

Adults Quick Guide

Homecare Trusted Assessors

This guide is intended to assist you in recording review activity on a person’s record.

This guide contains information on:

- [Accessing a person’s record](#)
- [Person summary screen](#)
- [Documents section](#)
- [Case notes](#)
- [Completing the Review](#)
- [Incomplete work](#)
- [Purchase Service Request – Permanent changes only](#)
- [Adult Purchase Service information required – Permanent changes only](#)



If you require assistance with any other aspects of Mosaic, you can access other user guides on the [Adults user guides](#) page on the Mosaic Hub.

Accessing a person’s record

When you log into Mosaic you will see the **Narrow workview** – if needed open the **Current work** section by clicking on the section heading.



Refer to the [Navigation overview](#) and [Managing Individual Workflow](#) user guides for further information.

The reviews you have been assigned to complete will appear in your **Current work** within your **Incoming work** (if due now / overdue) or in your **Future work** folder.

Current work		
Type ↑	Subject	Title
	Incoming work (1)	
	Brian Morton (3555473)	Adult My Review

Click on the **person's name** to enter their record – their **Person summary** screen will display.



You can use the three **workview state** icons  (top left of the screen) to change which workview you are viewing - click the **Show closed workview** icon  if you prefer a full screen view of the person's record.

Person summary screen

You should review the information on the **Person summary** screen and where needed you can add / update most information using the **Person details** extended sidebar menu or by clicking the **Change** link or button next to the information that needed amending.

For example, if the person now has a mobile phone, you can add the details using the **Person details > Telephone numbers / E-mail** option in the sidebar menu.

Refer to the user guides within the [Creating a person and updating their basic details](#) and [Other person details](#) sections for full guidance on recording and updating these details.

When reviewing the **Person summary** screen look out for:

- **Warning notes** in red at the top of the screen e.g. if the person has allergies.
- **General notes** towards the bottom right of the screen e.g. if there is a Carer's Emergency Response Plan in place.
- **Care packages provided** for details of the current care package (refer to the [Care Packages Provided](#) user guide for further information)
- **Personal relationships** for details of friends, family and neighbours involved with the person.
- **Professional and organisational relationships** for details of workers (professionals) and teams / organisations currently involved with the person.

Documents section

Click **Documents** in the sidebar menu to access the **Document** section.

You can view any previously completed assessments, plans and reviews in this screen.

Refer to the [Documents Section](#) user guide for full details

Case notes

Click **Case notes** in the sidebar menu to access the **Case notes** screen.

Case notes should be used for key case information not captured within the workflow step forms e.g. for details of the telephone call you make to arrange the review.

You can view any case notes already recorded by clicking on the title text.

Refer to the [Case Notes and Alerts](#) user guide for more information about viewing case notes.

You should record new case notes by clicking the **Add** button in the bottom right of the screen.

Ensure you record an informative title e.g. *Telephone call to Mr Bloggs to arrange review*

Use the **AC Case Note** value for the '**Type of note**'.



Once your case note is complete, make sure you click the **Finish** button in the bottom right.

Refer to the [Recording a Case Note and Sending an Alert](#) user guide for full details.

Completing the Review

Important: If you identify that a new assessment is required because a person's needs or circumstances have changed, before starting the review you will need to inform the relevant LCC Area Lead Practitioner (LP). The Area LP will then confirm whether you should complete the review or just record a case note (the review will be re-assigned to a LCC worker for completion in these cases).

To start the **Adult My Review**:

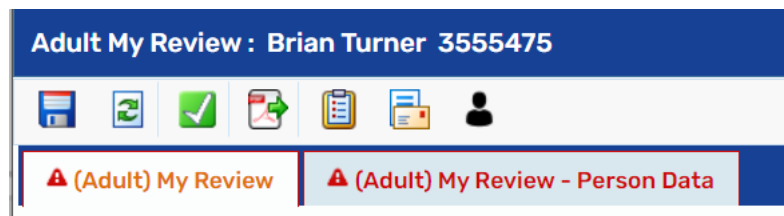
- Click the **Incoming work** icon  / **Future work** icon  within **Current work** on the **Person summary** screen
- Click **Start work** from the menu

The **Adult My Review** will open in a separate window.

The review steps contain two main forms:

- **(Adult) My Review**
- **(Adult) My Review – Person Data**

These forms will automatically display when you open the step and cannot be deleted.




