

Children's Services Quick Guide

Recording Worker Relationships

Workers are defined as any professional who works with a child or young person. Workers can be people who have access to Mosaic or external Professionals such as Teachers or Health Visitors.

Worker Relationships can either be added on an individual or a group. Recording the relationship on a group means it can be recorded against several people at once if appropriate.

Each client with services involved should have a **Key Worker** recorded as a Worker relationship. If Social Care is involved, this Worker will always be the Key Worker. Only one Key Worker should be recorded. Any further Workers, who are also involved with a person such as Early Help, can have the Relationship Type of **Involved Worker**. The only exception is if SEND Worker is involved, they will also be the **Key Worker** resulting in two Key Workers being on record. The Worker Relationship 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 a Worker Relationship.

GPs are added in a slightly different way through **Person Details > GP** rather than through a Worker relationship.

Adding a Worker Relationship on an Individual

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



Worker relationships - Master Samuel Smith (8679) born 13 Dec 2009 (11 years old) CLA

Worker Relationships	Telephone	From Date	To Date
<input type="button" value="Add"/> <input type="button" value="OK"/>			

- The screen will refresh and display options to add the relationship.
- Click **Find** button and search for the Worker using surname and/or first name.

Please note: The wildcard % can be used to replace any part of the text.

- Click the **name of the Worker** 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 Worker** or **Involved Worker**.
- 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.

The screenshot shows a web form titled "Add worker relationship - Sister Test (3549746) born 05 May 2015 (7 years old)". In the top right corner, there is a button labeled "CLA". Below the title bar, there is a blue header bar. The main form area contains the following fields:

- Worker ***: A text input field with a "Find" button to its right.
- Relationship type ***: A dropdown menu.
- From date ***: A date input field showing "20/03/2023" with a calendar icon to its right.
- To date**: An empty date input field with a calendar icon to its right.

 A note on the right side of the form states "Fields marked with a * are required". At the bottom right of the form, there are two buttons: "Save" and "Cancel".

Please note: if you are unable to find the Worker, you will need to complete a FreshService form so the Helpdesk can create the Worker in Mosaic.

Editing or Ending a Worker Relationship on an Individual

To make amendments, you can access the Worker relationships through **Person details > Worker 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.

Professional and organisational relationships

Professional [Change](#)

Head [Ed Master](#) (Lincoln Carlton Academy)

Teacher

Worker relationships - Master Samuel Smith (8679) born 13 Dec 2009 (11 years old) CLA

Worker Relationships	Telephone	From Date	To Date
Head Teacher : Mr Ed Master	01522 887654	10 Jun 2021	

To **edit** or **end** a Worker relationship, click its  edit icon. You can edit the existing details and also end the relationship by using the **To date** 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 a Worker Relationship on a Group

From the **Family Details** or **Carer Details** page, 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		

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

[Add](#)

Click the **Add** button to add a professional relationship of a Worker for one or more members of the group.

Enter the Worker 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

Last name #

First name #

Include only workers with a current role

Find **Cancel**

From the search results, click on the correct Worker.

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"/>
Unbornx 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 **Group Summary** displays with the **Professional relationships** tab open and the new relationship will be available to view.

Editing or Ending a Worker Relationship on a Group

To amend the Worker 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)		
Brother Test (08/03/2023 -)			
Sibling Test (08/03/2023 -)			
Sister Test (08/03/2023 -)			
Unbornx Test (08/03/2023 -)			
Kinga Bardocz	Key Worker (Childrens Social Care)		
Sleaford The William Alvey CE School	School		

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

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

End relationship - all subjects

Ending relationship with Ed Master(Head Teacher) for all current subjects of the relationship.

End date * 

End reason *

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 and click **OK** confirm.