Mosaic
Children's Services Guide

Lincolnshire COUNTY COUNCIL
Working for a better future

Post Adoption / SGO Support

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Please note
This document is intended to support staff who have attended the Mosaic training course relevant to their role. If you have not attended a relevant course, please contact the Mosaic Children's Training Team . Every effort has been made to ensure that screen shots included are current; there may be some minor differences in look and feel within the system. All data-examples included in this document are fictitious. Any resemblance to real persons, living or dead, is purely coincidental.

Introduction

This guide follows the steps completed within the **Adoption / SGO Support workflow** on Mosaic.

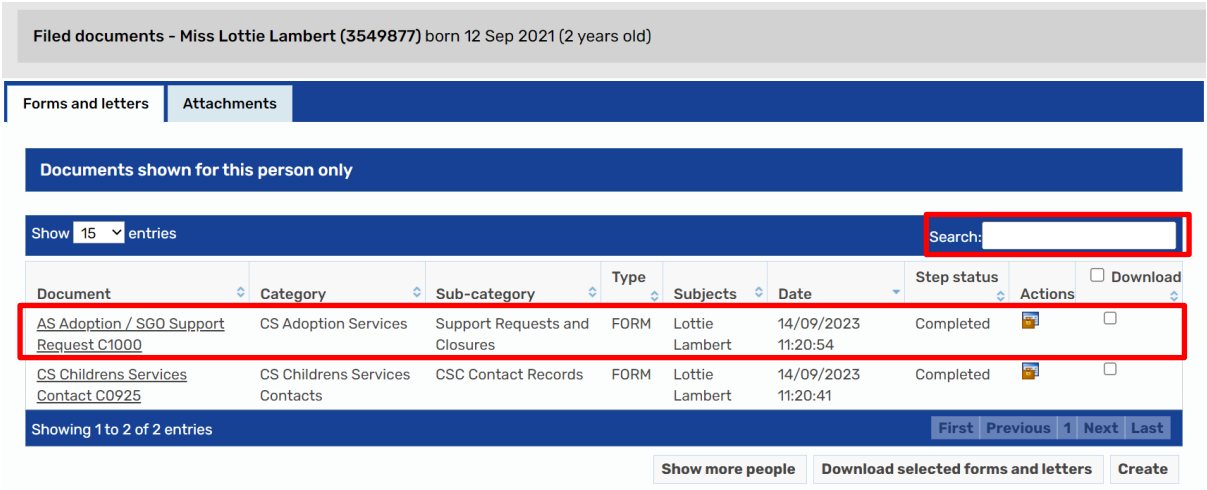
Adoption / SGO Support Requests can be sent to the Adoption Support team by the **Customer Service Centre**. The **Adoption Support Team** can also record a request for support when contact is made directly to the team.

Once a case has been allocated to a worker any associated worksteps will display within the worker's **Current work**. All work that has been allocated to you can be accessed and started from here.

Viewing the Adoption / SGO Support Request

The Adoption / SGO Support Request will contain the information gathered in the initial contact requesting support and any Practice Supervisors guidance regarding the case. This can be viewed from within **Documents** in the sidebar menu of the **Person summary** screen.

Once **Documents** has been clicked on, the **Filed documents** screen will display with the **Forms and Letters** tab open.



The **AS Adoption / SGO Support Request C1000** will be in the list of forms. If many documents are listed, the **Search** field can be used to filter the list of forms.

Clicking on the hyperlink for the form will open the document for you to read and gain an understanding of the case. You can exit out of the form by clicking on the close icon . Click on **OK** to return to the **Person summary** screen.