For detailed guidance on completing a workflow step or form please refer to the [Working with Workflow Steps or Forms](#) user guide.


For further information about the planning and review process refer to the [Assessment, Plan and Review Activity – Hints and Tips](#) user guide.

Adult My Review is to be used to review the person's outcomes. The focus of a review is the person's situation, what is important to them, what may have changed and any progress towards achieving their outcomes. It is not about the type of service they are receiving. You are reviewing a person, not a care package. It is the person's review, not your (the worker's) review so it needs to be meaningful to them.

All open cases must have a **Key Team (Adult Care)** recorded in **Organisational relationships**. When recorded, this will display in **Professional and organisational relationships** on the **Person summary** screen. You will be prompted to check and record this within the review form. For more information please refer to the [Organisational Relationships](#) user guide.

While completing the review you will need to open and complete relevant optional forms accessed via the **Forms and letters** toolbar icon .

Important: You must complete and save the **(Adult) My Review** and **(Adult) My Review – Person Data** forms before opening these forms.

- **(Adult) My Care and Support Plan** should always be opened and reviewed during completion of the **Adult My Review** step. If no changes are required, this can then be deleted using the **delete** icon .
- **(Adult) Support Plan Costings** should be opened and completed when a permanent change to existing services are required. Refer to the [Support Plan Costings – Hints and Tips](#) user guide for full guidance on completing this form.

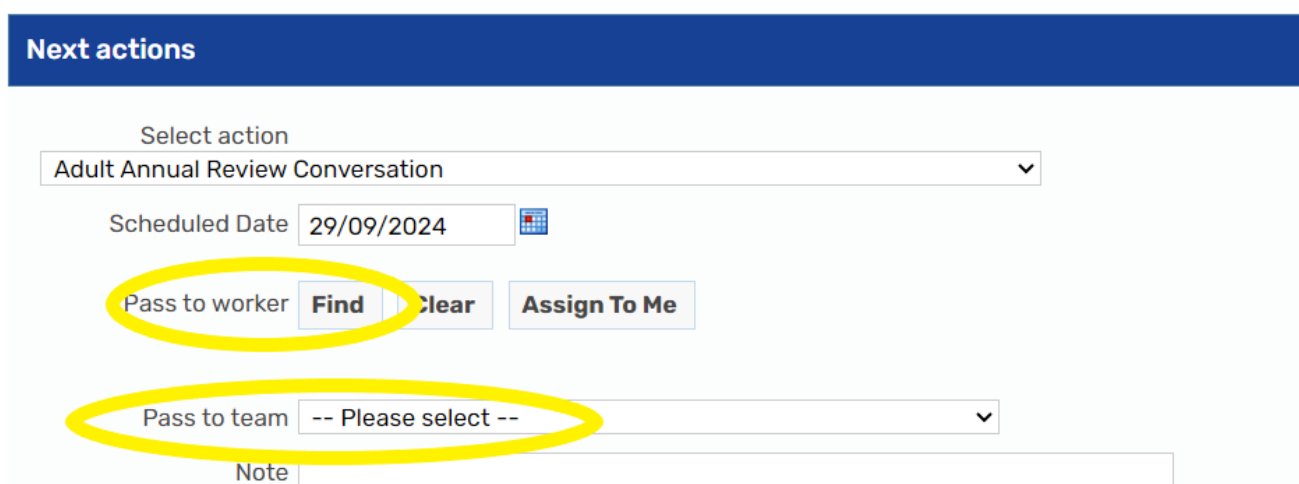
The textboxes within the plan and review forms should be used to paint a clear picture of the person. They should contain a narrative that adheres to the PERFORM guidance. Please refer to relevant practice guidance for further information.

Next actions

When completing the **Adult My Review** step, for all cases with ongoing services, the relevant next action should be added to schedule a new review.

Select a next action of **Adult Annual Review Conversation**.

The Area LP will advise whether the review should be assigned to the relevant **Adult Care team** using the Pass to team dropdown menu or to a **named worker / team inbox** using the Pass to worker > Find button.



