatory items" are outstanding.

You will find your finished form(s) in the **Documents** section – **Forms and letters** tab for the forms completed electronically and **Attachments** tab for any forms completed by hand and uploaded to the step.

Protection of Property Optional Forms

Remember the **Protection of Property** forms available in the **Forms and letters** icon 📧 of the **Adult Protection of Property** step are:

- Adult PoP Consent
- Adult PoP Inventory
- Adult PoP Risk Assessment
- Adult PoP Securing Property Checklist
- Adult PoP Witness Statement

Adult PoP Consent optional form

The person's name and the Protection of Property address will populate from the section 2 of the main **Protection of Property** form.

Remember, if the address of the property being protected is different from the person's current address, you should record this within the textbox in section 2 and save the main form (click the **Save** icon 💾) before opening any of the **Protection of Property** forms.

Select the radio button for the appropriate consent statement.

Depending on the consent statement selected the screen will expand with relevant subsections:

Consent Granted for Third Party

Use the **Find** button to search for the named person. The person's details will then populate into the form.

Remember 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

- accessing the third party's record

- editing the information on the **Person summary** screen (user guides on updating the person's details can be found on the **Mosaic Hub**)

- returning to the person's record (the one you are completing the Protection of Property for)

- maximising the workflow step window and clicking the **Refresh current form** icon to update the information in these fields

If the person does not have a Mosaic record and they should have one you can create them. Refer to the **Creating a Person** user guide for full details.

Only if the person does not have and should not have a Mosaic record, you can use the **Manual Input** button to record their details.

Consent Not Granted

A statement will appear absolving LCC and LPFT of responsibility for the person's property.

Best Interest Decision Maker

As per the on-screen prompt, the **Adult Mental Capacity Assessment** and the **Adult Best Interest Decision Making Checklist** forms are available as optional forms in the **Forms and letters** icon.

Note: Relevant requests relating to Best Interest are available in the **Requests** icon.

Use the **Find** button to search for the decision maker – remember to use the correct tab when searching.

If the decision maker is a **person**, remember 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

- accessing the decision maker's record

- editing the information on the **Person summary** screen (user guides on updating the person's details can be found on the **Mosaic Hub**)

- returning to the person's record (the one you are completing the Protection of Property for)

- maximising the workflow step window and clicking the **Refresh current form** icon to update the information in these fields

If the person does not have a Mosaic record and they should have one you can create them. Refer to the **Creating a Person** user guide for full details.

If the decision maker is a **worker** and they do not have a Mosaic record, but should have one, you should contact the Mosaic Helpdesk to request they are created

If the decision maker (person or worker) does not have and should not have a Mosaic record, you can use the **Manual Input** button to record their details.

Details of any other decision makers involved in the decision and whether the Lasting Power of Attorney is help jointly or severally should be recorded within the textbox provided

Use the **dropdown** list to confirm if the decision maker holds a Lasting Power of Attorney or deputyship order.

If Lasting Power of Attorney is held, and it is appropriate to do so, remember this information should also be recorded as a Legal status on the person's record. Refer to the **Legal status** user guide for further guidance

Confirmation of Consent

Use the **Find** button to search for the person who has consented to the Protection of Property being undertaken.

Explain how consent has been given and use the **date picker** icon to record the date that consent was decided.

Consent not sought

If you select the **Protection of Property is being carried out in the person's Best Interests (in line with the Mental Capacity Act)** radio button you will see a red message advising you to select the **'Acting in the Best Interests of the person named above'** consent type

If you select the **Following agreement with line manager** radio button you will need to record the line manager's details by using the **Find** button to search.

You will also need to record details in the mandatory textbox to explain why you are not seeking consent

If you select **Consent obtained via Third Party** a new subsection will open called **Consent obtained via Third Party.**

You will see a prompt - Please ensure there is a clear record of consent obtained / denied if acting on information via a Third Party. If insufficient record of this, practitioner completing Protection of Property will need to seek consent.

Use the **Find** button to record the 'Name of the Third Party confirming consent has been given e.g. AMHP, other professional

If the worker does not have a Mosaic record, but should have one, you should contact the Mosaic Helpdesk to request they are created.

Explain how consent was given or denied to the third party and use the **date picker** icon to record the date that consent was decided.

If consent was witnessed use the **Find** button to record the witness' details

If the worker does not have a Mosaic record, but should have one, you should contact the Mosaic Helpdesk to request they are created.

Practitioner's Details

Tick the **verification checkbox** to confirm that the information recorded in the form is accurate.

The supporting person should also verify the information.

