Closing a Case to the Fostering Team

All workflows on Mosaic need closing with a closure workstep to end the recording officially for reporting purposes. Depending on where in the process the clients are, the closure for the Fostering workflow is either Prospective Carer Process End or Approved Carer Case Closure. These steps would be used for Connected Persons and Foster Carer workflows. SGO and Private Fostering workflows end with a no further action workstep, and no closure step is required.

For a Prospective Foster Carer/Connected Persons carer, the Prospective Carer Process End can be added as a next action from:
- Fostering Panel, Carer Approval Decision
- Prospective Foster Carer Visit and Reg of Interest
- Prospective Foster Carer Stage One Assessment
- Prospective Foster Carer Stage Two Assessment

For an Approved Foster Carer/Connected Persons carer, the Approved Carer Case Closure can be added as a next action from:
- Fostering Panel, Carer Approval Decision
- Approved Foster Carer Visit
- Approved Foster Carer Review

Checklist

This is a checklist to be used as a reminder of the actions which need completing when closing a case.
- Adding a File Retention date – Supervising Social Worker
- Completing the Closure workstep – Supervising Social Worker/Practice Supervisor
- Ending any Care Packages – Supervising Social Worker/Practice Supervisor
- Cancelling outstanding worksteps – Practice Supervisor
- Ending a Service User Group – Practice Supervisor
- Ending a Worker relationship – Practice Supervisor
- Ending an Organisation relationship – Practice Supervisor

Adding a File Retention date

A File retention date indicates how long the Mosaic record and any paper files associated with this person should be kept before being destroyed or deleted.
If work has previously been completed with the adult, they may already have a file retention date recorded. This will be displayed on the Person summary screen for that person's record:

File retention

Retain until 24/03/2042

Please Note: Any pre-existing File retention recorded will need to be checked to ensure that the end date covers the retention requirements for your service. If they are not the existing File retention will need to be extended, a File retention cannot be decreased.

The File retention will need adding to the client's individually. To add a Retention date, select **File management > File retention** from the left-hand menu on the Person summary Screen.

The most used criteria for Fostering are:
- **CS Fostering Services: Approved Foster Carer (CFS.1.4)** – For approved Foster Carer or Connected Person Carers – This is 20 years from the retention date
- **CS Fostering Services: Carer Withdrawn / Not Approved (CFS.1.5)** – For prospective carers that withdrew, were not approved or those who were granted an SGO prior to panel – This is 6 years from the retention date

Once a retention has been selected, the **Retention start date** to be added will be the date that the case is closing.

File retention data - Mrs Clarissa Carer **(3549740)** born 12 Dec 1984 (38 years old)

Fields marked with a * are required

File retention criteria *   CS Fostering Services: Approved Foster Carer (CFS.1.4)

File retention rule   File to be retained for 20 years from retention start date

Instructions:

You will be required to enter the retention start date.
The system will calculate the retain until date.

Retention start date *   10/08/2023

Retain until date *   10/08/2043

Notes

Save   Cancel

Upon completion, press **Save** to add the **Retention date** or press **Cancel** to close the form without saving.

The Retention date needs adding prior to completing the Case Closure workstep. The File retention date pulls through to a mandatory field and the workstep cannot be finished without this information being recorded.

Prospective Carer Process End

The Prospective Carer Process End is to be started by the Supervising Social Worker. They are to complete Section 1 and 2 outlining why the case is closing.

Once complete, the worker will use the requests icon 📋 and select **CS Manager: Please review and authorise** to ask their manager to authorise the closure. The worker will find their manager, click **OK** and **Save** the workstep to send the request.

The worker can finally open Section 3. Next actions, click on **Add** and select **SC Prospective Carer Process Has Ended (NFA)**. As this is a no further action action, it does not need allocating to anyone and **Add and close** can be used. The worker can then save and close out of the workstep for the manager to be able to enter and authorise the closure.

The manager will receive an **Incoming request** in their Full/Narrow workview.

📁	Incoming requests (5)			
🗃	👥 Carer Carer (3492485)	CS Manager: Please review and authorise:SC Prospective Carer Process End	📄	10 Aug 2023

They can **resume** the step and read through the contents of Section 1 and 2.

The manager can complete **Section 3. Manager's Authorisation** which contains a checklist to confirm they have completed the closure tasks and closure questions.

They can then use the requests icon 📋 and click on the red request with their name next to it. They can then mark the sent request as **Completed**.

The workstep can then be finished using the finish icon ✅.

Approved Carer Case Closure

The Approved Carer Case Closure is to be started by the Supervising Social Worker. They are to complete Section 1 and 2 outlining why the case is closing.

Once complete, the worker will use the requests icon 📋 and select **CS Manager: Please review and authorise** to ask their manager to authorise the closure. The worker will find their manager, click **OK** and **Save** the workstep to send the request.

The worker can finally open Section 3. Next actions, click on **Add**, select **SC Carer Case Closed (NFA)** and click **Add and close**. Also on the **Select action** dropdown is **CS End Existing Social Care Services/Care Package**. This can be used to end any ongoing payments that are still open for the carer(s). It will need adding against the carer the payment is ongoing for. This would be assigned to the Supervising Social Worker to complete and is a send immediately action so can be sent whilst the closure is still open. This would only be added if there was any ongoing payments that needed ending and hadn't been ended previously.

The worker can then save and close out of the workstep for the manager to be able to enter and authorise the closure.

The manager will receive an **Incoming request** in their Full/Narrow workview.