Next actions

Select action
Adult Annual Review Conversation

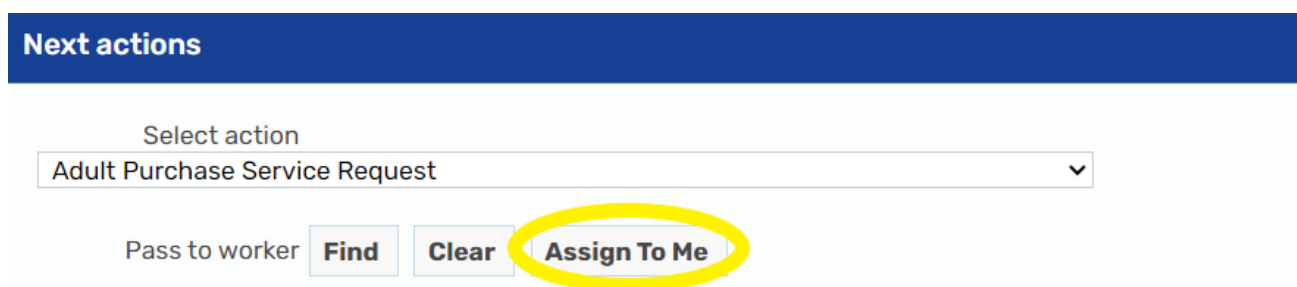
Scheduled Date 29/09/2024

Pass to worker Find Clear Assign To Me

Pass to team -- Please select --

Note

Where a permanent change to the care is required, you must also select a next action of **Adult Purchase Service Request** and assign it to self for completion using the **Assign to Me** button.




The screenshot shows a blue header bar with the text "Next actions". Below it is a dropdown menu labeled "Select action" with "Adult Purchase Service Request" selected. Underneath the dropdown are three buttons: "Pass to worker", "Find", and "Clear". To the right of these buttons is a button labeled "Assign To Me", which is circled in yellow.

Important: Remember the **(Adult) My Care and Support Plan** and **(Adult) Support Plan Costings** optional forms must be completed and saved before adding this action.

Other next actions may be required depending on the outcome(s) of the review – these will be added and completed by the Area LP when they authorise the review.

Authorisation Request



You must send your review for authorisation by the relevant Area LP using the **Adult Please review information and authorise** request using the **Requests** toolbar icon .

Important: Please state in the note text field “TRUSTED ASSESSOR PILOT REVIEW” along with detailing any recommended changes and any next actions required e.g. new Financial Assessment Referral required / Referral to Carers Services required / Frailty triggers met etc.

Use the **Pass to Worker > Find** button to search for the relevant Area LP.

Refer to the [Requests and Notifications](#) user guide for full details on how to send the request.

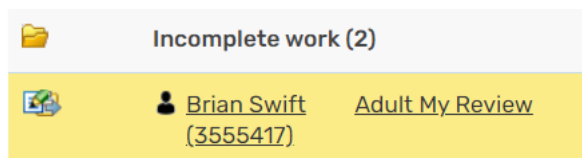
Review Recording Complete

Once you have completed the relevant forms within the review step, added the necessary next action(s) and sent the request to the Area LP you must click the **Save** toolbar icon  and then exit the review step using the **Close** toolbar icon .

Incomplete work

Once you have saved and exited the review it will remain in your **Incomplete work** folder within the **Current work** section in **Full** or **Narrow workview** until the Area LP authorises it or returns it to you for further changes.


While waiting to be authorised the **Adult My Review** will be highlighted in yellow to indicate the request has been sent.




It will 'vanish' from your **Incomplete work** folder once authorised, as the Area LP will also finish the review.

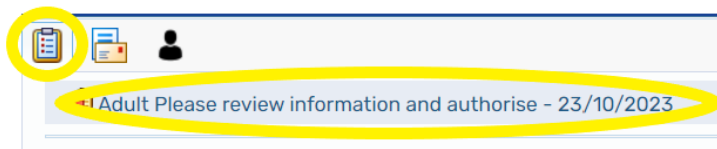
The **Adult My Review** will be highlighted in red if the Area LP returns the review to you for further updates.



You will need to click the **work** icon  and then **Resume work** to open the review step and complete any updates before resending the request to the Area LP.

To resend the authorisation request,

- click the **Requests** toolbar icon 
- click on the request text **Adult Please review information and authorise** (of the request you previously sent)



- click the **Send again** button
- save and exit the review step as previously detailed

You can refer to the [Returned Requests](#) user guide for further information.

The **Adult My Review** will change back to being highlighted in yellow as described above and then 'vanish' once authorised and finished by the Area LP.

