Children's Services Guide

Post-Adoption Tasks

In this guide:

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 by the Social Worker when an Adoption Order has been granted.

The guide outlines the tasks to be completed on the Pre-Adoption record through to creating a Post-Adoption record and further tasks to be completed on that new record. All tasks should be fulfilled to keep anonymity.

There is a checklist at the end of the guide to use as a reminder.

On the Pre-Adoption record

At the point the order is granted, the following tasks should be completed on the Pre-Adoption record.

To begin working through the list, access the Person summary of the Pre-Adoption record.

Contacting Workers with open Current work

On the Person summary, use the **Current work** on the right hand side to identify who has open steps on the person. Use the **Assigned to** to contact the allocated worker via email to let them know they need to they will need to add on Case Closure or No Further Action their worksteps. Their workflow can be added and resumed onto the Post-Adoption record once created.

End the Looked After Episode

To end a Looked after status, click on **Looked after > Looked after episodes** on the left-hand menu of the **Person summary** screen. The **Looked after episodes** screen displays.

Any previously recorded Placements and Legal status' will show on this screen. The Placement and Legal Status can be ended at the same time by clicking on the **End looked after period** button on the bottom right of the screen.

The **End placement** screen will display. The **Effective date of change** will prepopulate with today's date but it can be edited to reflect the correct date.

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The **Local end reason** and **DOH end reason** must be completed using the drop down options. You can then press **Save** to confirm the changes.

Once completed, click on **OK** to return to the Person summary.

Adding a Warning

Click on **Person details > Notes** on the left-hand menu. The **Person notes history** screen displays.

Click on the **Add** button on the bottom right.

In the **Type of Note** field, select **B: Warning.** In the **Note** field add '**DO NOT USE THIS RECORD AND DO NOT MERGE RECORD WITH ANY OTHER. THIS RECORD IS CLOSED AND IS NOT TO BE USED UNDER ANY CIRCUMSTANCES OR TO HAVE ANY FURTHER INFORMATION ADDED**'. Click on **Save**.

Once completed, click on **OK** to return to the Person summary.

Adding a Warning to Birth Parents

A warning should be added to the birth parents records. Use the **Personal relationships** on the Person summary, to access a birth parents record.

Click on **Person details > Notes** on the left-hand menu. The **Person notes history** screen displays.

Click on the **Add** button on the bottom right.

In the **Type of Note** field, select **C: Birth Parent of legally Adopted Child see historical relationships for detail.** Add an appropriate note into the **Note** field such as '**child adopted [date]**'. Click on **Save**.

Once completed, click on **OK** to return to the Person summary.

Navigate back to the child's Person summary using the birth parents, Personal relationships. Repeat for any other recorded birth parents. Return to the child's record to complete the remaining tasks.

End Personal relationships

To end the Personal relationships, click on **Person details > Personal relationships** on the left-hand menu of the **Person summary** screen. The **Personal relationships** screen displays.

Click on the edit icon 🖉 next to a relationship.

In the **To date** field, enter the date of the Adoption Order. Click on **Save**. Repeat for all the relationships displayed.

Once completed, click on **OK** to return to the Person summary.

Also check to see if the child was part of a Family group with other birth family members. If they are still part of a Family group, then you will see a widget on the Person Summary screen titled **Groups**. To end the membership of the group for the adopted child, click on the name of the group e.g. Family…. & then click on the red box at the end of the row in the group table in the Actions column against the adopted child's birth name. This will end their membership from the group.

End Telephone numbers

To end the Telephone numbers, click on **Person details > Telephone numbers / email** on the left-hand menu of the **Person summary** screen. The **Contact details** screen displays.

Click on the edit icon 🖉 next to a telephone number.

In the **To date** field, enter the date of the Adoption Order. Click on **OK**. Repeat for all the telephone numbers displayed.

Once completed, click on **Save** to return to the Person summary.

End and Amend Addresses

On the child, there is likely to be at least two addresses recorded, a Home Address and a Primary Placement.