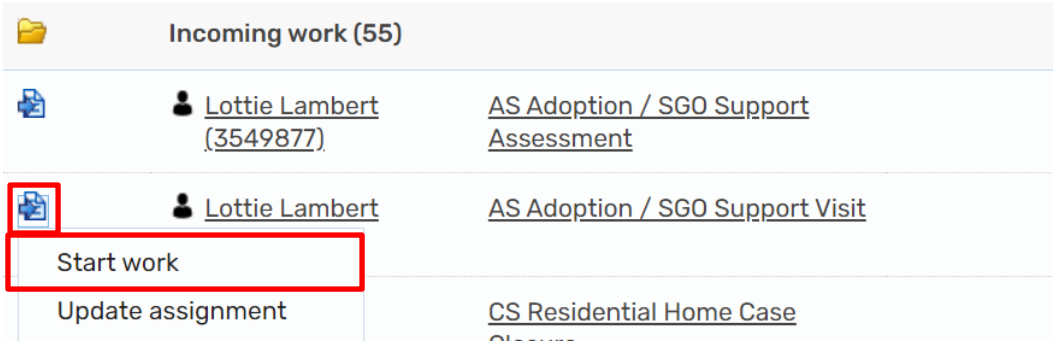
Recording the AS Adoption / SGO Support Visit

This step is used to record all visits to the young person as part of the Post Adoption and SGO Support process.

Please note: All visits must be recorded in this step including those that are part of the Assessment process.

This step will display within your **Current work** and can be started from here.

Click on the icon under the **Type** heading, then click on **Start work** from the drop-down menu that appears. This will open the workstep.



The **AS Adoption / SGO Support Visit C0738** form will display.

Section 1. Support Visit is used to record all the details of any successful and failed visits. The same visit step can be used to record several consecutive failed visits prior to a successful visit. However, there should only be one successful visit recorded per Visit step.

Log of attempted visits – clicking on **Add** will open additional fields to allow a failed visit to be recorded.

When a failed visit is recorded the workstep can be saved and closed. Additional failed visits can then be added at a future date, as well as the successful visit.

Other Persons Seen on Visit – use the **Find** button to add additional family members. If the person present does not exist on Mosaic, the **Manual Input** tab can be used to record their details.

The remaining fields are used to record the outcome of the visit as appropriate.

The **What needs to happen?** table will pull through to other worksteps in the workflow. It can be completed and updated in different steps to show progress.

Finally, when the record is complete, complete the **Date** field and tick the **Signature** box at the bottom of the section.

Section 2. Next actions. The following **Next actions** are currently available to be added:

- **AS Adoption / SGO Support Visit** – added to record additional visits. The **Scheduled Date** field can be amended to record the actual visit date, and the **Note** field can be used to record the location of the next visit. This information will then display within the **Current work** folder as a true reflection of planned future work.
- **SC Social Care Purchase Request** – added to record any details of expenditure directly related to the young person, including expenditure that needs to be reimbursed via Petty Cash. Ticking **Send Immediately?** enables the action to be added at any time during the recording and will allow the step to be accessed once this step has been **Saved**.
- **CS Internal Contact** – added to complete a referral to any LCC team that is currently using Mosaic. This can also be accessed early by ticking **Send Immediately?**
- **AS No Further Adoption / SGO Support Visits Required (NFA)** – added when the final visit has been recorded and support is no longer required.

Once the required Next actions have been added, click on the ✅ finish icon to Finish the workstep.

Recording the AS Adoption / SGO Support Assessment

This workstep contains the form **AS Adoption / SGO Support Assessment C0710**.

The Assessment can be started from within the **Current work** folder in the same way as outlined above for the visit. Click on **Start** for the workstep.

The **AS Adoption / SGO Support Assessment C0710** will display.

Section 1. Family and Household details, some information will map forward into this section from the AS Adoption / SGO Support Request.

Child / Young Person's details – click on the edit icon displays the Child / Young Person's details screen to allow the **EHC Plan** checkbox to be ticked if appropriate.

If the young person is over 18, a mandatory field will display to record details of consent to share information.

Members of the current support network (parents / carers / family members, friends) – click on the **Find** button opens the **Find Party** screen. Click on the appropriate tab to find and add People and Workers.

If the Worker, you are searching for does not exist on Mosaic the **Manual Input** tab can be used to add the details of the worker into Mosaic.

