

Adults Quick Guide

Adult Day Opportunities Process

This guide is intended to support Team Leaders, Assistant Team Leaders and Support Workers in the Adults Day Opportunities (Day Ops) Service.

There is a **Day Opportunities Management** team and a number of **Day Centre** teams – one for each day centre e.g. the **Day Opportunities Lincoln** team.

Team Leaders and Assistant Team Leaders are members of the **Day Opportunities Management** team and Support Workers are members of the **Day Centre** team where they are based.

The guide covers the following information and tasks to complete in Mosaic:

- [Day Opportunities Workflow](#)
- [Team workview – including screening and accessing a case](#)
- [Starting and Resuming work](#)
- [Recording workflow steps \(including tips for completing, actions taken and toolbar icons\)](#)
- [Worker and Organisational Relationships \(adding and ending\)](#)
- [Incomplete work](#)
- [Incoming requests – Managing requests and notifications](#)

Day Opportunities Workflow

The Day Opportunities (Day Ops) workflow always starts with an **Adult Referral to In House Day Services** step and ends with the next action **Adult Day Ops End Involvement (NFA)**.

Many details within this workflow will prepopulate (pull forward) from each workflow step to the next. You should review and update the information to reflect the person's current situation in each step.

The workflow steps available within the Day Ops workflow are:

Workflow Step	Who uses the Step and when
Adult Referral to In House Day Services	<p>Adult Learning Disabilities (LD) Practitioner</p> <p>Via the Start sidebar menu when they wish to refer the person to the Day Ops Service</p>
Adult Day Ops How Can We Help You	<p>Team Leaders and Assistant Team Leaders only.</p> <p>It is a next action from the referral step and is used to record whether a referral is accepted or not.</p>
Adult Day Ops Getting to Know You*	<p>Team Leaders and Assistant Team Leaders only.</p> <p>It is a next action from the How Can We Help You step and can be sent immediately so it can be completed before the step is finished.</p> <p>It is used to record details of the initial assessment of the person to determine whether the referral should be accepted or not.</p>
Adult Day Ops Getting to Know You Better	<p>Assistant Team Leaders or Support Worker (Day Ops Key Worker) where required initially.</p> <p>Usually Support Worker (Day Ops Key Worker) for subsequent (annual) recording.</p> <p>It is a next action from the Getting to Know You step for the initial step and the Getting to Know You Better step for subsequent recording.</p> <p>It is used to record further details about the person and to review the person annually.</p>



Workflow Step	Who uses the Step and when
<p>Adult Day Ops Daily Recording*</p>	<p>Support Worker (Day Ops Key Worker)</p> <p>Can also be updated by the Assistant Team Leaders and other Support Workers where required.</p> <p>It is a next action from the Getting to Know You step and the Daily Recording step for subsequent recording. It can be sent immediately from the Getting to Know You step so it can be started before the step is finished.</p> <p>It remains open for one calendar month and should be updated daily for each day the person attends the day centre.</p> <p>A Daily Recording should always be open on the person's record while they are open to the Day Ops Service.</p>
<p>Adult Day Ops Risk Assessment</p>	<p>Support Worker (Day Ops Key Worker) or Assistant Team Leader where required.</p> <p>It is a next action from the Getting to Know You, Getting to Know You Better and the Risk Assessment steps for subsequent recording. It can be sent immediately from the Getting to Know You and Getting to Know You Better steps so it can be started before the step is finished.</p> <p>It is used to detail any risks and should be reviewed and completed at least annually but as and when required.</p> <p>Where risks are present, a Risk Assessment should be scheduled on the person's record while they are open to the Day Ops Service.</p>
<p>Adult Day Ops Communication Passport</p>	<p>Support Worker (Day Ops Key Worker) or Assistant Team Leader where required.</p> <p>It is a next action from the Getting to Know You and the Communication Passport steps for subsequent recording. It can be sent immediately from the Getting to Know You step so it can be started before the step is finished.</p> <p>It is used where a person has specific communication needs and should be reviewed at least annually but as and when required.</p> <p>A Communication Passport will often be scheduled on the person's record while they are open to the Day Ops Service.</p>

*Optional forms are available from these steps – please see [optional forms table](#)

Team workview

Adult Day Ops How Can We Help You step will be sent (assigned) to the **Day Opportunities Management** team to be started by the Team Leaders or Assistant Team Leaders where needed.

