Adults Quick Guide

Recording a Case Note and Sending an Alert

Case notes are used to record significant case activity on a person's record.

You can notify other workers that a case note has been recorded by sending them a case note alert. You cannot send an alert to a team.

Important: You must add the worker(s) as a 'recipient' and the case note must be finished for the alert to send.

To Record a Case Note

From the **Person summary** screen of the person's record:

- Click **Case notes** in the sidebar menu

The **Case notes** screen displays.

Any case notes already recorded will display here. This screen will be blank if no previous case notes have been recorded.

- Click the **Add** button

The **Add case note** screen displays.

- **Title** = Enter a descriptive and meaningful title (e.g. Telephone call 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 when the contents of a case note is considered particularly significant

- **Note** = Enter details **-** this is a rich text field, meaning it has various editing and formatting options available, similar to those found in Microsoft Word.

Adding Alert Recipients

An alert is sent to advise a worker 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.

To find 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 by selecting the **Delete** icon ✖ against the recipient's name.

Alert recipients can be removed before the case note is finished and the worker will never receive an alert i.e. while still recording or editing the case note.

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 if necessary.

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 – To be 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 – To be 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 – returning you to the **Case notes** 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.
>
> See the **Finishing Timed-Out Case Notes** user guide for guidance.

Finish – To be used when you are happy the case note is complete and no longer requires any additional editing.

Mosaic will save the case note and mark it as 'Finished' – returning you to the **Case notes** screen.

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

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

Cancel – To be 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.