

Children's Services Quick Guide

Participation Group

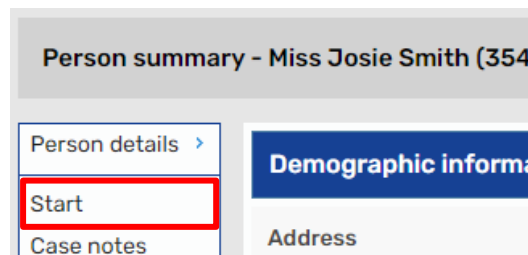
Finding or Creating a Person

Please refer to the guide [Finding and creating a person – Professional resources \(lincolnshire.gov.uk\)](#) for how to find or create a person on Mosaic you are working with.

Initiating the workflow



Once you have found the person who has attended the session, you will need to add on the workstep to record into initially.

Click on **Start** on the left hand side menu.



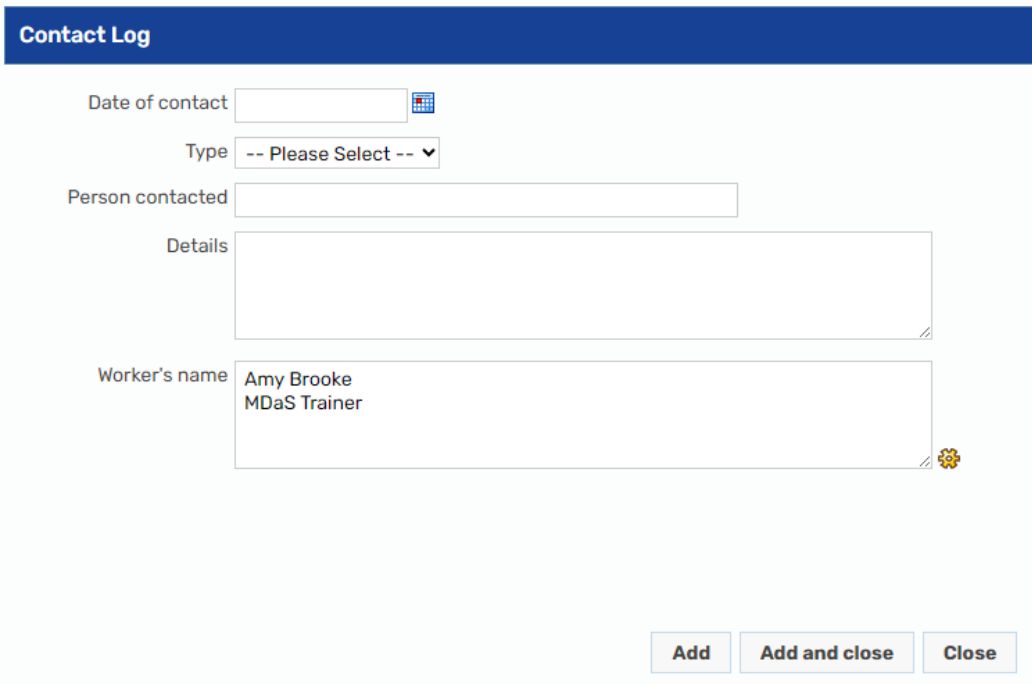
From the menu which opens, select **CS Participation Groups** and the workstep will open in a second window.

Recording into the workstep

- Section 1. Details, in **Please tick all the relevant groups this young person attends**, tick the groups the young person has attended
- For Voices 4 Choices, Young Inspectors and Lincolnshire Young Voices, you will need to open the corresponding form from the optional forms and letters icon 
- Any forms and letters that have been opened will display in another tab across the top.
- If you open one in error, it can be deleted with the delete icon 
- For Other, the fields to complete will reveal within this form.

At any point in time, the form can be saved using the save icon  and you can exit using the close icon .




- All the different group's forms can be recorded into the same way.
- **Contact Log** – use the **Add** button to record any contacts had outside of the session




The screenshot shows a form titled "Contact Log" with a blue header. The form contains the following fields and controls:

- Date of contact:** A text input field with a calendar icon to its right.
- Type:** A dropdown menu with the text "-- Please Select --" and a downward arrow.
- Person contacted:** A text input field.
- Details:** A large text area for notes.
- Worker's name:** A text area containing the text "Amy Brooke" and "MDaS Trainer". A gear icon is visible in the bottom right corner of this field.

At the bottom right of the form, there are three buttons: "Add", "Add and close", and "Close".

- Complete the relevant fields and click **Add** to add another contact, **Add and close** to add the contact to the table or **Close** to exit without recording anything
- Within the table, you can use the edit icon  or delete icon  to amend the information
- **Session Details – 1** – used to record details of a group the young person has attended
- If a subsequent session needs to be recorded after the first one, use the **Insert Section** button to add a new set of **Session Details** fields.
- This **Insert Section** button can be used as many times as required to record multiple sessions.
- Under each section, there are **Move Section Up** buttons to reorder the sessions and **Delete Section** to remove a section if it is no longer required
- In the top toolbar you can use the view documents icon  to upload any relating documents

- Click on the icon and then **Attach a document**
 - Click on **Choose File** and select the document you need to upload
 - In **File as**, rename the document using the naming convention of acronym for team, title of document, initials of creator, date backwards, for example PT Direct work AB 2023.08.24
 - **Main Category** – select **CS Participation**
 - **Sub-category** – select **Groups**
 - Click on **Add** to upload the document
 - This can be repeated as many times as required
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- Once all the sessions have been recorded or a certain number has been added to the form, you can tick on **Completed by** and then add on the relevant next action to finish this workstep
 - On the first tab of **CS Participation Options C0838, Section 2. Next actions**, click on **Add** and select one of the following actions:
 - **CS Participations Groups** – adding this will repeat this step in your Current work for you to record further sessions into a blank step. You can amend the Scheduled date to reflect the next session and use the **Pass to worker** to either **Find** a different worker or **Assign to me** to add to your own Current work
 - **CS No Further Action** – this will not add any further steps and end the workflow. A new workflow can be generated at any time from the Start menu.
 - Once selected, click on **Add and close** and use the finish icon  to lock down the step so no further details can be recorded in it