

Children's Services Quick Guide

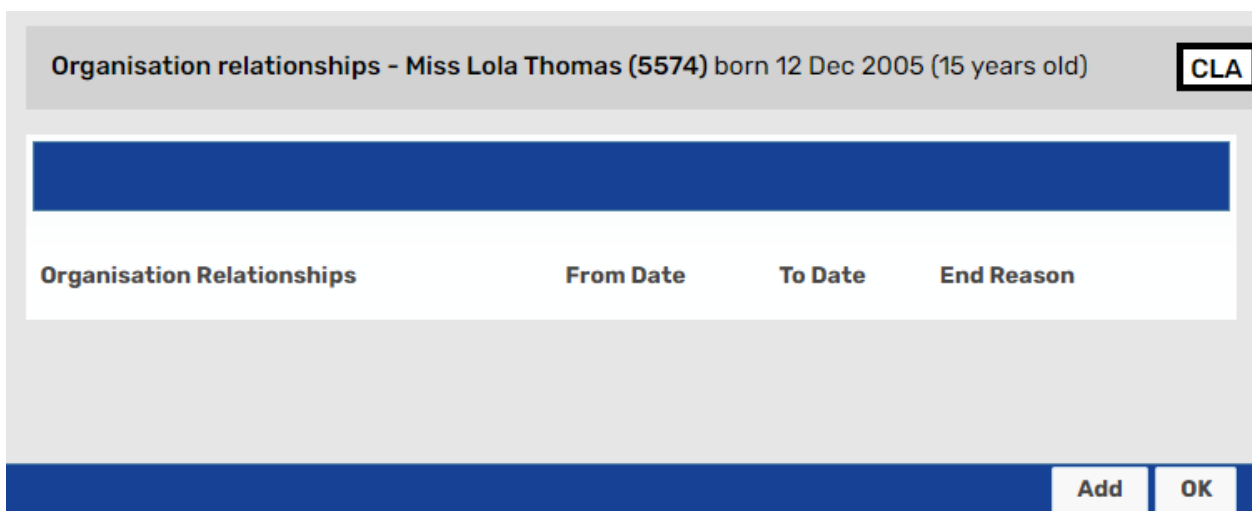
Recording Organisational Relationships

An Organisation is defined as any team, service provider or company that can either be involved with a person or have access to Mosaic. Organisations can include teams that use Mosaic, schools, GP surgeries and Children's Centre's for example.

Each client with services involved should have a **Key Team** recorded as an Organisational relationship. Only one **Key Team** should be recorded. If Social Care is involved, this will always be the Key Team. Any further teams, who are also involved with a person such as Early Help, can have the Relationship Type of **Involved Team**. The only exception is if SEND are involved, they will also be the Key Team resulting in two Key Teams being on record. The Team is usually added when a person in a managerial role accepts a Request and allocates the case to a worker. Any worker can add or amend an Organisational Relationship.

Adding an Organisational Relationship on an Individual

- Click **Person details > Organisational relationships**
- Click the **Add** button



Organisation relationships - Miss Lola Thomas (5574) born 12 Dec 2005 (15 years old) CLA

Organisation Relationships	From Date	To Date	End Reason
Add OK			

- The screen will refresh and display options to add the relationship.
- Click **Find** button and search for the organisation using one or more of the fields such as Name or Type.

Please note: It is advisable to always use the **wildcard %** first when searching for an organisation as naming conventions have been used. For example, all schools begin with the area the school is in such as 'The William Alvey School' is named 'Sleaford The William Alvey CE School' on Mosaic.

- Click the **name of the organisation** when it appears in the search results.
- Select the relevant relationship type from the **Relationship Type** drop down menu. The Relationship Types are purposefully generic so the most appropriate one should be picked. For Lincolnshire County Council Workers, this will usually always be **Key Team** or **Involved Team**.
- The **From** date field will automatically populate with today's date. This date can be changed and should reflect the date the relationship started.
- The **To** date and **End Reason** would only be completed when ending the relationship.
- Click **Save** to confirm the relationship or **cancel** to leave the section without entering anything.

Add organisation relationships - Miss Lola Thomas (5574) born 12 Dec 2005 (15 years old) CLA

Fields marked with a * are required. If you select 'To Date' a reason will also be required.