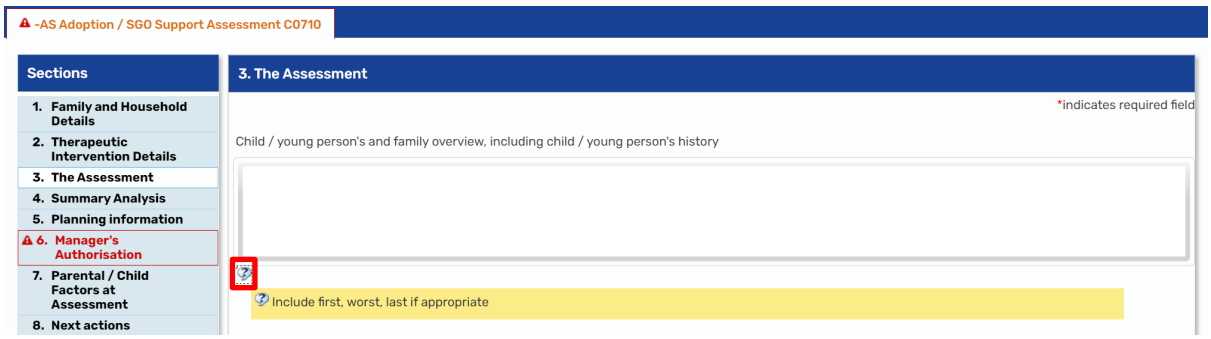
Update the remaining fields as appropriate.

Person completing this assessment – tick the **Worker's eSignature**. Enter the **Start date for assessment**. The **Completion date for assessment** will be entered by the Practice Supervisor when the assessment is authorised.

Section completed can be ticked to track progress. If the assessment is completed over a period of time, when resuming the assessment any sections completed will display as ticked in the **Sections** sidebar menu.

Section 2. Therapeutic Intervention Details – this section will be used to track and evidence all Therapeutic Intervention support that has been provided from the Adoption Support Fund. At the bottom of ASF Provision Details – 1, there is an Insert section button which will allow a new set of fields for ASF Provision Details – 2 to be completed. This Insert section button can be used as many time as required to allow multiple providers to be recorded. Information added should not be removed to provide a chronology of support provided which pulls through into later forms.

Section 3. The Assessment – this section has a series of free text boxes to allow the details of the assessment to be recorded.

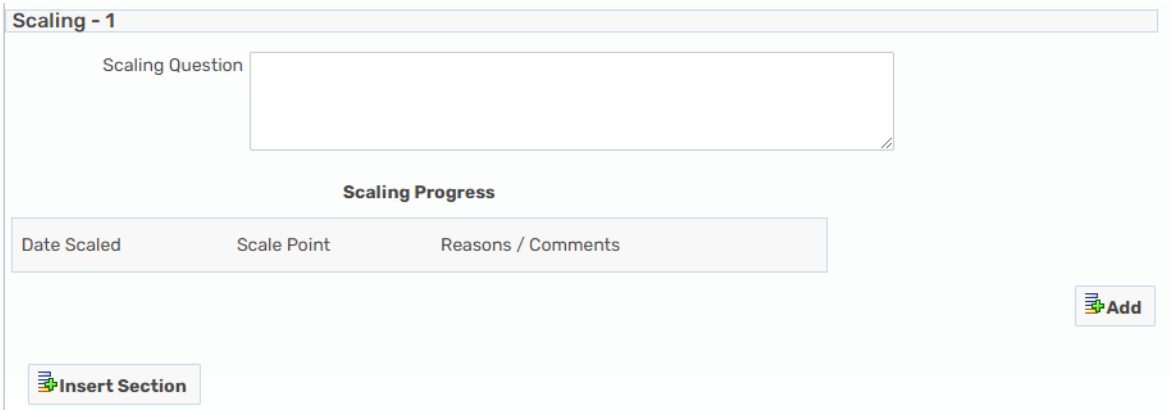


Clicking on the show guidance icon will display guidance that relates to the section above it.

Would you like to upload direct work? – ticking **Yes** displays the **Direct work completed** box. Please refer to the guide **How to place an image into a document** for further guidance.