The **Adult Day Ops Getting to Know You** step should be sent (assigned) to the relevant Day Centre Assistant Team Leader.

The **Team workview** is accessed by clicking the **Show team workview** icon  in **Full** or **Narrow workview** (When you are in **Team workview**, the icon will change to the **Show individual workview** icon .

The Team workview consists of two sections – **Team summary** and **Current work**. Each section can be opened or closed by clicking on it.

- **Team summary** - will display a list of all the sub teams (Day Centres) and the team members (Team Leaders and Assistant Team Leaders) when in the Day Opportunities Management team and Support Workers when in the Day Centre teams.

You will be able to click on the relevant team / worker **hyperlink** to view their Current work where needed and then click the **Team name** button at the top of the screen (top left) to return to the Team workview.

For each team, sub team and worker the **Team summary** will list number of allocations (only relevant for Support Workers) and workload – how many incoming, incomplete and future work each team/worker has assigned to them. This information may assist Assistant Team Leaders when allocating cases to Support Workers.


- **Current work** – will display the new cases (workflow steps) in the **Incoming work** folder ready for screening



Please note: It is highly recommended you access the person's record to screen the case before starting any workflow steps

To access and screen a case:

Ensure you are viewing the main team and have not drilled down to a sub team or team member. (Remember you should click the **Team name** button at the top of the screen (top left) to return to the Team workview if you are currently viewing a sub team (Day Ops Centre) or a team member).

- If needed, open the **Current work** section
- Open/look at the **Incoming work** folder
- Click the **person's name** to access their record (**Person summary** screen)

Please note: Mosaic will change the display to **Narrow workview** if you were previously in Full workview – you may wish to change to **Closed workview** if you want a full screen view of the record by clicking the **Show closed workview** icon 

- Use the **Documents** section in the sidebar menu to review the Adult In House Day Service Referral, relevant Adult Care forms e.g. Adult Care and Support Plan and any historic Day Ops workflow steps / forms
- You can also use the **Workflow map**  and **Work history**  sections (accessed via the buttons located on Current work) to view work previously completed on the person's record
- Remember to review the information on the **Person summary** screen too i.e. Current communication needs, Notes (warnings in red at the top of the screen and general in the bottom right) etc

See the relevant **user guides** for full details on these screens and areas of the record.

Starting and Resuming work


Regardless of whether a workflow step is assigned to a team or worker it is recommended you access the person's record before starting or resuming a workflow step. This allows you to review the person's record and read any important information such as **Notes** (warnings and general notes) and **Current communication needs** on their record.

From your / the team's **Current work** section in **Full** or **Narrow workview**, click the **person's name** to access their record (**Person summary** screen).

To start a workflow step:

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

If the workflow step is still assigned to the team you will see a popup window – click '**Yes**' to continue into the step.

Mosaic will automatically assign the step to you (it will be in your **Incomplete work** folder) the first time you click the **Save** icon 

To resume a workflow step:


- Click the **Incomplete work** icon  within **Current work** on the **Person summary** screen
- Click **Resume work** from the menu

The workflow step you are starting / resuming will always open in a separate window.


Recording workflow steps


Within the Day Ops workflow most information will pull through from the previous step completed. This information should be reviewed and can be edited if needed without amending the information recorded in the previous workflow step.



Tips for completing



Clicking on the **Show guidance** icon  will give you additional information to assist in answering the associated question.

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.

Information will prepopulate into the fields marked with the **blue cog** . 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 then clicking the **Refresh current form** icon  to update the information in these fields

Fields marked with the **yellow cog**  will prepopulate but can be edited within the form where required, but for best practice the person's record should be updated as per the **blue cog**  guidance above.

Use the **Find** button to record details about people, workers and organisations (varies depending on which workflow step you are in and what the field is asking for).