Remember, if they are a Mosaic user, send them the **Adult Please action** request (available in the **Requests** icon) then click the **Save** icon and exit the step using the **Close** icon

The supporting person can then resume the step and tick the supporting person's **verification checkbox** within the form

If the supporting person does not have a current Mosaic account, use the **Manual Input** button to record their details within the form. The person will need to complete the **Witness Statement** by hand and you should then upload it to the step using the **View documents** icon (0) (as described above)

Adult PoP Inventory optional form

Section 1. Person and Property Details

Remember 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 (user 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

You may need manually to amend the information captured in **Access details**.

You should use the **Find** button to record the practitioner's details and the supporting person's details.

Remember if the supporting person does not have a current Mosaic account, use the **Manual Input** button to record their details. The person will need to complete the **Witness Statement** by hand and you should then upload it to the step using the **View documents** icon 📎 (0) (as described above)

Section 2. Inventory Details

Most of this section is recorded in tables.

Click the **Add** button to record the information in each table.

Where available, click on the **Show guidance** icon ❓ to see guidance related to each part of the table.

Click the **Add** button to record an additional row in the table, or click the **Add and close** button if only recording one row or when all rows have been recorded

When rows have been recorded the following icons are displayed:

🖊 **Edit** – to edit/amend a row in the table

🗑 **Delete** – to delete/remove a row from the table

📑 **Move this row up** – to rearrange the order of the rows recorded (only displays if more than one row is recorded)

Complete all textboxes, dropdown menus and date fields / date and time fields within the section as appropriate.

Tick the **verification checkbox** to confirm that the information recorded in the Inventory form is accurate.

The supporting person should also verify the information.

Remember, if they are a Mosaic user, send them the **Adult Please action** request (available in the **Requests** icon 📋) then click the **Save** icon 💾 and exit the step using the **Close** icon ❌

The supporting person can then resume the step and tick the supporting person's **verification checkbox** within the form

If the supporting person does not have a current Mosaic account, use the **Manual Input** button to record their details within the form. The person will need to complete the **Witness Statement** by hand and you should then upload it to the step using the **View documents** icon 📎 (0) (as described above)

Section 3. Property Storage

You should detail which property has been stored in which location (e.g. bank, office safe, offsite storage). You should also include contact details for each location.

Tick the **verification checkbox** to confirm that the property location information is accurate.

The supporting person should also verify the information.

Remember, if they are a Mosaic user, send them the **Adult Please action** request (available in the **Requests** icon 📋) then click the **Save** icon 💾 and exit the step using the **Close** icon ❌

The supporting person can then resume the step and tick the supporting person's **verification checkbox** within the form

If the supporting person does not have a current Mosaic account, use the **Manual Input** button to record their details within the form. The person will need to complete the **Witness Statement** by hand and you should then upload it to the step using the **View documents** icon 📎 (0) (as described above)

Property Stored with Court of Protection Team (LCC only)

Note: LPFT colleagues cannot see this subsection because you do not store property with the LCC Court of Protection team.

If you have stored property with the Court of Protection team, you will need to state the date that property was stored with and collected from the team using the **date picker** icon 📅.

Send the **Adult CoP Protection of Property storage** request (available in the **Requests** icon) to the Court of Protection team or worker so they can resume the step and verify that they have received property.

Property Returned

Record details of who the property has been returned to and the date the property was returned.

If property is going to different locations, use the **Insert Section** button duplicate the subsection and record details of which property is being returned to each location.

Tick the **verification checkbox** to confirm that the property returned information is accurate.

The supporting person should also verify the information.

Remember, if they are a Mosaic user, send them the **Adult Please action** request (available in the **Requests** icon) then click the **Save** icon and exit the step using the **Close** icon

The supporting person can then resume the step and tick the supporting person's **verification checkbox** within the form

If the supporting person does not have a current Mosaic account, use the **Manual Input** button to record their details within the form. The person will need to complete the **Witness Statement** by hand and you should then upload it to the step using the **View documents** icon (as described above)

> **LPFT only**
>
> You may finish the **Protection of Property** step before property is returned.
>
> You should complete the **Storage** subsection of the **Inventory** form and add the **Adult Protection of Property Returned Property (LPFT Only)** next action in section 5 of the main form before finishing the step.

Adult PoP Risk Assessment optional form

The person's name and the protection of property address will populate from the section 2 of the main **Protection of Property** form.

Remember, if the address of the property being protected is different from the person's current address, you should record this within the textbox in section 2 and save the main form (click the **Save** icon 💾) before opening any of the **Protection of Property** forms.

Tick the **checkbox** for each type of hazard or risk relevant to the Protection of Property.

For each hazard selected you should record **Details of risk and risk reduction.**

When you click into the **Details of risk and risk reduction** box to record the details, guidance and relevant information will regarding that hazard type will display.

Use the **Find** button to enter your worker details and use the **date picker** icon 📅 to record the date that the risks were assessed.

