Children's Services Quick Guide

Residential Homes – Adding Case Closure

When a young person no longer lives at the Residential Home, Case Closure must be added to end the workflow.

The Case Closure step can either be assigned to the Duty Worker or a named Residential Care Officer to complete.

Accessing the Duty Worker

- Login to Mosaic using your details
- Click on the ⮕ act for symbol on the top left-hand side of the Full Workview
- Click on the Duty Worker's name to open their Full Workview

Recording the final Residential Home Casework and adding the Closure

- Within the Current Work, click on the symbol to the left of the Casework step and click on **Start work** or **Resume work**.
- **RH Residential Case Record C0341** will display.
- The young person's last day at the home should be recorded as normal within Section 1 - **Record of Intervention**.
- In Section 1, the question **Is child / young person remaining in residence?** should be answered **No**.
- The **e-signatures** at the bottom of Section 1 and 2 should be ticked.

- Open **Section 3. Next actions**, click **Add**
- From Select action, select **CS Residential Home Case Closure**

- Use Pass to Worker to assign to the Duty Worker or use the Find to search for and select a named Residential Care Officer. Adding the step to a named worker will add the step to their Current work rather than the Duty worker inbox.
- Click on **Add and Close**
- Use the ✅ finish icon to complete this casework and allow access to the new casework step

File Retention

Before the CS Residential Homes Case Closure can be completed, a **File Retention** should be added if not already.

A File retention date indicates how long the Mosaic record and any paper files associated with this person should be kept before being destroyed or deleted.

If a File Retention has been recorded, it will display on the Person summary screen.

Please Note: Any pre-existing File retention recorded will need to be checked to ensure that the end date covers the retention requirements for your service. If they are not the existing File retention will need to be extended, a File retention cannot be decreased.

To add a Retention date, select **File management > File retention** from the left-hand menu on the Person summary Screen.

Click on **File retention criteria** and choose **CS Children in Care Services: Child in Care (CFS.1.2; CFS.12.2)**. The **File retention rule** for the criteria will display underneath.

File retention data - Miss Josie Smith (3549723) born 14 Jun 2015 (8 years old)   CLA

Fields marked with a * are required

File retention criteria *   CS Children in Care Services: Child in Care (CFS.1.3; CFS.12.2)

File retention rule   File to be retained for 75 years from date of birth

Retention start date *   14/06/2015

Retain until date *   14/06/2090

Notes

Upon completion, press **Save** to add the **Retention date** or press **Cancel** to close the form without saving.

The Retention date needs adding prior to completing the Case Closure workstep. In many of the Case Closures, the File retention date pulls through to a mandatory field and the workstep cannot be finished without this information being recorded.

Recording the Residential Home Case Closure

- Within the Current Work, click on the symbol to the left of the Closure step and click on **Start work**.
- **RH Residential Closure Record C0347** will display.
- The Residential Care Officer should complete Section 1 of the closure.
- Open **Section 3. Next actions**, click **Add**
- From Select action, select **CS Residential Home Case Closed (NFA)**
- Click on **Add and Close**

- Use the request icon to invite the Homes manager into the step to complete Section 2.
- From New request, select **Required CS Manager: Please review and authorise**.
- Use the **Find** next to **Pass to worker** to search for and select the Homes manager.
- Click on **OK**
- Click on the save icon and close out of the workstep.

- The step will sit in **Incomplete work** highlighted in yellow until the manager has authorised and finished the step.
- The homes manager will cancel any unrequired steps and can end any relationships.