

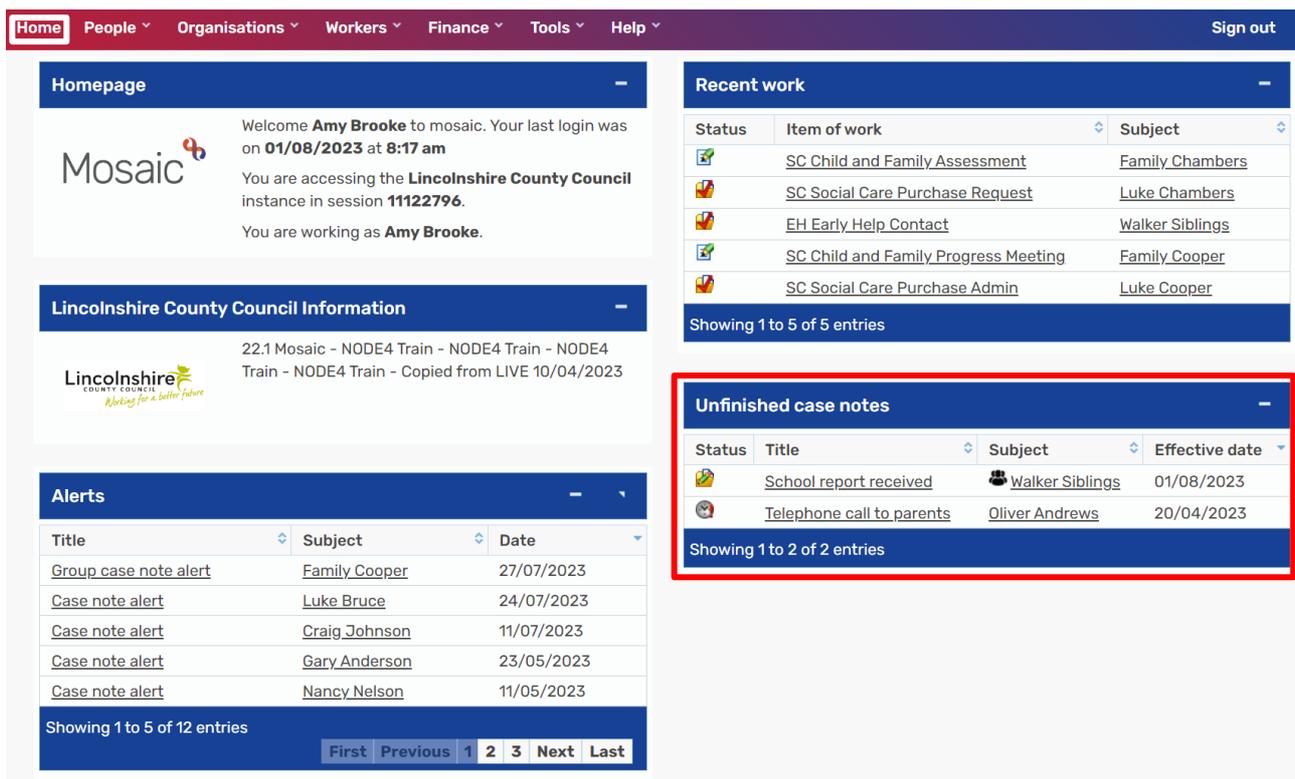
Children's Services Quick Guide

Working with Unfinished Case Notes

Case notes that are unfinished will 'time out' and automatically become locked after 24 hours. Information cannot be copied to other family members until the Case note has been 'Finished'.

Please note: Case note alerts are NOT sent until the Case note is 'Finished'.

All **Unfinished case notes** will display on the bottom right on the Home page. The Home page displays when you first login to Mosaic in the Narrow workview. The Home page can be accessed at any time by clicking the Home button in the top left-hand corner of the screen. This icon displays when you are in either the Narrow or Closed workview screens.



The screenshot shows the Mosaic user interface. At the top, there is a navigation bar with 'Home', 'People', 'Organisations', 'Workers', 'Finance', 'Tools', 'Help', and 'Sign out'. The main content area is divided into several sections:

- Homepage:** Welcome Amy Brooke to mosaic. Your last login was on 01/08/2023 at 8:17 am. You are accessing the Lincolnshire County Council instance in session 11122796. You are working as Amy Brooke.
- Lincolnshire County Council Information:** 22.1 Mosaic - NODE4 Train - NODE4 Train - NODE4 Train - Copied from LIVE 10/04/2023
- Alerts:** A table listing case note alerts with columns for Title, Subject, and Date.

Title	Subject	Date
Group case note alert	Family Cooper	27/07/2023
Case note alert	Luke Bruce	24/07/2023
Case note alert	Craig Johnson	11/07/2023
Case note alert	Gary Anderson	23/05/2023
Case note alert	Nancy Nelson	11/05/2023
- Recent work:** A table listing recent work items with columns for Status, Item of work, and Subject.