Purchase Service Request – Permanent changes only

For any cases where there is a permanent change required to the care package you will need to update the **(Adult) My Care and Support Plan** and **(Adult) Support Plan Costings** optional forms during the review and assign a next action of **Adult Purchase Service Request** to self (using the **Assign to Me** button).


Once the review is authorised and finished by the Area LP the **Adult Purchase Service Request** will appear in **Current work** on the **Person summary** screen within the person's record and in your **Incoming work** folder within **Current work** in **Full** or **Narrow** workview.

To start the **Purchase Service Request**:

- Click the **Incoming work** icon  within **Current work** on the **Person summary** screen
- Click **Start work** from the menu

The **Adult Purchase Service Request** will open in a separate window.

You will need to:

- complete the relevant sections of the form
- add the next action **Adult Homecare Services / Shared Lives Services Required** and assign this to the appropriate **Brokerage inbox** (based on where the person lives) using the **Pass to worker** the dropdown menu
- click the **Finish** toolbar icon  to send the next piece of work (**Adult Purchase Service Admin**) to the Brokerage team for processing.

For further information about completing this step refer to the [Commissioning Planned Services](#) user guide.

Adult Purchase Service information required – Permanent changes only

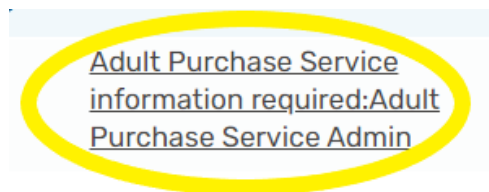
If you have not provided sufficient information in the **Adult Purchase Service Request** Brokerage will send you a request called **Adult Purchase Service information required**.

This request will appear in your **Incoming requests** folder within **Current work** in **Full** or **Narrow** **workview**.

Incoming requests (2)					
	Brian Bland (3555460)	Adult Purchase Service information required:Adult Purchase Service Admin		2 Nov 2023	Please provide more information regarding tasks to be carried out and make sure the schedule is comp...

It is useful to understand in the Title column the **first part** is the **name of the request** and the **second part** is the **name of the workflow step** it was sent from.

Click the Title text - **Adult Purchase Service information required : Adult Purchase Service Admin**.



The workflow step summary screen for the **Adult Purchase Service Admin** step will open – you’ll find details of why you have been sent the request in the **Requests** section.

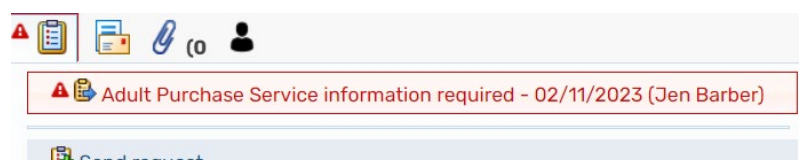
Requests

Adult Purchase Service information required - **SENT** | [History](#)
Assigned on 02/11/2023 14:19 to [Jen Barber](#) by [Brokerage 02 Louth - Admin Inbox](#)
Note Please provide more information regarding tasks to be carried out and make sure the schedule is complete. You can then complete the request, save and exit the step.

Click **Resume** in the mini menu in the top left to open the **Adult Purchase Service Admin** step – go into **section 2** and update/add the missing information as requested.

Click the **Requests** toolbar icon

Click the **red text** with your name on it





A **Sent request** popup window will open.

Click the **Completed** radio button and then the **OK** button.

The screenshot shows a web form titled "Sent request" with a blue header. Below the header, it displays "Request ID: 1348709" and "Request type: Adult Purchase Service information required". A yellow banner contains the text "You may complete or return the request." Below this is a "Status" section with two radio buttons: "Completed" (which is circled in yellow) and "Returned". A "Note" box contains the text: "Please provide more information regarding tasks to be carried out and make sure the schedule is complete. You can then complete the request, save and exit the step." Below the note is a "Status history" table with the following data:

Date/Time	Action	Worker/team	Note
02/11/2023 14:19	Sent to	Jen Barber	Please provide more information regarding tasks to be carried out and make sure the schedule is complete. You can then complete the request, save and exit the step.

At the bottom right of the form, there are three buttons: "Reassign", "OK" (circled in yellow), and "Cancel".

Once you have recorded/updated the information as requested and completed the request you must click the **Save** toolbar icon  and then exit the step using the **Close** toolbar icon .

Brokerage can then continue to process the change in service and the request will vanish from your **Incoming requests** folder.

For further information about completing requests refer to the [Completing or Returning Requests](#) user guide.