Organisation *

Relationship Type *

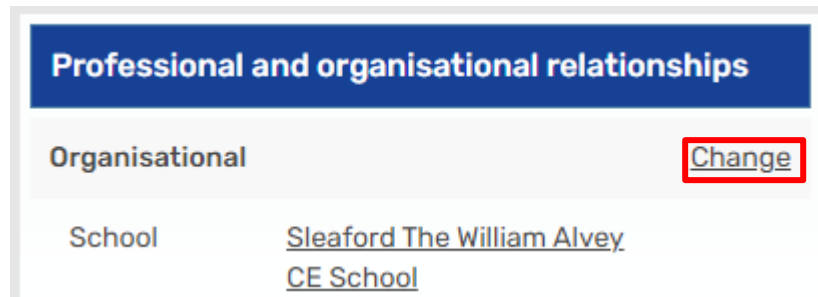
From *


To

Please note: if you are unable to find the Organisation, you will need to complete a My Portal form so the Helpdesk can create the organisation in Mosaic.

Editing or Ending an Organisational Relationship on an Individual

To make amendments, you can access the organisational relationships through **Person details > Organisational relationships** from the left hand side bar. Alternatively, you can click on the **Change** button on the right hand side of the **Professional and organisational relationships** on the **Person summary** page.



To **edit** or **end** an Organisational relationship, click its  edit icon. You can edit the existing details and also end the relationship by using the **To** date picker and choosing a reason from the **End reason** list.

Click **Save** to make the changes or **Cancel** to close the page without making any changes.

Please note: If a relationship was added in error, you can submit a request via MyPortal to request that it is deleted.

Adding an Organisational Relationship on a Group

From the **Family Details** or **Carer Details** page, click on the **Professional relationships** tab.

Worker/Organisation	Relationship	Telephone number	Action
Amy Brooke	Designated Teacher		
CS Childrens Social Care Team (North Kesteven)	Key Team (Childrens Social Care)		
Kinga Bardocz	Key Worker (Childrens Social Care)		

Click the **Add** button to add a professional relationship of an organisation for one or more members of the group. Click on the **Find organisation** tab.

Enter the organisation name. The wildcard % can be used when searching to replace any part of the text. Once all the search criteria have been input, click **Find**.

Find party

Find worker Find organisation

At least one field marked with a # is required

Name #

ID #

Street #

Post code #

Other reference #

Sector

Sub sector

Type

Find Cancel

From the search results, click on the correct organisation.

Add

Worker/Org name* Find again

Relationship type* -- Please select --

Start date*

End date

Show 15 entries Search:

Name	Date of birth	Select all
Brother Test	11/02/2021	<input type="checkbox"/>
Sibling Test	11/11/2011	<input type="checkbox"/>
Sister Test	05/05/2015	<input type="checkbox"/>
Unborn Test	12/09/2023	<input type="checkbox"/>

Showing 1 to 4 of 4 entries
First
Previous
1
Next
Last

OK
Cancel

Select a **Relationship type** from the list of available options. The **Start date** defaults to today's date, but this can be changed. Select the members of the group who have this relationship and click on **OK**.

The **Family/Carer Details** summary displays with the **Professional relationships** tab open and the new relationship will be available to view.









Editing or Ending an Organisational Relationship on a Group

To amend the Organisational relationship, open the **Family/Carer Details** page and click on the **Professional relationships** tab.

Group Summary - Family - Family Test (3492491)
No group description




Summary Professional relationships Case notes Documents

Show 15 entries Search:

Worker/Organisation	Relationship	Telephone number	Action
 Amy Brooke	Designated Teacher		
 CS Childrens Social Care Team (North Kesteven)	Key Team (Childrens Social Care)		
 Kinga Bardocz	Key Worker (Childrens Social Care)		
 Sleaford The William Alvey CE School	School		


Brother Test (13/03/2023 -)
Sister Test (13/03/2023 -)


Showing 1 to 4 of 4 entries First Previous 1 Next Last Add

-  **Expand** icon - Expands the field to display which members of the group are involved with the organisation. Clicking on the  collapse icon collapses the list of group members.
-  **End** icon - Allows the organisation relationship to be ended for all group members.

End relationship - all subjects

Ending relationship with Sleaford The William Alvey CE School(School) for all current subjects of the relationship.

End date * 

End reason *
-- Please select -- 

Please note: If individual cases are closing, and additional group members are remaining open the relationships will need ending from the **Person summary** screens instead.

Pick the end date and select a reason for ending the relationship. Click **OK** to end the relationship.