Status	Item of work	Subject
	SC Child and Family Assessment	Family Chambers
	SC Social Care Purchase Request	Luke Chambers
	EH Early Help Contact	Walker Siblings
	SC Child and Family Progress Meeting	Family Cooper
	SC Social Care Purchase Admin	Luke Cooper
- Unfinished case notes:** A table listing unfinished case notes with columns for Status, Title, Subject, and Effective date. This section is highlighted with a red box.

Status	Title	Subject	Effective date
	School report received	Walker Siblings	01/08/2023
	Telephone call to parents	Oliver Andrews	20/04/2023

- **Unfinished case notes** that are still editable will display the  unfinished icon.
- **Unfinished case notes** that have 'timed out' will display the  timed out icon.

Click on the hyperlink for the Case note in the **Title** list that is unfinished.

Unfinished case notes			
Status	Title	Subject	Effective date
	School report received	Walker Siblings	01/08/2023
	Telephone call to parents	Oliver Andrews	20/04/2023

Showing 1 to 2 of 2 entries

The screen will refresh to display the **Append case note** screen; the original text will be saved and locked. An additional **Case note** field will display to allow you to record further text if required.

Append case note - Oliver Andrews (3554626) born 17 May 2020 (3 years old)

Append case note

NOTE: This case note has been timed out - it can be finished with or without appending further.

Category Telephone Call

Title Telephone call to parents

Contact dates: 20/04/2023 at 11:32

Telephone call to arrange a visit. Appointment letter to be sent via post.
Entered on 20/04/2023 at 11:33 by Mrs Amy Brooke.

Significant Event (will be included in Chronologies)

Case note

[Add Alert Recipients for this Case Note?](#)

Finish Cancel

If an Alert Recipient had been previously added, they can be removed using the **X** delete icon if they no longer need to be alerted. Further alert recipients can be added using the **Add Recipient** button.

When the **Case note** has been checked and updated as required, click on **Finish**. The **Case note** will no longer appear in the list of **Unfinished case notes** on the **Home** page. Any **Case note alerts** which were added will be sent.

Unfinished Case notes added as a Can Act For

If a Case note has been saved and not finished whilst working on behalf of another worker, after 24 hours, the Case note will display in the Unfinished case notes on the Home page as normal. The Case note will display in your Unfinished case notes and not the person you were working on behalf of.

The case notes will display without a hyperlink for the Title.

Unfinished case notes			
Status	Title	Subject	Effective date
	School report received	 Walker Siblings	01/08/2023
	EH visit letter sent	Luke Bruce	10/07/2023
	Telephone call to parents	Oliver Andrews	20/04/2023

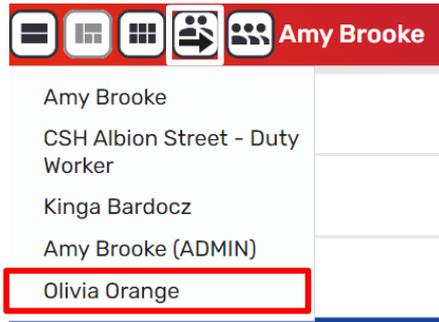
Showing 1 to 3 of 3 entries

In order to finish this case note, you will need to open the Person summary or Group summary and access the Case notes. Make a note of the person or group ID number and who you were acting on behalf of when you added the case note. The unfinished case note will display with the  timed out icon next to it.

Case notes - Luke Bruce (3555050) born 19 May 2010 (13 years old)

Title	Type	Contact date	Created by	Team	Appendices
 Case	CS Case Note	27/07/2023	Olivia Orange	Childrens Training Team	1
Reference	CS Case Note	24/07/2023	Olivia Orange	Childrens Training Team	0   
 Telephone call received from mum	Telephone Call	19/07/2023	Mrs Amy Brooke	Childrens Training Team	1
 EH visit letter sent	Correspondence	10/07/2023	Mrs Amy Brooke acting for Olivia Orange	Childrens Training Team	0   

Use the **Show workers available to act for icon**  to work on behalf of the worker you previously used and find the Person or Group whose case note needs finishing.



Access the Case notes and click on the Append icon . The screen will refresh to display the **Append case note** screen; the original text will be saved and locked. An additional **Case note** field will display to allow you to record further text if required.

If an Alert Recipient had been previously added, they can be removed using the **X** delete icon if they no longer need to be alerted. Further alert recipients can be added using the **Add Recipient** button.

When the **Case note** has been checked and updated as required, click on **Finish**. The **Case note** will no longer appear in the list of **Unfinished case notes** on your **Home** page. Any **Case note alerts** which were added will be sent.