

## Adults Quick Guide

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### Case Notes and Alerts

Case notes are used to record **significant case activity** on a person's record that has not been captured in a workflow step.

Depending upon your role, you can view and print existing case notes and record new case notes.

You can also notify other workers that a case note has been recorded by sending them a case note alert. Case notes must be **finished** for the alert to send.

Case notes will be available for editing for **24 hours** after you **first save** them. If you leave the case note unfinished, it will **time out** meaning you cannot edit it further. Timed out case notes should be finished as soon as possible.

When you finish a case note it will be locked down so no further edits can be made. A finished case note can be appended, where relevant, to add additional information.

### Case Notes Screen

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To access the **Case notes** screen, click **Case notes** in the sidebar menu of the **Person summary** screen of a person's record.

The **Case notes** screen lists any case notes that have already been recorded.

If no case notes have been recorded then the screen will be blank.

By default, case notes are organised in date order (most recently recorded at the top of the screen), but you can re-organise the screen by clicking on the column heading hyperlinks e.g. clicking the 'Type' heading will sort the case notes by type.


When a case note displays in bold, it means that it has been identified as a 'Significant Event'. These case notes are automatically included in any 'Chronologies' that are run, but any case note can be manually included in 'Chronologies' if required. See the **Chronologies** user guide for further information.

## Icons on the Case notes screen


- **Timed Out** icon  – This displays against any case note that has timed out.

The case note has not been finished within the 24 hour time limit and so cannot be edited.

Clicking this icon will not do anything.

- **Edit** icon  – This displays against any case note that has not yet been finished and can still be edited (where you have not surpassed the 24 hour time limit).

Clicking this icon allows you to edit the case note.

- **Append** icon  – This displays against any case note that has been finished or timed out.

Clicking this icon allows you to finish a timed out case note or to add an additional note to a finished case note.

- **Copy** icon  – This displays against any case note that has been finished.

Clicking this icon allows you to copy the case note to the record of a relative or co-inhabitant of the person.

Only finished case notes can be copied.

## Buttons on the Case notes screen

The buttons located at the bottom of the **Case notes** screen vary based on your role and system permissions. The buttons you may see are as follows:

- **Print multiple case notes** - Used to print one or multiple case notes within one document.
- **Find case note** - Used to perform a search to find a specific case note(s).

- **Show related people** - Used to show case notes recorded on the records of the person's personal relationships (related people).

**Please note:** This button changes to '**Hide related people**' once case notes for the person's personal relationships are displayed and is used to remove them from the screen.

- **View** - Used to view case notes in a separate '**Person case notes**' window.
- **Add** - Used to record a new case note on the record.
- **OK** - Used to exit the **Case notes** screen and navigate back to the **Person summary** screen.

## Viewing Case Notes

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From the **Case notes** screen you can either click the **Title** hyperlink of an individual case note or click the **View** button.

A **Person case notes** window opens.

This window displays the case note, plus any **Appended Notes**, if recorded.

It states who entered/updated the notes along with the date and time they did so.

## Recording a Case Note


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From the **Person summary** screen click **Case notes** in the sidebar menu.

The **Case notes** screen displays.

- Click the **Add** button

The **Add case note** screen displays.

- **Title** = Enter a descriptive and meaningful title (e.g. T/C from GP Dr Boil re 'topic')
- **Type of note** = Select from dropdown menu as appropriate
- **Date** = Defaults in - If necessary can be amended using the **date picker** icon 

- **Time** = Defaults in – if necessary can be amended manually
- **Significant Event (will be included in Chronologies)** = This checkbox should only be ticked if the content of the case note is considered to be particularly significant
- **Note** = Enter details - is a rich text field, meaning it has various editing and formatting options available, similar to those found in Microsoft Word.

## Adding Alert Recipients

A case note alert is sent to advise another worker(s) that a case note has been recorded on a person's record.

There are no automatic alerts/notifications within Mosaic.

If you believe another worker or multiple workers need to be sent an alert about a case note you are recording, you must add the alert recipient(s) when recording, editing or appending a case note.

Alerts can only be sent to workers in Mosaic – you cannot send an alert to a team.

From the **Add case note** screen scroll to the bottom of the screen:


- Click the '**Add alert recipients for this case note?**' hyperlink - you may need to scroll down to the bottom of the screen once the hyperlink has been clicked.
- Click the **Add recipient** button

The **Find workers** screen displays

Any workers who currently have, or have previously had involvement with the person will be listed in the top half of the screen – click the **worker name** hyperlink to select them.

For a worker not listed, enter the worker details and click the **Find** button. The results display at the bottom of the screen – click the **worker name** hyperlink to select them.

Repeat this process to add additional recipients as necessary.

Alert recipients can be removed at any time by selecting the **Delete** icon  against the recipient's name.