Important: The '**Manual Input**' button / tab should only be used as a last resort:

- If a person is not known in Mosaic they should be created. To avoid duplicate records, you should always search using at least 3 different search criteria before creating them. See the **Creating a Person** user guide for full details.
- If a worker (professional) or Organisation is not known in Mosaic, or their details are incorrect, you must complete the **Create / Change Professional** or **Create / Change Organisation** form via Our Intranet > Mosaic Requests to request they are created or updated.

Use the **Insert Section** button to duplicate fields to record multiple entries where needed.

The **Move Section Up** and **Delete Section** buttons will display if the **Insert Section** button has been used:


- The **Delete Section** button should be used if you do not need to use the extra section (if you've clicked the **Insert Section** button too many times)
- The **Move Section Up** button can be used to rearrange the order of the sections if needed

Use the **Add** button to record details to a table. In the popup window click the **Add** button to add a row and then refresh the window to add another row, click the **Add and close** button to add a row and close the popup window and click the **Close** button to close the popup window without add any rows.

When rows have been added the following icons are displayed:

 **Edit** – to edit/amend a row

 **Delete** – to delete/remove a row

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

Use the **date and time picker** icon  to record date and time details.


Use the **date picker** icon  to record date details.

Next actions section

Next actions are mandatory in all forms. At least one must be recorded before a workflow step can be finished.

To record a next action:

- Click the **Add** button
- Select the relevant action from the '**Select action**' dropdown menu
- Always tick the '**Send Immediately?**' checkbox when available e.g. when adding Getting to Know You from the How Can We Help You step (only available for certain actions)

- **Scheduled date** = Use the **date picker** icon  to amend where needed (only available for certain actions)
- **Assign to** = Select/Find as appropriate. Not required for NFA (no further action) actions
- **Notes** = record any necessary information. Usually needed when assigning the action to another team or worker
- **Priority** = select 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


As well as the next actions (Day Ops steps) listed in the table above there are also two additional NFA actions available within the Day Ops workflow:

- **Adult No Further Action Required** – available from the Adults Referral to In House Day Service (Recorded by the Adult Learning Disabilities Practitioner)
- **Adult Day Ops End Involvement (NFA)** – available from all other Day Ops workflow steps

These actions do not need assigning as they do not generate a new workflow step, they just highlight the fact the workflow ends at that point.

Toolbar Icons

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

You may need to use the **View documents** icon  to attach (upload) external documents to the workflow step e.g. a Positive Behaviour Support Plan in the Adult Day Ops Getting to Know You Better step.

To upload a document:

- Click the **Choose File** button and find the document you need to upload.
- Remember to rename the document to something relevant if needed e.g. Positive Behaviour Support Plan (date completed)

- Select the relevant category and sub category based on the type of document you are uploading.


The Day Ops workflow steps and forms are automatically categorised as follows:

Form / Step	Main Category	Sub Category
Day Ops How Can We Help You	AC Day Opportunities	Referral and Assessment
Day Ops Getting to Know You	AC Day Opportunities	Planning and Review
Day Ops Getting to Know You Better	AC Day Opportunities	Planning and Review
Day Ops Daily Recording	AC Day Opportunities	Monitoring
Day Ops Risk Assessment	AC Day Opportunities	Referral and Assessment
Day Ops Communication Passport	AC Day Opportunities	Planning and Review
Day Ops Significant Event Log	AC Day Opportunities	Alert
Day Ops Essential Information	AC Day Opportunities	Alert
Day Ops One Page Profile	AC Day Opportunities	Alert

- Click **Add** and then **OK**


You can refer to the **Uploading Documents** user guide if you require further details of this process.

You may need to complete one or more of the optional forms available via the **Forms and letters**

icon  - this icon is only visible in the steps where there are optional forms available to complete.