📁	Incoming requests (5)			
🗃	👥 Carer Carer (3492485)	CS Manager: Please review and authorise:SC Approved Carer Case Closure	📄	10 Aug 2023

They can **resume** the step and read through the contents of Section 1 and 2.

The manager can complete **Section 3. Manager's Authorisation** which contains a checklist to confirm they have completed the closure tasks and closure questions.

They can then use the requests icon and click on the red request with their name next to it. They can then mark the sent request as **Completed**.

The workstep can then be finished using the finish icon .

End Purchased Service Request

As the End Purchased Service Request is a send immediately next action, the step will appear in the worker's Incoming work once the Case Closure has been saved. The Supervising Social Worker must complete the End Purchased Service Request detailing the service that needs to end.

Section 1 is used to record the specific service that needs to be ended and the end date, as well as any additional details relating to the purchase.

The mandatory request will need authorising by their manager using the Request icon . The next action of **CS End Purchase Service Admin** would be added and the Pass to worker dropdown used to assign to the Children's Placements - Inbox.

Cancelling outstanding worksteps

Practice Supervisors and Managers can cancel steps which are no longer required that are Incoming or Future work. Any Incomplete work will need finishing if they are needed, or a Mosaic request should be completed to ask for the step to be deleted. Some worksteps have a next action available of No Further Action so where closure is planned this can be used.

The manager will be able to see any outstanding worksteps by looking at the **Current work** section on the **Person summary or Group Details** screen.

The manager must access the **Current work** of the Supervising Social Worker through the **Team workview**.

They can hover the cursor over the symbol on the far left of the workstep to be cancelled and it will turn into Open actions menu (cog) icon 🛠️. Click this symbol to display a list of options, with **Cancel work** at the bottom. Selecting **Cancel work** displays the Cancel window.

Select a **Reason** for cancelling the workstep from the options in the dropdown menu and, if appropriate, add a **Note** in the text field beneath. Pressing **OK** cancels the workstep and pressing **Cancel** closes the window without cancelling the workstep.

Once a workstep is cancelled it will no longer appear on the person's **Current work** section of their Person summary screen or on the worker's Worklist.

Ending a Service User Group

When you are closing a case, you must end any Service user groups that have been added specifically for your service and that are no longer relevant. To end a Service user group, click on **Person details > Service user groups** from left-hand side bar menu on the Person summary. The Service user group summary screen displays.

Click the 🟥 end button on the right-hand side of the Service User Group you wish to end. The **End Service User Group** screen displays.

Add the date of case closure or the date the User Group was no longer relevant into the **End Date** field. Press **Save** to add the changes you've made into the Service User Group table and return you to the **Service User Group** summary screen. You must press **Save** again on the summary page to lock in the changes and then you will return to the Person summary page. To return to the **Service User Group** summary screen without saving any changes, press **Cancel** and **Cancel** again to take you to the Person summary.

Ending Worker and Organisational Relationship

When you are closing a case, you must end any Worker and Organisational relationships that are no longer relevant. This can be done from either the **Group summary** screen or **Person summary** screen. The advantage of using the Group summary screen is that multiple relationships can be added or ended at once. If a group record exists it will display under the **Carer** heading.

Click on the hyperlink to open the **Group summary** screen.

All Worker and Organisational relationships display here. Clicking on the ▷ open icon will expand the list to display the group members that are allocated to the Key Worker. If all those listed are being closed, click on the End icon 🟥 to open the End relationship screen.

Record an **End date** and **End reason**. Click **OK** to save the changes, click **Cancel** to exit the screen without saving.

The above steps can be repeated to end the **Organisational relationship** for the team.

If the carer was individual, the relationships will need ending within the **Person summary** screen.

To end a Worker/Organisational relationship, click on **Person details > Worker relationships or Organisational relationships** from left-hand side bar menu on the Person summary screen. The relationships summary screen displays.
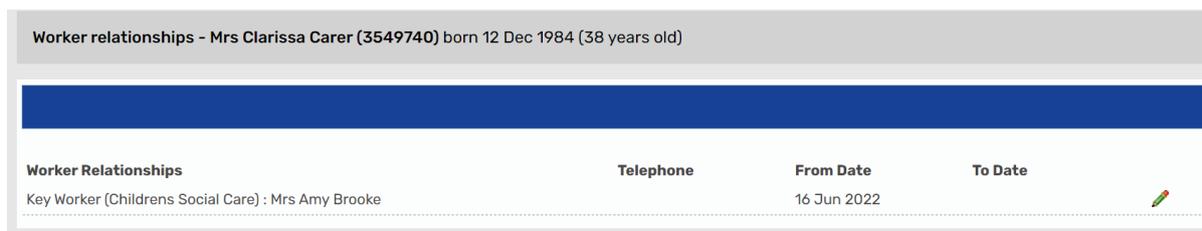
Worker Relationships	Telephone	From Date	To Date	
Key Worker (Childrens Social Care) : Mrs Amy Brooke		16 Jun 2022		✎

Worker relationships - Mrs Clarissa Carer (3549740) born 12 Dec 1984 (38 years old)

Click the ✎ edit button at the end of the row of the relationship you need to end. The **Amend relationship** screen displays.

Add the date the relationship ended in the **To date** field and then select an appropriate reason from the **End reason** menu. Press **Save** to save the changes and return to the **relationship** summary screen. To return to the **relationship** summary screen without saving changes, press **Cancel**.