To end the Home Address, click on **Person details > Addresses** on the left-hand menu of the **Person summary** screen. The **Addresses** screen displays.

Click on the edit icon 🖊 next to the address recorded under the **Type** of **Home Address**.

If multiple people have been recorded at the address, a list of people may display. Select only the child or children who's address you want to end. Click on **Confirm selection**.

In **Other details**, in the **To** field, enter the date of the Adoption Order. Click on **Finish**. Repeat for all addresses recorded which currently has no **To** date except the one recorded with **Primary Address** in brackets under **Type**.

There needs to be one address recorded on the Person's record as the **Primary Address** which will usually be the **Primary Placement**. This cannot be ended but can be made so it no longer displays on the Person summary screen.

Click on the edit icon 🖊 next to the address recorded as the **Primary Address** in brackets under **Type**. As previously mentioned, a list of people may display as living at the same address, only select the child or children who you wish to amend. Click on **Confirm selection**.

In **Other details**, under **Address settings** untick **Display address**. Click on **Finish**

Once completed, click on **OK** to return to the Person summary.

End Worker relationships

To end the Worker relationships, click on **Person details > Worker relationships** on the left-hand menu of the **Person summary** screen. The **Worker relationships** screen displays.

Click on the edit icon 🖊 next to a relationship.

In the **To date** field, enter the date of the Adoption Order.

The **End reason** must be completed using the drop down options. Click on **Save**. Repeat for all the relationships displayed.

Once completed, click on **OK** to return to the Person summary.

End Organisational relationships

To end the Organisational relationships, click on **Person details > Organisational relationships** on the left-hand menu of the **Person summary** screen. The **Organisation relationships** screen displays.

Click on the edit icon 🖉 next to a relationship.

In the **To date** field, enter the date of the Adoption Order.

The **End reason** must be completed using the drop down options. Click on **Save**. Repeat for all the relationships displayed.

Once completed, click on **OK** to return to the Person summary.

Update NHS Number in References

To end the NHS Reference, click on **Person details > References** on the left-hand menu of the **Person summary** screen. The **References** screen displays.

Click on the edit icon 🖉 next to the NHS Number. Make a note of the NHS number as you will be adding this on again in a moment. Click on **Delete** on the bottom right of the screen. Click **OK** to confirm you wish to delete.

To add the NHS number in the updated type, click on **Add**. In **Reference type**, select **Pre-Adoption NHS Number** from the drop down list and add the previous NHS number in **Reference**.

Click on **Save**. Once completed, click on **OK** to return to the Person summary.

Create and Update a Post-Adoption record

Once the above tasks have been completed on the Pre-Adoption record, a Post-Adoption record will need to be created and information updated on the new record.

Creating a new record

Before creating a new record, you should ensure the person does not already exist on Mosaic. From the Full workview, click on **Find Person** on the right hand side or from the Narrow/Closed workview, click on **People > Find Person** on the top toolbar.

Enter information to perform a search such as date of birth or their adopted name and click on **Find**. If the Post-Adoption record exists, click on it in the **Find person results**.

If the person you need does not appear, you must us the **Find again** at the bottom of the Find person results to complete three different searches.
You should use different search criteria such as the post code, date of birth or part of the address. The client could already exist on Mosaic with a variation of the spelling of their name.

If they still do not appear, you can create the person on Mosaic using the **Add new** button at the bottom of the **Find person results**.

Clicking on **Add new** will open the **Add new person** window. The more information you can add when creating a person, the more likely another worker will be able to identify them as the correct person they need.

It is advisable to add at least the First name, Last name and date of birth, and then click **Next**. The home address should be added and can be searched for by entering the **House No.** and **Post Code** then clicking **Find address**. If the address is outside of Lincolnshire, you must click on the tick box next to **Search through all addresses in the UK**. If an address has recently been searched for, the option of **Last address** can be used to pull through the last address found. **Find person** can be used to find another person on Mosaic and copy the address from them.