The **optional forms** that are available in the Day Ops workflow are:

Form name	Which Step it is available in	When to use it
Adult Day Ops One Page Profile	Adult Day Ops Getting to Know You	For every case
Adult Day Ops Essential Information	Adult Day Ops Daily Recording	Each calendar month when a new Daily Recording step is opened
Adult Day Ops Significant Event Log	Adult Day Ops Daily Recording	When a significant event needs logging

You may need to send a request or notification using the **Requests** icon 

The requests and notifications that are available in the Day Ops workflow are:

Requests (R) / Notifications (N)	Steps available in	When to use and where to assign to
(N) Adult Day Ops Referral accepted	How Can We Help You	To be sent to the referring LD practitioner when a referral is accepted Assigned to referring LD practitioner via Pass to worker > Find button
(N) Adult Day Ops Referral declined	How Can We Help You	To be sent to the referring LD practitioner when a referral is declined Assigned to referring LD practitioner via Pass to worker > Find button

Requests (R) / Notifications (N)	Steps available in	When to use and where to assign to
(N) Adult Day Ops Referral deferred	How Can We Help You	<p>To be sent to the referring LD practitioner when a referral is deferred</p> <p>Assigned to referring LD practitioner via Pass to worker > Find button</p> <p>Note: Should be followed up with either the 'accepted' or 'declined' notification once a decision is made</p>
(N) Adult Day Ops Discussion with manager	How Can We Help You, Getting to Know You	<p>To be used to notify a manager that a discussion is required (discussion takes place outside of Mosaic)</p> <p>Assigned to relevant manager via Pass to worker > Find button</p>
(N) Adult Day Ops Initial review planned	Getting to Know You	<p>To be used to inform the referring LD practitioner when the initial review is planned for</p> <p>Assigned to referring LD practitioner via Pass to worker > Find button</p>
(N) Adult Day Ops Information for practitioner	Getting to Know You	<p>To be used to notify the referring LD practitioner of important or useful information.</p> <p>Assigned to referring LD practitioner via Pass to worker > Find button</p>
(R) Adult Day Ops Conversation required	Getting to Know You	<p>To be used to alert another worker when a conversation is needed</p> <p>Assigned to relevant worker via Pass to worker > Find button</p>
(R) Adult Day Ops Please review and authorise	Getting to Know You Better, Risk Assessment	<p>Optional authorisation request</p> <p>To be used as and where required</p> <p>Assigned to relevant manager via Pass to worker > Find button</p>

Requests (R) / Notifications (N)	Steps available in	When to use and where to assign to
(N) Adult Day Ops Next review date	Getting to Know You Better	Usually used to inform the referring LD practitioner when the next review is planned for Assigned to referring LD practitioner via Pass to worker > Find button
(R) Adult Day Ops Additional information required	Getting to Know You Better	To be used to request additional information from another worker Assigned to relevant worker via Pass to worker > Find button
(N) Adult Day Ops For manager's attention	Daily Recording	To be used to flag information to a manager Assigned to relevant manager via Pass to worker > Find button
(N) Adult Day Ops For practitioner's attention	Daily Recording	To be used to flag information to the referring LD practitioner Assigned to referring LD practitioner via Pass to worker > Find button
(N) Adult Day Ops For support worker's attention	Daily Recording	To be used to flag information to a support worker Assigned to relevant support worker via Pass to worker > Find button


To send a request or notification:


- Click the **Requests** icon 

Please note: If you have already sent a request or notification from this step you will need to click **Send request** to open the **New request** window


The **New request** window will open

- Select the relevant request or notification you wish to send

- Scroll down in the window
- Add a **note** to explain why you are sending the request or notification
- Click the **Find** button by 'Pass to worker'
- Search for the worker you wish to send the request or notification to
- Click the **OK** button – the **New request** window will close
- Click the **Save** icon  - this will send the request or notification

Important note: To allow a request to be completed you must exit the workflow step using the **Close** icon  - remember to say 'Yes' to save again.

For further information on sending requests and notifications refer to the **Requests and Notifications** user guide.

Clicking the **Finish** icon  will finish and complete your workflow step.

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.

Once the **Finish** icon can be clicked, it will lock down your step and no further input can be made.

You will find all finished forms completed within the workflow steps stored in the **Documents** section. Only finished versions of the forms should be shared. A PDF version of your finished form should therefore only be generated from the **Documents** section.

The **Next actions** section of your step will automatically appear on the output unless the 'Output Options' are amended before printing. This section should not be included on any outputs for the person or their representative.