If you return to the property, you can complete another risk assessment by clicking the **Insert Section** button and repeating the process outlined above.

Adult PoP Securing Property Checklist optional form

Use the **dropdown** values to state whether each element of securing that property has been completed or if it isn't applicable.

You can record any additional information about securing the property, if relevant.

Tick the **verification checkbox** to confirm that the information recorded in the Securing Property Checklist form is accurate.

The supporting person should also verify the information.

Remember, if they are a Mosaic user, send them the **Adult Please action** request (available in the **Requests** icon 📋) then click the **Save** icon 💾 and exit the step using the **Close** icon ❌

The supporting person can then resume the step and tick the supporting person's **verification checkbox** within the form

If the supporting person does not have a current Mosaic account, use the **Manual Input** button to record their details within the form. The person will need to complete the **Witness Statement** by hand and you should then upload it to the step using the **View documents** icon (as described above)

Adult PoP Witness Statement optional form (LPFT only)

This form is for LPFT only, as LCC practitioners should usually work with a Mosaic user when protecting a property.

The form is for non-Mosaic users who have witnessed all or some of the protection of property process, it is available in both the **Protection of Property** and the **Protection of Property Returned Property** steps.

The form must be handwritten - print the form without adding any additional information.

- Click the **Output current document** icon

- Select the **Output for written completion (empty textareas are expanded)** checkbox

- Click the **Output to PDF** button

For further guidance, refer to the **Printing Documents** user guide.

The supporting person can then complete the relevant sections of the printed copy and add additional details if necessary.

The supporting person should add their name, signature, and the date they completed the form and then upload the completed form to the step:

- Click the **View documents** icon

- Click **Attach a document**

- Click the **Choose File** button and locate the document on your computer

- If needed amend the **File as** field

- **Main Category** = select **AC Legal**

- **Sub-category** = select **Protection of Property**

- Click the **Add** button and then click the **OK** button – you should see the number in brackets by the **View documents** icon increase

If needed, refer to the **Uploading Documents** user guide for further guidance

> As per the on-screen warning message, once the form has been uploaded, you will need to delete the original optional form using the **dustbin** icon before you can finish the step.

LPFT only - Protection of Property Returned Property step

> This **Adult Protection of Property Returned Property** step is for LPFT only. LCC practitioners should complete all protection of property activity before completing the **Protection of Property** step.

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 Protection of Property Returned Property** will open in a separate window.

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 or 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.

> You should refer to the **Adult PoP Inventory** form when completing this step.
>
> You can open the **Adult PoP Inventory** form from the **Adult Protection of Property** summary screen or from within the **Documents** section > **Forms and letters** tab (if completed electronically) or **Attachments** tab (if completed by hand) and keep it open whilst working on this step.

Section 1. Returned Property

The person's name, the protection of property address and where the property has been stored will populate from the **Protection of Property** step.

If property has moved whilst in the care of LPFT, the new details should be recorded in the **Where has property been stored** box.

Property Returned

Record details of who the property has been returned to and the date the property was returned.

If property is going to different locations, use the **Insert Section** button duplicate the subsection and record details of which property is being returned to each location.

Tick the **verification checkbox** to confirm that the property returned information is accurate.

The supporting person should also verify the information.

Remember, if they are a Mosaic user, send them the **Adult Please action** request (available in the **Requests** icon 📋) then click the **Save** icon 💾 and exit the step using the **Close** icon ❌

The supporting person can then resume the step and tick the supporting person's **verification checkbox** within the form

If the supporting person does not have a current Mosaic account, use the **Manual Input** button to record their details within the form. The person will need to complete the **Witness Statement** (available in the **Forms and letters** icon) by hand and you should then upload it to the step using the **View documents** icon

- Click the **View documents** icon

- Click **Attach a document**

- Click the **Choose File** button and locate the document on your computer

- If needed amend the **File as** field

- **Main Category** = select **AC Legal**

- **Sub-category** = select **Protection of Property**

- Click the **Add** button and then click the **OK** button – you should see the number in brackets by the **View documents** icon increase

Refer to the **Uploading Documents** user guide for further instructions if needed.

Section 2. Next actions

Click the **Add** button and record the **Adult Protection of Property Completed (NFA)** next action.

Finish the step by clicking the **Finish** icon

Note the step cannot be finished if there are any incomplete mandatory fields or if there are any requests which need completing. If the **Finish** icon is clicked while there are outstanding mandatory sections, a system message will display explaining the form cannot be finished as "mandatory items" are outstanding.

You will find your finished form(s) in the **Documents** section – **Forms and letters** tab for the forms completed electronically and **Attachments** tab for any forms completed by hand and uploaded to the step.