The search results will display and you can click on the correct option. The address will display in the **Address details**. A **Telephone number** can be added from this screen also by clicking on **Add telephone number**. Once completed, click **Finish**.

The person is now created in Mosaic and their Person summary page will display for you to begin any work on them. They will have their own ID number and you will be able to search for them in the future.

Add the NHS Number in References

To add the new NHS Reference, click on **Person details > References** on the left-hand menu of the **Person summary** screen. The **References** screen displays.

Click on **Add**. In **Reference type**, select **NHS Number** from the drop down list and add the new NHS number in **Reference**.

Click on **Save**. Once completed, click on **OK** to return to the Person summary.

Add the Pre-Adoption ID in Case notes

To add the Pre-Adoption ID number, click on **Case notes** on the left-hand menu of the **Person summary** screen. The **Case notes** screen displays.

Click on **Add**. In **Title**, enter **Pre-Adoption Reference Number**. In **Type of note**, select **Pre-adoption Reference number** from the drop down list. In **Note**, add the Pre-Adoption ID number to link the two accounts. This **Type of note** is restricted so only certain worker roles can see this case note.

Click on **Finish** and Yes when the **Confirm finish case note** box appears. Once completed, click on **OK** to return to the Person summary.

Adding workflow to the Post-Adoption record

Any teams who require workflow to be added to the Post-Adoption record will need to contact the Mosaic Helpdesk via FreshService to have the Post-Adoption Data Setup initiated. The option of **Request Change to a Record / Workflow** can be used to outline what is needed and the Mosaic Childrens Support team will liaise with the Childrens Targeted Reporting team to ensure the recording data continues.

Final tasks on the Pre-Adoption record

Once the Post-Adoption record is created, the link can be added to the Pre-Adoption record before it is full restricted.

Add the Post-Adoption ID in References

To add the Post-Adoption ID, click on **Person details > References** on the left-hand menu of the **Person summary** screen. The **References** screen displays.

Click on **Add**. In **Reference type**, select **Post-Adoption ID** from the drop down list and add the ID number of the Post-Adoption record created.

Click on **Save**. Once completed, click on **OK** to return to the Person summary.

Restricting the Pre-Adoption record

Once all tasks have been completed on the Pre-Adoption record, the Adoption team can ask for it to be fully restricted. The Mosaic Helpdesk can be contacted via FreshService.

The option of **Restricted Records** should be selected with the **Type of** request of **Restrict a New Person Record** and **Reason for Restriction** as **Pre-adoption Record**. This should ensure the record is restricted to the Pre-adoption whitelist.

Post-Adoption Checklist

Access the child's Person summary page using their pre-adoption ID:

- ☐ Use the Current work to make a list of workers who have work assigned. Contact the workers and ask them to end their workflow.
- ☐ End the Looked after episode
- ☐ Add a Warning to the child's record highlighting the record isn't to be used
- ☐ Add a Warning to the birth parent's records
- ☐ Add an end date to all Personal relationships
- ☐ Add an end date to any recorded telephone numbers
- ☐ Amend the Primary Address so it is no longer recorded as the Display Address
- ☐ Add an end date to all other addresses
- ☐ Add an end date to all Worker relationships
- ☐ Add an end date to all Organisational relationships
- ☐ Make a note of the NHS Number and delete it from References
- ☐ Add the previous NHS Number in References under the type of Pre-Adoption NHS Number
- ☐ Create a Post-Adoption record for the child if one does not already exist
- ☐ Add the new NHS Number in References
- ☐ Add the Pre-Adoption ID number as a Case note
- ☐ Contact the Mosaic Helpdesk to initiate any required workflow that was ended on the pre-adoption record
- ☐ On the Pre-Adoption Record, in References add the Post-Adoption ID
- ☐ Contact the Mosaic Helpdesk to ask for the Pre-Adoption recorded to be fully restricted as per the whitelist