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

Worker and Organisational Relationships (adding and ending)

While a case is open to the Day Ops Service, the relevant Day Centre team should be recorded as an **Organisational relationship** of 'Involved Team'. The Team Leader / Assistant Team Leader should add this, once it has been decided a referral is accepted.

Tip: All Day Centre teams have the same name format; Day Opportunities (location) e.g. Day Opportunities Sleaford. Search by typing *Day Opp* in the name field and you will see all the Day Centre teams display in the search results.

The Support Worker who is key working the case should also be recorded as a **Worker relationship** of 'Key Worker (Adult Day Opportunities)'. The Team Leader / Assistant Team Leader should add this when they allocate the case.

Please note: No other Support Workers should be added as a **Worker relationship**.

The team and worker will both display within **Professional and organisational relationships** on the **Person summary** screen.


The **Organisational** and **Worker relationships** should both be ended once the next action of Adult Day Ops End Involvement (NFA) is recorded – when the Day Ops Service involvement is ending.



See the **Worker Relationships** and **Organisational Relationships** user guides for further details on adding and ending the relationships.

Important note: Where a case is closing to the Day Ops Service due to a permanent reason, i.e. person has died or left the area, you will need to inform the Learning Disabilities Key Worker via telephone or email so they can propose a full case closure.

Incomplete work

If you send a request from a workflow step it is useful to be aware that the appearance of this workflow step in your **Incomplete work** folder (visible in **Full** or **Narrow workview**) will vary:

- If the request is still outstanding (sent but not completed or returned) the step will be highlighted in **yellow** with the **work** icon  indicating a request has been sent and not yet completed

- If your step is rejected (returned to you) it will remain in your **Incomplete work** folder with a **red** border and the **work** icon  will have changed to indicate the request has been returned – the worker you sent the request to will add notes to explain why it has not been completed. You will need to update the step and then resend the request to the original recipient. Refer to the **Returned Requests** user guide for further information on how to deal with these.
- If the request has been completed and the step has been finished by the worker you sent the request to (only applicable for authorisation requests) it will disappear from your **Incomplete work** folder. The next actions you have recorded will then appear as new work for you / the recipient to start.
- If the request has been completed but the step has not been finished by the worker completing the request, the step will be **white** and the **work** icon  will have changed to indicate the request has been completed

Incoming requests – Managing requests and notifications

If you are sent a request or notification it will appear in your **Incoming requests** folder.

To remove it from your folder you will have to complete a request and complete (if sent from an incomplete step) or acknowledge (if sent from a completed step) a notification.

From your **Incoming requests** folder (in **Full** or **Narrow workview**):

- Click the request / notification title hyperlink

Please note: The first part of the title shows you the name of the request / notification and the second part shows you which workflow step it was sent from.

The workflow step summary screen for the step the request / notification was sent from will open; requests and notifications display within Requests on this screen (bottom of right column).

Mosaic will change to **Narrow workview** but if you prefer a full screen view of the information,

remember you can change to **Closed workview** by clicking the **Show closed workview** icon 



If you have received a notification from a completed step:

- Click the '**Acknowledge**' hyperlink in the **Requests** section – you can add a note if necessary

If you have received a request or notification from an incomplete step:

- Click **Resume** in the sidebar menu


The workflow step will open in a separate window


- Click the **Requests** icon  (if sent notifications)  (if sent requests)


The outstanding request / notification will display with your name against it - click on the request / notification text to open it

- Select the **Completed** radio button.

Important note: For requests you may need to return rather than complete the request. To do this select the **Returned** radio button instead and add a note to explain why you are returning the request.

- Click the **OK** button
- Click the **Save** icon 

For most notifications and requests close the step using the **Close** icon  - remember to say 'Yes' to save again.

For completed requests where you have authorised a workflow step click the **Finish** icon  to lock the step down, so further editing cannot take place once to have authorised it.

The request / notification should now have vanished from your **Incoming requests** folder.

Refer to the **Acknowledging Notifications** user guide for more information and to help you 'complete' or 'acknowledge' notifications and the **Completing or Returning Requests** user guide for more information and to help you 'complete' or 'return' requests.