Section 4. Summary Analysis – the overall summary of the assessment and Signs of Safety scaling are recorded here.

Scaling – 1 – use the free text box to record your scaling question.



Scaling Progress – click on **Add** to record the details of any scaling.

Insert Section repeats the above fields to allow additional scaling questions to be recorded.

Section 5. Planning information - this section includes a table to record Needs and actions.

Clicking on **Add** opens up free text boxes to record details of needs and the responses to these. Once the details have been recorded click on **Add** to record additional needs or **Add and Close** to exit the screen.

There is a mandatory question of **Is this case going to progress to monitoring?** If answered **Yes**, a mandatory question asking for details displays which will pull through to the **AS Adoption / SGO Support Monitoring** step.

Section 6. Manager's Authorisation – this section should be ignored by workers

Section 7. Parental / Child Factors at Assessment – tick the appropriate option that reflects the outcome of the assessment. This section will not display on the printed document.

Section 8. Next actions. This allows next actions to be added as appropriate to record further work. The current Next actions that are available are as follows:

- **AS Adoption / SGO Support Review** – added when the case will stay open following assessment
- **AS Adoption / SGO Support Case Closure** – added when no further support is required. This will also allow the case to be put onto the Monitoring list
- **SC Social Care Purchase Request** – added to record expenditure relating directly to the child / young person such as funding for therapy and any expenditure relating to direct work. Ticking **Send Immediately?** will make this available once this workstep has been saved.
- **AS Further Assessment Complete, Continue Existing Process (NFA)** – only added when a subsequent Assessment has been completed and there is already a Review workstep open on the case

Once the appropriate Next actions have been added, and all forms within the Assessment workstep have been completed the workstep is ready to send for authorisation.

Click on the requests icon. The **New request** screen displays.

Select **Required CS Manager: Please review and authorise**. Use the **Find** button to complete a search for your Practice Supervisor. Once found, select your Practice Supervisor from the search results. Finally, from within the **New request** screen click on **OK**. Save and close the workstep. The Request will be automatically sent once the workstep has been saved.

The Practice Supervisor will review the Assessment. Once it has been authorised, they will Finish the workstep and any Next actions will be generated and assigned back to yourself.

Recording the AS Adoption / SGO Support Review

The **AS Adoption / SGO Support Review** workstep is used to record updates regarding the case. Some information will map forward into this workstep from the Assessment workstep.

The Review can be started from within the **Current work** folder in the same way as outlined above for the visit.

The **AS Adoption / SGO Support Plan and Review C0744** displays.

Section 1. Meeting Minutes – If any plans are ticked for the question of **Are any of the following plans in place?**, a further mandatory box displays asking for further details.

Child / young person's and family overview, including child / young person's history will map information forward from the Assessment and can be updated here as appropriate.

In any of the tables, clicking on the edit icon allows the information to be updated. Clicking on the delete icon deletes the information if it is no longer valid. Clicking on the **Add** button allows additional needs to be recorded.

The next fields allow the details of any meetings to be recorded. **Date of meeting**, **Venue** and **Attendees** are used to record the details of the meeting. The **Summary** field is used to record an overview of the meeting in lieu of minutes.

What is the outcome of this review? – select the appropriate option.

There is a mandatory question of **Is this case going to progress to monitoring?** If answered **Yes**, a mandatory question asking for details displays which will pull through to the **AS Adoption / SGO Support Monitoring** step.

Section 2. Next actions - This allows next actions to be added as appropriate to record further work. The current Next actions that are available are as follows:

- **SC Adoption Support Review** – added when the case will stay open following this review
- **SC Social Care Purchase Request** – added to record expenditure relating directly to the child / young person such as funding for therapy and any expenditure relating to direct work. Ticking **Send Immediately?** will make this available once this workstep has been saved.

- **AS Adoption / SGO Support Case Closure** – added when no further support is required. This will allow the case to be put onto the Monitoring list
- **AS Further Assessment Required** – only added when a subsequent Assessment is needed

Recording the AS Adoption / SGO Support Consultation

The **AS Adoption / SGO Support Consultation** workstep is added when the case is open to another service within Lincolnshire County Council. This step will be allocated as a standalone step and will be used to record any advice and support given to other professionals.

