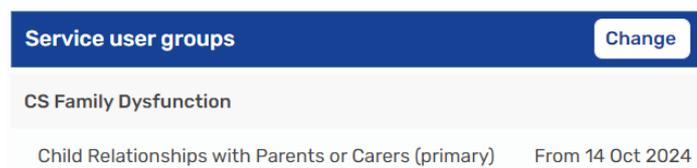


Purchasing Worksteps – Social Care

Recording a purchase for Social Care in Mosaic is completed over three worksteps, Purchase Request, Purchase Admin and Purchase. This guide outlines how to complete these steps starting with the SC Social Care Purchase Request.

Service User Groups

Before starting the Social Care Purchase Request, there must first be a **Service user group** added to the clients record. If one has already been added, it will show on the Person summary screen on the right hand side.



To add a **Service user group**:

- Click on **Person details**
- Select **Service user groups** from the menu
- Check and amend the **Start Date**
- Select a **Group**
- Select a **Sub-Group**
- Click on **Add** on the middle right of the screen
- The selection will pull through to the Service user groups table
- Click on **Save** to confirm the choice

Once a Service user group is added, it will pull through to the Social Care Purchase Request.

Social Care Purchase Request

The Social Care Purchase Request is a **Send Immediately** next action from multiple steps. Send Immediately can be used to access the next action when the step has been saved rather than finished. This step should be completed by the worker who is requesting the purchase and authorised by the manager whose budget the money will come from.

After the Social Care Purchase Request has been added to the workflow, it can be started from Incoming work.

Within the SC Social Care Purchase Request, the form **CS Children's Purchase Request C1300** will display.

Section 1. Purchase Request Details

The Child / Young Person's Details section should be checked to ensure the child's details are correct and a Service user group has been added.

CS Children's Purchase Request C1300

Sections

- 1. Purchase Request Details
- 2. Fostering / Staying Put Placements
- 3. Legal Order / Adoption Support Costs
- 4. Leaving Care
- 5. Child with Disabilities - Non Fostering / Non Direct Payment
- 6. Supported Childcare Costs
- 7. Direct Payment
- 8. Generic Purchase
- 9. Authorisation
- 10. Next actions

1. Purchase Request Details

Please ensure that the Key Worker / Lead Professional is aware of any funding requests and that the need for funding support is identified in the Child's Plan.

Child / Young Person's Details							
ID	Name	Address	Contact Number(s)	Date of Birth	Age	Service User Group	Service User Sub Group
3599768	Tilly Jones	56 North Parade Sleaford NG34 8AN		03/08/2022	2	CS Family Dysfunction	Child Relationships with Parents or Carers

Required Purchase Type

Fostering / Staying Put
 Legal Order / Adoption Support Costs
 Leaving Care
 Child with Disabilities - Non Fostering / Non Direct Payment
 Direct Payment
 Generic Payment
 Transport Request
 Supported Childcare Costs
 Services No Longer Required

Please select at least one option

The **Required Purchase Type** should be completed next to ensure the correct sections of the form reveal. The step should only be completed for one purchase type at a time.

All mandatory fields will need to be completed within the form.

Below is a table outlining the next steps depending on the Required Purchase Type and the Next action that should be added.

Required Purchase Type	What to complete within the Purchase Request step	What Next action to add	Who the Next action should be assigned to
Fostering / Staying Put	Section 2. Fostering / Staying Put Placements	SC Proceed to Purchase Admin (Additional Costs for Child in Care)	Children's Placements - Inbox
Legal Order / Adoption Support Costs	Section 3. Legal Order / Adoption Support Costs	SC Proceed to Purchase Admin (Adoption Support Costs)	Children's Placements - Inbox

		If a financial review is required – SC Schedule Adoption Funding Review	CS Adoption Review - Inbox
Leaving Care	Section 4. Leaving Care	SC Proceed to Purchase Admin (Additional Costs for Child in Care)	Children's Placements - Inbox
Child with Disabilities – Non Fostering / Non Direct Payment	Section 5. Child with Disabilities – Non Fostering / Non Direct Payment	SC Social Care Purchase Admin	CS Children with Disabilities – Business Support
Direct Payment	Section 7. Direct Payment	CS Childrens Direct Payment Setup	Direct Payments - Inbox
Direct Payment	Section 7. Direct Payment	Direct Payments Referral to Penderels	Assign to Me or worker completing the referral
Generic Payment	Section 8. Generic Purchase	SC Social Care Purchase Admin	Appropriate Business Support Virtual Worker who will record the purchase
Transport Request	Using the optional forms icon  open and complete CS Childrens Transport Purchase Request C0400	SC Request Transport from Transport Team	LCC Passenger Transport - Inbox
Supported Childcare Costs	Section 6. Supported Childcare Costs	SC Social Care Purchase Admin	Appropriate Business Support Virtual Worker who will record the purchase
Services No Longer Required	A table in Section 1 reveals to detail what purchase is to be ended	Depending on the originally selected Purchase type, the Next action would be selected as above to notify the	

		workers to end the payment	
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After Section 1, the corresponding Section or form and correct Next action has been completed, the worker must seek authorisation for the payment via the clipboard request.

- Click on the Requests icon 
- Select **Required CS Please review purchase request and authorise**
- Find the manager for whose budget is going to be used within **Pass to worker**
- Click **OK**

The workstep can be saved and exited so the authorising manager can review and complete Section 9. Authorisation.

The workstep will remain in the worker's Incomplete work, highlighted in yellow, until the manager has authorised and finished the step. When finished, the step will be removed from Incomplete work and replaced with the step added as the Next action in a virtual worker's Incoming work.

Social Care Purchase Admin

The Next action of SC Proceed to Purchase Admin (Additional Costs for Child in Care), SC Proceed to Purchase Admin (Adoption Support Costs) and SC Social Care Purchase Admin all add the step SC Social Care Purchase Admin.

Starting the SC Social Care Purchase Admin will open the form **CS Children's Purchase Admin C1340**.

Information from the Social Care Purchase Request will prepopulate for the worker to review and fulfil the purchase outside of Mosaic.

Any invoices or documentation can be uploaded to the workstep using the view documents icon  .

If the final amount of the purchase is greater than the amount previously authorised in the Social Care Purchase Request, the worker can make any amendments to the cost within the appropriate section and use the clipboard request icon  to get the new amount authorised. The authoriser can complete Section 8.

In **Section 9. Next actions**, the following action should be added depending on the purchase type:

Next action	When it is used	Who it is assigned to
SC Social Care Purchase	For purchases where a carer/adopter is paid, some Leaving Care	Use Find to assign to someone with the Accounts Payable Team or Assign to Me
CS Payment Actioned (NFA)	By Business Support once the payment has been actioned within Business World	N/A
CS Social Care Purchase No Longer Required (NFA)	By Business Support if the payment is no longer needed or authorised due to payment	N/A

Once completed, the step can be finished. If a no further action (NFA) was added, no more steps will be added. If the SC Social Care Purchase step was selected, this will be available in the assigned worker's Incoming work.