

## Adults Quick Guide

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### Referring to In House Day Service

Practitioners in Adult Care Learning Disability teams can now refer a person to the In House Day Service (Day Opportunities) in Mosaic using the **Adult Referral to In House Day Service** step, available from the **Start > New...** sidebar menu.

From within the person's record:

- Click **Start > New ...** in the sidebar menu
- Click **Adult Referral to In House Day Service** hyperlink

The **Adult Referral to In House Day Service** will open in a separate window

### Recording Adult Referral to In House Day Service


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The **Adult Referral to In House Day Service** form is split into 4 different sections.


**Sections 1 to 3** should be completed with relevant information about person being referred, the referrer and the reason for referral.

The referral form should be completed with as much information as possible to allow the Day Ops Senior Coordinator to screen and decide if the referral is appropriate or not.


### General Tips for completing the form



Clicking on the **Show guidance** icon  will give you additional practice assistance relevant to 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 nor 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. About Me

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 (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

Use the **Find** button to record details in the **Significant People in Your Life** and **Professionals Involved in Your Life** tables in **Section 1**.

**Important:** The '**Manual Input**' button 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) is not known in Mosaic, or their details are incorrect, you must contact the Mosaic Helpdesk using the **Create / Change Professional** form on My Portal to request they are created or updated

Complete all textboxes with as much information as possible.

Record details of the **Goals and Outcomes** required from the person's time at the day centre in the **What you want to achieve** textbox.

If you select 'yes' to the question **Are there any risks we should be aware of?** a mandatory textbox displays for you to explain the risks.

Click the **Insert Section** button to record multiple goals and outcomes if needed.

The **Move Section Up** and **Delete Section** buttons will display if multiple goals and outcomes are recorded.

- The **Delete Section** button should be removed if you do not need to add an additional goal and outcome
- The **Move Section Up** button can be used to rearrange the order of the goals and outcomes if needed

## Section 2. Referral Details

Use the dropdown menus to select the person's preferred location and 'other location'.

Use the **Add** button to record details of the **Number of Days** required.


Within the popup window that opens:


- tick to select individual days or 'Tick to select all days' as required
- select the 'Time of day' from the dropdown menu
- click the **Add** button to add one entry and then add another. 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 added the following icons are displayed:

**Edit** icon  – to edit/amend details on that row

**Delete** icon  – to delete/remove that row

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

Remember to refer to the **Show guidance** icon  to assist you when completing the **Activities** textbox.


## Section 3. Referrer Details

Your name, team and the date the referral was completed will default into this section.

## Section 4. Next actions

To refer the person to the In House Day Service:

- Click the **Add** button
- Select the next action **Adult Request for In House Day Services** from the dropdown menu
- Assign to = select **Day Opportunities Management** from the 'Pass to Team' dropdown menu
- Notes = record any necessary information
- Priority = select radio button as appropriate, if changing to urgent ensure you highlight why within the notes box
- Click the **Add and Close** button


**Please Note:** If you have saved the referral and then identify that it is no longer required, select the **Adult No Further Action Required (NFA)** next action instead and then finish the step by clicking the **Finish** icon 


## Toolbar Icons



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

The **View documents** icon  is used to upload (attach) external documents to the referral.

Select **AC Day Opportunities** as the main category and **Referral and Assessment** as the sub-category. Please refer to the **Uploading Documents** user guide for further information.

The **Output current document** icon  is used to generate a PDF version of the referral which can then be printed if required. Please refer to the **Printing Documents** user guide for further information.

Remember you must click the **Finish** icon  once you have completed the referral to send the case to the In House Day Service.

The referral cannot be finished if there are any incomplete mandatory fields. 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. Complete these "mandatory items" then click the **Finish** icon  again.

## Notifications from the In House Day Service

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Once a decision has been made by the In House Day Service as to whether they have accepted the referral or not they will send you a notification from the **Adult Day Ops How Can We Help You** step.

You will receive the following notifications into your **Incoming requests** folder:

- **Adult Day Ops referral accepted** – if the referral is accepted
- **Adult Day Ops referral declined** – if the referral is declined
- **Adult Day Ops referral deferred** – if the referral is deferred. You should then receive a follow up notification confirming if the referral is accepted or not once a decision is made

You may also receive other notifications from the Day Ops workflow to keep you informed when meetings / reviews are planned or when there is signification information for you to be aware of.

All notifications received should be treated as normal and acknowledged (if sent from a finished workflow step) or completed (if sent from an incomplete workflow step) to remove them from your **Incoming requests** folder once you are aware of why they have been sent to you. Refer to the **Acknowledging notifications** user guide for further guidance if needed.