Adults Quick Guide

Wellbeing Service – SADL Service

The Trusted Assessor will complete the **WB Trusted Assessment and Support Planning** step which, when someone requires simple aids for daily living (equipment), will prompt them to complete the **WB SADL Referral** form and assign a next action of **WB Referral to SADL** to the **Wellbeing SADL Service**.

The ability to refer to the SADL Service is also available for the Generic Support Officer in the **WB Support Action Plan Delivery** step – they will completed the same form (**WB SADL Referral**) and assign the same next action (**WB Referral to SADL**) to the **Wellbeing SADL Service**.

This action can be 'sent immediately' from the **WB Trusted Assessment and Support Planning** and **WB Support Action Plan Delivery** steps which will allow the equipment to be ordered while the Trusted Assessor/Generic Support Officer is still working on the assessment/action plan.

It will appear as **WB SADL Service** in Current work.

To start a case

The **WB SADL Service** step will appear as **Incoming work** for the Wellbeing SADL Service.

- 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

- In the **Current work** section - access the **Incoming work** folder

Please note: You can use the header filters to sort by person's name, priority or date if needed

- 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

> It is important to note if the WB SADL Service step is still assigned to the team you will see a popup window – click **'Yes'** to continue into the step.

The **WB SADL Service** will open in a separate window

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

WB SADL Service

Complete the form. Some information will pull through from the **WB SADL Referral** form.

Clicking the **Section completed** checkbox at the end of each section puts 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 forms.

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.

Fields marked with the **yellow cog** symbol will prepopulate but can be edited within the form where required. For best practice, wherever possible, these should be treated as a **blue cog**

Fields with a **blue cog** are prepopulated from the person's record and cannot be edited within the form. To correct information or add missing information:

- Click the **Show subject summary** icon to minimise the workflow step window

- Edit the information on the **Person summary** screen (refer to the relevant user guides on the **Mosaic Hub** to assist you in updating information)

- Maximise the workflow step window and then click the **Refresh current form** icon to update the prepopulated information.

The **Next actions** section is always the last section of a form and is where next actions are recorded. At least one next action must be recorded before a workflow step can be finished.

Next actions are how we show what will happen next and who will do it.

You will be prompted to add certain actions based on the answers to the questions within the form.

To record a next action:

- Click the **Add** button

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

WB SADL Service Installation Complete (NFA) – To be used when supply and/or installation has been completed. This is a 'no further action' action and so does not need assigning

Or

WB SADL Installation Abandoned (NFA) – To be used if supply/installation is abandoned e.g. person declines or dies. This is a 'no further action' action and so does not need assigning

- Click the **Add and close** button – this will close the popup window

Toolbar Icons

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

You should use the **View documents** icon to attach relevant supporting documents created outside of Mosaic. See the **Uploading Documents** user guide for full details.

The **Requests** icon contains requests that you can send to a team or named worker.

- o **Requests** require a response – you will not be able to finish the workflow step until the team/worker responds and completes the request.

- o **Notifications** are purely for information – you will be able to finish the workflow step without a response.

Refer to the **Requests and Notifications** user guide for details on how to send a request or notification.

The following are available from the **Requests** icon :

- **WB Please action** - Request found in all workflow steps. To be used as and when required and so can be assigned as appropriate

- **WB Additional information required** – Request to be used to ask for more information from the Trusted Assessor/Generic Support Officer. To be assigned to the Trusted Assessor/Generic Support Officer using the 'Find' button against 'Pass to Worker'

- **WB SADL involvement ended –** Notification used to inform the referring working that SADL involvement is complete. To be sent to the referring Trusted Assessor/Generic Support Officer using the 'Find' button against 'Pass to Worker'

Clicking the **Finish** icon will finish (lock down) your workflow step. Workflow steps cannot be finished if there are any incomplete mandatory fields or if there are any requests which need completing. Once the **Finish** icon can be clicked no further input can be made and the next action(s) will send, appearing as new 'Incoming work' to be completed.

You will find all finished forms completed within your steps in the **Documents** section. Only finished versions of the forms should be shared. A PDF version of your finished form should therefore be generated from the **Documents** section. For further guidance, please refer to the **Printing Documents** user guide.