The alert will only be sent once the case note is finished.

If a case note is appended and the original alert recipient is still listed they will receive two alerts – one for the original case note and one for the appended note.

Alert recipients can also be amended when appending a case note, i.e. additional recipients can be added and original recipients can be removed.

## To Save and Finish the Case Note

Use the buttons at the bottom of the screen to save and/or finish a case note:

- **Save and continue** – is used to save the case note and continue inputting immediately.


Mosaic will save the case note (recording that a save has occurred for audit) but will not exit the **Add case note** screen.

- **Save and close** – is used to save the case note and exit to continue editing later.

Mosaic will save the case note (recording that a save has occurred for audit) and will exit the **Add case note** screen.

Unless finished, Mosaic will allow a case note to be edited for 24 hours after the first 'save'.

If you do not return to finish the case note within 24 hours it will 'time out' and only appending will be possible.

A timed out case note must be finished and will display with the **Timed Out** icon .

A timed out case note will remain in your **Unfinished case notes** on your Homepage and any alert recipients added will not receive the alert.

- **Finish** – is used when the case note is complete and no longer requires any additional editing.

Mosaic will save the case note and mark it as 'Finished'.

Finished case notes are locked down so they cannot be edited – though it will be possible to append the case note.

Remember clicking the **Finish** button will also send alerts to any recipients that have been added.

- **Cancel** – is used when you do not want to save the case note.

Mosaic will exit the **Add case note** screen and return you to the **Case notes** screen without saving the case note.

If you try to Sign out of Mosaic while recording a case note a warning message will display reminding you to '*Save or cancel your changes before logging out of Mosaic*'.

Click the **OK** button on the warning message and then use the appropriate button to save, finish or cancel the case note.

## Copying Case Notes

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Only finished case notes can be copied.

You can copy a case note from the person's record to another person's record, if they have been added as a personal relationship for that person.

The copy function should only be used when it is appropriate to do so.

Case notes should not be copied to the records of personal relationships just because the system allows you to do so.

From the **Case notes** screen:

- Click the **Copy** icon 

Related people (those recorded as personal relationships) who are available to copy to are displayed automatically.

You can also click the **Show unrelated coinhabitants** button to display any people who live at the same address as the person but are not listed as a personal relationship i.e. those living in the same Residential or Nursing Home. For best practice we would recommend this button is not used

- Tick the **Select** checkbox against the person/people to copy to
- Click the **Copy and save** or **Copy and finish** button

Case notes can be copied across as **finished** (**Copy and finish** button) or **unfinished notes** (**Copy and save** button).

For **unfinished notes** you must access the record the case note was copied to and finish the note – this allows for edits to be made to ensure the information is correct for that record i.e. unnecessary information removed and additional information recorded.

## Editing an Unfinished Case Note

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Once a case note has been '**Saved and closed**' it can be edited until 24 hours after the first time it was saved.

This is when the case note will 'time out'. Only unfinished case notes which have not timed out can be edited.


From the **Case notes** screen:

- Click the **Edit icon** 

The **Amend case note** screen displays.

**Please note:** This screen contains a message to explain how long the case note is available for editing before it times out and is locked down.

All fields on the screen can be edited including removing or adding alert recipients.

Alert recipients can be removed by selecting the **Delete** icon  next to the recipient's name.

## Appending a Case Note

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Once a case note has been **Finished** it cannot be edited.

It can, however, be **Appended**.

In most scenarios a new case note should be recorded rather than the original case note appended.

However, if you have started to record information in a case note and the case note has subsequently been timed out then it is appropriate to use the append function to complete recording.

From the **Case notes** screen;

- Click the **Append** icon 

The **Append case note** screen displays.


The **Category**, **Title**, **Contact dates** and **original case note text** cannot be edited.

The **Significant Event (will be included in Chronologies)** checkbox can be ticked or un-ticked.

This box should be ticked if the content of a case note is considered to be particularly significant.

There is an additional **Case note** text field which is mandatory and should be used to record your additional information.

Any alert recipients previously added will receive an additional alert – one for the original case note and one for the appended note.

Alert recipients can be removed by selecting the **Delete** icon  against the recipient's name if an additional alert is not needed. Additional recipients can also be added if necessary.



## Finishing a Timed Out Case Note

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A case note times out 24 hours after first clicking save.

A timed out case note will appear with the **Timed Out** icon  next to the case note within the **Case notes** screen

A timed out case note is an unfinished case note.

Any alert recipients added to the case note will not receive an alert until the case note is finished. You can only finish your own notes, you cannot finish notes someone else has written.

Any timed out case notes that you have created will display in **Unfinished case notes** on your **Homepage** (Closed or Narrow workview). You can access this page at any time by clicking **Home** in the main header menu.

To finish a timed out note and clear it from your **Unfinished case notes** you will need to click on the **title** of the case note.