This workstep can be added from the AS Adoption / SGO Support Request and accessed from the **Current work** screen on the Full or Narrow workview.

Click on the icon under the **Type** heading, then click on **Start work** from the drop-down menu that appears. This will open the workstep.

The **AS Adoption / SGO Support Consultation C1323** and **AS Adoption Support Consultation Agreement C1392** forms will display. You can click between the two tabs to enter each form.

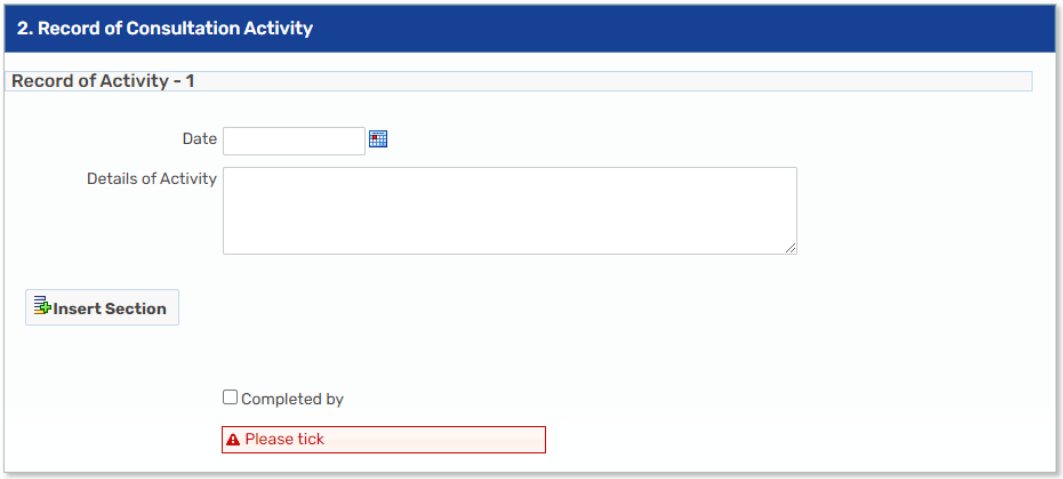
AS Adoption Support Consultation Agreement C1392

Section 1. Adoption Support Consultation agreement - This will be used when other services are seeking support from the team to record a brief history, details of assessments completed, any agreements in place, and who will complete specific actions.

AS Adoption / SGO Support Consultation C1323

Section 1. Consultation Details – information recorded here will map forward from the **AS Adoption / SGO Support Request** workstep. This information can be updated as appropriate.

Section 2. Record of Consultation Activity – this section contains a date and free text field to enable all consultation work to be recorded.



Clicking on **Insert Section** repeats the fields above to allow additional contacts to be recorded.

Please note: It is recommended that Insert Section is used no more than 12 times within a form. Once Record of Activity – 12 has been added and recorded add a Next Action of AS Adoption / SGO Support Consultation if support is to continue.

Section 3. Next actions - This allows next actions to be added as appropriate to record further work. The current Next actions that are available are as follows:

- **AS Adoption / SGO Support Consultation** – added when the case will stay open and further recording is required
- **SC Social Care Purchase Request** – added to record expenditure relating directly to the child / young person such as funding for therapy and any expenditure relating to direct work. Ticking **Send Immediately?** will make this available once this workstep has been saved.
- **AS Adoption / SGO Support Case Closure** – added when no further support is required. This will allow the case to be put onto the Monitoring list

In addition to the two mandatory forms, there is an optional form of **AS Adoption / SGO Support Assessment Update C1393**. This can be opened by using the forms and letters icon and selecting the form. It will open as a third tab and can be deleted if no longer required by using the delete icon.

The **AS Adoption / SGO Support Assessment Update C1393** will be used to provide an update following therapeutic intervention.

Once all sections have been completed the workstep is ready to send to the Practice Supervisor for authorisation.

Click on the requests icon. The **New request** screen displays.

Tick – **Required CS Manager: Please review and confirm next action**. Use the **Find** button to complete a search for your Practice Supervisor. Once found, select your Practice Supervisor from the search results. Finally, from within the **New request** screen click on **OK**. Save and close the workstep. The Request will be automatically sent once the workstep has been saved.

The Practice Supervisor will access and review the workstep. Once authorised they will Finish the workstep.

Recording the AS Adoption / SGO Case Closure

The Case Closure is started by the worker and finished by the Practice Supervisor. Before the Case Closure is started a File retention must be recorded first.

To add or check an existing File retention click on **File management > File retention** within the sidebar menu.
Please refer to the **Viewing and Recording File Locations** guide for further guidance.

The **Case Closure** can now be started.

The **AS Adoption / SGO Support Closure C1343** will display. As a worker you are only responsible for completing Section 1.

Section 1. Service Closure Record – all the fields are mandatory in this section and consist of free text boxes to record any overview of the case and the reason for closing. Once all the fields have been completed the workstep will be ready to send to the Practice Supervisor for authorisation.

Click on the requests icon. Tick – **Required CS Manager: Please review and authorise**. Use the **Find** button to complete a search for your Practice Supervisor. Once found, select your Practice Supervisor from the search results. From within the **New Request** screen, click on **OK**. Save and close the workstep. The Request will be automatically sent once the workstep has been saved.

The Practice Supervisor will review the Case Closure. They will complete their section and add any Next actions as appropriate. The Practice Supervisor will Finish the workstep. If the **AS Adoption / SGO Support Monitoring** step is added it will be assigned to the **CS Adoption Support – Business Support** virtual worker.

As part of the Case Closure process the Practice Supervisor will cancel any outstanding Visit and Case Supervision worksteps.

Recording the AS Adoption / SGO Support Monitoring

This step allows the service to record any further contact with the family post Case Closure. If it is identified that further support will be required, the Practice Supervisor will record a new AS Adoption / SGO Support Request to reopen the case.

Clicking on **Start** will open **AS Adoption / SGO Support Monitoring C1324**.

Section 1. Adoption Support Monitoring Details – information will map forward from the last completed Assessment or Review depending on when the Case Closure was added.

Section 2. Record of Monitoring Activity – this section contains a date and free text field to enable all contact to the family to be recorded. Clicking on **Insert Section** repeats the fields above to allow additional contacts to be recorded.

Please note: It is recommended that Insert Section is used no more than 12 times within a form. Once Monitoring Activity – 12 has been added and recorded add a Next Action of AS Adoption / SGO Support Monitoring if support is to continue.

The **AS Adoption / SGO Support Update C1393** can be loaded from the Forms and letters icon to record any updates to the Adoption Support Fund. If this form as been opened in error the delete icon can be used but any information added within this update form will be lost. It is advised to take a PDF copy of the information in case it is required.

In Section 1. the question of **Is this an Assessment update or a Therapeutic Support Review?** will open or hide other sections depending on how it has been answered.

Information in **Section 2. Therapeutic Intervention History** will pull through from the Assessment or itself and can be updated from here to add to the chronology of support.

Returning to **AS Adoption / SGO Support Monitoring C1324, Section 3. Next actions** - This allows next actions to be added as appropriate to record further work. The current Next actions that are available are as follows:

- **AS Adoption / SGO Support Monitoring** – added when further contact needs to be maintained with the family
- **AS No Further Monitoring Required (NFA)** – added when no further contact is required
- **SC Social Care Purchase Request** – added to record expenditure relating directly to the child / young person such as funding for therapy and any expenditure relating to direct work. Ticking **Send Immediately?** will make this available once this workstep has been saved.
- **CS End Existing Social Care Services / Care Package** – added to end any ongoing payments that are in place in relation to the child

Click on the requests icon. Tick – **Required CS Manager: Please review and authorise**. Use the **Find** button to complete a search for your Practice Supervisor. Once found, select your Practice Supervisor from the search results. Finally, from within the **New Request** screen click on **OK**. Save and close the workstep. The Request will be automatically sent once the workstep has been saved.