To finish case notes from the **Case notes** screen click the **Append** icon 

In both cases the **Append case note** screen will display.

You can add additional information within the case notes textbox if required and you can add to or amend the alert recipients, and then click the **Finish** button.

For any case notes you have recorded when acting for another worker you'll need to act for that worker to finish the case note.

## Printing Case Notes

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One or more case notes can be printed by clicking the **Print multiple case notes** button on the **Case notes** screen.

The **Select case notes for printing** screen displays

Select checkbox against the case note(s) you wish to print. The **Select/deselect all case notes** checkbox can be ticked or un-ticked to quickly select all or none of the case notes.

Click the **Preview Selected** button to open a separate window which displays what will be printed. You can then close this window to select or deselect case notes as required, or click the **Print** button to open the Windows Print dialog box, choose a printer and start the print

You can also save the selected case note(s) as a PDF by selecting '**Save as PDF**' as the destination rather than selecting a printer

You can also just click the **Print** button without clicking the **Preview Selected** button if preferred, or you can click the **Cancel** button to cancel all printing options and return to the **Case notes** screen.

Individual case notes can also be printed by clicking the **Print** button when viewing case notes.

## The Find Case Note Button

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Over time a person could have a large number of case notes on their record.

Mosaic has a search functionality to allow for case notes to be located efficiently.


From **Case notes** screen click the **Find case note** button

The **Find case notes** screen displays.

You can then complete any of the following search criteria fields to perform a simple or more complex search as necessary:

- **Keyword(s) in title** - Allows you to specify one or more words included in the case note title.

Clicking on the **Show guidance** icon  will help you perform a search

- **Case note date range** - Allows you to specify a date range for the case note to fall into.
- Enter dates using the **date picker** icon 
- **Type** - Allows you to specify a particular type of case note by selecting from the dropdown menu.

The only options you can choose from are those that have already been recorded.

- **Entered by** - Allows you to specify case notes recorded by a specific worker by selecting from the dropdown menu
- **Include case notes of related people** - Allows you to choose whether case notes which have been recorded on the records of any personal relationships for the person are included or not.

To activate the search using your specified criteria click the **Find** button, or to cancel your search and return to the **Case notes** screen click the **Cancel** button.

Search results are displayed on the **Case notes** screen

You can reset the **Case notes** screen by either clicking the **Find case note** button and clearing all search criteria then clicking the **Find** button, or by clicking the **OK** button on the **Case notes** screen to navigate to the **Person summary** screen then clicking back into **Case notes** in the sidebar menu.

## Alerts history

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The **Alerts history** section lists all case notes and appended case notes which have had an alert sent from them.

From the **Person summary** screen of the person's record click **Alerts history** in the sidebar menu.

The **Alerts history** screen displays the following information:

- The date and time an alert was sent (Date/Time field on left)
- Whether the alert was sent from a case note (added) or appended case note (appended)
- Who recorded the case note
- The title of the case note
- The type of note
- The date and time the case note was recorded (Date/Time field on the right)

A list of recipients for each case note alert is also included on this screen.

If a case note is recorded on a person's record and it does not appear in the **Alerts history** screen it either had no alert recipients added or the case note has not yet been 'Finished'.

## Viewing and Acknowledging Alerts

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Viewing and acknowledging an alert is completed outside of the person's record.

The recipient of an alert will receive it in their **Alerts** folder within their **Current work** section in either the **Full** or **Narrow** **workview**.

- If needed, open the **Alerts** folder within the **Current work** section
- Click the **Case note alert** hyperlink

An **Alert** popup window opens.

This window tells you who's record the case note has been recorded on and which worker recorded the case note.

It will show whether it is a case note or appended case note.

It also states the title and type of case note recorded, the date and time recorded against the case note and lists all the alert recipients so you can see whether others have also been alerted.

### Button options in Alert window

- **OK** – Closes the **Alert** popup window while leaving the alert in the **Alerts** folder.
- **Acknowledge** – Closes the **Alert** popup window while removing the alert from the **Alerts** folder.

The alert is logged by Mosaic in the **Alerts history** section of a person's record but there will be no lasting record in your individual workview (Alerts folder)

- **View case note** – Opens an additional **Person case notes** popup window.

This allows you to view the case note without having to access the person's record, enter the **Case notes** screen and search for and open the specific case note.

- **View all case notes** – Will take you to the person's record and open their **Case notes** screen for you to view all case notes recorded on their record

Alerts can also be viewed and acknowledged from the **Alerts** section on your **Homepage** when in **Closed** or **Narrow workview**.

- Click the **Case note alert** hyperlink to open the **Alert** popup window

This window is the same **Alert** window, containing the same information and options as displayed when the **case note alert** hyperlink is clicked from the **Alerts** folder.