Recording a Purchase Request

The Purchase Request step is used to record all expenditure that directly relates to the child / young person. This includes anything that is paid via invoice, budget transfer, petty cash, and Procurement Card (P Card) including any services commissioned because of Adoption Support Fund applications. The **Purchase Request** is a **Next action** from most worksteps and can be accessed before the workstep is Finished by ticking **Send Immediately** when adding it.

The workstep can be started from within your **Current work** or by clicking on the symbol next to the workstep and then **Start** under the **Current work** within the **Person summary** screen.

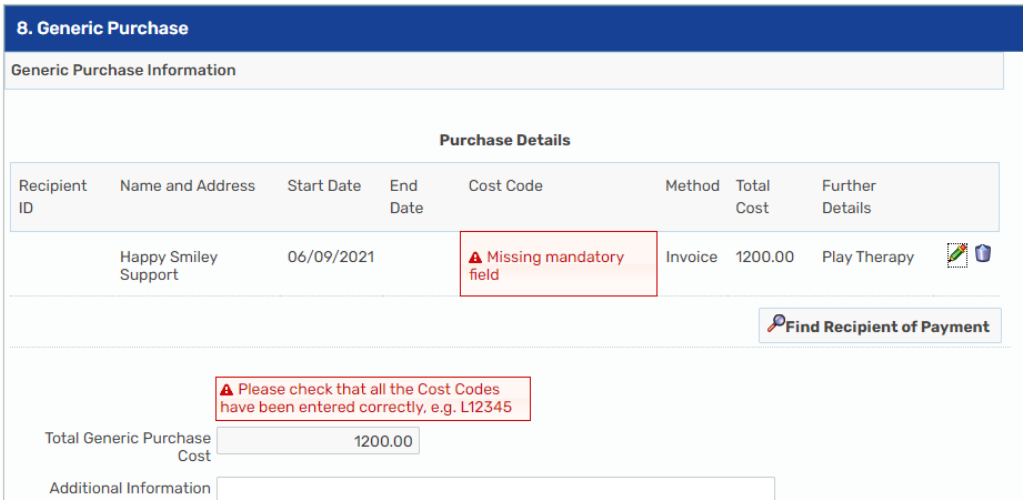
Once accessed the **CS Children's Purchase Request C1300** displays.

Section 1. Purchase Request Details – basic information defaults into the form.

Required Purchase Type – tick the option that reflects the purchase type. The most used option for your service will be **Generic Payment**. Once ticked a pop-up box reminder will appear to remind you to complete the correct Section in the sidebar. Click **OK**. Scroll down to the bottom of Section 1 and tick **Requested by**. This will add your electronic signature to the form.

If the **Generic Payment** option is ticked, the corresponding section in the sidebar should be completed. **Section 8. Generic Purchase** – click on **Find Recipient of Payment** this opens the **Find Party** screen. Click on the appropriate tab to complete a search for the worker or organisation that you are paying. If they do not exist on Mosaic use the **Manual Input** tab to free text, the information into the form.

Once the worker or organisation has been selected the **Purchase Details** screen will display. Enter the information as appropriate. If the **Cost Centre** is not known, leave it blank the Practice Supervisor will update this field when the workstep is authorised.



The Additional Information field can be used to record any information that will aid Business Support and the Practice Supervisor with authorising and processing the payment.

The workstep is now ready to send to the Practice Supervisor for authorisation. Click on the requests icon. The **New Request** screen displays.

Tick – **Required Please review purchase request and authorise**. Use the **Find** button to complete a search for your Practice Supervisor. Once found, select your Practice Supervisor from the search results. Finally, from within the **New request** screen click on **OK**. Save and close the workstep. The Request will be automatically sent once the workstep has been saved.

The Practice Supervisor will review the Purchase Request. Once it has been authorised the Practice Supervisor will Finish the workstep and any Next actions will be generated and assigned to Business Support who will process the payment.